

# Monthly Highlights

No. 6 / 2021

E U M O F A

European Market Observatory for  
Fisheries and Aquaculture Products

## In this issue

*According to data collected by EUMOFA from 14 EU Member States, in March 2021 European flounder and megrim together accounted for 16% of the total first-sales value of the commodity group “flatfish”.*

*From January to mid-April 2021, the EU import price of fresh or chilled Atlantic halibut from Norway remained stable and ranged from 6,59 to 8,49 EUR/kg. Volume of supply ranged from 12,8 to 28,6 tonnes.*

*In March 2021, consumption of fresh fisheries and aquaculture products increased in both volume and value compared to March 2020 in almost all Member States, with Germany seeing the highest increases driven primarily by salmon and trout consumption.*

*International trade is significant for the EU, being the largest global importer of fish and shellfish, accounting for 34% of the total world import value.*

*The EU was responsible for 70% of global whelk production in 2018, comprising two species, the common whelk and the veined rapa whelk, with exports mainly destined for Asian markets.*

*The European Commission adopted new strategic guidelines for a more sustainable and competitive EU aquaculture industry.*



As of this issue, the Monthly Highlights include **Cyprus** among surveyed countries.

## Contents



### First sales in Europe

European flounder (Denmark, Poland, the Netherlands) and megrim (Denmark, France, Spain)



### Extra-EU imports

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### Consumption

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### Case studies

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## 1. First sales in Europe

During **January–March 2021**, 14 EU Member States (MS), Norway, and the United Kingdom reported first-sales data for 10 commodity groups<sup>1</sup>. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section “*First sales in Europe*” are extracted from EUMOFA<sup>2</sup> as collected from national administrations.

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

**Increases in value and volume:** Cyprus, Estonia, France, Latvia, Lithuania, and Portugal were the countries that recorded an increase in both first-sales value and volume. In Lithuania and Estonia, a higher supply of herring led to a sharp increase.

**Decreases in value and volume:** The Netherlands, Poland, Spain, and the United Kingdom recorded decreases in first-sales value and volume. Poland stood out with the most significant decrease, which was due to a lower supply of herring and sprat.

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

Country	January - March 2019		January - March 2020		January - March 2021		Change from January - March 2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	3.541	14,4	3.341	16,2	3.352	12,8	0%	-21%
Bulgaria	324	0,27	136	0,28	179	0,27	31%	-1%
Cyprus	100	0,74	78	0,59	89	0,62	14%	5%
Denmark	283.313	122,5	159.598	90,0	184.633	85,8	16%	-5%
Estonia	18.381	3,9	16.966	4,5	24.481	5,4	44%	20%
France	46.197	154,2	38.744	131,2	42.689	141,4	10%	8%
Italy	17.911	74,9	16.610	64,8	16.629	69,5	0%	7%
Latvia	16.066	2,7	13.380	2,6	16.227	3,4	21%	30%
Lithuania	341	0,4	648	0,3	1.023	0,6	58%	73%
Netherlands	50.504	85,4	54.244	81,8	45.868	63,1	-15%	-23%
Poland	39.834	10,1	40.853	9,7	15.659	3,7	-62%	-61%
Portugal	20.965	57,5	14.006	47,7	14.150	51,6	1%	8%
Spain	115.340	344,5	115.376	313,1	103.911	292,4	-10%	-7%
Sweden	78.389	27,1	41.718	18,1	47.483	18,1	14%	0%
Norway	917.712	825,4	925.199	898,0	964.737	822,1	4%	-8%
United Kingdom	72.937	148,7	86.112	140,6	83.285	121,8	-3%	-13%

*Possible discrepancies in % changes are due to rounding.*

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

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

<sup>2</sup> First sales data updated on 17.05.2021.



## 1.2. March 2021 compared to March 2020

**Increases in value and volume:** First sales increased in Bulgaria, Cyprus, Estonia, France, Italy, Latvia, Portugal, and Spain. Sprat and clam were responsible for the sharp increases in Bulgaria, while picarel was the main species responsible for increases in Cyprus. Small pelagic species were responsible for increases in Italy (anchovy and sardine) and Portugal (horse mackerel species).

**Decreases in value and volume:** First sales decreased in Denmark, the Netherlands, Poland, and Sweden. Poland and Sweden recorded the sharpest decreases due to lower sales of sprat and herring.

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

Country	March 2019		March 2020		March 2021		Change from March 2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	952	4,8	1.095	5,5	1.231	5,2	12%	-6%
Bulgaria	203	0,13	43	0,06	126	0,16	193%	157%
Cyprus	46	0,32	29	0,20	42	0,25	43%	29%
Denmark	130.201	45,3	102.441	39,1	83.497	33,6	-18%	-14%
Estonia	7.145	1,4	6.754	1,5	7.383	1,5	9%	3%
France	13.903	48,0	11.183	34,7	15.264	50,7	36%	46%
Italy	6.244	26,6	3.628	14,6	6.459	28,3	78%	94%
Latvia	6.123	1,0	5.672	1,2	6.843	1,4	21%	15%
Lithuania	108	0,1	323	0,1	298	0,2	-8%	36%
Netherlands	19.484	31,5	20.381	29,5	19.010	26,7	-7%	-9%
Poland	17.933	4,4	20.968	4,9	1.244	0,3	-94%	-93%
Portugal	6.528	19,9	4.381	13,7	6.350	23,0	45%	68%
Spain	48.811	132,2	53.646	110,4	55.579	129,1	4%	17%
Sweden	24.127	8,3	19.719	7,3	2.998	3,6	-85%	-51%
Norway	392.180	344,4	358.656	305,3	377.603	295,7	5%	-3%
United Kingdom	11.859	28,5	23.343	28,3	20.874	32,6	-11%	15%

*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 26 of 2021**) are available via the EUMOFA website, and can be accessed [here](#).

The most recent monthly first-sales data **for April 2021** are available via the EUMOFA website, and can be accessed [here](#).



### 1.3. First sales in selected countries

First sales data analysed in this section are extracted from EUMOFA<sup>3</sup>.

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


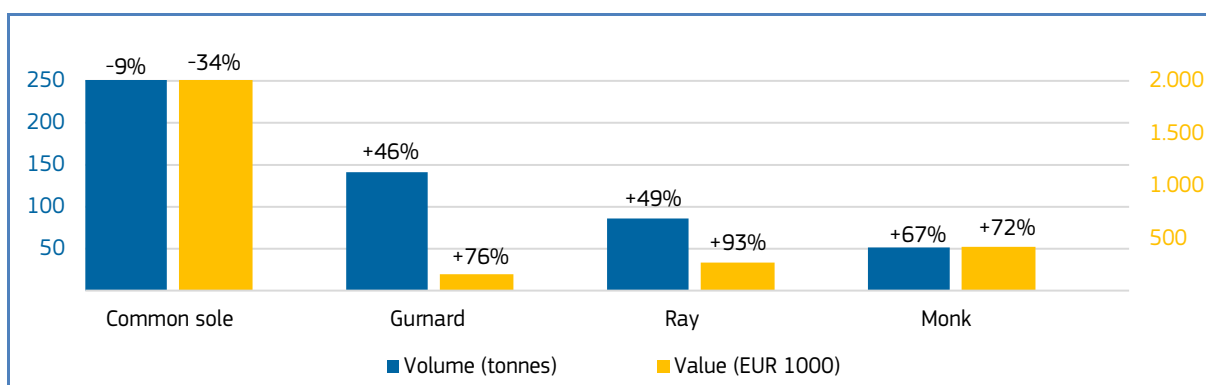

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 12,8 million, -21%	3,352 tonnes, 0%	<b>Value:</b> common sole, squid, megrim. <b>Volume:</b> common sole, European plaice, cuttlefish, gurnard.
<b>Mar 2021 vs Mar 2020</b>	EUR 5,2 million, -6%	1,231 tonnes, +12%	<b>Value:</b> common sole. <b>Volume:</b> gurnard, ray, monk.

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



Percentages show change from the previous year.

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

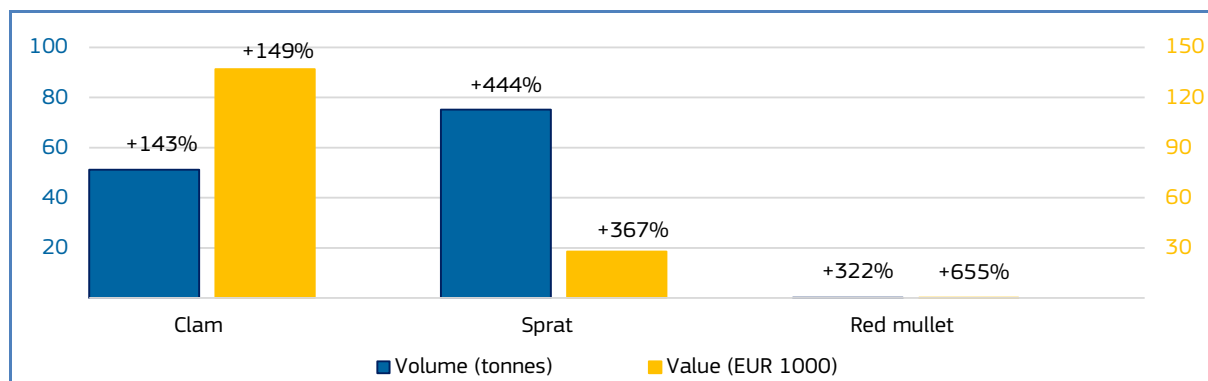
 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 0,3 million, -1%	179 tonnes, +31%	<b>Value:</b> clam, molluscs and aquatic invertebrates (other)*. <b>Volume:</b> sprat.
<b>Mar 2021 vs Mar 2020</b>	EUR 0,2 million, +157%	126 tonnes, +193%	Clam, sprat, red mullet.

<sup>3</sup> First-sales data update on 17.5.2021.

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



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



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

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


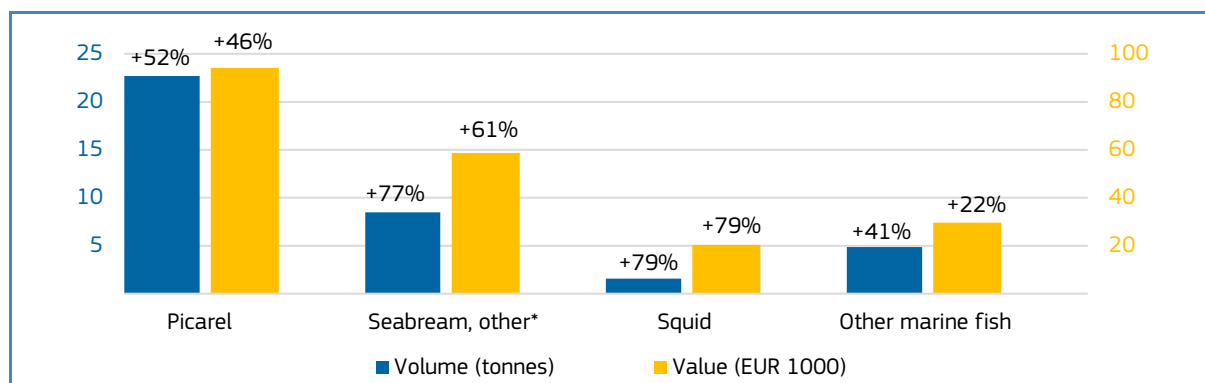
 Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2021 vs Jan-Mar 2020	EUR 0,6 million, +5%	89 tonnes, +14%	Other seabream (other than gilthead seabream)*, picarel, squid.
Mar 2021 vs Mar 2020	EUR 0,3 million, +29%	42 tonnes, +43%	Picarel, other seabream (other than gilthead seabream), squid, other marine fish*.

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



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

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


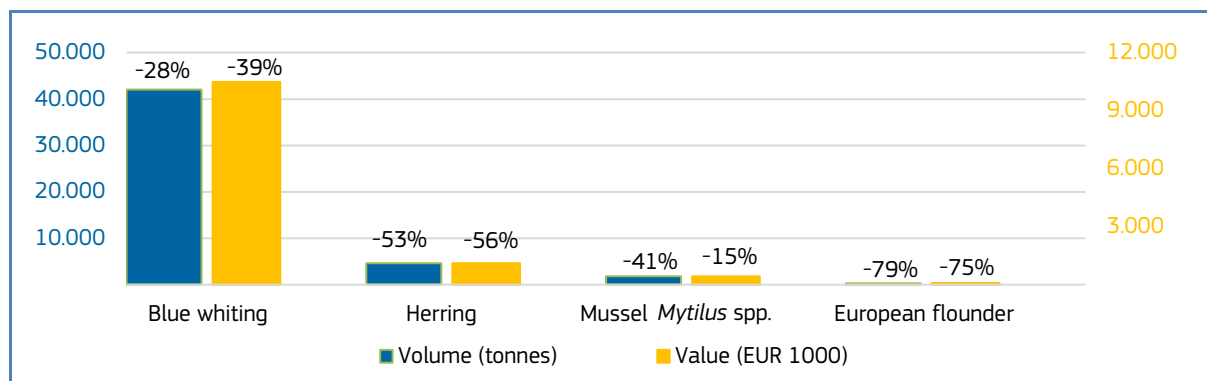
 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2021 vs Jan-Mar 2020	EUR 85,8 million, -5%	184.633 tonnes, +16%	<b>Value:</b> mackerel, blue whiting, cod, saithe. <b>Volume:</b> sprat, herring, other marine fish*.
Mar 2021 vs Mar 2020	EUR 33,6 million, -14%	83.497 tonnes, -18%	Blue whiting, herring, mussel <i>Mytilus</i> spp., European flounder.



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



Percentages show change from the previous year.

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


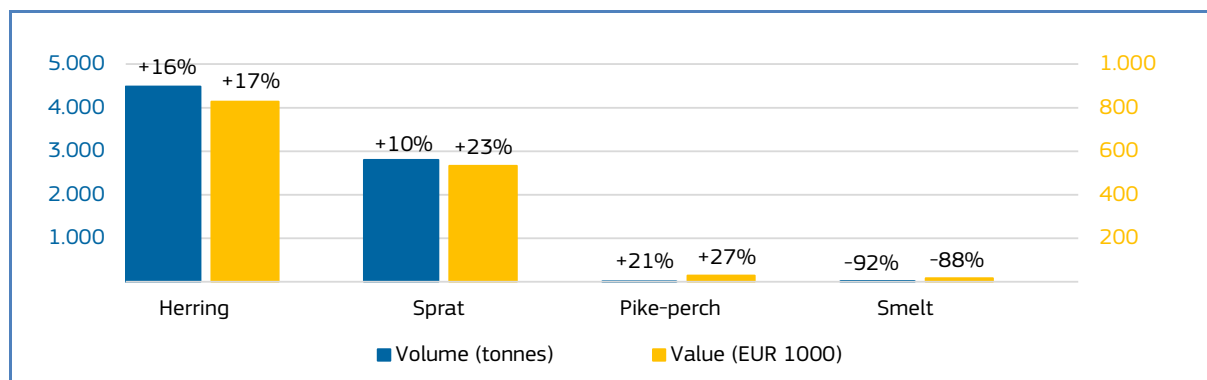

 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 5,4 million, +20%	24.481 tonnes, +44%	Sprat, herring.
<b>Mar 2021 vs Mar 2020</b>	EUR 1,5 million, +3%	7.383 tonnes, +9%	Herring, sprat, pike-perch. Smelt was the main species that offset the increasing trend.

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



Percentages show change from the previous year.

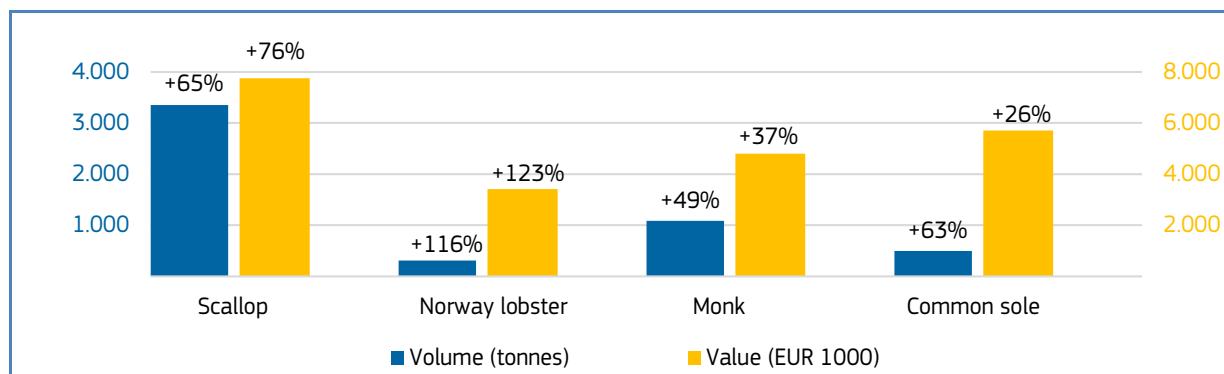
Table 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE**

 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 141,4 million, +8%	42.689 tonnes, +10%	Scallop, Norway lobster, monk.	The increase in first sales of <b>Norway lobster</b> is related to the boom-and-bust dynamics of the species as well as low capture rates in March 2020. In fact, the figures for volume and value are at the average of the last 10 years. First sales increase of <b>scallop</b> could be explained by record quantities of exploitable biomass (in Bay of Seine and the Bay of Saint-Brieuc), and a corresponding increase in scallops' quota <sup>5</sup> from 4.500 to 6.300 tons for the Bay of Saint-Brieuc fishery.
<b>Mar 2021 vs Mar 2020</b>	EUR 50,7 million, +46%	15.264 tonnes, +36%	Scallop, Norway lobster, monk, common sole.	

<sup>5</sup> <https://cdpmem22.fr/pecher-en-cotes-darmor/coquille-saint-jacques/>



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

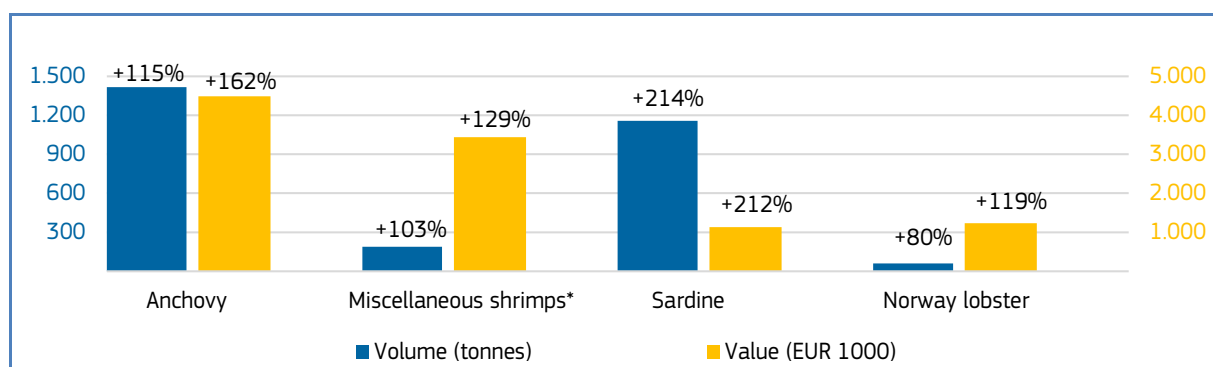


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 69,5 million, +7%	16.629 tonnes, 0%	Anchovy, sardine.	The increase in first sales of <b>sardine</b> and <b>anchovy</b> in March 2021 is an effect of the COVID-19 lockdown in March 2020. In March 2020, most of the Italian purse seine and pelagic pair-trawl fleets targeting small pelagics were less active due to sanitary restrictions. Moreover, a collapse of demand for seafood due to the closure of fish markets and restaurants was observed. This caused the drop of prices and the reduction of direct sales <sup>6</sup> . In 2021, fishing effort returned to similar levels as before the pandemic.
<b>Mar 2021 vs Mar 2020</b>	EUR 28,3 million, +94%	6.459 tonnes, +78%	Anchovy, miscellaneous shrimps*, sardine, Norway lobster.	

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



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

<sup>6</sup> <http://www.fao.org/documents/card/en/c/ca8637en/>



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


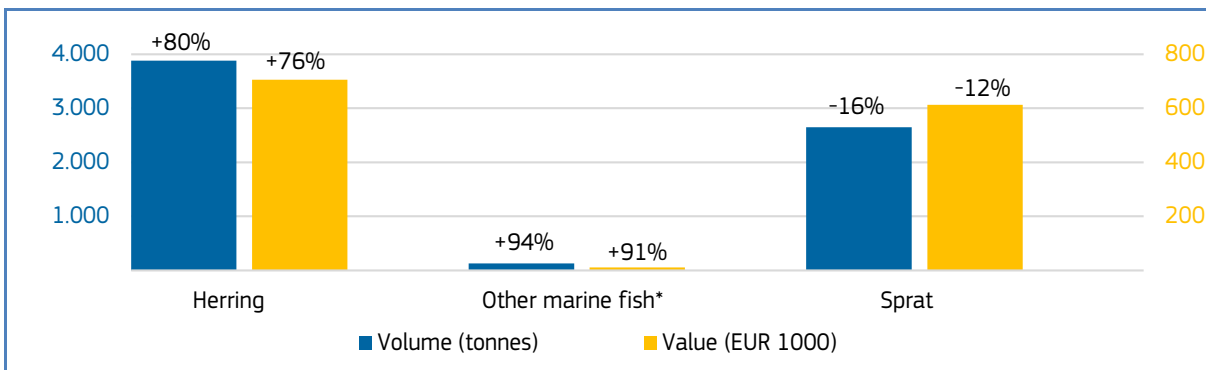
 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 3,4 million, +30%	16.227 tonnes, +21%	Herring, other marine fish*.
<b>Mar 2021 vs Mar 2020</b>	EUR 1,4 million, +15%	6.843 tonnes, +21%	Herring, other marine fish*. Sprat was the main species that offset the overall increasing trend in both value and volume.

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



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

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


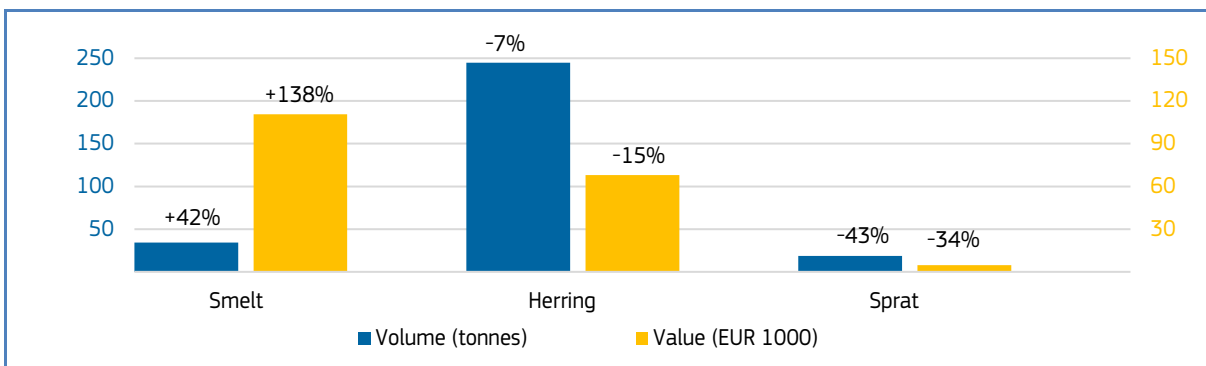
 Lithuania	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 0,6 million, +73%	1.023 tonnes, +58%	Smelt, herring, sprat.
<b>Mar 2021 vs Mar 2020</b>	EUR 0,2 million, +36%	298 tonnes, -8%	<b>Value:</b> smelt. <b>Volume:</b> herring, sprat.

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



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





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


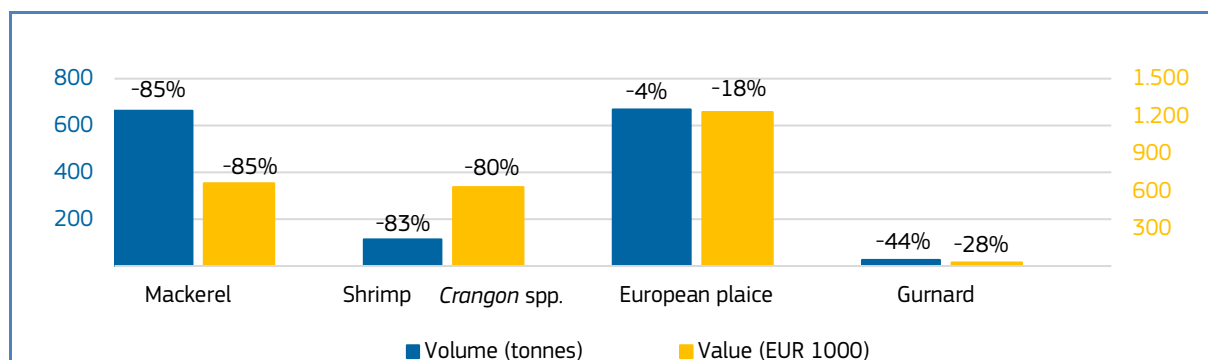

 The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 63,1 million, -23%	45.868 tonnes, -15%	Mackerel, herring, shrimp <i>Crangon</i> spp., common sole, European plaice.	<b>Shrimp <i>Crangon</i> spp.</b> life history is characterized by a short life span of at most two years. Production largely depends on annual recruitment levels, which can fluctuate greatly. According to ICES <sup>7</sup> , strong fishing pressures on the stock, as well as a high abundance of whiting - a predator of shrimp - have led to the decline in stock size. The decrease in <b>mackerel</b> sales occurs in a context of rather good stock status and a lower quota of 65% compared to 2020 (which saw a temporary fishing agreement prior to Brexit), bearing in mind that monthly production of mackerel is highly variable, mostly due to natural fluctuations and changes in fishing strategies (especially the location of fishing).
<b>Mar 2021 vs Mar 2020</b>	EUR 26,7 million, -9%	19.010 tonnes, -7%	Mackerel, shrimp <i>Crangon</i> spp. European plaice, gurnard.	

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



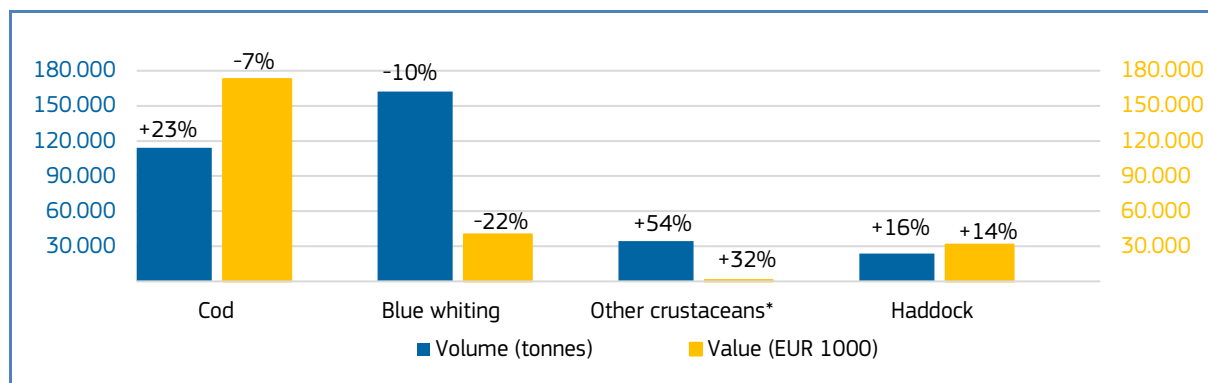
Percentages show change from the previous year.

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

 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 822,1 million, -8%	964.737 tonnes, +4%	<b>Value:</b> cod, mackerel, blue whiting. <b>Volume:</b> miscellaneous small pelagics*, herring, other crustaceans*.
<b>Mar 2021 vs Mar 2020</b>	EUR 295,7 million -3%	377.603 tonnes, +5%	<b>Value:</b> cod, blue whiting. <b>Volume:</b> cod, other crustaceans, haddock.

<sup>7</sup> ICES. 2019. Report of the Working Group on Crangon Fisheries and Life History (WGCRAN), 9–11 October 2018, ICES. ICES CM 2018/EPDSG:06. 68 p.p. <https://doi.org/10.17895/ices.pub.8105>

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

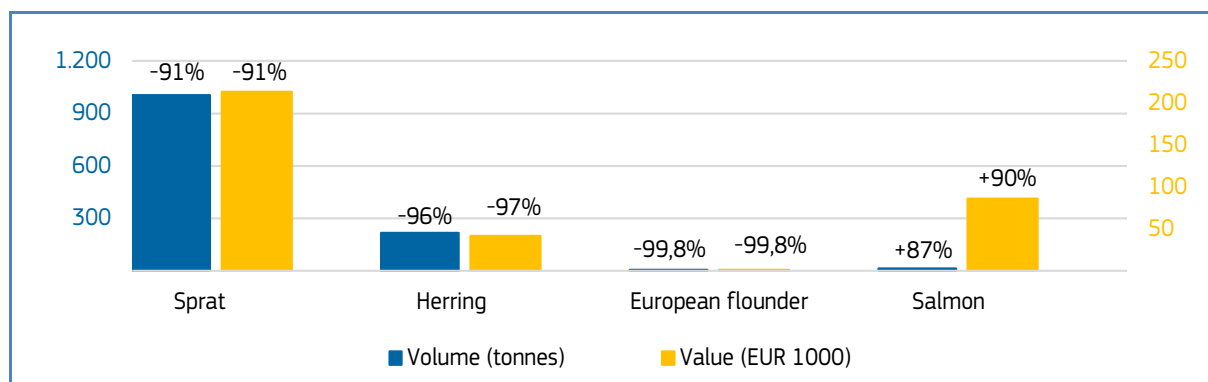


Percentages show change from the previous year. \*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

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

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 3,7 million, -61%	15.659 tonnes, -62%	Sprat, herring, European flounder.	One reason for the decrease of <b>herring</b> first sales is the reduction in total allowable catches (TAC) for the Polish fleet in multiple regions by 43% in 2021 <sup>8</sup> compared to 2020 <sup>9</sup> . It could be indicative that, due to decreases in market demand, local herring suppliers provided fish to the foreign market, therefore such sales are not included in Poland's first sales data. <b>Sprat</b> sales decreased as catches of sprat and herring in the Baltic Sea region are always mixed, therefore local suppliers have probably provided sprat to the foreign market, as well as other species mixed with herring in catches.
<b>Mar 2021 vs Mar 2020</b>	EUR 0,3 million -93%	1.244 tonnes, -94%	Sprat, herring, European flounder. Salmon was among the few species that slightly offset the overall decreasing trend.	

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



Percentages show change from the previous year.

<sup>8</sup> COUNCIL REGULATION (EU) 2021/92 of 28 January 2021 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R0092>

<sup>9</sup> COUNCIL REGULATION (EU) 2020/123 of 27 January 2020 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32020R0123>



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


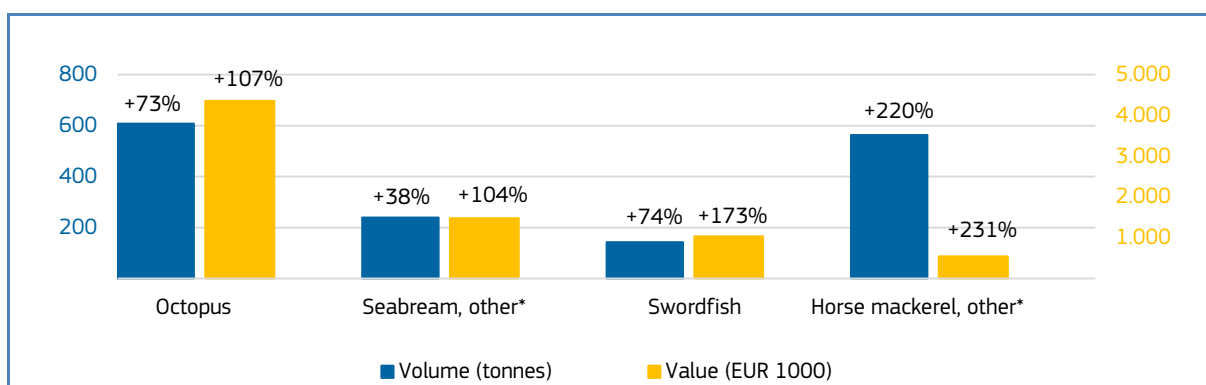
 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 51,6 million, +8%	14.150 tonnes, +1%	Octopus, swordfish, bluefin tuna, clam, other horse mackerel (other than Atlantic horse mackerel) *.
<b>Mar 2021 vs Mar 2020</b>	EUR 23,0 million +68%	6.350 tonnes, +45%	Octopus, other seabream (other than gilthead seabream)*, swordfish, clam, other horse mackerel (other than Atlantic horse mackerel).

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



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

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


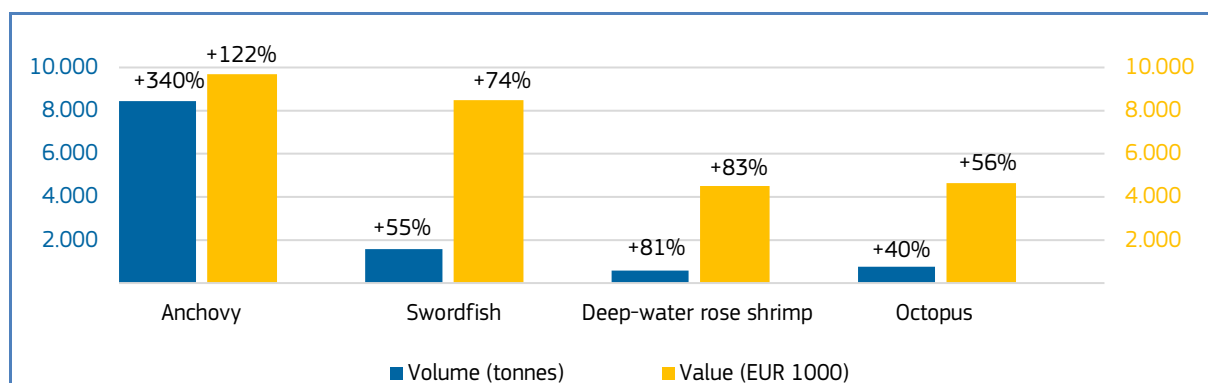
 Spain	First-sales value / trend in %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 292,4 million, -7%	103.911 tonnes, -10%	Hake, skipjack tuna, mackerel, other sharks*, other marine fish*, clam, Atlantic horse mackerel.	The increase in first sales of <b>anchovy</b> was due to high recruitment in 2020. The volume figures show an increase that is supported by scientific observations, confirming an abundance of the species in the Bay of Biscay. While both volume and value increase, the trend in value is influenced by the species, the markets, and the processing capacity. As a significant part of the catches are processed, the capability to deal with such increase is limited. This fact affects the value.
<b>Mar 2021 vs Mar 2020</b>	EUR 129,1 million +17%	55.579 tonnes, +4%	Anchovy, swordfish, deep-water rose shrimp, octopus, blue whiting.	



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



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

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


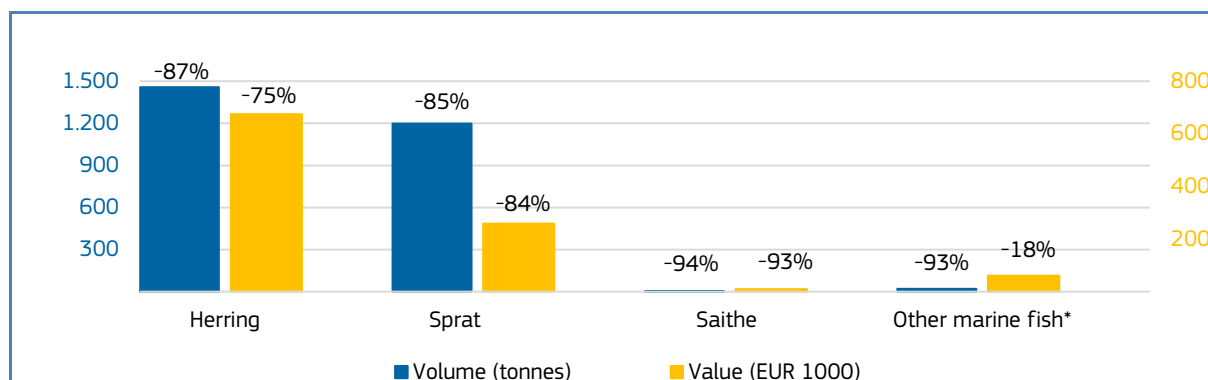

 Sweden	First-sales value / trend in %	First-sales volume / trend in %	Main contributing species	Notes
<b>Jan-Mar 2021 vs Jan-Mar 2020</b>	EUR 18,1 million, 0%	47.483 tonnes, +14%	<b>Value:</b> Herring, sprat, coldwater shrimp. <b>Volume:</b> sprat.	One of the reasons for a significant reduction of sales of <b>herring</b> and <b>sprat</b> in 2021 might be a reduction of their quotas <sup>10</sup> by 26% and 24%, respectively, when accounting for the Swedish fleet operating in different waters.
<b>Mar 2021 vs Mar 2020</b>	EUR 3,6 million, -51%	2.998 tonnes, -85%	Herring, sprat, saithe, other marine fish*, cod.	

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



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

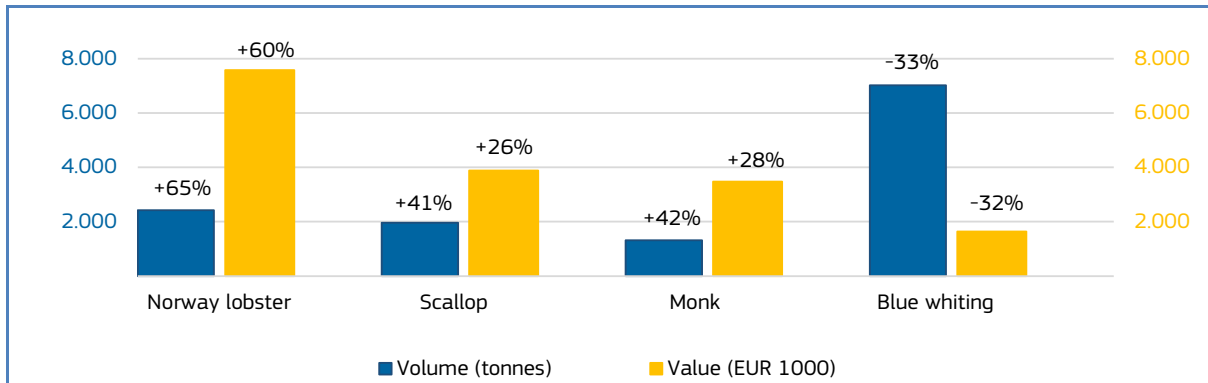
Table 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM**

 The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Marc 2021 vs Jan-Marc 2020</b>	EUR 121,8 million, -13%	83.285 tonnes, -3%	Mackerel, cod, saithe, haddock, hake, blue whiting.
<b>Mar 2021 vs Marc 2020</b>	EUR 32,6 million, +15%	20.874 tonnes, -11%	<b>Value:</b> Norway lobster, scallop, monk. <b>Volume:</b> blue whiting, mackerel, saithe.

<sup>10</sup> COUNCIL REGULATION (EU) 2021/92 of 28 January 2021 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R0092>



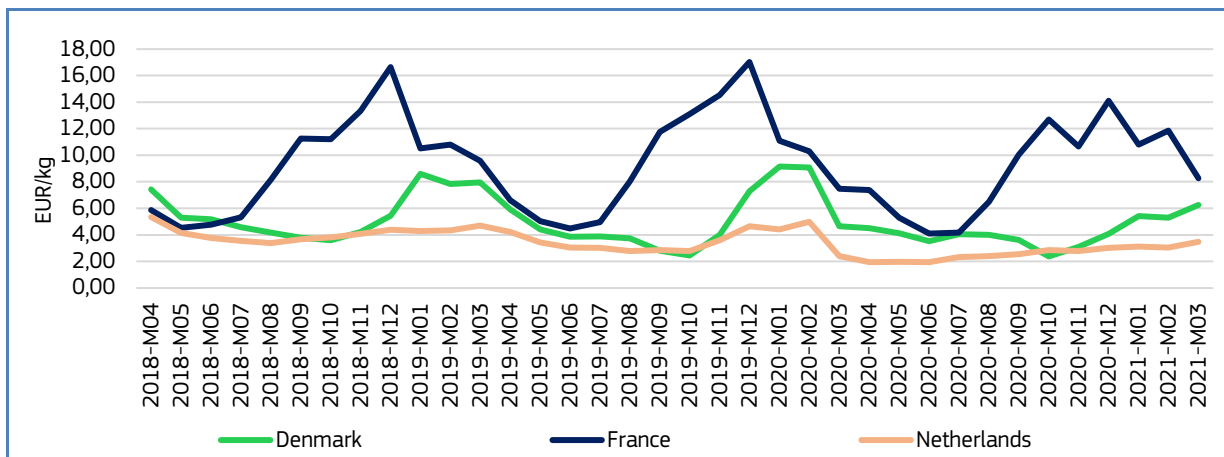
Figure 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, FEBRUARY 2021**



Percentages show change from the previous year.

#### 1.4. Comparison of first-sales prices of selected species in selected countries<sup>11</sup>

Figure 17. **FIRST-SALES PRICES OF COMMON PRAWN IN DENMARK, FRANCE, AND THE NETHERLANDS**



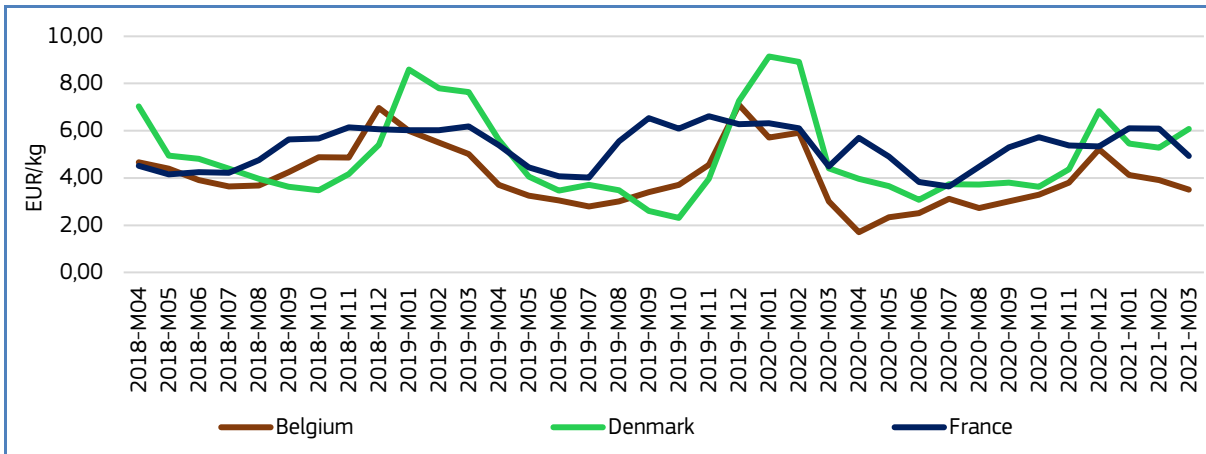
EU first sales of **common prawn**<sup>12</sup> occur in multiple countries, including **Denmark, France, and the Netherlands**. In March 2021 (the most recent available data), the average first-sales prices of common prawn were 6,24 EUR/kg in Denmark (up from both the previous month and year by 18% and 34%, respectively); 8,26 EUR/kg in France (30% lower than February 2021, and 10% higher than March 2020); and 3,47 EUR/kg in the Netherlands (up from both the previous month and year by 14% and 45%, respectively). In Denmark and France, the price spikes correlated with drops in supply from the previous month. In March 2021, supply decreased in Denmark and the Netherlands (-59% and -9%, respectively), and increased in France (+46%), relative to the previous year. Volumes sold in the three markets are seasonal. In Denmark and the Netherlands, they peak in June–August, and in France in the winter months (November through February). Over the past 36 months, common prawn prices showed an upward trend in France and the opposite trend in Denmark and the Netherlands. At the same time, supply declined in all the three countries.

<sup>11</sup> First sales data updated on 17.5.2021.

<sup>12</sup> Common prawn (*Palaemon serratus*) is a species included in the "Shrimp, miscellaneous" main commercial species (ERS code: CPR).

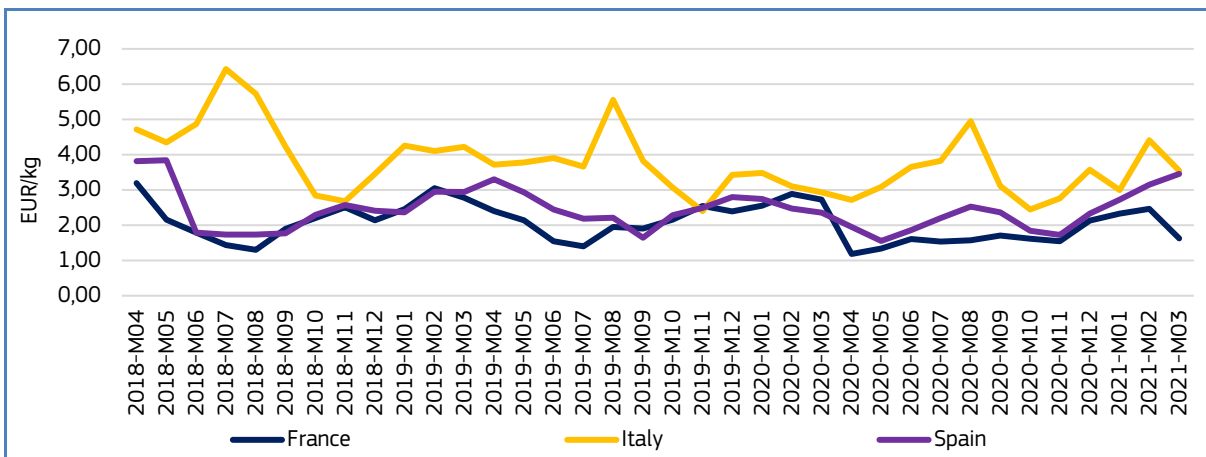


Figure 18. **FIRST-SALES PRICES OF LEMON SOLE IN BELGIUM, DENMARK, AND FRANCE**



EU first sales of **lemon sole**<sup>13</sup> occur predominantly in **Denmark**, as well as in **France** and **Belgium**. In March 2021, the average first-sales prices of lemon sole were: 3,51 EUR/kg in Belgium (10% down from the previous month and 17% up from the previous year); 6,08 EUR/kg in Denmark (up from both the previous month and year by 15% and 38%, respectively); and 4,93 EUR/kg in France (19% lower than February 2021, and 10% higher than March 2020). In Belgium and Denmark, the price spikes correlated with drops in supply from the previous month. In March 2021, supply decreased by 57% in Denmark, and increased in Belgium (+50%), and France (+46%), relative to the previous year. Supply is seasonal, with peaks in April and November in Belgium, June–July in Denmark, and May–July in France. Over the 36-month period, lemon sole prices exhibited different trends: a downward trend in Belgium, a slightly increasing trend in Denmark, and an increasing trend in France. During the same period, supply showed a decreasing trend in all the three countries.

Figure 19. **FIRST-SALES PRICES OF WEEVER IN FRANCE, ITALY, AND SPAIN**



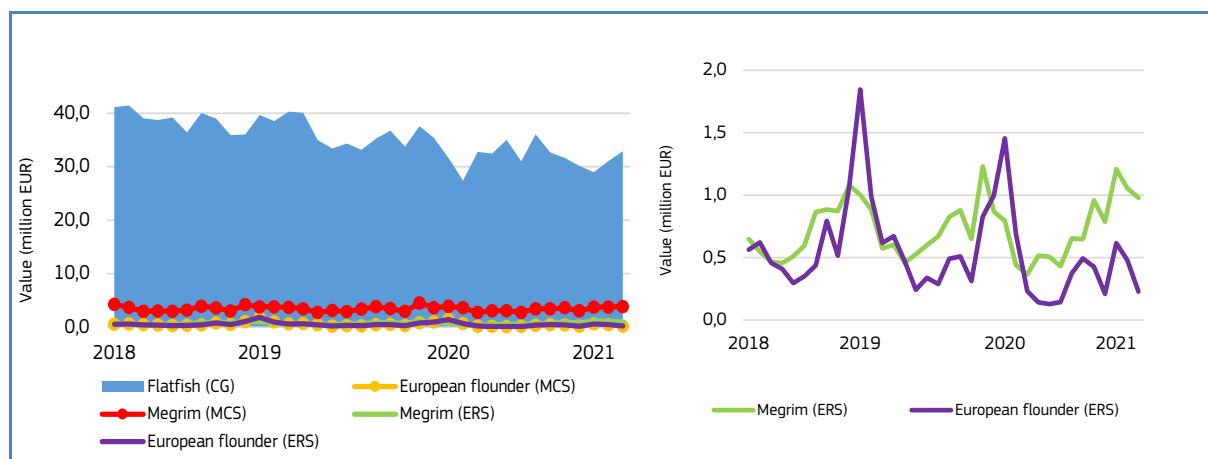
EU first sales of **weever** occur predominantly in **Spain**, as well as in **France** and **Italy**. In March 2021, the average first-sales prices of weever were: 1,62 EUR/kg in France (down from both the previous month and year by 34% and 40%, respectively); 3,54 EUR/kg in Italy (-20% from February 2021, and +21% from March 2020); and 3,45 EUR/kg in Spain (10% higher than February 2021, and 47% up from March 2020). In March 2021, supply increased in all three countries compared to March 2020: +138% in France, +1089% in Italy, and +12% in Spain. Supply is seasonal with similar peaks in all three countries, from June to August. Prices exhibited a downward trend in all three markets. Over the past three years, supply rose remarkably in Italy (most notably since May 2020), and had a downward trend in France and Spain.

<sup>13</sup> Lemon sole (*Microsmus kit*) is a species included in the “Sole, other” main commercial species (ERS code: LEM).



## 1.5. Commodity group of the month: Flatfish<sup>14</sup>

Figure 20. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES<sup>15</sup>, JANUARY 2018 - MARCH 2021**



The “**flatfish**” commodity group (CG<sup>16</sup>) recorded the fifth-highest first-sales value and the sixth-highest volume out of the 10 CGs recorded in March 2021<sup>17</sup>. Of reporting countries covered by EUMOFA database, first sales of flatfish reached a value of EUR 32,9 million and a volume of 6.953 tonnes, representing a value increase of 4% and a volume decrease of 35% compared to March 2020. In the past 36 months, the highest first-sales value of flatfish was registered at EUR 41,4 million (May 2018).

The flatfish commodity group includes 13 main commercial species (MCS): Atlantic halibut, brill, common sole, other soles, dab, European flounder, other flounders, European plaice, other plaices, Greenland halibut, megrim, turbot, and the grouping “other flatfish”.

At Electronic Recording and Reporting System (ERS) level, European flounder (3%) and megrim (1%) together accounted for 4% of “flatfish” total first-sales value recorded in March 2021.

<sup>14</sup> First sales data updated on 17.5.2021.

<sup>15</sup> Norway and the UK excluded from the analyses.

<sup>16</sup> Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

<sup>17</sup> More data on commodity groups can be found in Table 1.2 of the Annex.



## 1.6. Focus on European flounder



Source: Scandinavian Fishing Year Book

The European flounder (*Platichthys flesus*) is a demersal fish species in the right-eye flounders family Pleuronectidae. In about 30% percent of individuals, eyes move to the left and the left side becomes uppermost. The species is found in European coastal waters from the White Sea in the north to the Mediterranean and the Black Sea in the south. It has been introduced into the waters of the United States and Canada accidentally through transport in ballast water<sup>18</sup>. European flounder is a migratory fish, and is found in estuaries for most of the year. Adults occur on muddy and sandy bottoms in shallow marine or brackish waters, and also enter fresh waters. During winter, adults retreat to deeper, warmer waters, where they spawn in spring. Juveniles over a year old and adults feed on benthic fauna. The species has a maximum length of about 60 cm, with a maximum published weight of 2,9 kg and a maximum reported age of 15 years<sup>19</sup>.

The European flounder is caught by bottom trawling and is directly targeted in some fisheries, whereas in others (the North Sea) it is retained as a bycatch<sup>20</sup>. In EU waters, management measures comprise Total Allowable Catches, and minimum reference sizes in the Baltic Sea of 18 cm (sub-divisions 29-32, south of 59°), 21 cm (sub-divisions 26-28), and 23 cm (sub-divisions 22-25). Additionally, technical measures include restriction on fisheries in designated areas from February to May and minimum mesh size of at least 80 mm<sup>21</sup>.

### Selected countries

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

European flounder		Changes in European flounder first sales Jan-Mar 2021 (%)		Contribution of European flounder to total "flatfish" first sales in March 2021 (%)	Principal places of sale Jan-Mar 2021 in terms of first-sales value
		Compared to Jan-Mar 2020	Compared to Jan-Mar 2019		
Denmark	Value	-60%	-62%	2%	Hvide Sande, Neksø, Grenaa.
	Volume	-68%	-64%	17%	
Netherlands	Value	-67%	-70%	1%	IJmuiden/Velsen, Scheveningen, Vlissingen.
	Volume	-26%	-29%	7%	
Poland	Value	-64%	-72%	99%	Kolobrzeg, Międzyrzecz, Władysławowo.
	Volume	-58%	-56%	99%	

<sup>18</sup> <https://www.fishbase.de/summary/Platichthys-flesus.html>

<sup>19</sup> <https://www.fishbase.de/summary/Platichthys-flesus.html>

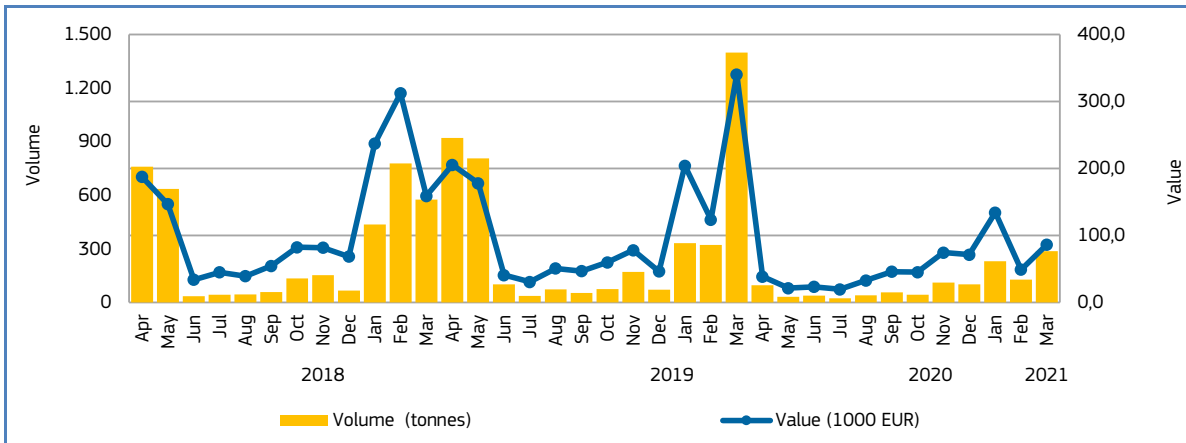
<sup>20</sup> <https://www.geintegreerdevisserij.nl/wp-content/uploads/ices-advies-bot.pdf>

<sup>21</sup> Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02019R1241-20210101>





Figure 21. **EUROPEAN FLOUNDER: FIRST SALES IN DENMARK, APRIL 2018 - MARCH 2021**



Over the past 36 months, the highest first-sales value of European flounder in **Denmark** occurred in March 2020 when 1.399 tonnes were sold. Typically, first sales were higher in the first half of the year during spring.

Figure 22. **FIRST SALES: COMPOSITION OF “FLATFISH” (ERS LEVEL) IN DENMARK IN VALUE AND VOLUME, MARCH 2021**

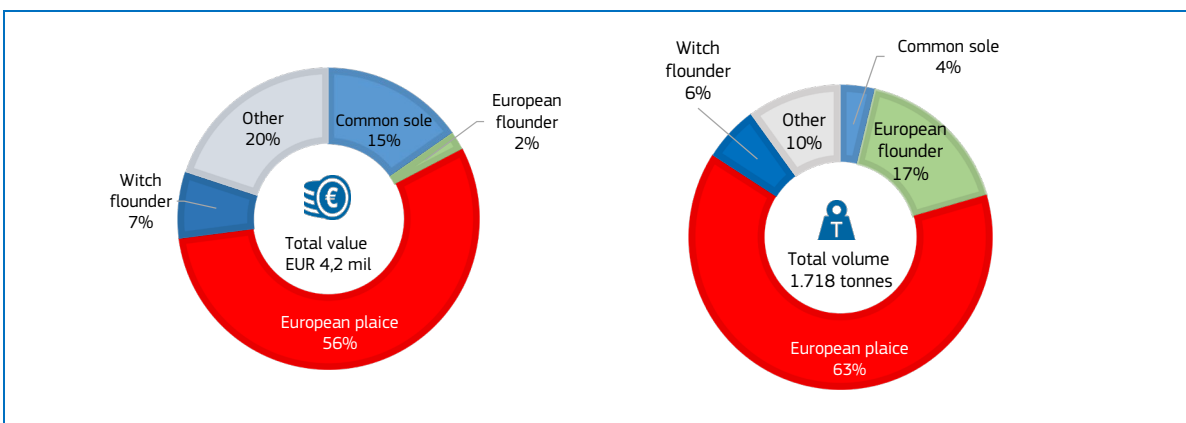
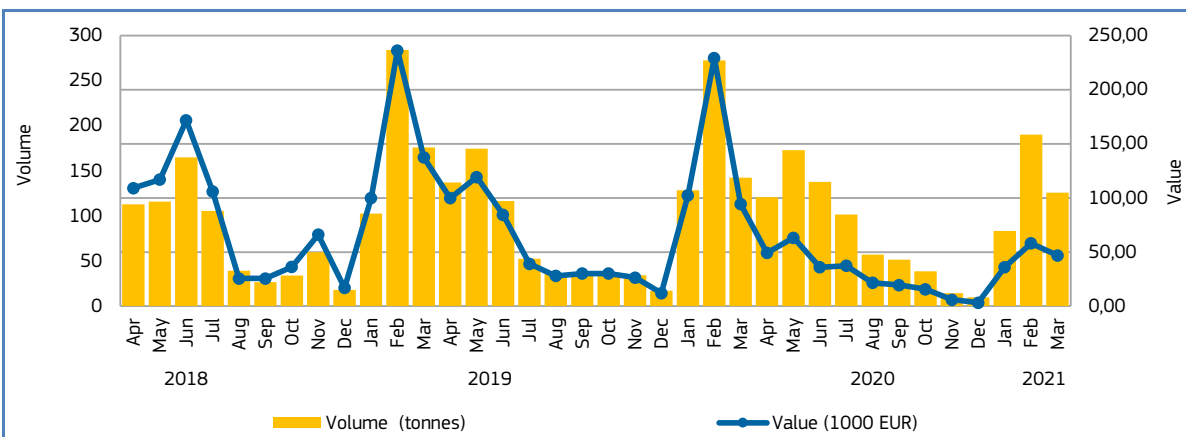


Figure 23. **EUROPEAN FLOUNDER: FIRST SALES IN THE NETHERLANDS, APRIL 2018 - MARCH 2021**



Over the past 36 months in **the Netherlands**, the highest first sales of common European flounder were in February and March each year, peaking in February 2019 when 284 tonnes were sold.



Figure 24. **FIRST SALES: COMPOSITION OF “FLATFISH” (ERS LEVEL) IN THE NETHERLANDS IN VALUE AND VOLUME, MARCH 2021**

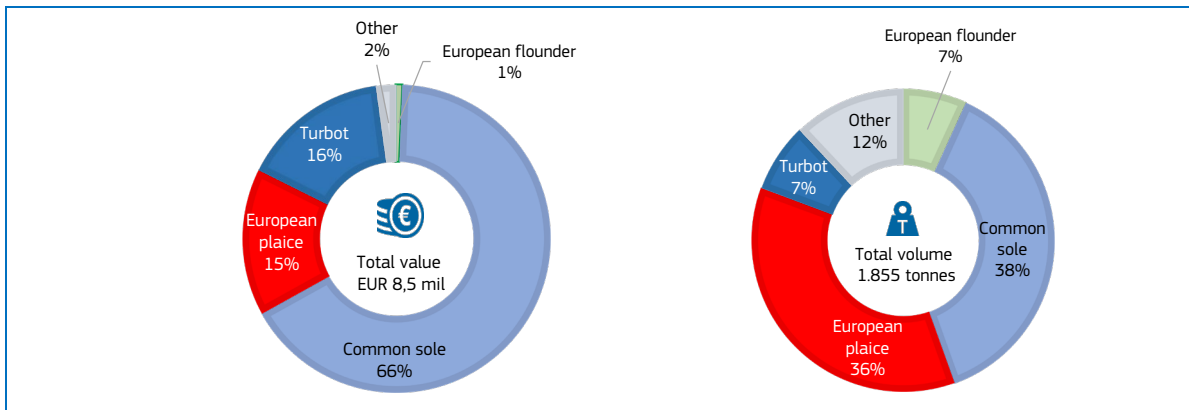
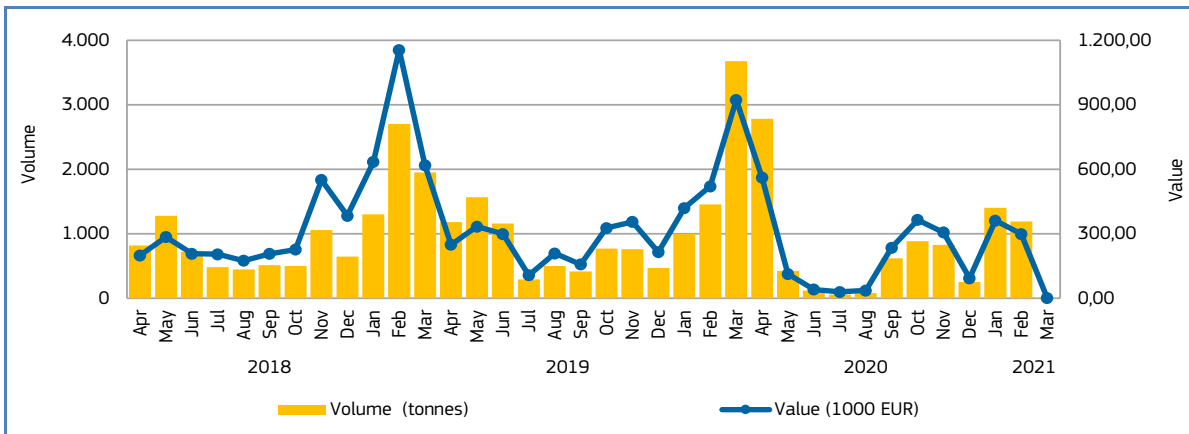
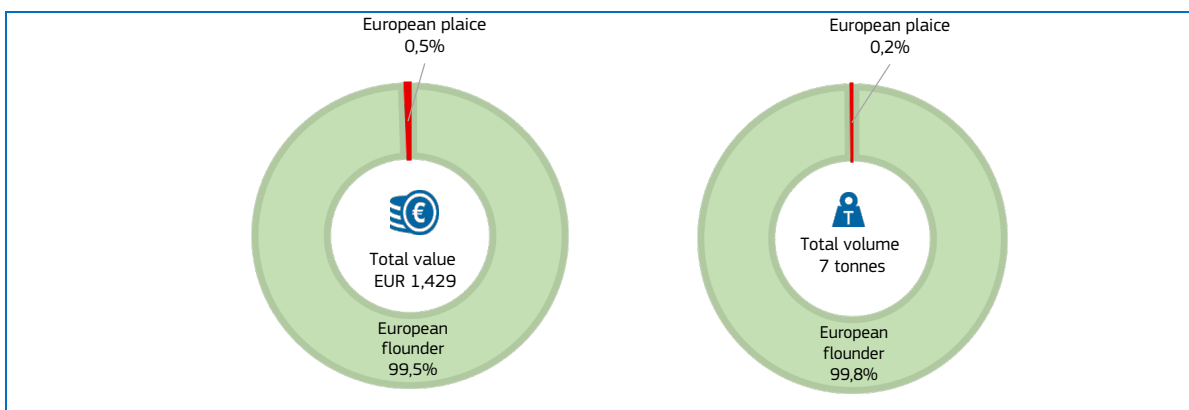


Figure 25. **EUROPEAN FLOUNDER: FIRST SALES IN POLAND, APRIL 2018 - MARCH 2021**



Over the past 36 months in **Poland**, the highest first-sales volume of European flounder occurred in March 2020 when 3.679 tonnes were sold. The most intense fishery season occurs in the spring.

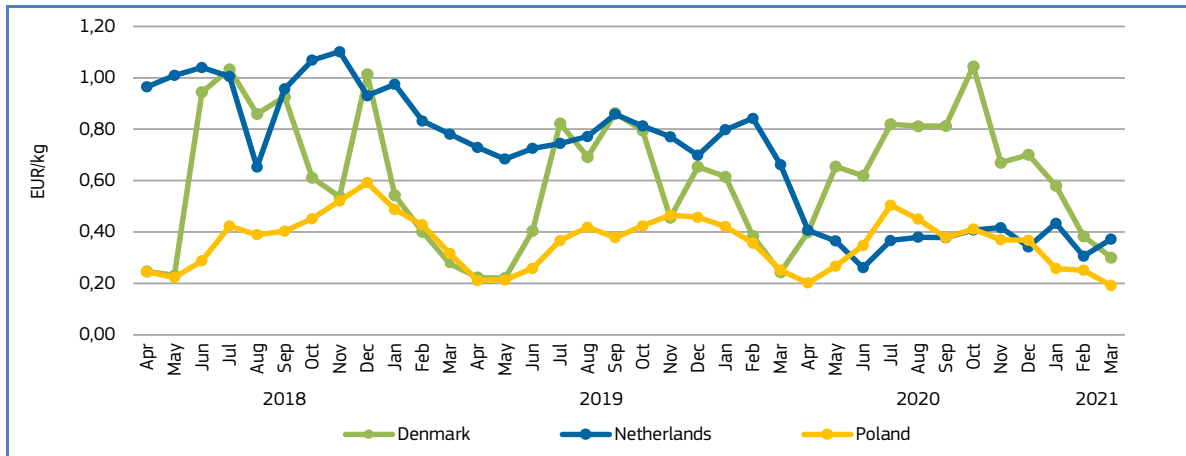
Figure 26. **FIRST SALES: COMPOSITION OF “FLATFISH” (ERS LEVEL) IN POLAND IN VALUE AND VOLUME, MARCH 2021**





## Price trend

Figure 27. **EUROPEAN FLOUNDER: FIRST-SALES PRICES IN SELECTED COUNTRIES, APRIL 2018 - MARCH 2021**



Over the 36-month observation period (April 2018 to March 2021), the weighted average first-sales price of European flounder in **the Netherlands** was 0,69 EUR/kg, 108% higher than in **Poland** (0,33 EUR/kg), and 83% greater than that of **Denmark** (0,39 EUR/kg).

In **Denmark** in March 2021, the average first-sales price of European flounder (0,30 EUR/kg) increased by 24% compared with March 2020, and 9% compared with March 2019. Over the past 36 months, average price ranged from 0,22 EUR/kg for 807 tonnes in May 2019, to 1,04 EUR/kg for 43 tonnes in October 2020.

In **the Netherlands** in March 2021, the average first-sales price of European flounder (0,37 EUR/kg) decreased by 44% and 52%, compared to of the same month in 2020 and 2019 respectively. During the observed period, the lowest average price (0,26 EUR/kg for 138 tonnes) was seen in June 2020, while the highest average price was recorded in November 2018 at 1,10 EUR/kg for 60 tonnes.

In **Poland** in March 2021, the average first-sales price of European flounder (0,19 EUR/kg) decreased by 24% compared to March 2020 and by 39% relative to March 2019. During the observed period, the lowest average price of 0,19 EUR/kg for 7 tonnes was seen in March 2021, while the highest average price was recorded in December 2018, at 0,59 EUR/kg for 649 tonnes.



## 1.7. Focus on megrim



Source: Dolgov Andrey, Polar branch of VNIRO (PINRO), Murmansk, Russia

The megrim, megrim sole, whiff, or Cornish sole (*Lepidorhombus whiffiagonis*) is a demersal fish species of left-eyed flatfish in the family Scophthalmidae. The species is found in the northeast Atlantic and Mediterranean Sea between 100 and 700 m below sea level<sup>22</sup>. The megrim is usually found over a sandy or muddy sea floor. This species spawns at the end of spring and beginning of summer<sup>23</sup>. The megrim feeds on small bottom-living fishes as well as squids and crustaceans<sup>24</sup>. It can reach up to 1.85 kg<sup>25</sup> in weight, and 60 cm in length<sup>26</sup>.

The megrim is an economically valuable species caught by deep-sea bottom trawling and is directly targeted in some fisheries, whereas in others it is retained as a valuable bycatch.

France and Spain are the largest consumers of this species, with most of the megrim caught in the UK water being exported to these nations. In the EU, management of this species is set through multiannual plan for the demersal stock (including megrim) fished in the Western Waters and their adjacent waters<sup>27</sup>. Since two megrim species (*L. whiffiagonis* and *L. boscii*) are not totally separated in the landings, a single Total Allowable Catch (TAC) covers both<sup>28</sup>. Megrim sold to UK consumers is often given a different name to make it more appealing, with megrim sole and Cornish sole being two of the most common alternative names applied<sup>29</sup>.

## Selected countries

Table 20. COMPARISON OF MEGRIM FIRST-SALES PRICES, MAIN PLACES OF SALE AND CONTRIBUTION TO OVERALL SALES OF FLATFISH IN SELECTED COUNTRIES

Megrim		Changes in megrim first sales Jan-Mar 2021 (%)		Contribution of megrim to total "flatfish" first sales in March 2021 (%)	Principal places of sales in Jan-Mar 2021 in terms of first-sales value
		Compared to Jan-Mar 2020	Compared to Jan-Mar 2019		
Denmark	Value	+385%	+351%	1%	Hanstholm, Thyborøn, Skagen.
	Volume	+275%	+219%	1%	
France	Value	-2%	-5%	10%	Guilvinec, Lorient, Loctudy.
	Volume	-5%	-23%	22%	
Spain	Value	+4493%	+1627%	1%	Santa Eugenia Ribeira, Villajoyosa, Motril.
	Volume	+2487%	+864%	1%	

<sup>22</sup> <https://www.fishbase.se/summary/Lepidorhombus-whiffiagonis.html>

<sup>23</sup> <http://www.fao.org/fishery/species/2560/en>

<sup>24</sup> <https://onlinelibrary.wiley.com/doi/abs/10.1111/j.1439-0426.2009.01257.x>

<sup>25</sup> <http://specimenfish.ie/irish-record-fish/marine-species/megrim-lepidorhombus-whiffiagonis/>

<sup>26</sup> <http://www.fao.org/fishery/species/2560/en>

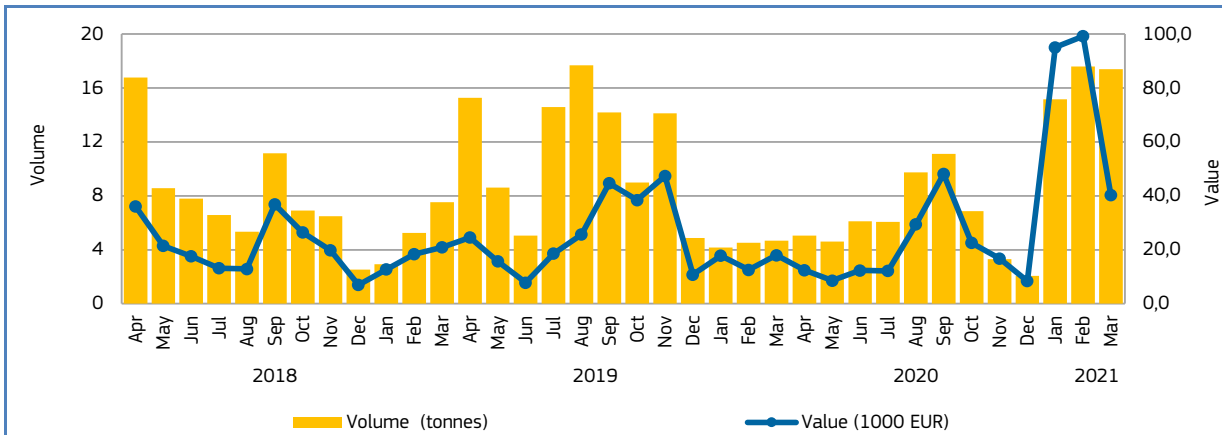
<sup>27</sup> Council Regulation (EU) 2019/472 <https://eur-lex.europa.eu/eli/reg/2019/472/oj>

<sup>28</sup> <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2020/2020/meg.27.8c9a.pdf>

<sup>29</sup> <https://britishseafishing.co.uk/megrim/#:~:text=Megrim%20is%20a%20fish%20of,it%20is%20caught%20as%20bycatch.>

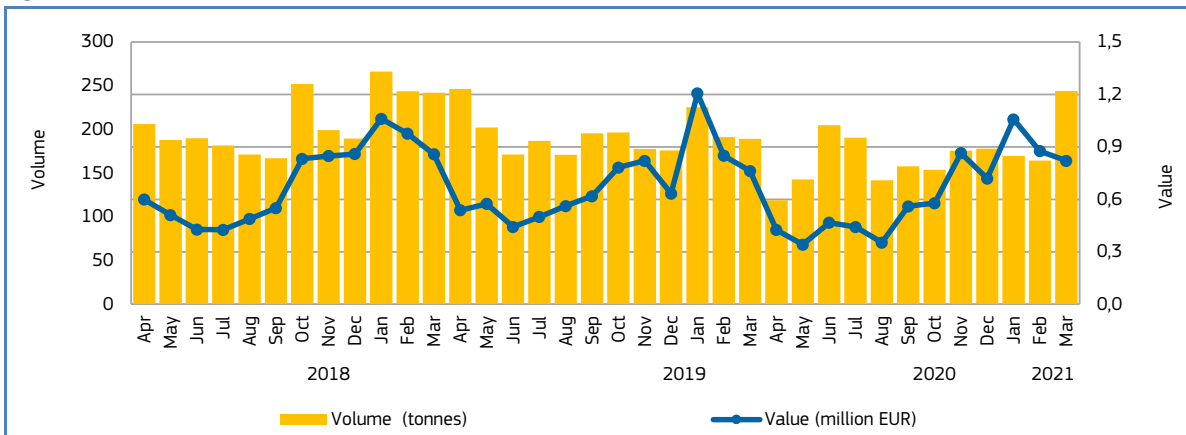


Figure 28. **MEGRIM: FIRST SALES IN DENMARK, APRIL 2018 - MARCH 2021**



In **Denmark**, over the observed 36-month period, the highest first sales of megrim occurred in August 2019 and February 2021, when 18 tonnes were sold in both months. During the rest of each year, first sales were the lowest in December, possibly due to unfavourable weather condition among other factors. Megrim sales are generally low, so trends tend to fluctuate more frequently.

Figure 29. **MEGRIM: FIRST SALES IN FRANCE, APRIL 2018 - MARCH 2021**



In **France**, first sales of megrim were the highest in terms of volume among the three surveyed countries. Over the past 36 months, fishing activity fluctuated regularly, with the highest first sales registered in January 2019 when 266 tonnes were sold. Fishing activity peaks at the beginning of each observed year.

Figure 30. **FIRST SALES: COMPOSITION OF “FLATFISH” (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, MARCH 2021**

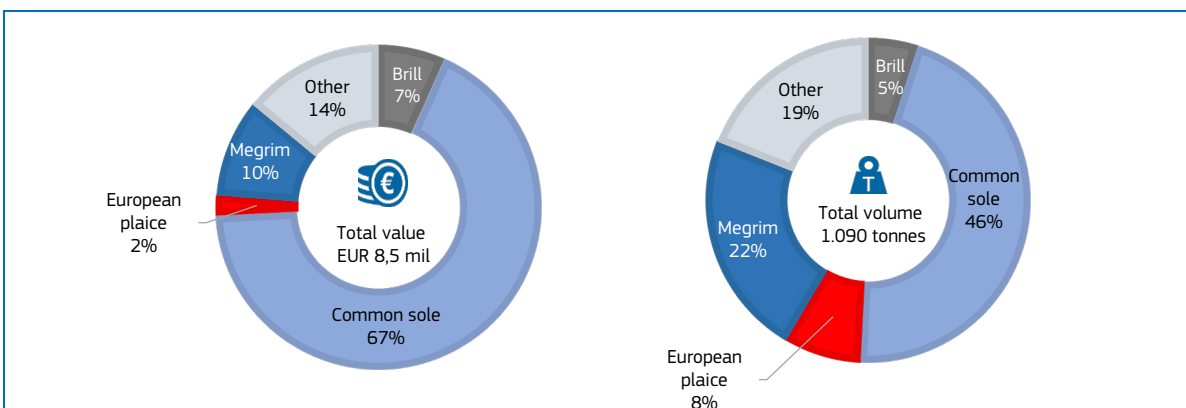
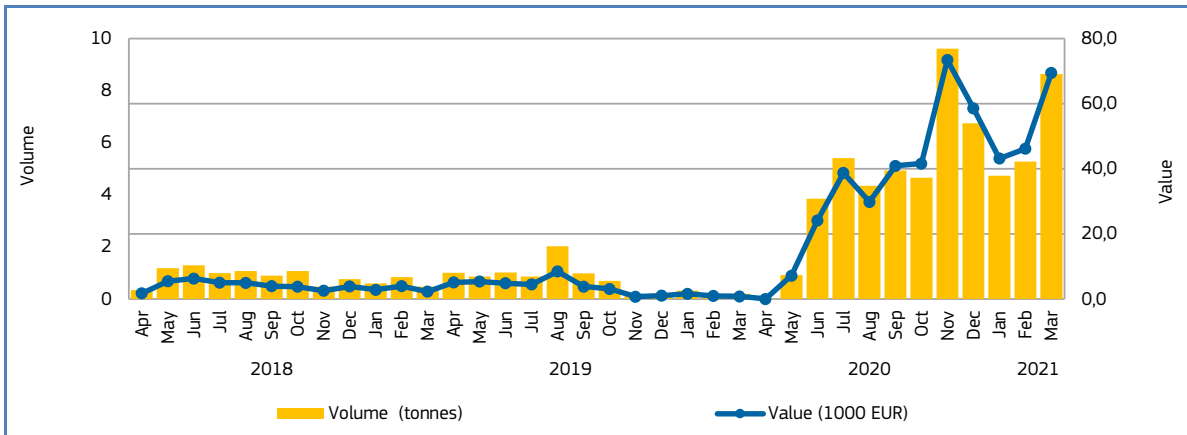


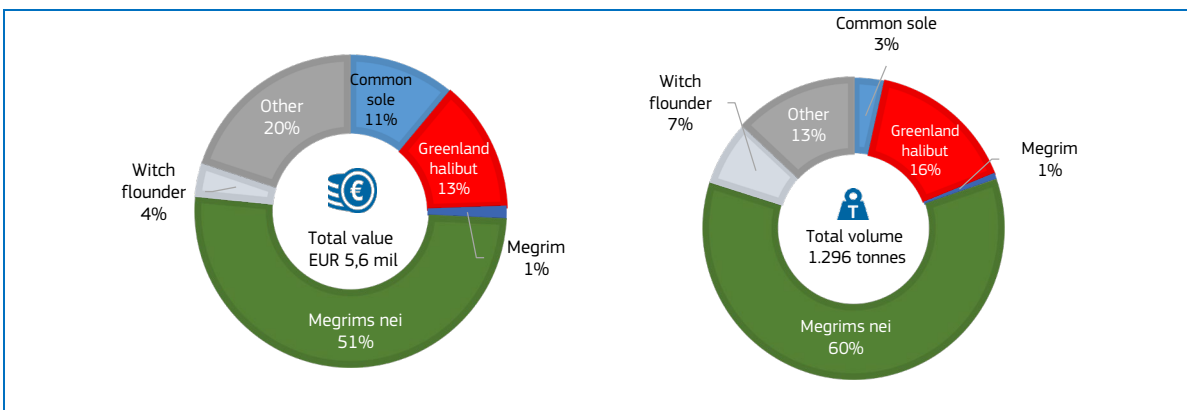


Figure 31. **MEGRIM: FIRST SALES IN SPAIN, APRIL 2018 - MARCH 2021**



In **Spain**, over the past 36 months, the highest first sales of megrim were registered in November 2020, when about 10 tonnes were sold. In general, first sales of megrim are low, and fluctuate on a regular basis. From April 2018 to May 2020 there were low registered first sales, possibly due to a change in the reporting system. Indeed, up to May 2020, megrim (*Lepidorhombus whiffiagonis*) was not reported in the Bay of Biscay and Iberian coast.

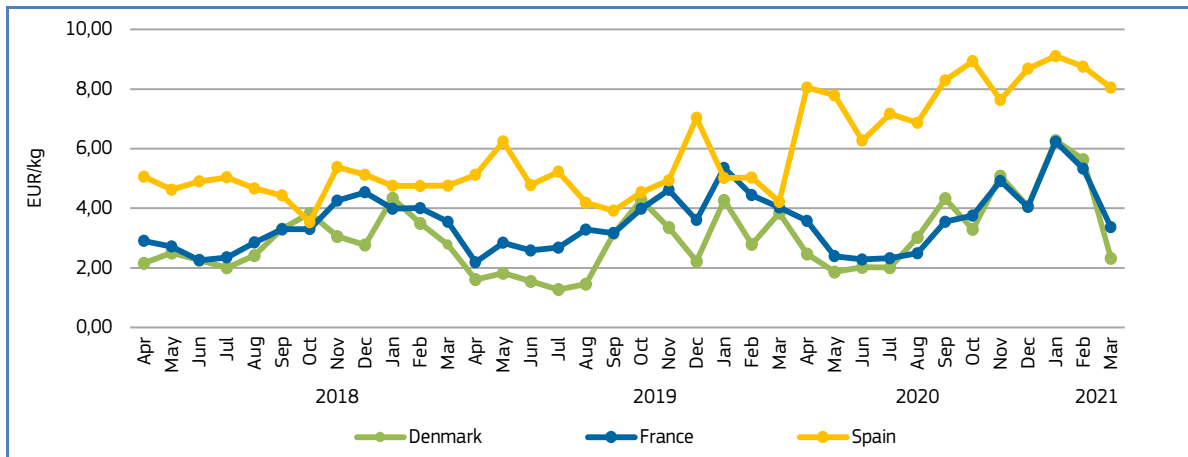
Figure 32. **FIRST SALES: COMPOSITION OF “FLATFISH” (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, MARCH 2021**





## Price trend

Figure 33. **MEGRIM: FIRST-SALES PRICES IN SELECTED COUNTRIES, APRIL 2018 - MARCH 2021**



Over the 36-month observation period (April 2018–March 2021) among the three surveyed countries, the weighted average first-sales price of megrim was the highest in **Spain** at 7,22 EUR/kg. That price was 140% greater than in **Denmark** (3,01 EUR/kg), and 105% over the weighted average price in **France** (3,53 EUR/kg).

In **Denmark** in March 2021, the average first-sales price of megrim (2,32 EUR/kg) decreased by 40% compared to March 2020 and by 17% compared to March 2019. The lowest average price was registered in July 2019 at 1,27 EUR/kg for 15 tonnes, while the highest average price of 6,27 EUR/kg for 15 tonnes was registered in January 2021.

In **France** in March 2021, the average first-sales price of megrim was 3,36 EUR/kg, 17% and 5% lower than in March 2020 and 2019 respectively. The lowest price in the past 36 months was registered in April 2019, at 2,18 EUR/kg for 246 tonnes, while the highest price (6,23 EUR/kg for 170 tonnes) was observed in January 2021.

In **Spain** in March 2021, the average first-sales price of megrim (8,05 EUR/kg) increased by 91% compared to March 2020 and by 69% compared to March 2019. The lowest average price was registered in October 2018, at 3,54 EUR/kg for a volume of 1 tonne. The highest average price of 9,11 EUR/kg for about 5 tonnes was registered in January 2021.

## 2. Extra-EU imports

The weekly extra-EU import prices (weighted average values per week, in EUR per kg) for nine different species are examined every month. The three most relevant species in terms of value and volume remain consistent: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (*Penaeus* spp.) from Ecuador. The other six species change each month; three are chosen from the commodity group of the month, and three are randomly selected. The commodity group for this month is “flatfish”, and the featured species are fresh or chilled Atlantic halibut from Norway, frozen fillets of plaice from Iceland, and frozen sole from Morocco. The three randomly selected species this month are frozen octopus from Morocco, frozen squid from Tunisia, and prepared or preserved shrimps and prawns from Canada.

Data analysed in the section “Extra-EU imports” are extracted from EUMOPA, as collected from the European Commission<sup>30</sup>.

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

Extra-EU Imports		Week 16/2021	Preceding 4-week average	Week 05/2020	Notes
<b>Fresh whole Atlantic salmon imported from Norway</b> ( <i>Salmo salar</i> , CN code 03021440)	<b>Price (EUR/kg)</b>	6,17	6,13 (+1%)	5,02 (+23%)	In 2021, prices ranged from 4,62 to 6,31 EUR/kg. Upward trend since the beginning of the year, in contrast with a downward trend over the past three years.
	<b>Volume (tonnes)</b>	10.162	10.844 (-6%)	12.121 (-16%)	Most of the weekly volumes (34%) range from 11.000 to 13.000 tonnes. Downward trend since the beginning of the year, in contrast with the upward trend since week 17 of 2018.
<b>Frozen Alaska pollock fillets imported from China</b> ( <i>Theragra chalcogramma</i> , CN code 03047500)	<b>Price (EUR/kg)</b>	2,61	2,55 (+2%)	2,91 (-10%)	In 2021, prices ranged from 2,40 to 2,61 EUR/kg and had an upward trend in contrast with the same period of 2020, when the trend was slightly downward.
	<b>Volume (tonnes)</b>	1.708	2.436 (-30%)	2.236 (-24%)	Fluctuations in supply from 370 to 7.300 tonnes. About 46% of volumes are between 2.000 and 3.000 tonnes. Downward trend over the past three years.
<b>Frozen tropical shrimp imported from Ecuador</b> (genus <i>Penaeus</i> , CN code 03061792)	<b>Price (EUR/kg)</b>	5,21	5,09 (+2%)	5,58 (-7%)	Most prices (46%) range between 5,50 and 6,00 EUR/kg. Slight upward trend since week 1 of 2021, in contrast with a downward trend over the past three years.
	<b>Volume (tonnes)</b>	2.994	2.685 (+12%)	2.401 (+25%)	Volumes fluctuate from 700 to 4.000 tonnes/week: 50% of volumes range between 1.000 to 2.000 tonnes. Upward trend since week 17 of 2018.

<sup>30</sup> Last update: 23.05.2021



Figure 34. **IMPORT PRICE OF FRESH AND WHOLE ATLANTIC SALMON FROM NORWAY, 2018 - 2021**

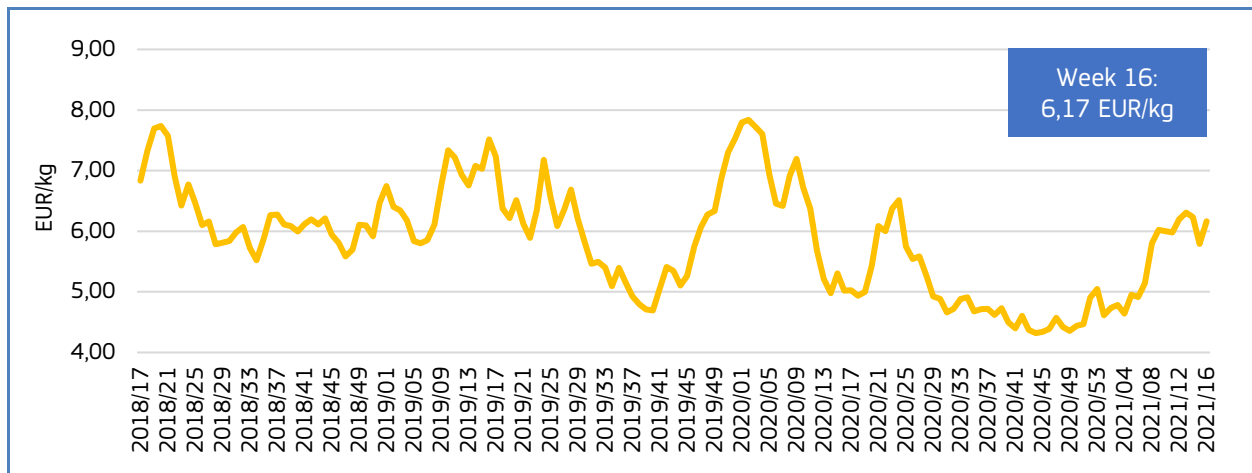


Figure 35. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2018 - 2021**

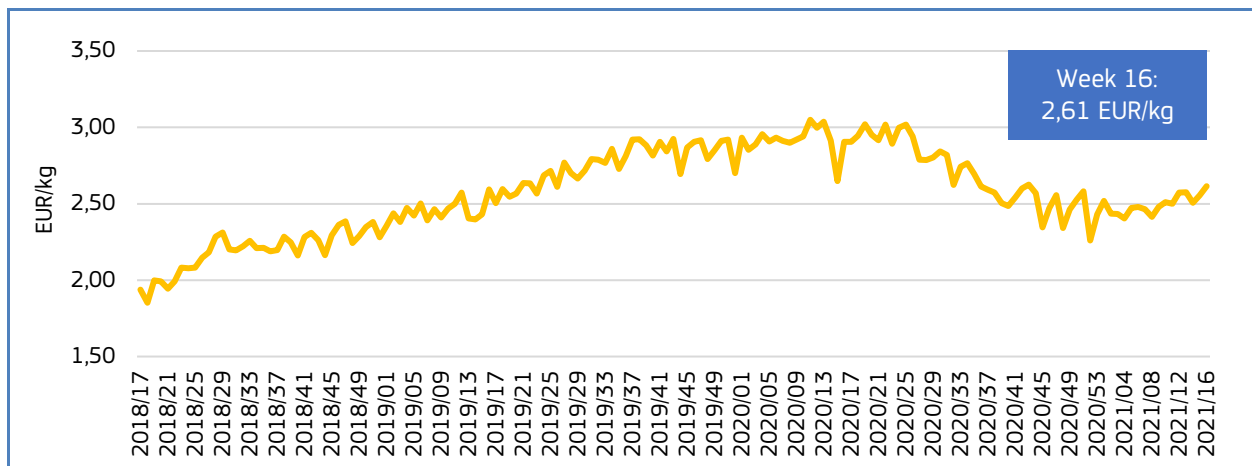


Figure 36. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2018 - 2021**

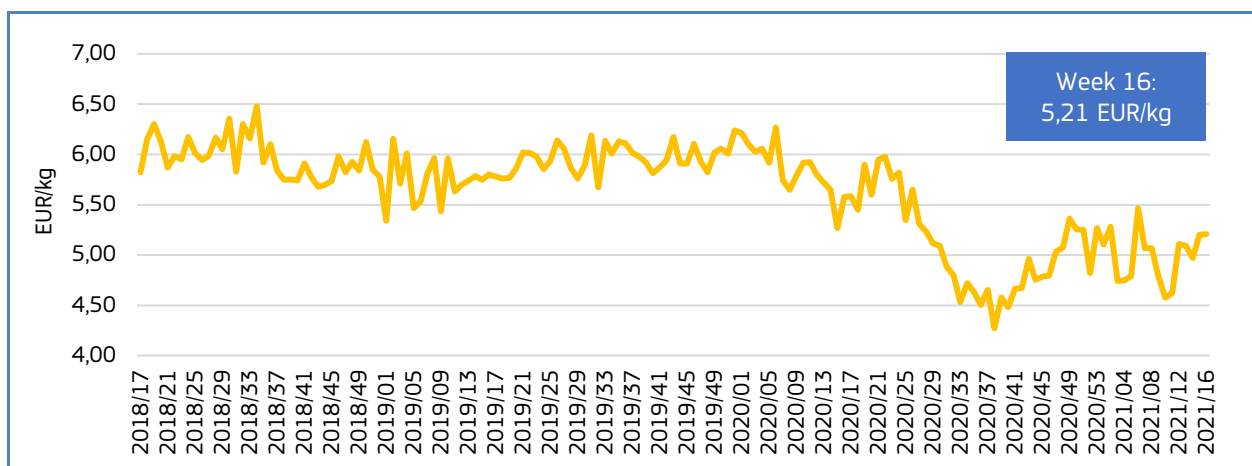


Table 22. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 16/2021	Preceding 4-week average	Week 16/2020	Notes
<b>Fresh or chilled Atlantic halibut from Norway</b> <i>(Hippoglossus hippoglossus, CN code 03022130)</i>	<b>Price (EUR/kg)</b>	6,59	7,87 (-16%)	7,03 (-6%)	Downward trend over the past three years. Price fluctuated around 9,00-10,00 EUR/kg before week 11 of 2020, and around 7,00-8,00 EUR afterwards. Since week 1 of 2021, prices range from 6,59 to 8,49 EUR/kg.
	<b>Volume (tonnes)</b>	24	18 (+34%)	11 (+129%)	Fluctuations in supply from 7 to 100 tonnes. Upward trend from week 17 of 2018.
<b>Frozen fillets of plaice from Iceland</b> <i>(Pleuronectes platessa, CN code 03048310)</i>	<b>Price (EUR/kg)</b>	8,17*	8,27** (+8%)	8,23*** (+9%)	Data are missing, mainly in 2020, when only 23 weekly prices were available, possibly due to the pandemic. Fluctuations in price over the past three years.
	<b>Volume (tonnes)</b>	4,9*	1,1** (+21%)	2,2*** (-37%)	Data are missing, mainly in 2020, when only 23 weekly prices were available, possibly due to the pandemic. Fluctuations in supply, from 0,024 to 31 tonnes.
<b>Frozen sole from Morocco</b> ( <i>Solea spp.</i> , CN code 03033300)	<b>Price (EUR/kg)</b>	5,61*	5,40**** (-1%)	5,28 (-1%)	Data are limited, mostly in 2020, possibly due to the pandemic. Most of prices range between 9,00-11,00 EUR/kg. Downward trend from week 14 of 2018.
	<b>Volume (tonnes)</b>	33*	8,4**** (-75%)	16 (-87%)	Data are limited, mostly in 2020, possibly due to the pandemic. High fluctuations in supply, from 0,167 to 169 tonnes. Downward trend from week 14 of 2018.

\* Data refers to week 13 of 2021 (the most recent available); \*\*data refers to weeks 9 to 12 of 2021; \*\*\*data refers to week 13 of 2020; \*\*\*\*data refers to weeks 9,10, and 12 of 2021.

Figure 37. **IMPORT PRICE OF FRESH OR CHILLED ATLANTIC HALIBUT FROM NORWAY, 2018 - 2021**

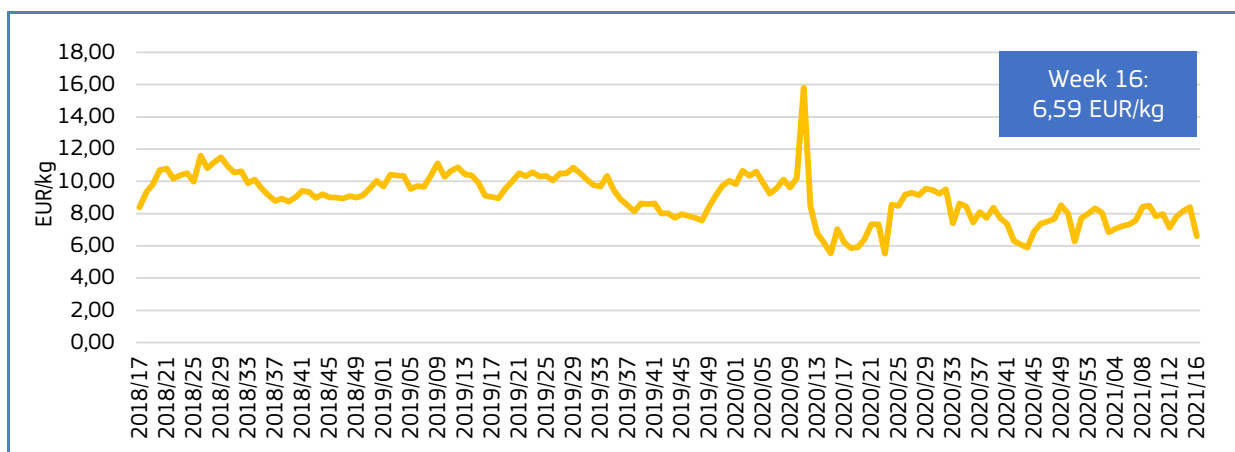


Figure 38. **IMPORT PRICE OF FROZEN FILLETS OF PLAICE FROM ICELAND, 2018 - 2021**

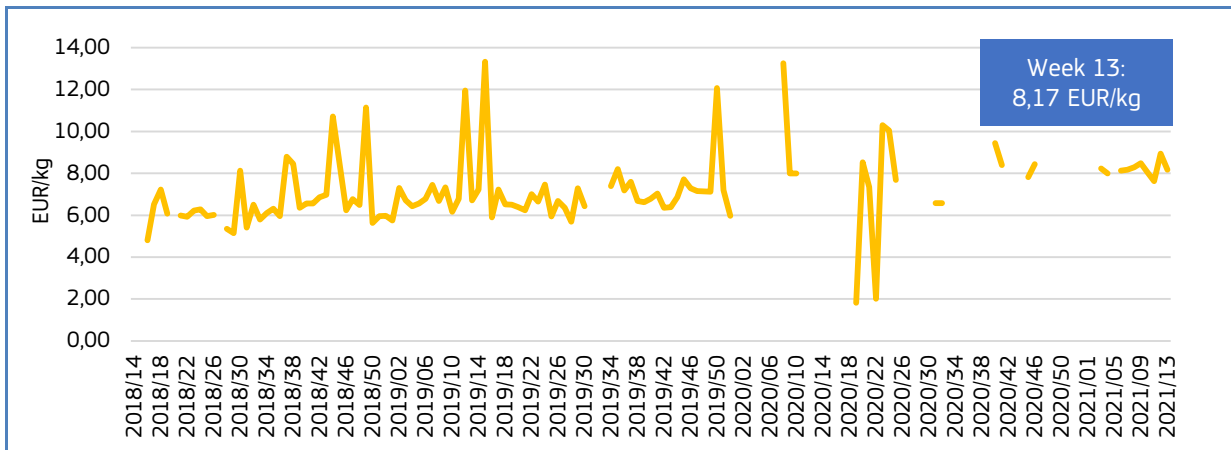
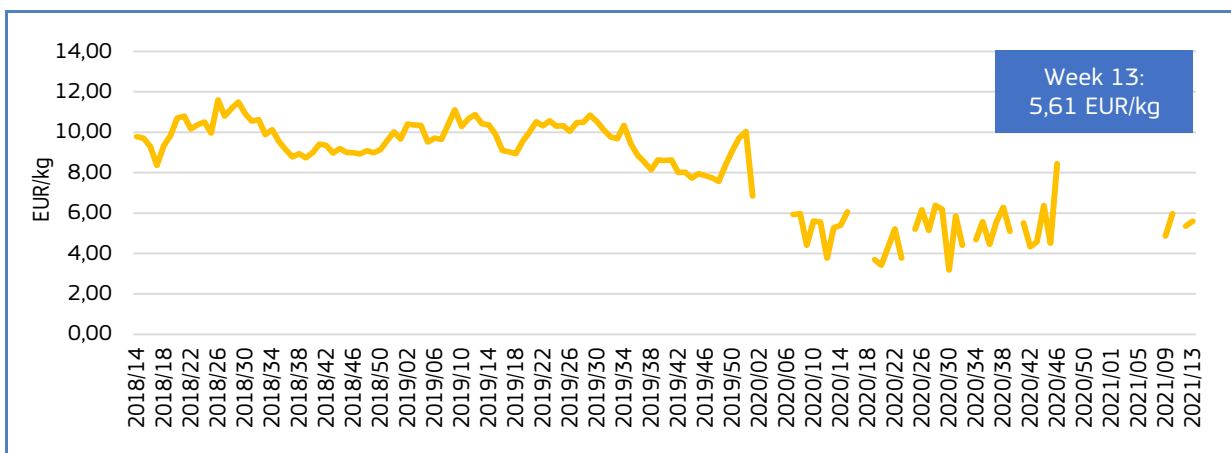


Figure 39. **IMPORT PRICE OF FROZEN SOLE FROM MOROCCO, 2018 - 2021**



Since week 1 of 2021, the price of fresh or chilled Atlantic halibut from Norway remained stable and ranged from 6,59 to 8,49 EUR/kg. Volume of supply ranged from 12,8 to 28,6 tonnes.

From 2018 to 2021, the price of frozen fillets of plaice from Iceland showed an upward trend, while volume followed an opposite trend. Over the past three years, price fluctuated between 1,83 and 13,33 EUR/kg.

From 2018 to 2021, the price of frozen sole from Morocco fluctuated from 3,18 to 11,60 EUR/kg. Since the beginning of 2021, volume exhibited an upward trend.

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

Extra-EU Imports		Week 16/2021	Preceding 4-week average	Week 16/2020	Notes
<b>Frozen octopus from Morocco</b> ( <i>Octopus</i> spp., CN code 03075200)	<b>Price (EUR/kg)</b>	10,42	9,87 (+6%)	8,22 (+27%)	Downward trend from 2018 to 2021. Since week 1 of 2021, prices jumped, ranging from 9,39 to 10,42 EUR/kg; they were between 7,79 to 9,65 EUR/kg in the same period of 2020.
	<b>Volume (tonnes)</b>	896	1.304 (-31%)	366 (+45%)	High fluctuations in supply from 2018 to 2021, varying between 41 and 1.719 tonnes. Overall upward trend.
<b>Frozen squid from the Falkland Islands</b> ( <i>Loligo gahi</i> , CN code 03074335)	<b>Price (EUR/kg)</b>	2,89	3,17* (-9%)	n/a	Upward trend over the past three years. Most prices range between 2,5 to 3,00 EUR/kg. Price spikes correlate with decrease of supply.
	<b>Volume (tonnes)</b>	1.306	491* (+166%)	n/a	Downward trend over the past three years. Fluctuations in supply from 0,5 kg to 7.114 tonnes.
<b>Prepared or preserved shrimps and prawns from Canada</b> (CN code 16052190)	<b>Price (EUR/kg)</b>	7,08	6,79 (+4%)	7,08 (+0%)	Downward trend over the past three years, with prices ranging from 5,23 to 15,35 EUR/kg. Since week 1 of 2021, prices averaged around 7,00 EUR/kg.
	<b>Volume (tonnes)</b>	74	40 (+84%)	20 (+277%)	High weekly fluctuations. Volume ranged between 0,007 and 680 tonnes from 2018 to 2020, with an overall downward trend.

\* Data refers to week 16 of 2020 (the most recent available);\*\*data refers to weeks 12 and 15 of 2020;\*\*\*data refers to week 16 of 2019.

Figure 40. **IMPORT PRICE OF FROZEN OCTOPUS FROM MOROCCO, 2018 - 2021**

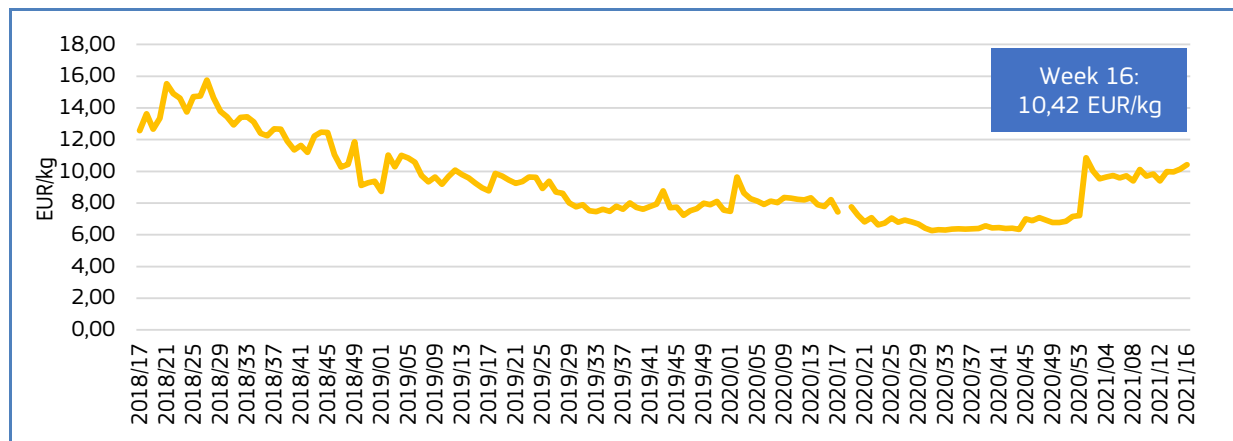


Figure 41. **IMPORT PRICE OF FROZEN SQUID FROM THE FALKLAND ISLANDS, 2018 - 2021**

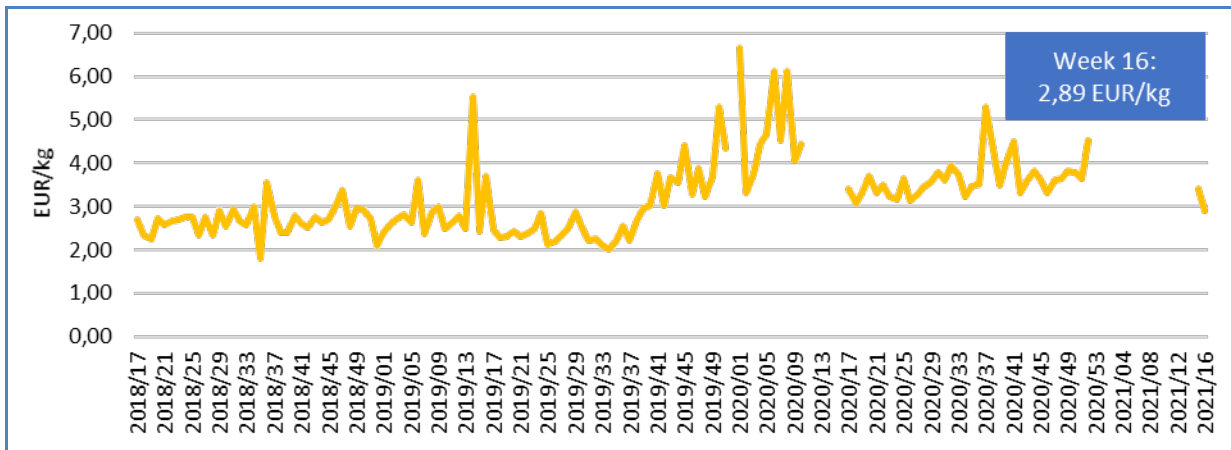
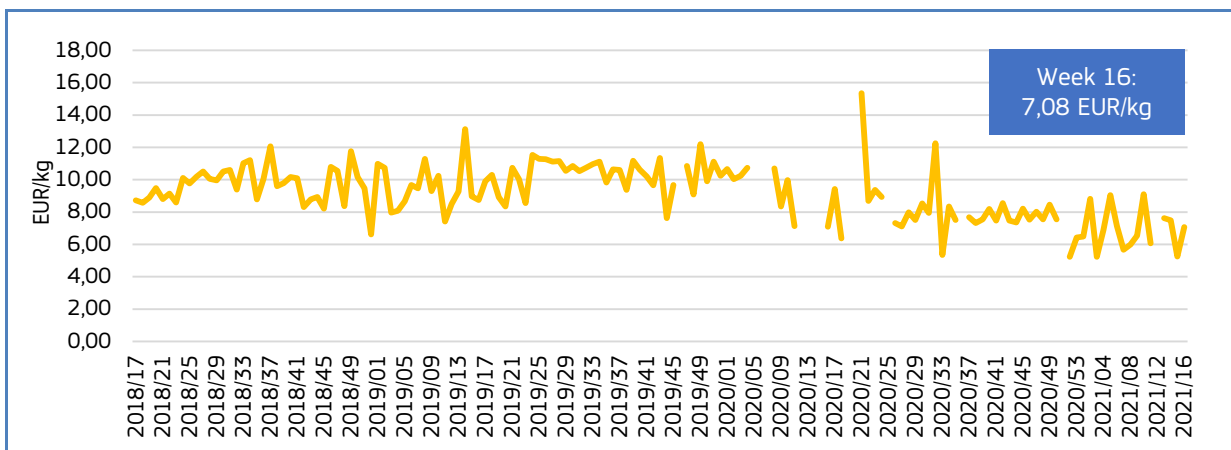


Figure 42. **IMPORT PRICE OF PREPARED OR PRESERVED SHRIMPS AND PRAWNS FROM CANADA, 2018 - 2021**



Since the first week of January 2021, both the price and volume of frozen octopus from Morocco have exhibited a slight upward trend.

From 2018 to 2021, the price of frozen squid from Falkland Islands ranged between 1,80 and 6,65 EUR/kg. At the same time, volume exhibited high weekly fluctuations.

Since the beginning of the year, the price of prepared or preserved shrimps and prawns from Canada has exhibited a downward trend, while volume has shown an opposite trend.

## 3. Consumption

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel<sup>31</sup>.

### 3.1. HOUSEHOLD CONSUMPTION IN THE EU

In March 2021 compared with March 2020, household consumption of fresh fisheries and aquaculture products increased in both volume and value in almost all Member States analysed, with Germany seeing the highest increases. Salmon (+27% in volume and +28% in value) and trout (+63% in volume and +65% in value) were the main species responsible for the increases.

Salmon was also the main species responsible for increased consumption in Sweden and France (+40% and +10%, respectively). In France, cod also contributed to the increase (+25%). In Ireland, haddock and hake were the species most consumed (+39% and +36%, respectively), whereas in Italy, European seabass and gilthead seabream were the species most consumed (+17% and +9%, respectively).

Table 24. MARCH 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	March 2019		March 2020		February 2021		March 2021		Change from March 2020 to March 2021	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	39,83	1.148	18,26	1.191	19,20	1.194	21,28	1.380	25,33	16%	32%
France	33,52	17.948	211,09	13.851	179,05	17.681	217,74	20.026	244,25	45%	36%
Germany	14,50	5.231	78,14	4.942	81,64	7.617	107,10	8.899	131,29	80%	61%
Hungary	6,12	263	1,60	298	1,79	573	2,86	511	2,84	72%	59%
Ireland	23,13	1.463	21,14	1.020	15,12	1.545	22,89	1.500	22,08	47%	46%
Italy	31,02	32.600	338,43	22.794	240,59	27.150	291,04	30.638	333,08	34%	38%
The Netherlands	20,90	2.915	47,16	3.176	54,35	2.656	44,07	3.860	67,70	22%	25%
Poland	13,02	4.770	28,71	3.679	23,19	4.454	29,45	4.732	31,49	29%	36%
Portugal	60,92	6.049	40,08	6.658	43,70	6.719	48,36	6.628	46,41	1%	6%
Spain	46,01	52.134	396,52	49.996	412,96	52.307	454,94	55.606	474,56	11%	15%
Sweden	26,61	701	9,69	759	10,21	914	11,79	1.179	14,78	55%	45%

\*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](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 March in terms of volume has been above the annual average in most of the Member States analysed. Only in France and Hungary was the average volume for March below the annual average monthly household consumption. In terms of value, the March average household consumption was below the annual average only in Hungary.

The most recent weekly consumption data (up to **week 26 of 2021**) are available on the EUMOFA website and can be accessed [here](#).

<sup>31</sup> Last update: 14.05.2021

## 3.2. Miscellaneous shrimps

The category 'miscellaneous shrimps' includes various shrimp species (tropical shrimp, brown shrimp, coldwater shrimp, etc.). The main shrimp species consumed may differ significantly among EU countries, as well as the most popular states of preservation/presentation (raw/cooked, whole/peeled, etc.). These variations may partly explain the strong price differences observed among the selected countries.

### 3.2.1. Overview of household consumption in Germany, Ireland, the Netherlands, and Portugal

Portugal is among the EU Member States with the highest per capita apparent consumption<sup>32</sup> of fisheries and aquaculture products. In 2018, this amounted to 60,92 kg, an increase of 1%, compared to the previous year. This was 41% less than in Malta<sup>33</sup>, the Member State with the highest per capita apparent consumption (85,95 kg LWE), 2,5 times higher than the EU average (24,36 kg LWE).

In Ireland, per capita apparent consumption was 23,13 kg, while in Germany it reached 14,50 kg (down by 3% and up by 3% from 2017, respectively). In the Netherlands, the per capita apparent consumption was 20,90 kg (between 1 and 3% down from the previous year).

See more on per capita apparent consumption in the EU in Table 24.

For the four countries, total household consumption of miscellaneous shrimps, and average expenditure for a kilogram of miscellaneous shrimps (April 2018 – March 2021), came to:

- Germany: 7.813 tonnes; 17,52 EUR/kg.
- Ireland: 1.928 tonnes; 18,83 EUR/kg.
- Netherlands: 3.372 tonnes; 21,70 EUR/kg.
- Portugal: 12.307 tonnes; 10,12 EUR/kg.

We have covered **miscellaneous shrimps** in previous *Monthly Highlights*:  
**Extra-EU Imports**: 5/2017.

<sup>32</sup> "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.

<sup>33</sup> The high per capita apparent consumption in Malta could be due to imports of frozen small pelagics that are not destined for human consumption but for the bluefin tuna fattening industry.

Figure 43. **PRICES OF MISCELLANEOUS SHRIMP PURCHASED BY GERMAN, IRISH, DUTCH, AND PORTUGUESE HOUSEHOLDS**

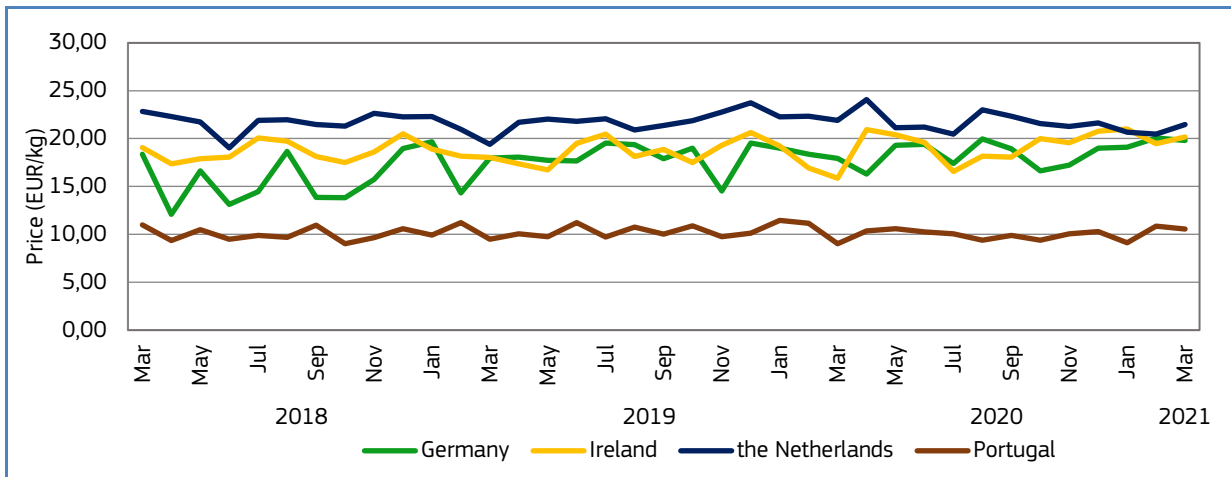
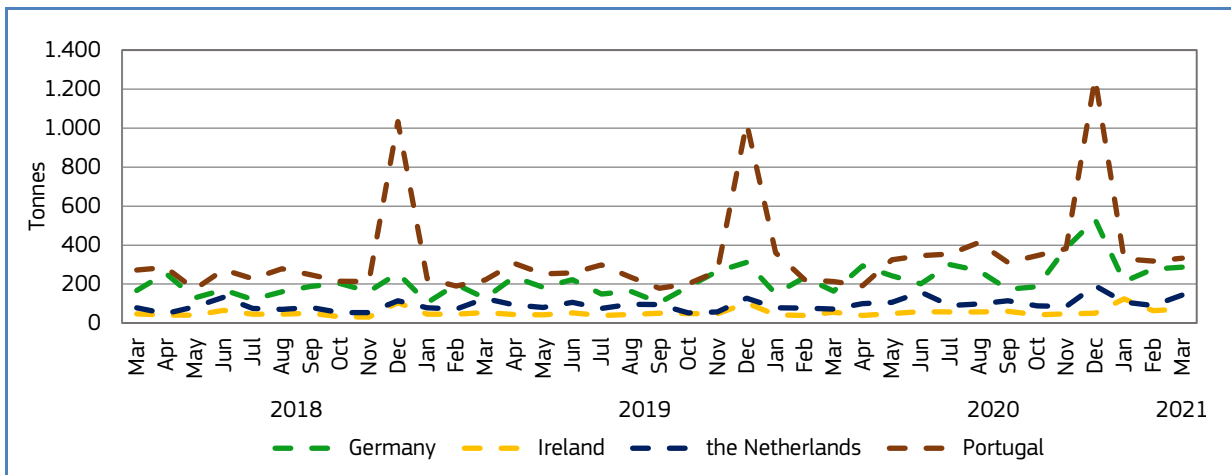


Figure 44. **HOUSEHOLD PURCHASES OF MISCELLANEOUS SHRIMP IN GERMANY, IRELAND, THE NETHERLANDS, AND PORTUGAL**



### 3.2.2. Household consumption trends in Germany

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

**Yearly average price:** 15,72 EUR/kg (2018), 17,79 EUR/kg (2019), 18,26 EUR/kg (2020).

**Yearly consumption:** 2.044 tonnes (2018), 2.254 tonnes (2019), 3.134 tonnes (2020).

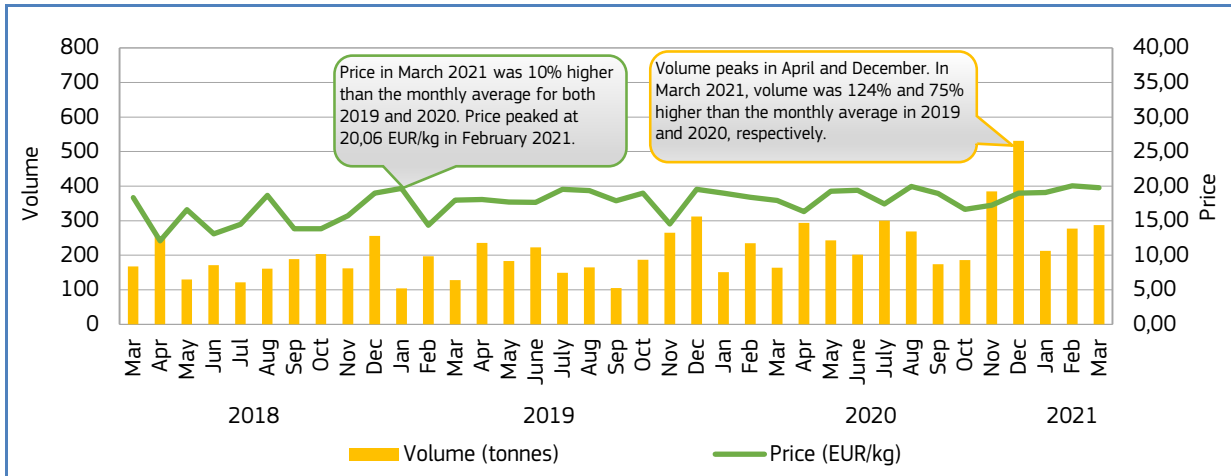
**Short-term trend (January to March 2021):** increase in price (+4%), increase in volume (+35%).

**Average price:** 19,70 EUR/kg.

**Consumption:** 777 tonnes.



Figure 45. **RETAIL PRICE AND VOLUME OF MISCELLANEOUS SHRIMP PURCHASED BY HOUSEHOLDS IN GERMANY, MARCH 2018 – MARCH 2021**



### 3.2.3. Household consumption trends in Ireland

**Long-term trend (March 2018 to March 2021):** Upward trend in price, stable trend in volume.

**Yearly average price:** 18,89 EUR/kg (2018), 18,80 EUR/kg (2019), 18,74 EUR/kg (2020).

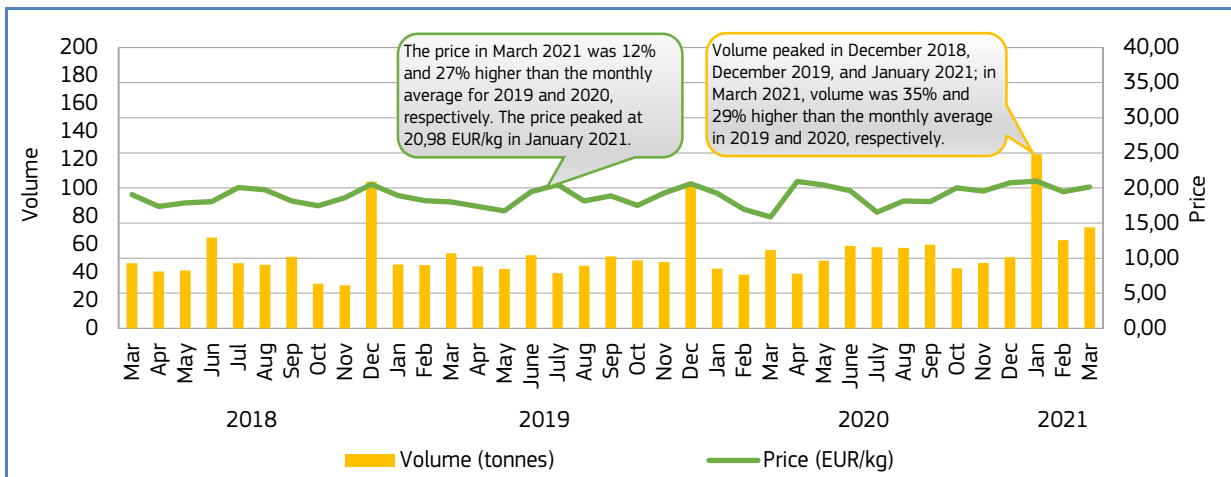
**Yearly consumption:** 593 tonnes (2018), 616 tonnes (2019), 597 tonnes (2020).

**Short-term trend (January to March 2021):** decrease in price (-4%), decrease in volume (-42%).

**Average price:** 20,38 EUR/kg.

**Consumption:** 259 tonnes.

Figure 46. **RETAIL PRICE AND VOLUME OF MISCELLANEOUS SHRIMP PURCHASED BY HOUSEHOLDS IN IRELAND, MARCH 2018 – MARCH 2021**



### 3.2.4. Household consumption trends in the Netherlands

**Long-term trend (March 2018 to March 2021):** Stable trend in price, slight upward trend in volume.

**Yearly average price:** 21,61 EUR/kg (2018), 21,68 EUR/kg (2019), 21,88 EUR/kg (2020).

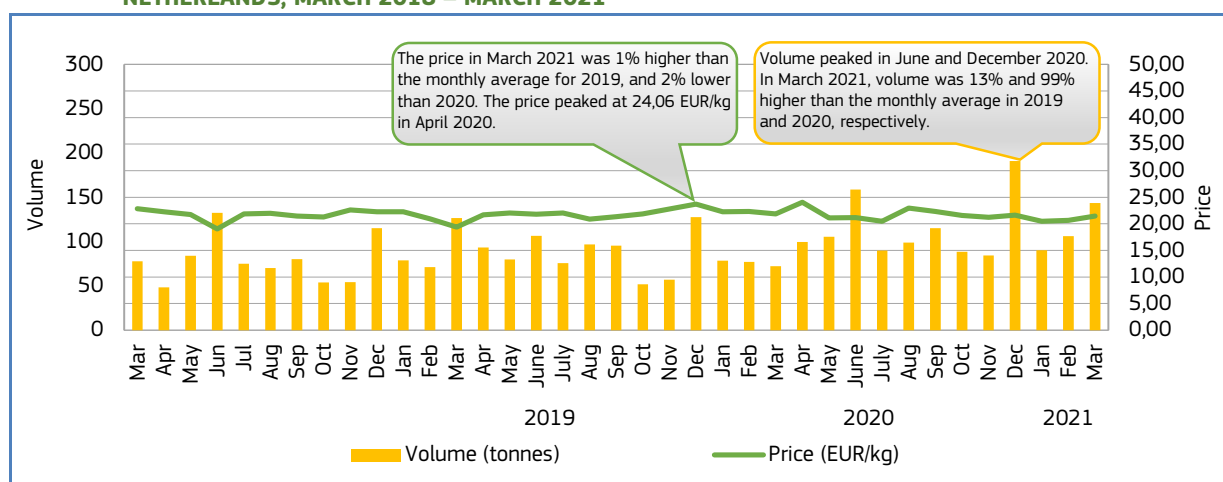
**Yearly consumption:** 868 tonnes (2018), 1.060 tonnes (2019), 1.259 tonnes (2020).

**Short-term trend (January to March 2021):** increase in price (+5%), increase in volume (+59%).

**Average price:** 20,95 EUR/kg.

**Consumption:** 340 tonnes.

Figure 47. **RETAIL PRICE AND VOLUME OF MISCELLANEOUS SHRIMP PURCHASED BY HOUSEHOLDS IN THE NETHERLANDS, MARCH 2018 – MARCH 2021**



### 3.2.5. Household consumption trends in Portugal

**Long-term trend (March 2018 to March 2021):** Stable trend in price, upward trend in volume.

**Yearly average price:** 10,20 EUR/kg (2018), 10,20 EUR/kg (2019), 10,17 EUR/kg (2020).

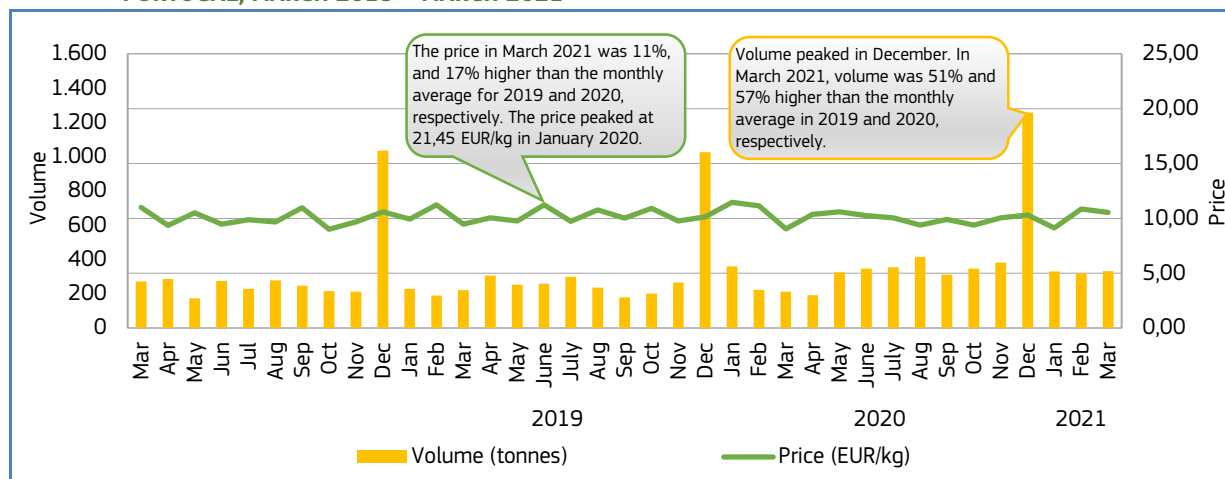
**Yearly consumption:** 3.569 tonnes (2018), 3.660 tonnes (2019), 4.721 tonnes (2020).

**Short-term trend (January to March 2021):** decrease in price (-8%), increase in volume (+4%).

**Average price:** 10,16 EUR/kg.

**Consumption:** 980 tonnes.

Figure 48. **RETAIL PRICE AND VOLUME OF MISCELLANEOUS SHRIMP PURCHASED BY HOUSEHOLDS IN PORTUGAL, MARCH 2018 – MARCH 2021**



## 4. Case study – EU Trade in 2020

The World Health Organization (WHO) declared a Public Health Emergency of International Concern due to COVID-19 on 30 January 2020 and later declared a pandemic on 11 March 2020. This pandemic and associated restrictions strongly affected global trade – including trade in fisheries and aquaculture products, and the seafood processing industry. As of 2020, EU trade in fisheries and aquaculture products continues to be dominated by the many direct and indirect effects of the COVID-19 pandemic. The sector has been seriously disrupted with impacts occurring across supply chains<sup>34</sup>. A comprehensive overview of the fishery and aquaculture sector during the current COVID-19 pandemic can be read in EUMOFA's monitoring reports at [eumofa.eu/covid-19](http://eumofa.eu/covid-19)<sup>35</sup>.

### 4.1 Trade flow trends

Trade is significant for the EU<sup>36</sup>, as it is the leading import market for fishery and aquaculture products in the world. In the EU, demand for these products exceeds domestic supply, making imports a key component of trade. In 2018, the EU was the largest importer of fish and shellfish in the world, accounting for 34% (in terms of value) of total imports across the globe, followed by the United States of America (14%) and Japan (9%).<sup>37</sup> The EU imports products to meet its seafood needs from all around the world. EU exports, while small relative to imports, consist of a wide variety of products, including those destined for non-food use (e.g., fish oil and fishmeal). Within the Union, intra-EU trade is very active, and includes Member States producing fishery and aquaculture products for consumption in other Member States.

In 2020, EU imports from third countries (extra-EU imports) decreased in both volume (-2,0%) and value (-8,7%) compared with 2019, dropping to 6,15 million tonnes, with a value of EUR 24,21 billion. For the same period, extra-EU exports were 2,57 million tonnes (+0,5%), which, though representing a small increase in volume, showed a reduced value, at EUR 6,96 billion (-4,0%). Intra-EU exports<sup>38</sup> in 2020 decreased in both volume (-1,0%) and value (-3,7%), totalling around 5,62 million tonnes, valued at EUR 23,25 billion<sup>39</sup>.

In this section, value variations for periods longer than 5 years are analysed by deflating values using the GDP deflator (base=2015). This approach applies to figures 46, 47 and 50. In the rest of the study, the nominal value and price are used.

<sup>34</sup> <http://www.fao.org/in-action/globefish/news-events/details-news/en/c/1326499/>

<sup>35</sup> <https://eumofa.eu/covid-19>

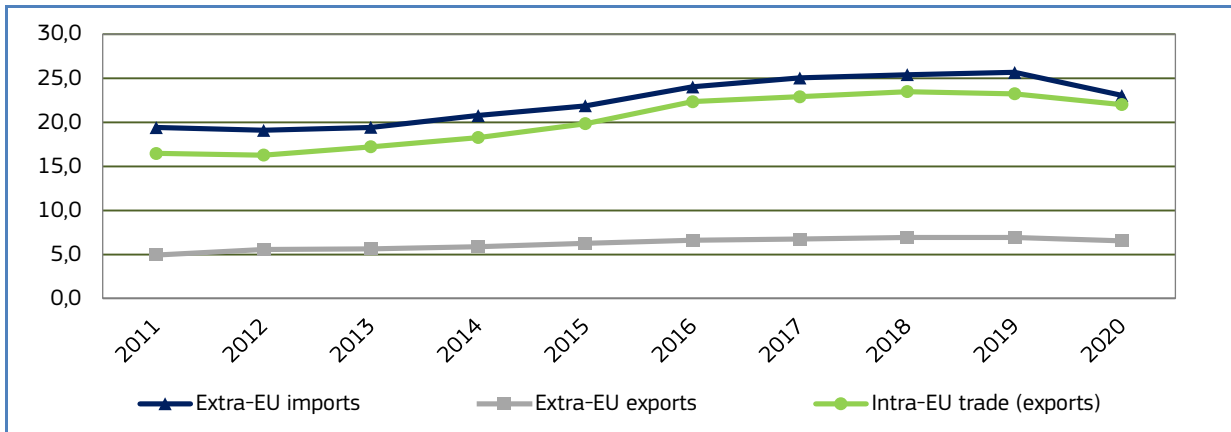
<sup>36</sup> In line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU (31<sup>st</sup> Jan 2020), and since the most recent reference period is the year 2020, the UK is excluded from the EU aggregations of each year. This means that UK is dealt with as extra-EU country of origin/destination for EU-27 imports and exports.

<sup>37</sup> FAO The State of the World Fisheries and Aquaculture (SOFIA) 2018, page 172, Table 18.

<sup>38</sup> Intra-EU trade flows encompass all transactions declared by Member States of the European Union (EU) with one another. For the analysis of intra-EU trade, only export flows have been considered. The source used for these trade flows is EUROSTAT - COMEXT. In general, bilateral comparisons between Member States of intra-EU flows reveal major and persistent discrepancies, thus comparisons dealing with intra-EU trade statistics and related results must be taken into account cautiously and should consider the existence of these discrepancies. This is the official explanation from Eurostat: considering that the intra-EU trade data are based on common and largely harmonized rules, one might expect the intra-EU trade balance to be zero or at least close to it. However, it is worth underlining that a perfect match is made impossible by the CIF/FOB approach, which states that the import value should be higher than the mirror export value, as it includes extra transport costs. A close match could nevertheless be legitimately expected, given that trading partners within the EU are often neighboring countries. However, deliveries to vessels and aircraft prevent this, as such movements of goods create asymmetries in intra-EU ITGS, given that specific legal provisions state that only dispatches are to be reported. At a global level, most methodological reasons for asymmetries disappear. The remaining issues are in data reporting (e.g., missing Intrastat declarations, and trade in specific goods like sea-going vessels and aircraft not being properly captured).

<sup>39</sup> For the purpose of the analysis, for time series shorter than 5 years, nominal values are used.

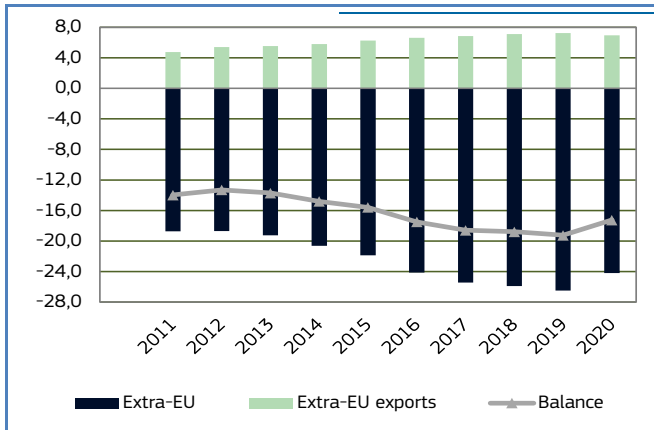
Figure 49. **EU TRADE FLOW (value in billion EUR)\***



Source: EUMOFA (updated 10.05.2021). \*Values are deflated by using the GDP deflator (base=2015).

The EU trade balance in fisheries and aquaculture products continued to be negative, confirming the EU's dependence on imports. In 2020, the fisheries and aquaculture trade deficit reached EUR -17,24 billion, with EUR 2,0 billion less than in 2019 (-EUR 19,25 billion, when the highest deficit in the past ten years was registered). Measured in volume terms, the trade deficit was -3,59 million tonnes, down by 3,7% from 2019.

Figure 50. **EXTRA-EU TRADE BALANCE (value in billion EUR).**



Source: EUMOFA (updated 10.05.2021). \*Values are deflated by using the GDP deflator (base=2015).



**EXTRA-EU IMPORTS:** In 2020, imports from third countries went down in both volume (-2,0%) and value (-8,7%), from 2019. In 2020, salmonids (EUR 6,1 million), groundfish (EUR 4,2 billion), crustaceans (EUR 4,0 billion), and tuna and tuna-like species (EUR 2,7 million), were the most imported commodity groups, representing 71% of total extra-EU import value. Salmonids (down by EUR 481 million, -7%), cephalopods (down by EUR 470 million, -19%), crustaceans (down by EUR 374 million, -8%), and groundfish (down by EUR 344 million, -8%) were the main contributors to the overall decrease in the extra-EU import value. The main reason behind the decrease in cephalopod imports was a drop in the supply of octopus (-28% or -209 million), which accounts for 27% of cephalopod import value. "Miscellaneous shrimps" (down by EUR 184 million, -11%) was the main commercial species behind the decrease in crustacean imports (representing 35% of crustacean imports' value). The main reason behind the decrease in groundfish was a drop in the supply of cod, which accounts for 51% of the value of groundfish imports (down by EUR 236 million, -10%). Small increases in volume were observed for salmonids, (up by 50.300 tonnes, +5%), as well as small pelagics, mainly due to herring (up by 16.200 tonnes, +7%).

Herring (up by EUR 38 million, +17%), and sardine (up by EUR 7,5 million, +4%) were the main commercial species contributing to the value increase of the small pelagics commodity group (the only one which experienced an increase in value: +3%). As noted, the EU imports fisheries and aquaculture products from many countries around the world – however,

in 2020, 55% of the EUR 24,21 billion total import value (EUR 13,23 billion), originated from just six countries (those whose exports were greater than EUR 1 billion).

The main suppliers in terms of value were:

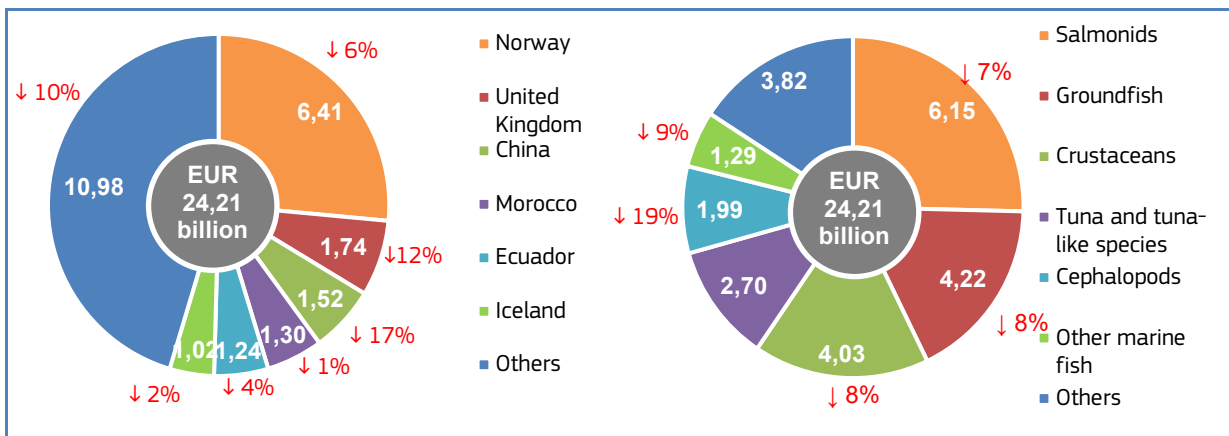
- Norway (EUR 6,41 billion, down by 6% compared to 2019, mostly salmon).
- United Kingdom (EUR 1,74 billion, -12%, mostly salmon and cod).
- China (EUR 1,52 billion, -17%, mostly Alaska pollock and cod).
- Morocco (EUR 1,30 billion, -1%, mostly octopus).
- Ecuador (EUR 1,24 billion, -4%, mostly skipjack and yellowfin tuna).
- Iceland (EUR 1,0 billion, -2%, mostly redfish and saithe).

Imports from China experienced the most significant decrease, most probably due to the impacts of the pandemic.

Other countries who contributed to an overall picture of decreasing EU imports were:

- United States (EUR 893 million, -8%)
- Vietnam (EUR 793 million, -13%).
- India (EUR 606 million, -12%).
- Argentina (EUR 546 million, -15%).
- Russian Federation (EUR 583 million, -9%).
- Peru (EUR 398 million, -23%).
- Canada (EUR 313 million, -16%).

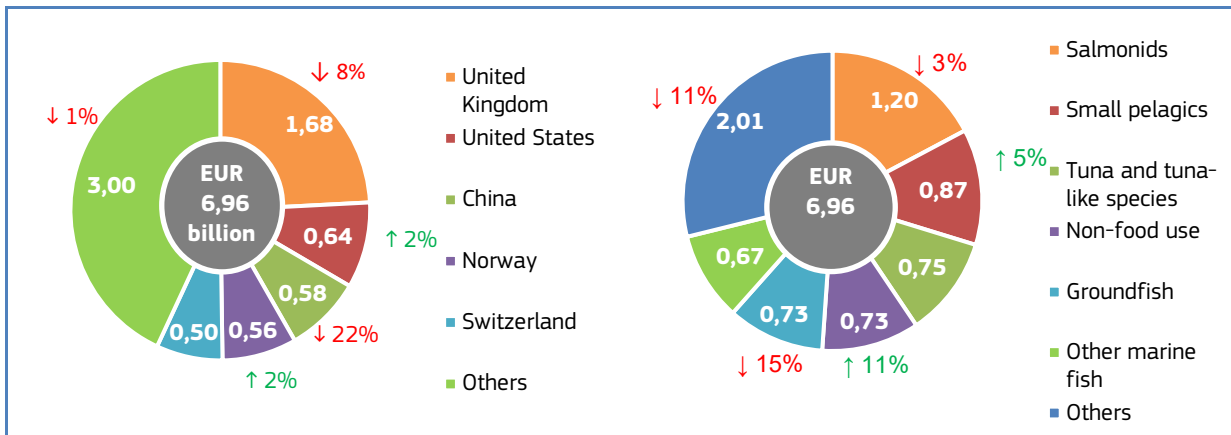
Figure 51. **EXTRA-EU IMPORTS: MAIN PARTNERS AND MAIN COMMODITY GROUPS IN 2020**  
(value in billion EUR)\*



\*Nominal value data are for 2020, percentages indicate change from 2019  
Source: EUMOFA (updated 10.05.2021).

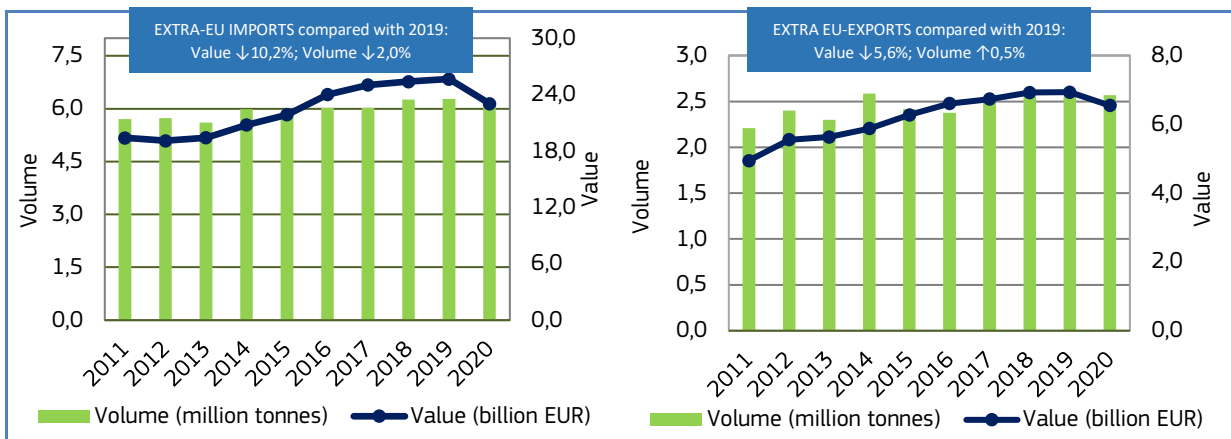
**EXTRA-EU EXPORTS:** Groundfish (accounting for 10% of total extra-EU export value) was the commodity group that experienced the largest decrease in 2020 reaching EUR 730 million (-15% from 2019). Other commodity groups that contributed to the decrease were tuna and tuna-like species (EUR 753 million, -10%), cephalopods (EUR 183 million, -26%), flatfish (EUR 306 million, -17%), and crustaceans (EUR 665 million, -7%). Salmonids, which account for 17% of the total extra-EU export value, went down by 3%, to a level of exports worth EUR 1,2 billion. The volume growth was driven mainly by exports for non-food use, as well as small pelagics and other marine fish. Of the roughly 200 countries to which extra-EU exports were destined in 2020, five markets accounted for over half of the total export value (57%, EUR 3,9 billion). The UK became the largest EU export market (mainly salmon and other marine fish). Exports to China (third largest market), decreased by 22%, to EUR 578 million (mainly Greenland halibut and coldwater shrimp) – most likely linked to the pandemic. Exports to the United States (EUR 644 million) and Norway (EUR 560 million), increased by 2% for each country. Gains were seen in exports to Switzerland (+5%, mainly salmon). On a volume basis, the five leading export markets were the UK, Norway, Nigeria, China, and Egypt, which together accounted for 51% of export volume in 2020. Except for the United States (105.000 tonnes, or +19%), and Egypt (134.000 tonnes, or +2%), the remaining markets experienced drops in volume, of which the largest were to the UK (424.000 tonnes, -3%), and China (197.000 thousand tonnes, -6%).

Figure 52. **EXTRA-EU EXPORTS: MAIN PARTNERS AND MAIN COMMODITY GROUPS IN 2020**  
(value in billion EUR)\*



\*Nominal value data are for 2020, percentages indicate change from 2019.  
Source: EUMOFA (updated 10.05.2021).

Figure 53. **10-YEAR TREND OF EXTRA-EU TRADE \***



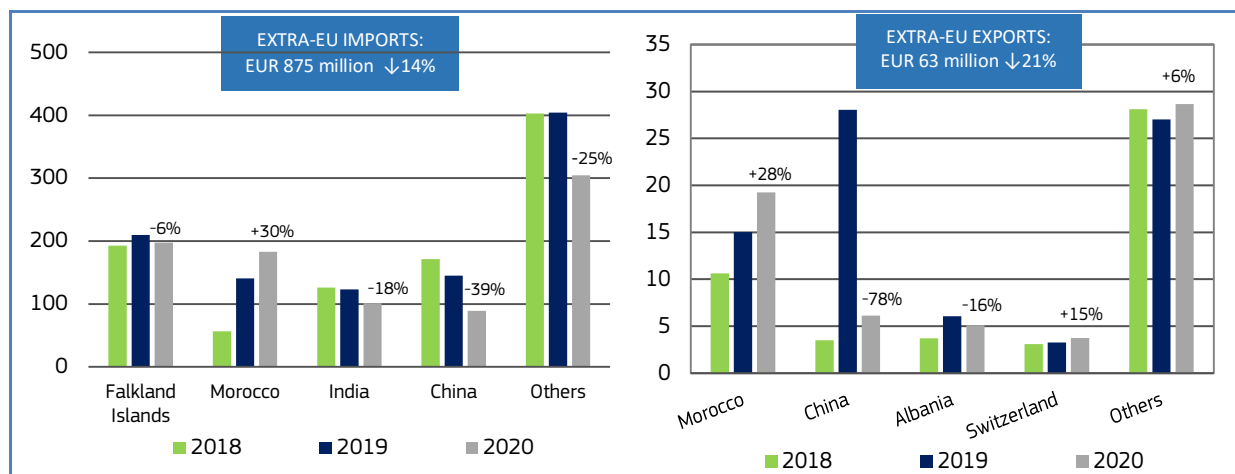
\* Values are deflated by using the GDP deflator (base=2015).  
Source: EUMOFA based on EUROSTAT (updated 10.05.2021).

## 4.2 Trade flows of squid

**EXTRA-EU IMPORTS:** Squid played a significant role in the trade flow of the cephalopods commodity group, representing 44% of its value and 42% of volume. Imports of cephalopods in 2020 were valued at EUR 2,0 billion and had a volume of 457.000 tonnes (-19% and -20%, respectively, from 2019 levels). In 2020, the EU imported EUR 875 million and 192.000 tonnes of squid, down by 14% and 20%, respectively, from 2019. The EU imported squid mainly from the Falkland Islands and Morocco, which together represented 43% of the total import value. Other partner countries included India and China. In 2020, the Falkland Islands supplied 56.500 tonnes of cephalopods at EUR 198 million, down by 29% and 6%, respectively, from the previous year. The average unit value was 3,50 EUR/kg, up by 33% from the previous year (2,63 EUR/kg). Imports from Morocco have followed an increasing trend since 2018, jumping from EUR 56 million to EUR 183 million. Volume also increased, reaching 27.500 tonnes (+56% from 2019), but there was a decrease in unit value over the same period: 6,65 EUR/kg (-17% from 2019). Imports from India decreased since 2018, reaching 26.800 tonnes and EUR 101 million (-24% and -18% respectively). The unit value went up by 7% ending at 3,77 EUR/kg. Imports from China totalled 21.500 tonnes (-37%), valued at EUR 89 million which is down by 39% from 2019. The unit value was 4,16 EUR/kg, down by 2% from 2019. Squid is mainly imported frozen.

**EXTRA-EU EXPORTS:** Total extra-EU exports of squid in 2020 were valued at EUR 63 million, down by 24% from 2019. At the same time, volume dropped by 44% (16.500 tonnes), while unit value increased – reaching 3,83 EUR/kg (up by 36% from 2019). Squid accounts for 35% of the value and 49% of the volume of the cephalopods' extra EU exports. The main EU export markets for squid are Morocco and China, which together account for 40% of extra-EU exports value. Exports to Morocco, the largest third-country market for squid, have steadily increased in value across the past three years. In 2020, Moroccan exports totalled 5.600 tonnes (-2% from 2019) at a value of EUR 19 million (+28% from 2019). The export unit value was 3,44 EUR/kg – 31% higher than the previous year. EU exports to China (10% of total export value) dropped sharply by 86% in volume and 78% in value (ending at 1.600 tonnes, and EUR 6,1 million respectively) most probably due to the pandemic. An increase of 51% in the export unit value (3,90 EUR/kg) did not offset the decrease in value. This decline reversed a trend of remarkable growth between 2018 and 2019, when exports grew almost 700% in value and 800% in volume. Exports to Albania accounted for 8% of total exports value, and the trade value was EUR 5,1 million, 16% down from 2019. This was due to a decrease in volume (1.600 tonnes, -31%), and a significant rise in price (3,29 EUR/kg, +21%). EU exports to Switzerland, though relatively small, have grown continuously over the past three years. From the 2018 level of 483 tonnes and a value of EUR 3,1 million, trade reached 590 tonnes and EUR 3,8 million (+16% and +15%, respectively) in 2019. Squid is exported frozen, as well as fresh (primarily to Albania and Switzerland).

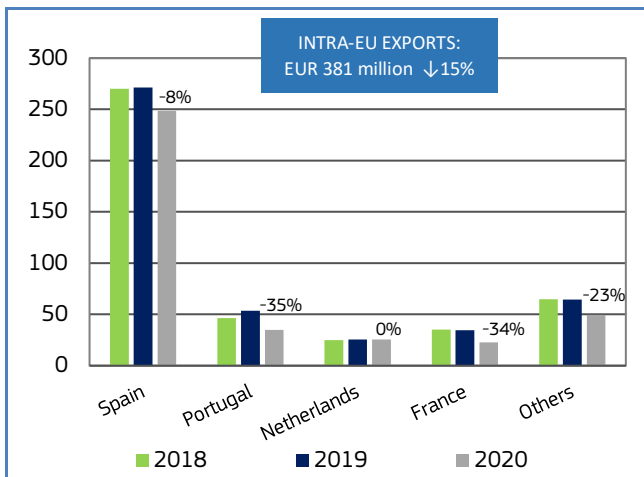
Figure 54. **SQUID: EXTRA-EU IMPORTS AND EXPORTS (value in million EUR)\***



\*Nominal value data. Source: EUMOFA (updated 10.05.2021).



Figure 55. **SQUID: INTRA-EU TRADE BY MAIN EXPORTING COUNTRIES (value in million EUR) \***



\*Nominal value data. Source: EUMOFA (updated 10.05.2021).

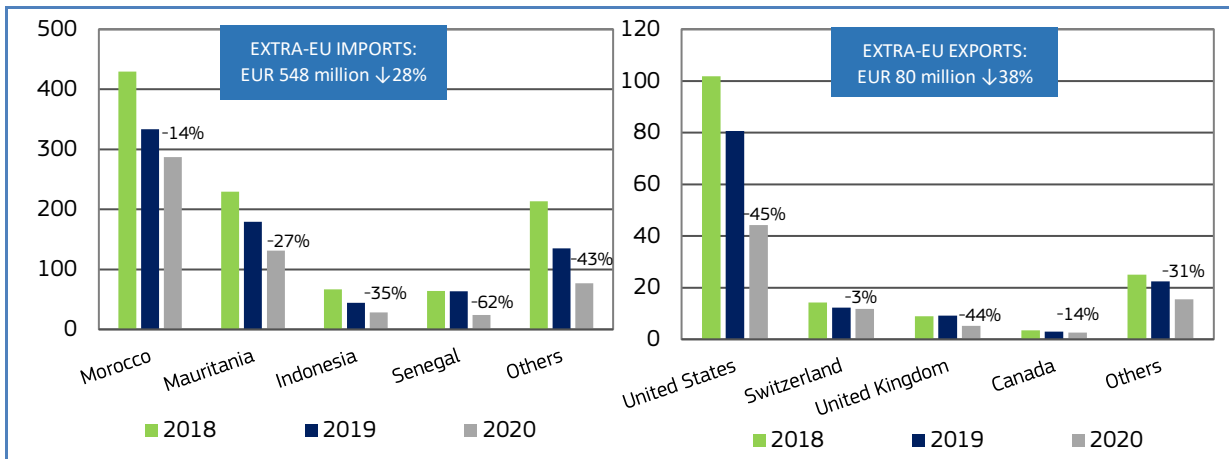
**INTRA-EU TRADE:** Squid trade between EU Member States has decreased. In 2020, total intra-EU squid exports reached 72.500 tonnes (-24%), valued at EUR 381 million (-15%). Average unit value was 5,26 EUR/kg up by 11% from 2019. The Member States with the largest intra-EU exports were Spain, Portugal, the Netherlands, and France, which together held 87% of 2020 total trade value. In 2020, Spain, which holds the largest market share in value (65%), saw its exports decrease from 2019, dropping to 50.000 tonnes (-22%), valued at EUR 249 million (-8%) – a reverse trend from 2018 to 2019. Compared with 2019, Portugal's exports were 6.800 tonnes and EUR 35 million (-36% and -35%, respectively). Although the average unit value of both countries increased from 2019: +17% in Spain (4,97 EUR/kg) and +2% in Portugal (5,13 EUR/kg), they did not offset the value decrease, most probably due to the lack of demand in the restaurant and catering sector, which was closed for most of the year due to the pandemic.

### 4.3 Trade flows of octopus

**EXTRA-EU IMPORTS:** In 2020, octopus imports from outside the EU represented 27% of the value and 19% of volume of the cephalopods commodity group. Extra-EU imports of octopus fell, in comparison to 2019, to 85.900 tonnes, valued at EUR 548 million – representing a decline of 15% in volume and 28% in value. The average unit value went down by 15% (6,37 EUR/kg), exacerbating the decline in import value. Morocco and Mauritania are the main third-country suppliers of octopus, accounting for 76% of total import value between them. Other suppliers of octopus are Indonesia and Senegal. In 2020, imports from Morocco were higher in volume (39.000 tonnes, +7% from 2019), but lower in value (EUR 287 million, -14%), due to a 19% drop in price (7,35 EUR/kg). Reduced supplies from Mauritania dropped to 19.500 tonnes (-10%) and EUR 131 million (down by 27%). Imports from Indonesia, which supplies about 5% of the total value of octopus, have shown a continued decline since 2018, ending at 6.500 tonnes and EUR 29 million (-14% and -35% from 2019). Indonesia unit value plummeted from 5,81 EUR/kg in 2019 to 4,40 EUR/kg in 2020. Imports from Senegal saw the steepest decline (4.000 tonnes, -56%), valued at EUR 24 million (-62% from 2019).

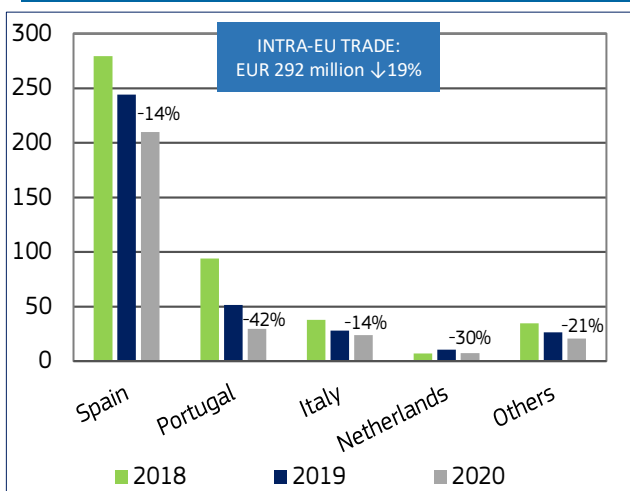
**EXTRA-EU EXPORTS:** EU octopus exports to third-country markets have decreased in volume. In 2020, exports of this species totalled 9.300 tonnes (-33% from 2019), valued at EUR 80 million (-38%). Average unit values have decreased, from 9,24 EUR/kg in 2019, to 8,54 EUR/kg in 2020 (-8%). The largest markets for extra-EU octopus exports include the United States (56% of total value), Switzerland (15%), the United Kingdom (7%), and Canada (3%). Exports to the United States declined steadily since 2019, reaching 5.400 tonnes (-40% from 2019). In addition, a 9% drop in the unit value (8,19 EUR/kg), caused an overall value decrease (EUR 44 million, -45%). Exports to Switzerland reached 1.200 tonnes (+9% from 2019); however, value dropped to EUR 11,9 million (-3%), caused by a reduction in the average unit value (10,19 EUR/kg, -11%). At 556 tonnes, exports to the United Kingdom dropped 42% from 2019. A decrease in price at 9,34 EUR/kg (-4%) also contributed to the value decrease (EUR 5,2 million -44%). Exports to Canada ended at 209 tonnes from 294 tonnes in 2019, and in 2020 were valued at EUR 2,6 million (-14%). The unit value reached 12,55 EUR/kg (+20%). As with other species, the lack of demand due to the pandemic was the most likely the cause of decrease in exports.

Figure 56. **OCTOPUS: EXTRA-EU IMPORTS AND EXPORTS (value in million EUR)\***



\*Nominal value data. Source: EUMOFA (updated 10.05.2021).

Figure 57. **OCTOPUS: INTRA-EU TRADE BY MAIN EXPORTING COUNTRIES (value in million EUR) \***



\*Nominal value data. Source: EUMOFA (updated 10.05.2021).

**INTRA-EU TRADE:** Octopus exports between EU Member States in 2020 decreased from 2019, totaling 38.800 tonnes (-14%), valued at EUR 292 million (-21%). The leading Member State in intra-EU exports of octopus was Spain with 72% of total EU export value in 2020. Other EU exporters are Portugal, Italy, and the Netherlands, with 10%, 8%, and 3% respectively, of the total intra-EU export value. Spanish intra-EU exports decreased in both volume (26.800 tonnes, -9%) and value (EUR 210 million, -16%). At the same time, the unit value dropped by 7%, ending at 7,83 EUR/kg. Portugal followed a similar trend: volume reached 4.600 tonnes (-36%); value dropped at EUR 30 million (-43%); and unit value fell to 6,40 EUR/kg (-12%). Both Italy and the Netherlands experienced significant declines in the exported volume (-18% and -24%, respectively), valued at EUR 2,4 million (down 19%), and EUR 1,4 million (down 32%), respectively. The export unit value to Italy decreased slightly (-1%) at 10,06 EUR/kg, while the unit value for the Netherlands dropped to 5,22 EUR/kg (-10%). All the declines experienced by Member States are most probably due to the lack of demand from the restaurant and catering sector, which was closed due to the pandemic.

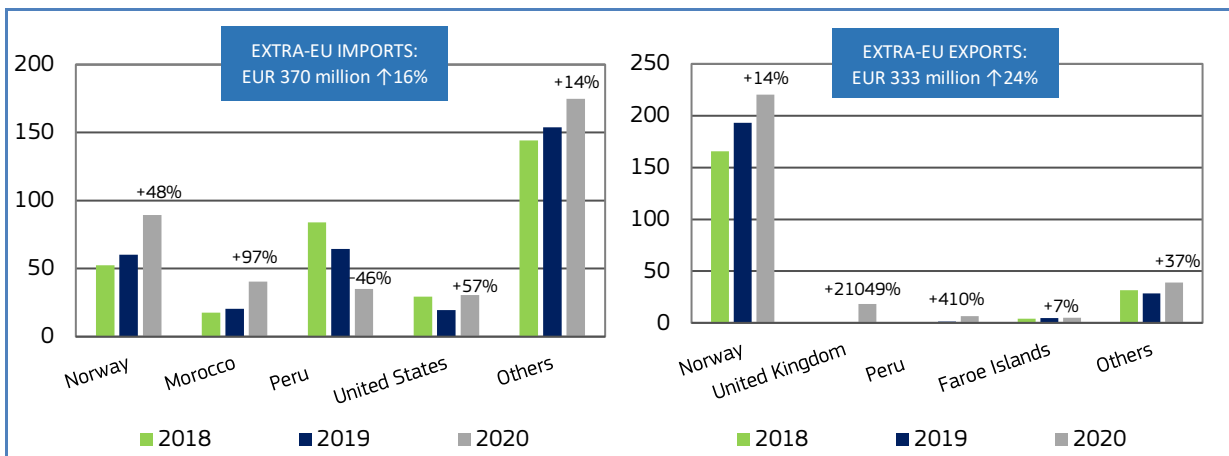
#### 4.4 Trade flows of fish oil

**EXTRA-EU IMPORTS:** In terms of value, fish oil is the most traded product within the non-food commodity group, accounting for 41% of total non-food extra-EU import value. In 2020, extra-EU imports of fish oil of 217.200 tonnes (valued at EUR 370 million) were 4% up in volume, and 16% up in value from 2019 levels. The average unit value of 1,70 EUR/kg in 2020 was 12% higher than in the preceding year.

Norway was the largest supplier to the EU market (representing 24% of the total EU value of fish oil imports in 2020). Shipments from Norway have increased continuously since 2018; in 2020 they reached 72.300 tonnes and EUR 89 million, up from 2019 by 35% and 48%, respectively. The next three largest suppliers were Morocco, Peru, and the United States – with market shares of 11%, 9%, and 8%, respectively. Moroccan imports reached 22.900 tonnes (+98%) and 40 million (+97%), at a price of 1,77 EUR/kg – unchanged from the preceding year. Imports from Peru dropped sharply since 2018, reaching 16.500 tonnes (-55%), valued at EUR 35 million (-46%); at the same time, the import price (2,11 EUR/kg) went up by 21% from 2019. Supplies from the United States increased, ending at 18.400 tonnes and EUR 31 million (+25% and +57% respectively, from 2019). Import unit price also increased by 26% (1,66 EUR/kg).

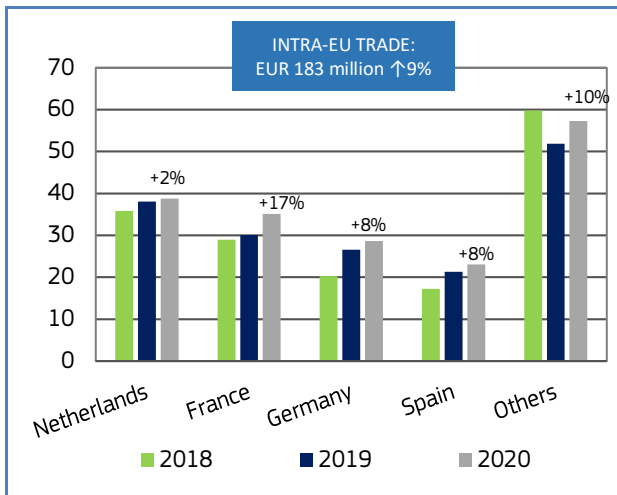
**EXTRA-EU EXPORTS:** In 2020, fish oil exports to markets outside the EU reached 174.600 tonnes, up by 10% from 2019 at a value of EUR 323 million, a volume increase of 24%, and an average unit value of 1,85 EUR/kg (+14%). Norway is by far the largest export market, accounting for around 68% of the value of the fish oil exported to third countries. The next largest markets include the United Kingdom, Peru, and Faroe Islands, which together accounted for 20% of the total extra-EU exports value of fish oil. Exports to Norway grew by 14% in value, reaching 220 million, while volume declined slightly (-2%) ending at 125.100 tonnes, with an average unit export value of 1,76 EUR/kg (+17% from 2019). Exports to the UK increased marginally in volume (20.900 tonnes, +1%), and went up 7% (EUR 39 million) in value. From a negligible value (EUR 86.400) and volume (3,6 tonnes) in 2019, exports to Peru ended at 7.900 tonnes, valued at EUR 18 million, with an export unit value of 2,30 EUR/kg. Exports to the Faroe Islands have experienced continuous growth since 2018, reaching 3.500 tonnes and EUR 6,5 million (+192% and +410%, respectively, from 2019), at an export unit value of 1,87 EUR/kg (+74%).

Figure 58. FISH OIL: EXTRA-EU IMPORTS AND EXPORTS (value in million EUR)\*



\*Nominal value data. Source: EUMOFA (updated 10.05.2021).

Figure 59. **FISH OIL: INTRA-EU TRADE BY MAIN EXPORTING COUNTRIES (value in million EUR)**



\*Nominal value data. Source: EUMOFA (updated 10.05.2021).

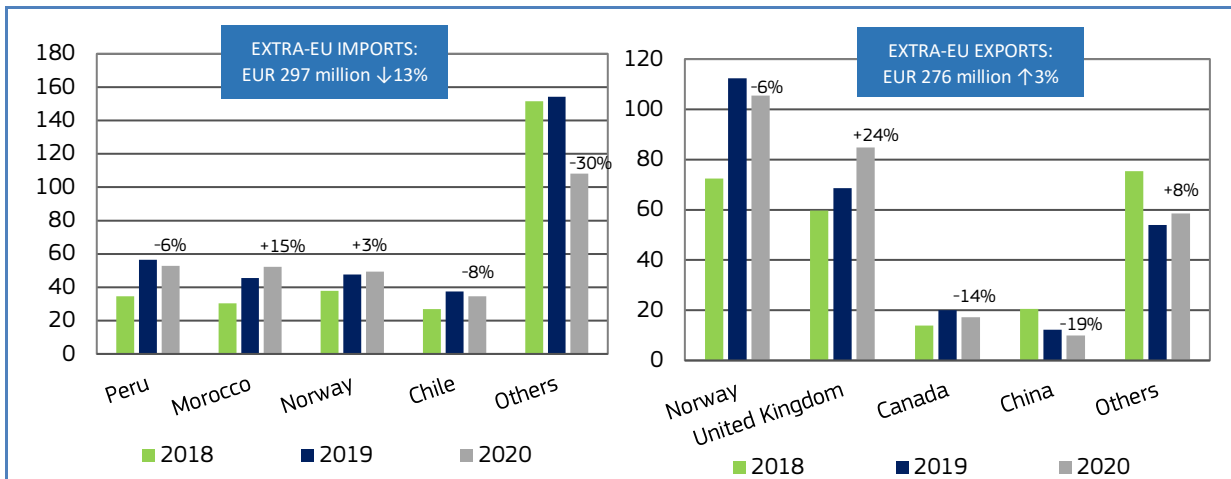
**INTRA-EU TRADE:** Trade of fish oil between EU Member States has increased since 2019. In 2020, intra-EU exports reached 95.500 tonnes, valued at EUR 183 million (both representing a 9% increase in comparison to 2019). The average unit value remained unchanged, at 1,92 EUR/kg. The leading exporting Member States were the Netherlands and France, which together accounted for 40% of total export value in 2020. Other important markets were Germany and Spain, with 16%, and 13% market share respectively. At a unit value of 3,38 EUR/kg (+21%), the Netherlands' exports totalled 11.500 tonnes (-16%), valued at EUR 39 million (+2%), from 2019. All remaining exporting countries experienced increases in both volume and value in comparison to 2019: France increased its exports by 20%, at 19.000 tonnes (worth EUR 35 million) – representing a 17% increase in value. France's export average unit value was 1,84 EUR/kg (-3%). Germany exported 14.500 tonnes (+14%), worth EUR 29 million (+8%), at an average export unit value of 1,98 EUR/kg (-5%); and Spain exported 10.500 tonnes, worth EUR 23 million (both +8%), with the average export price of 2,19 EUR/kg (a slight increase of +1% from the previous year).

## 4.5 Trade flows of fishmeal

**EXTRA-EU IMPORTS:** Fishmeal extra-EU imports decreased by 8% in volume (229.300 tonnes) and 13% in value (EUR 297 million) in 2020 from 2019, a reverse trend from 2018 to 2019. Average unit value in 2020 was 1,30 EUR/kg (-5% from 2019). The largest suppliers were Peru and Morocco, accounting for 18% each of total imports value, as well as Norway (17%), and Chile (12%). EU imports from Peru totalled 42.300 tonnes (+5%) valued at EUR 53 million (-6%, compared to 2019). At the same time, the unit value (1,25 EUR/kg) went down by 10%. EU imports from Morocco grew steadily during 2018–2020, reaching 46.600 tonnes, up by 18% to a total value of EUR 52 million (+15%). The unit value of 1,12 EUR/kg went down by 3% from 2019. Fishmeal imported from Norway experienced increases in both volume (29.300 tonnes, +4%) and value – reaching EUR 49 million (+3%). At the same time, the unit value decreased slightly (-1%) reaching 1,68 EUR/kg. Imports from Chile experienced an opposite trend, reaching 26.300 tonnes (-2%) and EUR 35 million (-8%), at an import unit value of 1,32 EUR/kg (-6%) from 2019.

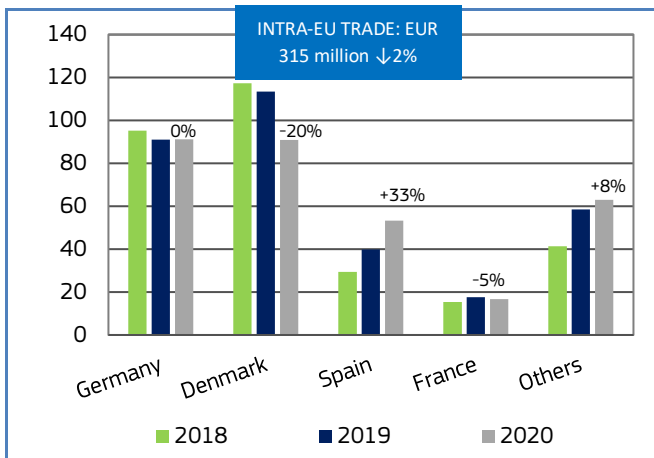
**EXTRA-EU EXPORTS:** Total extra-EU exports of fishmeal increased in 2020 from 2019, from 171.500 tonnes to 184.700 tonnes, and from EUR 267 million to EUR 276 million, while the average export unit value declined from 1,56 EUR/kg (2019) to 1,49 EUR/kg (2020). EU exports to Norway, the largest market (accounting for 38% of the total export value) were 2% up in volume (70.700 tonnes), but 6% down in value (EUR 106 million), reversing the trend from 2018 to 2019. At 1,49 EUR/kg, the unit value decreased by 8% when compared to 2019. Exports to the UK increased in both volume (57.400 tonnes) and value (EUR 85 million), by 20% and 24% respectively. Exports to Canada and China (accounting for 4% each of the total export value), experienced declines in both volume and value. Supplies to Canada and China reached 10.000 tonnes (-10%) and 6.400 tonnes (-16%), respectively. Export value to Canada dropped to EUR 17 million (-14%), and to EUR 10 million (-19%) to China. Export unit value was EUR 1,71 for Canada and 1,53 EUR/kg for China (both down by 4% from 2019).

Figure 60. **FISHMEAL: EXTRA-EU IMPORTS AND EXPORTS (value in million EUR)\***



\*Nominal value data. Source: EUMOFA (updated 10.05.2021).

Figure 61. **FISHMEAL: INTRA-EU TRADE BY MAIN EXPORTING COUNTRIES (value in million EUR) \***



\*Nominal value data. Source: EUMOFA (updated 10.05.2021).

**INTRA-EU TRADE:** In 2020, intra-EU exports of fishmeal totalled 239.200 tonnes (+3%), valued at EUR 315 million (-2%) at an average export unit value of 1,32 EUR/kg (-5% from 2019). In 2020, the largest fishmeal-exporting Member States were Germany and Denmark (accounting each for 29% of the total export value), followed by Spain (17%) and France (5%). In 2020, Germany's exports reached 74.400 tonnes (+10%), valued at EUR 91 million, unchanged from 2019; the unit value went down by 9% (1,23 EUR/kg). Denmark experienced a more significant decline: 61.000 tonnes valued at 91 EUR million (-19% and -20%, respectively, since 2019), and Denmark's unit export value (1,49 EUR/kg) decreased slightly (-1%). Spain experienced the opposite trend from 2019: fishmeal exports grew in both volume (43.800 tonnes, +32%) and value (EUR 53 million, +33%). With 10.500 tonnes (-3%) of fishmeal valued at EUR 17 million (-5%) and an export price of 1,61 EUR/kg (-2%), France experienced a decline.

## 5. Case study – Whelks in the EU

71.545 tonnes of whelk were produced globally in 2018. The EU was the main producer, accounting for 70% of world production. Other major producers are Canada and the United States, and more recently Russia and Ukraine. The EU catches concern two species of whelk: the common whelk (*Buccinum undatum*) and the veined rapa whelk (*Rapana venosa*), which is an invasive species that fishers started to catch during the last decade, mainly for export markets.

### 5.1. Biology, resource and exploitation

#### BIOLOGY

The **common whelk** (*Buccinum undatum*), or waved whelk, is a subtidal, carnivorous neogastropod mollusc that is distributed throughout most of the northern Atlantic and adjacent seas. They are found from shallower waters to depths up to 1.000 meters but are most commonly caught between about 40 and 60 meters<sup>40</sup>. There is no planktonic larval stage in the common whelk reproductive strategy. In addition, adult whelks are relatively sedentary and only exhibit limited movements. Therefore, the dispersal potential of this species is low, which could limit mixing populations. The reduced connectivity between populations of common whelk and the species' slow growth, have implications for its evolution and also for its management. For example, it could mean that this species is particularly susceptible to localised depletion and may lead to protracted recovery times if overfishing does occur, indicating that regionalisation of management would be most appropriate from a biological perspective<sup>41</sup>. Whelks typically reach sexual maturity at around 2,5-3 years<sup>42</sup>, when they measure between 40 and 45 mm, although this varies between populations. Spawning takes place from October-May<sup>43</sup>.

The **veined rapa whelk** (*Rapana venosa*)<sup>44</sup>, originally from the western Pacific, is one of the most important invasive species in the Black Sea and was first recorded there in 1946. Its establishment in the Black Sea appeared to be facilitated by its high ecological fitness (high fecundity, early sexual maturity, longevity, fast growth rate, and broad tolerance to salinity, temperatures, etc.), as well as the general lack of competition from other gastropods, a lack of direct predation on rapa whelk by predators, and an abundance of potential prey species<sup>45</sup>. Its biogeographical range has extended into the northwest Black Sea to the coastlines of Romania, Bulgaria and Turkey, and more recently towards Europe (Mediterranean, Adriatic and Aegean Seas) and the Americas due to marine shipping. In addition, there are reports of it being identified on the Brittany coast of France and in the North Sea<sup>46</sup>.



Veined rapa whelk (*Rapana venosa*)<sup>46</sup>

#### EXPLOITATION AND MANAGEMENT IN EUROPE

##### Fisheries

The common whelk has been used as a bait for cod fishing since the Middle Ages. Only in the last century has it specifically been fished for human consumption. Both in France and the United Kingdom (the main EU producers), **common whelk** is almost exclusively caught using baited traps (with crabs, dogfish, etc.), although some are taken as a bycatch of other fisheries (bottom trawlers for instance). In France, whelk fishing is carried out by small coastal vessels of less than 12 meters, whereas in the UK it is targeted by two types of fleet segments.

40 [https://www.bluemarinefoundation.com/wp-content/uploads/2020/01/MRAG\\_Final\\_Whelk\\_Report.pdf](https://www.bluemarinefoundation.com/wp-content/uploads/2020/01/MRAG_Final_Whelk_Report.pdf)

41 Ibidem.

42 <http://www.guidedesespeces.org/fr/bulot>

43 <https://www.nw-ifca.gov.uk/managing-sustainable-fisheries/whelk/>

44 <https://eumofa.eu/documents/20178/149985/MH+5+2019+EN.pdf/#page=2>

45 Saglam, Hacer & Duzgunes, Ertug. (2014). RAPA WHELK (*Rapana venosa* VALENCIENNES, 1846) FISHERIES IN THE BLACK SEA.

46 Ibidem.

These two types comprise larger vessels that target whelks exclusively (and are able to fish outside of national jurisdictions) and small-scale fishers who target whelks only periodically. According to UK statistics, landings from small vessels under 10 meters constituted almost 50% of the total landings, which is decreasing in comparison to previous years<sup>47</sup>.

In the Black Sea, **rapa whelk** is caught by diving and more recently by dredging vessels.

## Management

European **common whelk** fisheries are subject to measures defined under the Common Fisheries Policy and hence are subject to technical measures that aim to safeguard them from overfishing. An EU-wide Minimum Conservation Reference Size (MCRS) of 45 mm is set under Regulation (EC) No 850/98<sup>48</sup>.

In **France**, in the two most important producing regions in particular (la Manche and Calvados), the fishery is also managed through regional and local measures. Whelk fisheries are managed through licenses, the number of which have decreased in recent years in order to reduce the fishing effort. In addition to limiting the number of vessels that are authorized to fish whelk, their types are also defined (only vessels under 12 meters can operate). The number of traps used is also limited to 240 per fisher with a maximum of 720 per vessel, a daily fishing quota is established at 300 kg live weight per fisher with a maximum of 900 kg per vessel, and a fishing calendar limits the fishing activity to working days (i.e. closed on weekends and public holidays) with a closure period during January (for biological recovery)<sup>49</sup>. These management efforts have resulted in obtaining the MSC certification for "*Bulot de la baie de Granville*". In 2020, producers decreased fishing effort by 10% in order to keep the certification, following some concerns regarding the stock status<sup>50</sup>. In the **United Kingdom**, whelk permitting byelaws have been introduced in some districts (Kent & Essex, Eastern, and Sussex), which as part of their conditions include: pot limitations, escape holes, and minimum riddle sizes<sup>51</sup>. Most scientific studies suggest that whelk stocks (for both species) are not managed well to date. In addition, there are some concerns regarding the status of the stocks and the efficiency of the established MCRS in the context of significant differences between regions in terms of the species biological parameters (e.g. size, growth, age, maturity) which suggest that large-scale management measures (such as an MCRS at EU level) are not efficient<sup>52</sup>.

In the Black Sea and particularly in Bulgaria and Romania, **rapa whelk** is not subject to any management measure<sup>53</sup>. Scientists recommend that stocks should be managed with an ecosystem-based approach in relation to the impacts of the species on endemic species, due to the absence of natural predators in the Black Sea and high food competition with other benthic species<sup>54</sup>. Recently, the General Fisheries Commission for the Mediterranean has identified rapa whelk in the Black Sea as one of the priority species for the adoption of long-term management plans. For this reason, it launched in 2020 a specific research programme to fill information gaps on this species<sup>55</sup>.

## 5.2. PRODUCTION

### Catches

Global production of whelk amounted to 71.545 tonnes in 2019. With 70% of the global production, the EU was the main whelk producer in the same year. The other major producers were Ukraine, the United States of America (USA), Canada and Russia. The global production of whelk has increased by 39% from 2010 to 2019, driven by the increase in EU production (by 38% during the same period) and the significant increase in production in Ukraine and Russia, which both started recently to catch the species. Ukraine has increased its production from 369 tonnes to 11.203 tonnes between 2015 and 2019, and Russia has almost tripled its production during the same period (production volumes were very low in 2010 for both

<sup>47</sup> [https://www.bluemarinefoundation.com/wp-content/uploads/2020/01/MRAG\\_Final\\_Whelk\\_Report.pdf](https://www.bluemarinefoundation.com/wp-content/uploads/2020/01/MRAG_Final_Whelk_Report.pdf)

<sup>48</sup> Council Regulation (EC) No 850/98 of 30 March 1998 for the conservation of fishery resources through technical measures for the protection of juveniles of marine organisms

<sup>49</sup> <http://www.guidedesespeces.org/fr/bulot>

<sup>50</sup> Ibidem.

<sup>51</sup> <https://www.kentandessex-ifca.gov.uk/wp-content/uploads/2016/01/review-of-whelk-permit-byelaw-appendix-1.pdf>

<sup>52</sup> [https://www.bluemarinefoundation.com/wp-content/uploads/2020/01/MRAG\\_Final\\_Whelk\\_Report.pdf](https://www.bluemarinefoundation.com/wp-content/uploads/2020/01/MRAG_Final_Whelk_Report.pdf)

<sup>53</sup> Some management measures taken by the Turkish authority are in place and are in relation to fishing method (scuba diving and dredges are permitted in the western part of the Black Sea), fishing period (scuba diving is allowed throughout the year while dredges are banned between 1 May and 30 August, fishing at night is banned) and areas limitation (e.g. closure of areas beyond 500 m from the coast).

<sup>54</sup> Sağlam, Hacer & Duzgunes, Ertug. (2014). RAPA WHELK (Rapana venosa VALENCIENNES, 1846) FISHERIES IN THE BLACK SEA.

<sup>55</sup> <https://medblueconomyplatform.org/wp-content/uploads/2020/12/file-library-99bffbff1cf43f777384.pdf>

countries). The significant increase for Ukrainian fisheries is related to the experimental use of beam trawls to target the species<sup>56</sup>.

Table 25. **TOTAL WORLD CATCHES OF WHELK (volume in tonnes)**

Countries	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
UK	14.515	13.170	15.195	19.374	18.412	18.724	22.780	19.580	16.681	19.076
France	13.839	13.537	11.140	12.241	12.124	12.656	13.366	13.629	14.998	14.363
Ukraine	230	189	513	644	200	369	1.060	1.375	5.562	11.203
Romania	-	218	588	1.314	1.953	4.460	6.505	9.244	7.330	6.815
Ireland	2.976	3.047	3.442	2.655	2.131	3.296	2.621	2.525	5.196	5.034
Bulgaria	4.831	3.119	3.793	4.834	4.732	4.092	3.435	3.653	3.515	4.222
Russia	2	25	19	50	320	1.011	985	1.506	1.916	2.832
USA	6.412	4.200	5.386	9.167	5.013	3.875	2.921	2.395	3.270	2.814
Canada	7.060	7.537	6.353	6.302	3.491	3.607	3.592	2.592	2.409	2.050
Others	1.594	1.611	1.871	1.813	1.636	2.015	2.406	2.381	2.953	3.136
<b>Total EU</b>	<b>36.366</b>	<b>33.305</b>	<b>34.332</b>	<b>40.609</b>	<b>39.563</b>	<b>43.443</b>	<b>48.988</b>	<b>49.200</b>	<b>48.272</b>	<b>50.088</b>
<b>Total</b>	<b>51.459</b>	<b>46.653</b>	<b>48.300</b>	<b>58.394</b>	<b>50.012</b>	<b>54.105</b>	<b>59.671</b>	<b>58.880</b>	<b>63.830</b>	<b>71.545</b>

Source: FAO.

Concerning EU production, EUROSTAT and FAO statistics are consistent and provide the same statistics for each MS. The main difference is that while catches in Bulgaria are reported in FAO under the species veined rapa whelk (*Rapana venosa*), they are reported under the category "sea snails" in EUROSTAT.

The increase in EU production is driven by significant demand from Asian markets and by competitive sales prices (compared to other shellfish).

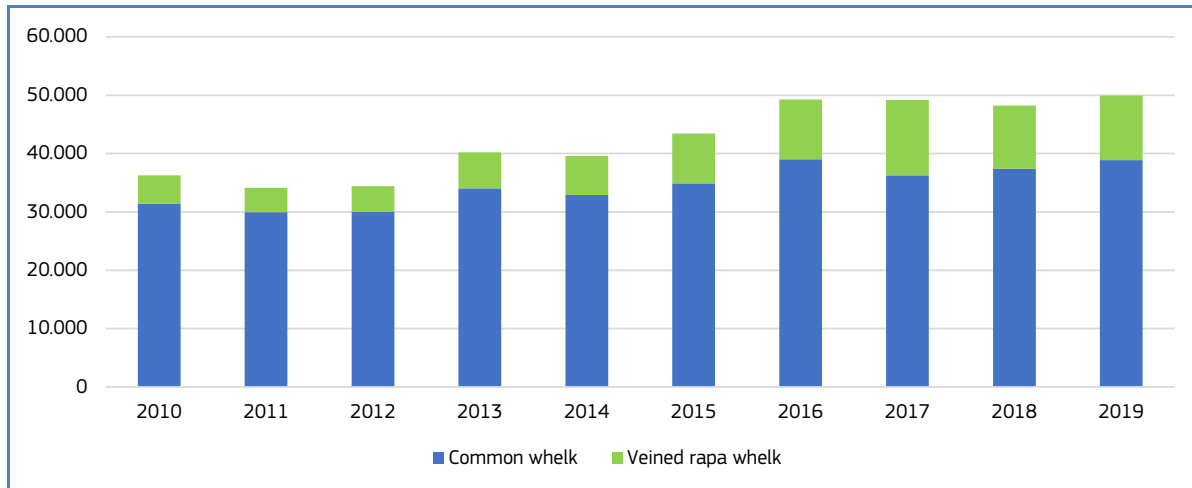
Up to 2019, European whelk fisheries were almost exclusively operated by five EU countries. The United Kingdom and France were the main producers. They target the common whelk and contributed to respectively 38% and 29% of the EU whelk catches in 2019. The other main producers were Romania, Ireland, and Bulgaria, with 14%, 10%, and 8%, respectively, of the EU whelk production volume. Romania and Bulgaria target the rapa whelk species. Romania, the third largest producer of whelk in the EU, has started recently targeting the species (EUROSTAT statistics show production since 2011). In fact, historically, marine fisheries activities in Romania along the coast of the Black Sea are limited compared to inland fisheries. However, in recent years, landings from the Black Sea are becoming significant due to the increasing landings of *Rapana venosa*.

In terms of species, in 2019, 78% of the EU catches constituted common whelk, while the rapa whelk constituted 22%. During the period between 2010 and 2019, there was an overall increase of the share of rapa whelk in total EU catches.

<sup>56</sup> [https://gfcmsitestorage.blob.core.windows.net/documents/SAC/SAFs/DemersalSpecies/2017/RPW\\_GSA\\_29\\_2018\\_BGR\\_GEO\\_ROU\\_RUS\\_TUR\\_UKR\\_.pdf](https://gfcmsitestorage.blob.core.windows.net/documents/SAC/SAFs/DemersalSpecies/2017/RPW_GSA_29_2018_BGR_GEO_ROU_RUS_TUR_UKR_.pdf)



Figure 62. **EU CATCHES OF WHELK BY SPECIES (volume in tonnes)**



Source: EUROSTAT.

### 5.3. FIRST SALES IN THE EU

While whelk is sold in several places around the UK's coasts, first sales of whelk in France are concentrated in Granville (35% of the French first sales occurred in this port in 2020). The other main ports in France are Erquy and Dieppe. The top three main ports in the UK in terms of whelk first sales are Eastbourne, Shoreham-by-Sea, and Fleetwood. Together, they were responsible for 30% of whelk first sales in the UK in 2020.

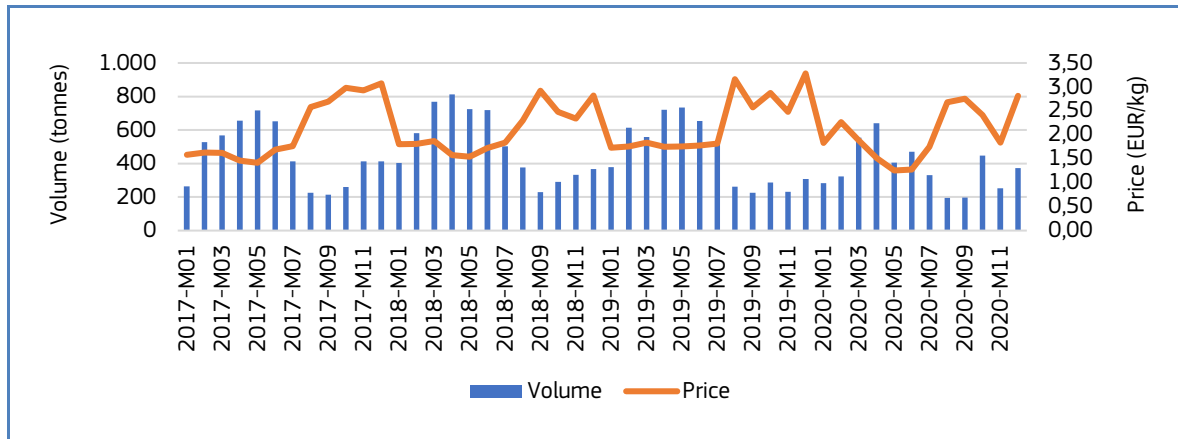
Whelk fishing occurs throughout the year with differing seasonal changes in first sales in the main producing countries (France and UK). Higher volumes of first sales (and catches<sup>57</sup>) are noticed between January and July or August of each year. The small production volume in January of each year in France is related to the closure of fishing activity during this month in the most important producing regions. This variability throughout the year is not linked to the abundance of whelks (which could have interannual variability) but related to fishing strategies of fishers that may target another species, particularly in the UK<sup>58</sup>.

Prices at first-sale stage are more stable in the UK than in France, even though there is more variability in the supply throughout the year in the UK than in France. This could be explained by the fact that a large share of UK landings is exported and that there is less pressure on auctions, in relation to the small size of the domestic market for fresh whelk.

<sup>57</sup> The first sales are used as proxies for the catches.

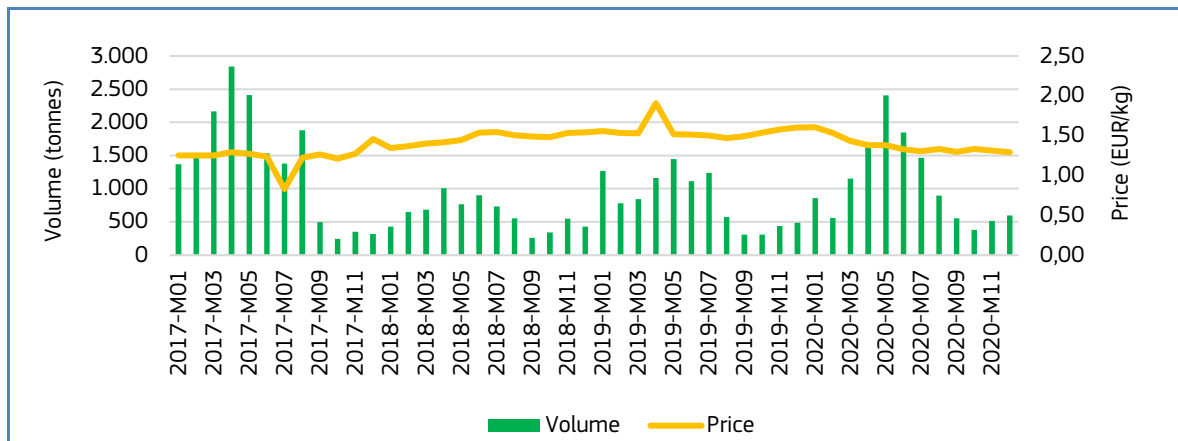
<sup>58</sup> [https://www.bluemarinefoundation.com/wp-content/uploads/2020/01/MRAG\\_Final\\_Whelk\\_Report.pdf](https://www.bluemarinefoundation.com/wp-content/uploads/2020/01/MRAG_Final_Whelk_Report.pdf)

Figure 63. **FIRST SALES OF COMMON WHELK IN FRANCE (volume in tonnes, price in EUR/kg)**



Source: EUMOFA.

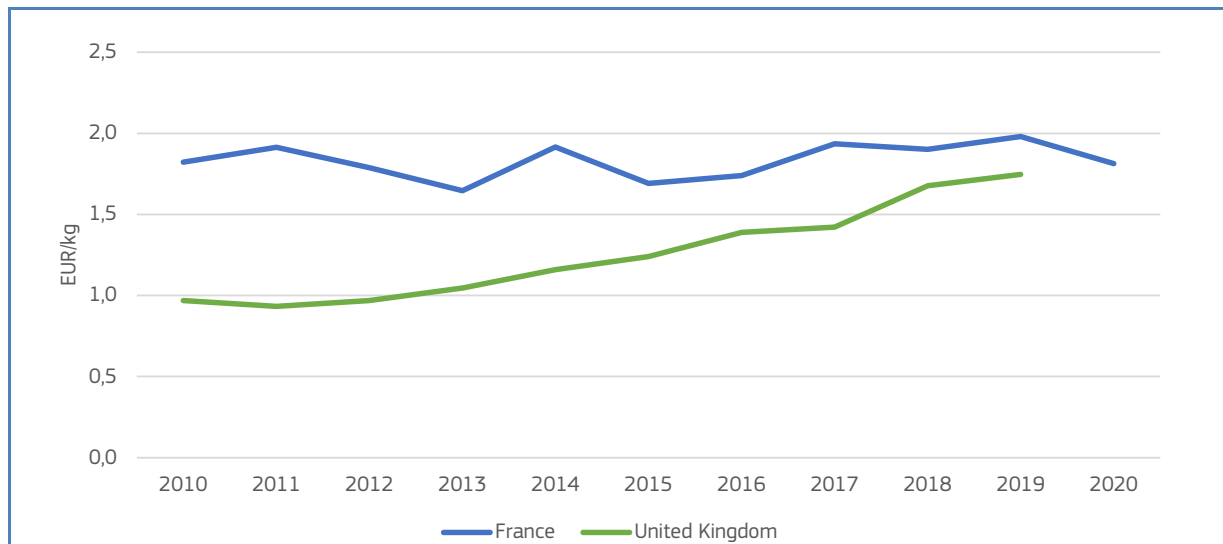
Figure 64. **FIRST SALES OF COMMON WHELK IN THE UK (volume in tonnes, price in EUR/kg)**



Source: EUMOFA.

There was an overall increase of average first-sales prices in both France and the UK over the last decade, with a significant increase in the UK, particularly since 2014. Average first-sales price increased from 0,83 EUR/kg to 1,38 EUR/kg between 2014 and 2019. In France, the average first-sales price has only increased by 0,20 EUR/kg in 10 years. However, first-sales prices in France are higher than in the UK. This could be related to: different products (in terms of quality and size); to the MSC certification of the most important fisheries in France, (*“bulot de la baie de Granville”*) which could be rewarded by better prices; and to different markets (processing in the UK versus mainly the fresh market in France), etc. More recently, higher first-sales prices in France could be linked to the Protected Geographical Indication (*“bulot de la baie de Granville”*) which constitutes almost half of the French whelk production.

Figure 65. **FIRST SALES OF WHELK IN FRANCE AND THE UK (2010-2020, price in EUR/kg)\***



Source: EUMOFA. \*Values are deflated by using the GDP deflator

There are no data available on first sales of rapa whelk in Romania and Bulgaria.

## 5.4. PROCESSING AND MARKETING

Whelk species are either marketed alive or cooked and chilled (particularly in France where there is significant local consumption) or cooked and frozen (mainly for export purposes). Cooking made it possible to lengthen the marketing period. The sale of cooked products is growing in importance due to their time-saving nature and the ease with which they can be consumed<sup>59</sup>.

For processing, whelks are firstly placed in fresh water for a few hours to remove the sand. They are then boiled for a few minutes (pressurized steam cookers are also used in some processing units, particularly in the UK) before removing the shell. The meat is then removed from the shell manually, cleaned and graded before being frozen and packed for exports (in the UK, Romania, and Bulgaria, and to a lesser extent in France)<sup>60</sup> or packed in a modified atmosphere to be sold in supermarkets (in France).

## 5.5. IMPORT – EXPORT

There is not a specific statistical trade code for whelk. In this context, specific codes related to the category of “other molluscs and aquatic invertebrates” have been used. These codes cover mostly whelk exported frozen and processed (the other code of the category of “other molluscs and aquatic invertebrates” excludes sea snails). These codes include:

- 03079200: molluscs, even in shell, frozen, flours, meals and pellets of molluscs, frozen fit for human consumption;
- 16056900: aquatic invertebrates, prepared or preserved (excl. smoked, crustaceans, molluscs, sea cucumbers, sea urchins and jellyfish).

### Romania and Bulgaria

The codes mentioned above cover most veined rapa whelk exports from Bulgaria and Romania; mainly frozen and processed rapa whelk meat. According to trade statistics, it seems that whelk is exported to extra-EU countries mainly as frozen products under the CN code: 03079200. Exports from Bulgaria and Romania to other EU countries are marginal, except small volumes of frozen whelk from Romania to Germany (mainly consumed by the South Korean community<sup>61</sup>). Small

<sup>59</sup> <https://www.rungisinternational.com/tendances/bulots-bigorneaux%E2%80%89-coquillages-gardent-cote/>

<sup>60</sup> <http://www.eurofishmagazine.com/component/k2/item/374-processing-rapana-for-korean-buyers> and <https://macduffshellfish.co.uk/products/whelk/>

<sup>61</sup> <http://www.eurofishmagazine.com/component/k2/item/374-processing-rapana-for-korean-buyers>

volumes of processed and frozen products are imported but it is assumed they do not correspond to whelk. In 2020, Bulgaria exported 562 tonnes for around EUR 4 million and Romania exported 125 tonnes for almost EUR 1 million.

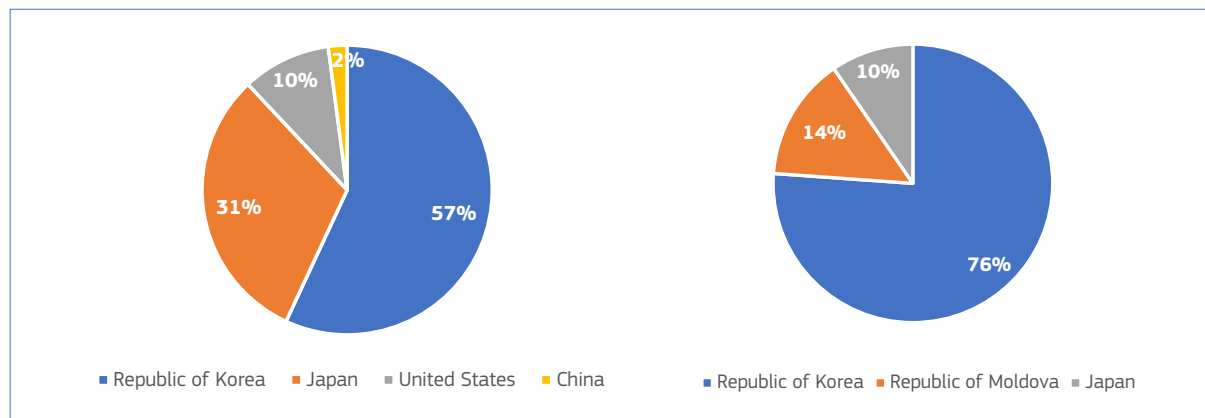
Table 26. **EXPORTS OF FROZEN WHELK TO EXTRA-EU COUNTRIES FROM BULGARIA AND ROMANIA (2017-2020)**

Country	2017		2018		2019		2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Bulgaria	250	1.706	143	1.111	593	4.682	562	3.722
Romania	14	61	13	62	111	634	125	706

Source: COMEXT

Main destinations are Asian countries - mainly the Republic of Korea which represented 76% of whelk exports from Bulgaria and 57% from Romania in 2020 (in terms of value). Japan is also a significant market for Romanian (31% of exports value in 2020) and Bulgarian (10%) exports.

Figure 66. **MAIN DESTINATIONS OF THE BULGARIAN (left) AND ROMANIAN (right) EXPORTS IN 2019**



Source: COMEXT

For France and the United Kingdom, the same codes have been selected as whelk is mainly marketed frozen and processed. Unlike Romania and Bulgaria, France and the United Kingdom may export or import other species under the selected trade codes. For this reason, the figure below should be considered as indicative only. According to Comext statistics, France exported 1.511 tonnes of “other molluscs” (frozen and processed), mainly to extra-EU countries (82% of exports in volume). The share of whelk is not known but the Japanese and Chinese markets, which are the main markets for whelk, constituted 61% of exports. French exports include both whelk meat and whelk with shell. French imports of whelk are from the United Kingdom and Ireland, which are main producers but do not, themselves, have a significant local market for whelk. In 2019, 99 tonnes were imported from these two countries.

The United Kingdom is a major exporter of whelk. In 2019, 2,918 tonnes of molluscs were exported. According to desk research, 90% of whelk exports are for South Korea, facilitated by a free trade arrangement between both countries<sup>62</sup>. According to statistics, this market represented 1.529 tonnes in 2019. Exports within the EU were destined for mainly France and to a lesser extent Spain.

<sup>62</sup> <https://www.undercurrentnews.com/2019/03/29/loss-of-third-party-tariffs-a-serious-blow-for-uks-post-brex-it-whelk-industry/>

Table 27. **TRADE FLOW FOR COMMON WHELK IN FRANCE AND THE UNITED KINGDOM IN 2019 (volume in tonnes)**

Country	Preservation state	Extra EU Exports	Intra EU Exports	Extra EU Imports	Intra EU Imports
<b>France</b>	Frozen	1.227	223	695	514
	Prepared/Preserved	10	49	-	280
	<b>Total</b>	<b>1.238</b>	<b>273</b>	<b>695</b>	<b>793</b>
<b>United Kingdom</b>	Frozen	2.482	267	132	196
	Prepared/Preserved	435	0	5	335
	<b>Total</b>	<b>2.918</b>	<b>267</b>	<b>137</b>	<b>531</b>

Source: COMEXT

## 6. Global highlights

**EU / Sustainability / Aquaculture:** The European Commission adopted new strategic guidelines for a more sustainable and competitive EU aquaculture industry. The guidelines offer a common vision for the Commission, Member States, and stakeholders to develop the sector in a way that contributes directly to the European Green Deal and in particular the Farm to Fork Strategy. The guidelines will help the EU aquaculture sector become more competitive and resilient and improve its environmental and climate performance<sup>63</sup>.



**EU / Sustainability / Fishing Gear:** On 31 May, the European Commission published guidance on the EU rules on single-use plastics and adopted an Implementing Decision on the monitoring and reporting of fishing gear placed on the market and waste fishing gear collected. These rules aim to reduce marine litter from single-use plastic products and fishing gear, and promote the transition to a circular economy with innovative and sustainable business models, products, and materials<sup>64</sup>.

**EU / Fishery Management / Baltic:** An evaluation of compliance with the landing obligation (LO) in selected fisheries in the Baltic Sea carried out in 2017 and 2018, found an overall good level of compliance in herring and sprat fisheries. The evaluation was carried out by the European Fisheries Control Agency (EFCA), in cooperation with the Member States Control Expert Group for the Baltic Sea Fisheries Forum (BALTFISH). It covered plaice, in addition to the species already included in the previous analysis, such as cod, Atlantic salmon, herring and sprat<sup>65</sup>.

**EU / Maritime Day / EUMOFA:** On 20 and 21 May the virtual European Maritime Day (EMD) conference was broadcasted from Den Helder in the Netherlands. The event attracted more than 2.400 ocean stakeholders and focused on the contribution of a sustainable blue economy to post-pandemic recovery, and the European Green Deal. EUMOFA was an active participant, and its team held a workshop titled "COVID-19 and seafood: impact and way forward", where experts outlined how the COVID-19 crisis has affected and might continue to affect the fishery and aquaculture supply chains, and which policies and measures are needed to address the related economic effects of the crisis<sup>66</sup>.

**Croatia / Seafood / Consumption:** The Ministry of Agriculture of Croatia – Directorate of Fisheries, conducted an analysis of the consumption of fishery and aquaculture products in the Republic of Croatia for the years 2018 and 2019. The aim of the study was to determine the net supply (availability) and per capita (apparent) consumption of fishery and aquaculture products. Data were collected from publicly available sources (Croatian Bureau of Statistics) as well as from the internal database of the Ministry of Agriculture, Directorate of Fisheries. As for the standardisation and harmonisation of the data and presentation of the results, the production was sorted out according to Organisation for Economic Co-operation and Development (OECD) nomenclature for products (commodity groups). Apparent consumption of fishery and aquaculture products per capita in the Republic of Croatia amounted to 18,06 kg in 2018 and 20,02 kg in 2019, an increase of 10.84%. This increase is a clear indicator of changes in outputs from the aquaculture and fish processing industries, resulting from investments, primarily financed through the European Maritime and Fisheries Fund (EMFF)<sup>67</sup>.

**Norway / Seafood:** In its new report, "Seafood Trends", the Norwegian Seafood Council presents some answers to what people want and expect from the seafood industry – as well as what it takes for people to choose seafood. The report outlines the five most important consumer trends when it comes to seafood: new sales channels, sustainability, convenience, transparency, and health and wellness. The report can be used to understand more about the major macro trends that affect seafood<sup>68</sup>.

<sup>63</sup> [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_21\\_1554](https://ec.europa.eu/commission/presscorner/detail/en/ip_21_1554)

<sup>64</sup> [https://ec.europa.eu/oceans-and-fisheries/ocean/clean-and-healthy-oceans\\_en](https://ec.europa.eu/oceans-and-fisheries/ocean/clean-and-healthy-oceans_en)

<sup>65</sup> [https://ec.europa.eu/oceans-and-fisheries/news/efca-landing-obligation-evaluation-shows-overall-compliance-baltic-sea-2021-05-28\\_en](https://ec.europa.eu/oceans-and-fisheries/news/efca-landing-obligation-evaluation-shows-overall-compliance-baltic-sea-2021-05-28_en)

<sup>66</sup> [https://ec.europa.eu/maritimeaffairs/maritimeday/index\\_en](https://ec.europa.eu/maritimeaffairs/maritimeday/index_en)

<sup>67</sup> <https://ribarstvo.mps.hr/default.aspx?id=5182>

<sup>68</sup> <https://en.seafood.no/market-insight/open-reports/seafood-trends/>

## 7. Macroeconomic Context

### 7.1. Marine fuel

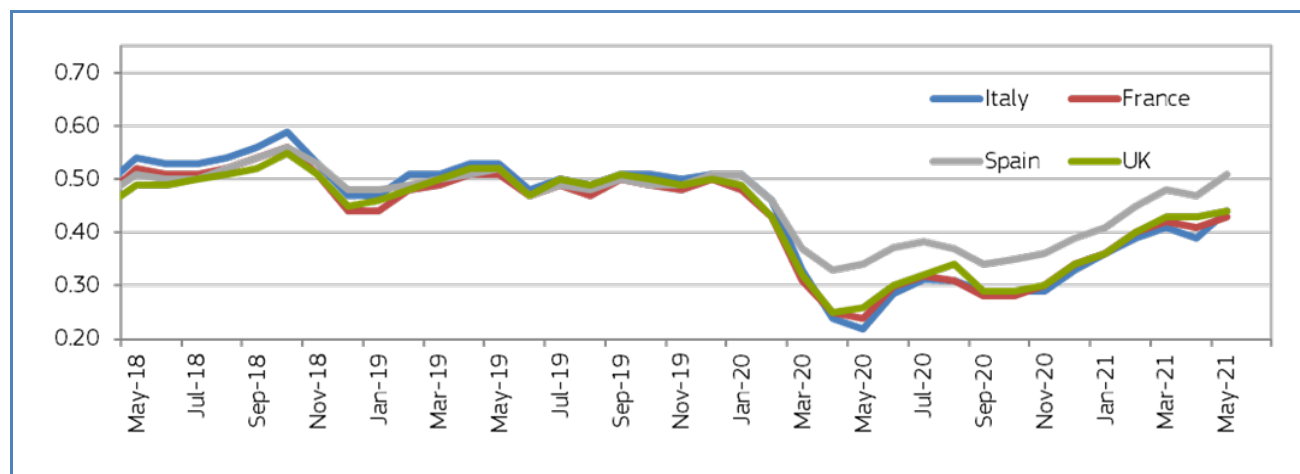
Average prices for marine fuel in **May 2021** ranged between 0,43 and 0,51 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices decreased by an average of about 7,1% compared with the previous month, although they increased by an average of 71,7% compared with the same month in 2020.

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

Member State	May 2021	Change from Apr 2021	Change from May 2020
France <i>(ports of Lorient and Boulogne)</i>	0,43	5%	79%
Italy <i>(ports of Ancona and Livorno)</i>	0,44	13%	100%
Spain <i>(ports of A Coruña and Vigo)</i>	0,51	9%	50%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,444	2%	69%

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

Figure 67. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

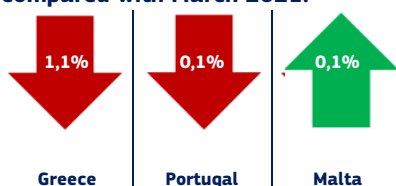


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

### 7.2. Consumer prices

The EU annual inflation rate was at 2% in April 2021, up from 1,3% in March 2021. A year earlier, the rate was 1,7%.

**Inflation: lowest rates in April 2021, compared with March 2021.**



**Inflation: highest rates in April 2021, compared with March 2021.**



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

	Apr 2019	Apr 2020	Mar 2021	Apr 2021	Change from Mar 2021	Change from Apr 2020
<b>Food and non-alcoholic beverages</b>	106,21	110,74	110,15	110,88	↑ 0,7%	↑ 0,1%
<b>Fish and seafood</b>	110,11	114,91	113,26	114,14	↑ 0,8%	↓ 0,7%

Source: Eurostat.

### 7.3. Exchange rates

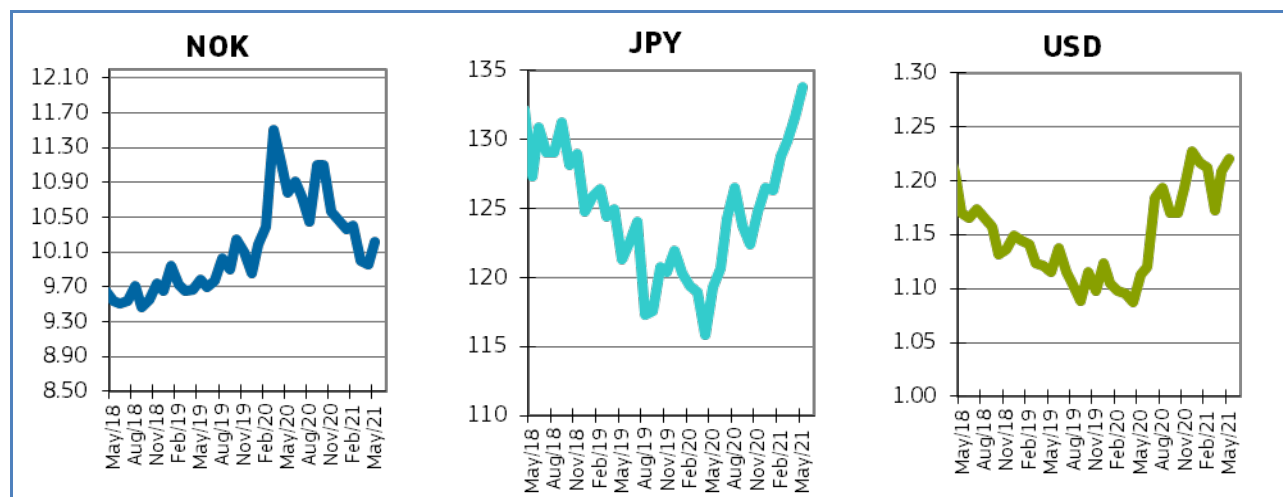
Table 30. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	May 2019	May 2020	Apr 2021	May 2021
NOK	9,7915	10,7880	9,9533	10,2183
JPY	121,27	119,29	131,62	133,79
USD	1,1151	1,1136	1,2082	1,2201

Source: European Central Bank.

In May 2021, the euro appreciated against the Norwegian krone (2,7%), the US dollar (0,1%), and against the Japanese yen (1,6%), relative to the previous month. For the past six months, the euro has fluctuated around 1,21 against the US dollar. Compared with May 2020, the euro has appreciated 12,2% against the Japanese yen, 9,6% against the US dollar, and depreciated 5,3% against the Norwegian krone.

Figure 68. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.



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

**First sales:** EUR-Lex, DG Mare – European Commission, Fishbase, ICES, FAO, Specimenfish.ie, Britishseafishing.co.uk,

**Consumption:** EUROPANEL, FAO.

**Case studies:** FAO, Eurostat, Blue Marine Foundation, [guidedesespecies.org](http://guidedesespecies.org), North Western Inshore Fisheries and Conservation Authority of the UK, The State of Mediterranean and Black Sea Fisheries 2020 by FAO, GFCM, Eurofish Magazine, [undercurrentnews.com](http://undercurrentnews.com), [rungisinternational.com](http://rungisinternational.com).

**Global highlights:** DG Mare - European Commission, Ministry of Agriculture of Croatia, Norwegian Seafood Council.

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

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

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

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

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

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

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

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