2014 Edition
THE EU FISH MARKET

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Scope

“The EU fish market” aims at providing an economic description of the whole European fisheries and aquaculture industry. It replies to questions such as what is produced/exported/imported, when and where, what is consumed, by whom and what are the main trends. Structural analysis allows a comprehensive view of the fisheries and aquaculture industries in Europe in comparison with other food industries.

This publication is one of the services delivered by the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA).

This edition is based on data available as of October 2013.

More detailed and complementary data are available in the EUMOFA database: by species, place of sale, Member State, partner country. Data are updated daily.

EUMOFA, developed by the European Commission, represents 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 on the common organisation of the markets in fishery and aquaculture products, Article 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 four languages: English, French, German and Spanish.

EUMOFA website, publicly available as from April 2013, can be accessed at:

http://ec.europa.eu/fisheries/market-observatory/
The report is mainly based on consolidated and exhaustive volume and value data collected and disseminated by EUMOFA at all stages of the supply chain.

**MAIN SOURCES OF DATA.**
EUMOFA, EUROSTAT, national administrations of the EU, Joint Research Centre – European Commission, FAO, OECD, Federation of European Aquaculture Producers (FEAP).

**SUPPLY BALANCE SHEET.**
The supply balance sheet provides an estimate of the supply of fishery and aquaculture products available for human consumption at EU level. Catches targeted for fishmeal (industrial catches) are excluded. The calculation of the supply balance sheet is based on the equation:

\[
\text{Apparent consumption} = \left( \text{total catches} - \text{industrial catches} \right) + \text{aquaculture} + \text{imports} - \text{exports}.
\]

The resulting figures should be considered as proxies of market consumption (i.e. apparent consumption).

**SELF-SUFFICIENCY RATE.**
EU production / Apparent consumption of the EU market

**EXPENDITURE FOR FISHERY AND AQUACULTURE PRODUCTS**
Expenditure data of this “EU fish market” are provided by EUROSTAT (for EU countries, see Charts 3 and 4) and by OECD - Organisation for Economic Cooperation and Development (for non-EU countries, see Table 2). These data are compiled by both organisations basing on a common methodology elaborated within the “EUROSTAT – OECD PPP Programme” ([http://www.oecd.org/std/prices-ppp/eurostat-oecdmethodologicalmanualonpurchasingpowerparitiesppps.htm](http://www.oecd.org/std/prices-ppp/eurostat-oecdmethodologicalmanualonpurchasingpowerparitiesppps.htm)).

In “The EU fish market” report, the “Nominal expenditure at national prices in euro (millions)” and the “Nominal expenditure per head at national prices in euros” have been used. The “expenditure” is taken as a component of the GDP and concerns the final consumption expenditures on goods and services consumed by individual households. Expenditure is provided in Purchasing Power Parities (PPPs) which are spatial deflators and currency converters that eliminate the effects of the differences in price levels between Member States/countries, thus allowing volume comparisons of GDP components and comparisons of price levels. For the countries outside the Euro-zone, Price Level Indices (PLIs) are used for harmonising different currencies in a single currency (euro in this case). PLIs are obtained as ratios between PPPs and current nominal exchange rates, therefore, PPPs and PLIs values coincide in the Euro-zone countries.


**LIVE WEIGHT EQUIVALENT.**
Since EUROSTAT provides production data in live weight, import/export net volumes are converted by using Conversion Factors (CF) for the purpose of building a harmonized Supply balance sheet. Taking the example of CF for cod, or more specifically for the item whose CN8 code is 0304 44 10: this item corresponds to the following description: “Fresh or chilled fillets of cod ‘Gadus morhua, Gadus ogac, Gadus macrocephalus’ and of fish of the species “Boreogadus saida””. The CF is set at 2.85, representing an average of those found for skinned and boned fillets for this species in Eurostat/FAO publications. For the complete list of CFs used for the EUMOFA purposes, please refer to the Metadata published within the EUMOFA website at the link: [http://ec.europa.eu/fisheries/market-observatory/eumofadoc/library/10_conversion_factor%2oby%20CN-8.pdf](http://ec.europa.eu/fisheries/market-observatory/eumofadoc/library/10_conversion_factor%2oby%20CN-8.pdf).
ESTIMATES OF AQUACULTURE PRODUCTS IN IMPORTS AND EXPORTS.

For the procedure of assessment of origin of imports and exports, please refer to the EUMOFA Metadata at the link: https://ec.europa.eu/fisheries/market-observatory/eumofadoc/library/Metadata%20Data%20ANALYSIS.pdf.

AQUACULTURE DATA FOR 2010 AND 2011. ESTIMATES AND EXTRAPOLATION FROM EUROSTAT AND MEMBER STATES PUBLICATIONS.

For the purpose of properly conducting an analysis on aquaculture production in the EU, EUROSTAT data have been integrated with data deriving from both national sources and sector associations. This was necessary to deal with the fact that EUROSTAT lacks data for several Member States in several years.

In order to solve this issue, the following integrations have been carried out:

- **Poland:**
  2010 and 2011 data regarding carp and trout have been integrated using Federation of European Aquaculture Producers (FEAP) figures. In the instances in which values were missing, 2012 prices (the only available in FEAP) have been applied to 2010 and 2011 volumes in order to estimate homogeneous values.

- **Belgium:**
  2010 data regarding trout and molluscs were integrated using figures provided by the national source (STATBEL).

- **Slovakia:**
  It was excluded by the 2010 aggregation since no data was available neither in EUROSTAT nor in FEAP. However, Slovakia’s aquaculture production has a minor impact on the overall EU production (913 tonnes in 2011).

- **Germany:**
  2011 data were integrated with figures provided by the national source (DESTATIS). They refer to trout, carp, pike, pike-perch, eel, other freshwater fish and molluscs. Specifically as concerns mollusc figures, since no details at species level is provided by DESTATIS, the aggregate amount was entirely assigned to the species “mussel”. In fact, mussel is the main mollusc farmed in Germany (oyster production is limited). Finally, since DESTATIS does not report values for 2011, they have been estimated by multiplying the volumes to its price as for year-1 (namely, 2010).

- **Greece:**
  2010 figures referring to values were integrated with the ones provided by the national source (EL.STAT.).

- **Cyprus, Denmark, United Kingdom and Ireland:**
  For these four Member States, EUROSTAT does not report values for the years 2011 (CY), 2010 (DK) and 2008 (UK and IE). Therefore, values were estimated by multiplying the volumes of each main commercial species to its average price (average calculated using the price corresponding to year-1 and year+1).

EU LANDINGS DATA FOR 2011.

As specified within Chapter 5, “EU landings”, as regards the Netherlands, it has to be mentioned that: i) the majority of 2008 and 2009 data are confidential; ii) almost all data reported for 2010 and 2011 are estimates; iii) no 2011 data is reported for four important species, namely Black seabream, Jack and horse mackerel and Atlantic mackerel.

EXTRA-EU TRADE.

It encompasses all transactions between European Union (EU) Member States and countries outside the EU (non-member countries).

INTRA-EU TRADE.

It encompasses all transactions declared by Member States of the European Union (EU) with one another. For the analysis of intra-EU trade, only exports have been taken into account. Actually, intra-EU trade as reported by EUROSTAT covers both arrivals (i.e. imports) and dispatches (i.e. exports). Because of different valuation principle (CIF > FOB), arrivals should be slightly higher than dispatches. This is one of the main reasons explaining asymmetries between import and export figures. In general, bilateral comparisons between MS of intra-EU flows have revealed major and persistent discrepancies. Therefore, comparisons dealing with intra-EU trade statistics and related results have to be taken into account cautiously and should consider the existence of these discrepancies. For more information, please visit EUROSTAT’s “Quality Report on International Trade Statistics”, at http://epp.eurostat.ec.europa.eu/cache/ITY_OFFPUB/KS-RA-10-026/EN/KS-RA-10-026-EN.PDF.
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A major market for seafood

The EU is a major consumption market of seafood products in the world with 12.3 million tonnes representing EUR 52.2 billion in 2011. It is the first importer of seafood products, absorbing 24% of total world exchanges in value.

Contraction of consumption per capita

EU consumption per capita is 24.5 kg (2011). It decreased by 5% between 2008 and 2010 and remained stable between 2010 and 2011. This is a change in trend after a robust growth in per capita consumption since 2000. Seafood consumption varies a lot from one Member State to the other. Northern Member States are more focused on processed fish while Southern Member States still favour fresh products and devote a larger part of household expenditures to fish. Central and Eastern European countries are below the EU average but register increase in consumption.

3 out of 4 seafood products consumed in the EU come from capture fisheries. Market share of farmed sea products decreased

Consumption of farmed products, which represents 24% of total EU consumption, decreased by 5% in 2011. This could be a consequence of reduced EU aquaculture production and diminished imports of farmed products in particular pangasius.

Continuous and dynamic growth of imports in value led by shrimps and salmon

Extra-EU imports grew at a substantial rate of 3% in value between 2011 and 2012 and reached EUR 19.2 billion.

Norway and China are the main EU suppliers. Norway showed significant increases in volumes of seafood products exported to the EU – mainly salmon and cod. China confirms its leading role as a processing country for white fish. Shrimp imports (mainly destined to Spain) boosted by 20% between 2011 and 2012, after a three-year decrease.

Prominent role of intra-EU trade

In 2012, extra-EU exports grew by 24% in value compare to 2011 reaching EUR 4.1 billion. This included a strong preponderance of exports from Spain, the Netherlands and Denmark. Main clients are the United States, Norway and Switzerland in value, and Nigeria, Norway, Russia and Egypt in volume.

In 2012, exports between EU Member States were 4 times larger than exports to third countries. Intra-EU trade registered a volume of exchanges accounting to more than 5.1 million tonnes (net weight), increasing by over 270.000 tonnes (+5.6%) with respect to 2011. In terms of value, it accounted to EUR 17.9 billion (+8.5%).

Fall in EU landings

In 2011, EU landings reached their lowest volume level of the last six years, decreasing by 12% with respect to the previous year. Small pelagics and groundfish suffered the sharpest decline between 2010 and 2011. At Member State level, Denmark, Spain and the United Kingdom registered the most significant decreases.
Main market trends and dynamics

Seafood consumption per capita in the EU seems to have reached a plateau after a decade of dynamic growth.

Expenditure on seafood at EU level increased by 1% between 2011 and 2012 and almost reached the 2007 level. However it decreased in EU countries most affected by the economic crisis.

Consumer prices for seafood increased faster than other food products since 2010.

Tuna, cod and salmon are the main species consumed in the EU in volume.

Imports are characterised by strong increase in value (+15% or +EUR 3 billion) between 2009 and 2012. In volume they remain below the levels registered between 2007 and 2009 despite a 1,8% increase between 2011 and 2012.

Shrimps have become the first imported species in value ahead of salmon, tuna and cod.

EU self-sufficiency for seafood (i.e. the production relative to its internal consumption) was stable at around 45% between 2008 and 2011. While the EU covers fully its needs for flatfish and small pelagics (and even produces surpluses) it is increasingly and highly dependent on external sourcing for groundfish, salmonids and tuna.
The EU in the world

The EU percentage of production of the world total (3.4% in 2011) has been steadily declining since 2005 (4.5%). As a matter of fact, the EU occupies fifth place in the fish production ranking after China, Indonesia, India and Peru. As concerns aquaculture production, it accounts for 1.24 million tonnes, covering only 1.5% of the total and ranking sixth.

However, when it comes to expenditure for purchasing fish products, the EU occupies first place. The EU covers its domestic consumption mostly through imports, the majority of which are either frozen or prepared products. Shrimps, tuna, white fish and fishmeal are the most imported products.

Table 1

<table>
<thead>
<tr>
<th>Country</th>
<th>Fishery</th>
<th>Aquaculture</th>
<th>Total production</th>
<th>% total</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>16.046</td>
<td>50.173</td>
<td>66.219</td>
<td>37.0%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>5.714</td>
<td>7.937</td>
<td>13.651</td>
<td>7.6%</td>
</tr>
<tr>
<td>India</td>
<td>4.302</td>
<td>4.578</td>
<td>8.880</td>
<td>5.0%</td>
</tr>
<tr>
<td>Peru</td>
<td>8.254</td>
<td>92</td>
<td>8.346</td>
<td>4.7%</td>
</tr>
<tr>
<td><strong>EU-27</strong></td>
<td>4.806</td>
<td>1.240</td>
<td>6.046</td>
<td>3.4%</td>
</tr>
<tr>
<td>U.S.A.</td>
<td>5.163</td>
<td>397</td>
<td>5.560</td>
<td>3.1%</td>
</tr>
<tr>
<td>Viet Nam</td>
<td>2.503</td>
<td>3.053</td>
<td>5.556</td>
<td>3.1%</td>
</tr>
<tr>
<td>Philippines</td>
<td>2.367</td>
<td>2.608</td>
<td>4.975</td>
<td>2.8%</td>
</tr>
<tr>
<td>Japan</td>
<td>3.850</td>
<td>907</td>
<td>4.757</td>
<td>2.7%</td>
</tr>
<tr>
<td>Chile</td>
<td>3.467</td>
<td>970</td>
<td>4.437</td>
<td>2.5%</td>
</tr>
<tr>
<td>Russian Federation</td>
<td>4.262</td>
<td>130</td>
<td>4.392</td>
<td>2.5%</td>
</tr>
<tr>
<td>Norway</td>
<td>2.434</td>
<td>1.139</td>
<td>3.573</td>
<td>2.0%</td>
</tr>
<tr>
<td>Thailand</td>
<td>1.862</td>
<td>1.008</td>
<td>2.870</td>
<td>1.6%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>1.383</td>
<td>527</td>
<td>1.910</td>
<td>1.1%</td>
</tr>
<tr>
<td>Other</td>
<td>28.677</td>
<td>8.973</td>
<td>37.650</td>
<td>21.1%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>95.090</td>
<td>83.732</td>
<td>178.822</td>
<td>100.0%</td>
</tr>
</tbody>
</table>

Table 2

<table>
<thead>
<tr>
<th>Country</th>
<th>Expenditure¹</th>
<th>Expenditure per head²</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EU-27</strong></td>
<td>52.035</td>
<td>103</td>
</tr>
<tr>
<td>Japan</td>
<td>46.126</td>
<td>361</td>
</tr>
<tr>
<td>United States</td>
<td>9.911</td>
<td>32</td>
</tr>
<tr>
<td>Canada</td>
<td>2.377</td>
<td>69</td>
</tr>
<tr>
<td><strong>Total OECD</strong></td>
<td>126.511</td>
<td>102</td>
</tr>
</tbody>
</table>

¹ Nominal expenditure at national prices in euro (millions)
² Nominal expenditure per head on GDP at national prices in euro (millions)
Chart 1
Supply balance in 2011 (live weight equivalent)
Source: EUMOFA based on elaboration of EUROSTAT data

- Import 8.38 mln tonnes
- Production 5.35 mln tonnes
- Export 1.61 mln tonnes
- Supply 13.93 mln tonnes
- Apparent consumption 12.32 mln tonnes
2.1 EU self sufficiency

The supply of the EU market is ensured by EU production and imports.

The self-sufficiency rate, which is the ratio of the EU production (catches + aquaculture) and the total apparent consumption\(^3\) of the EU market, registered a slight increase between 2010 and 2011. Indeed, it went from 44.8% in 2010 to 45.1% in 2011, reaching the same level as in 2004\(^4\).

![Chart 2: EU market growth and self-sufficiency rates](image)

Table 3

<table>
<thead>
<tr>
<th>Commodity group</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bivalves and other molluscs and aquatic invertebrates</td>
<td>62.1%</td>
<td>63.2%</td>
<td>63.0%</td>
<td>66.4%</td>
</tr>
<tr>
<td>Cephalopods</td>
<td>17.4%</td>
<td>17.4%</td>
<td>17.3%</td>
<td>18.3%</td>
</tr>
<tr>
<td>Crustaceans</td>
<td>23.0%</td>
<td>22.6%</td>
<td>24.7%</td>
<td>26.4%</td>
</tr>
<tr>
<td>Flat fish</td>
<td>93.2%</td>
<td>93.2%</td>
<td>95.4%</td>
<td>97.5%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>25.6%</td>
<td>25.3%</td>
<td>22.2%</td>
<td>17.1%</td>
</tr>
<tr>
<td>Groundfish</td>
<td>24.4%</td>
<td>21.9%</td>
<td>21.2%</td>
<td>18.0%</td>
</tr>
<tr>
<td>Other marine fish</td>
<td>51.3%</td>
<td>58.1%</td>
<td>62.3%</td>
<td>60.3%</td>
</tr>
<tr>
<td>Salmonids</td>
<td>34.2%</td>
<td>34.7%</td>
<td>35.3%</td>
<td>33.3%</td>
</tr>
<tr>
<td>Small pelagics</td>
<td>108.7%</td>
<td>107.7%</td>
<td>117.2%</td>
<td>112.7%</td>
</tr>
<tr>
<td>Tuna and tuna-like species</td>
<td>34.4%</td>
<td>23.9%</td>
<td>20.6%</td>
<td>25.6%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>45.5%</strong></td>
<td><strong>45.2%</strong></td>
<td><strong>44.8%</strong></td>
<td><strong>45.1%</strong></td>
</tr>
</tbody>
</table>

Groundfish

The EU self-sufficiency for groundfish has been decreasing since 2008, reaching its 4-year minimum in 2011 when it was at 18.0%. Between 2010 and 2011, EU production (catches) diminished by 70,000 tonnes and imports increased by 88,000 tonnes.

Small pelagics

Despite a 148,000 tonnes catch increase and a consequent lessen by 33,000 tonnes of imports, the self-sufficiency rate of small pelagics declined by almost 4% between 2010 and 2011. This was due to decreasing exports which declined more significantly than imports.

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\(^3\) The estimate of apparent consumption provided by the EUMOFA supply balance is obtained as the residual of the total annual available supply after subtracting non-food use products

The EU self-sufficiency of salmonids diminished from 35.3% in 2010 to 33.3% in 2011. This resulted from a reduction in both catches and aquaculture production, which obliged the EU market to increasingly meet internal demand through imports.

Flatfish and crustaceans self-sufficiency rates increased between 2010 and 2011, reaching their 4-year peaks, respectively at 97.5% and 26.4%, thanks to decreasing imports. A self-sufficiency decline was registered as for other marine fish, as a consequence of decreasing catches and aquaculture production.
### 2.2 Supply balance and apparent consumption

<table>
<thead>
<tr>
<th>Commodity group</th>
<th>Production (tonnes)</th>
<th>Import (tonnes)</th>
<th>Export (tonnes)</th>
<th>Apparent consumption (tonnes)</th>
<th>Per capita (kg)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fishery</td>
<td>Aquaculture</td>
<td>Fishery</td>
<td>Aquaculture</td>
<td>Fishery</td>
</tr>
<tr>
<td>Bivalves and other molluscs and aquatic invertebrates</td>
<td>244.268</td>
<td>627.392</td>
<td>307.054</td>
<td>147.656</td>
<td>6.291</td>
</tr>
<tr>
<td>Cephalopods</td>
<td>114.972</td>
<td>3</td>
<td>539.468</td>
<td>0</td>
<td>27.610</td>
</tr>
<tr>
<td>Crustaceans</td>
<td>214.364</td>
<td>242</td>
<td>407.295</td>
<td>292.323</td>
<td>99.890</td>
</tr>
<tr>
<td>Flat fish</td>
<td>203.941</td>
<td>11.039</td>
<td>54.635</td>
<td>1.307</td>
<td>50.475</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>37.700</td>
<td>89.927</td>
<td>130.727</td>
<td>497.149</td>
<td>497.149</td>
</tr>
<tr>
<td>Groundfish</td>
<td>516.110</td>
<td>0</td>
<td>2.468.617</td>
<td>21.184</td>
<td>136.557</td>
</tr>
<tr>
<td>Miscellaneous aquatic products</td>
<td>34.137</td>
<td>55</td>
<td>317.719</td>
<td>0</td>
<td>9.006</td>
</tr>
<tr>
<td>Other marine fish</td>
<td>512.132</td>
<td>148.432</td>
<td>576.016</td>
<td>30.775</td>
<td>165.074</td>
</tr>
<tr>
<td>Salmonids</td>
<td>8.437</td>
<td>357.497</td>
<td>72.709</td>
<td>764.749</td>
<td>38.083</td>
</tr>
<tr>
<td>Small pelagics</td>
<td>2.084.872</td>
<td>1</td>
<td>454.628</td>
<td>0</td>
<td>690.152</td>
</tr>
<tr>
<td>Tuna and tuna-like species</td>
<td>340.160</td>
<td>5.060</td>
<td>1.298.329</td>
<td>1</td>
<td>294.130</td>
</tr>
<tr>
<td>Total</td>
<td>4.311.093</td>
<td>1.239.648</td>
<td>6.627.198</td>
<td>1.755.143</td>
<td>1.522.192</td>
</tr>
</tbody>
</table>

In 2011, apparent consumption of fishery and aquaculture products in the EU reached 12.3 million tonnes. Of these, 9.4 million tonnes originated from fishing activities while 2.9 million tonnes were farmed.

Per capita fish consumption amounted to 24.53 kg, slightly increasing from 2010, when consumption was 24.48 kg per capita.

However per capita consumption contracted compared to 2008 (25.9 kg per capita) and 2009 (25.3 kg per capita).

More specifically for 2011, 18.7 kg of the fish consumed per capita in the EU originated from fishing activities, while 5.8 kg were from aquaculture. On balance, it has seen a decrease of 0.30 kg per capita of apparent consumption of farmed products (-5%) and a parallel increase of 0.35 kg per capita of captured products (+2%).

Consumption in the EU market is dominated by wild fish. Farmed products represent 24% of EU total consumption.
Despite the economic crisis that has affected Europe for the last four years, the total 2012 expenditure for fishery and aquaculture products in the EU reached its highest point since 2007, at more than EUR 52.7 billion. Almost 60% of the EU expenditure was covered by three Member States, namely Spain, France and Italy, which in 2012 spent EUR 11.3 billion, EUR 10.0 billion and EUR 9.7 billion, respectively, for buying seafood. In addition, the 2012 expenditures in Spain and France represented their highest amount over the last four years. The United Kingdom registered a remarkable increase in consumption expenditure (+11%).
Chart 4

Per-capita expenditure for fishery and aquaculture products in the EU in 2012 by Member State and % variation 2012/2011

Source: EUROSTAT (Purchasing Power Parities - PPPS)
3.1 Consumer Prices – Fish vs. meat and food

We can observe that fish prices increased much less than total food prices in 2009, much more in 2010 and 2011 and that in 2012, the gap between both was shrinking.

3.2 Apparent consumption by main species

Almost 62% of total apparent consumption of both captured and farmed products was covered by 13 species, whose apparent consumption is illustrated in Table 6.

<table>
<thead>
<tr>
<th>Main commercial species</th>
<th>Per capita (Kg)</th>
<th>% wild</th>
<th>% farmed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuna (canned)</td>
<td>2.14</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Cod</td>
<td>1.96</td>
<td>98%</td>
<td>2%</td>
</tr>
<tr>
<td>Salmon</td>
<td>1.72</td>
<td>2%</td>
<td>98%</td>
</tr>
<tr>
<td>Pollack</td>
<td>1.64</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Herring</td>
<td>1.18</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Mussel</td>
<td>1.16</td>
<td>10%</td>
<td>90%</td>
</tr>
<tr>
<td>Hake</td>
<td>0.94</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Mackerel</td>
<td>0.87</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Pangasius</td>
<td>0.80</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>Tropical shrimps</td>
<td>0.75</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>Sardine</td>
<td>0.71</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Squid</td>
<td>0.70</td>
<td>100%</td>
<td>0%</td>
</tr>
<tr>
<td>Scallop</td>
<td>0.58</td>
<td>87%</td>
<td>13%</td>
</tr>
</tbody>
</table>
Each of the most consumed small pelagics has seen an increase since 2010. Herring, the most consumed species among small pelagics, accounted for 1,18 kg per capita consumption in 2011. This represented an interruption of the decreasing trend between 2007 and 2010, when its consumption was 1,11 kg per capita. Mackerel also had a decreasing trend from 2007 to 2010, but it inverted this trend in 2011, when consumption increased by 34% (0,87 kg per capita). Indeed, in 2011, mackerel reached its highest amount of apparent consumption of the 2007-2011 period. Sardine’s apparent consumption recovered and touched 0,71 kg per capita, after a 24% decline that occurred between 2009 and 2010.
Cod was the second most consumed species in the EU in 2011, at 1,96 kg per capita. Pollack followed at 1,64 kg per capita, increasing by 14% with respect to the previous year but reporting a decrease of 6% with respect to 2008, when it was the most consumed species among groundfish. Apparent consumption of hake accounted for 0,94 kg per capita in 2011, and has stayed almost flat since 2007.

Mussel consumption in 2011 accounted for 1,16 kg per capita. However, this represented a continuation of the decreasing trend that began in 2009, when consumption was at 1,29 kg per capita. Unlike mussel, of which 90% of consumption was farmed, 87% of scallop consumption, or 0,50 kg per capita, was wild. In 2011, scallop’s total apparent consumption was at 0,58 kg per capita, registering a slight decrease of 6% over 2010 when it was at 0,62 kg per capita.
The most important products in terms of apparent consumption were canned tunas.

Tuna (canned) was the most important product in terms of apparent consumption in 2011, accounting for 2.14 kg per capita. Its apparent consumption registered a slight increase of 2% with respect to 2010.

Salmon apparent consumption accounted for 1.72 kg per capita in 2011, its highest amount since 2007. As a matter of fact, among the top 12 species, salmon was the only one registering an increasing trend between 2007 and 2011. It was almost entirely (98%) of aquaculture origin.

Squid and tropical shrimps accounted respectively for 0.70 and 0.75 kg consumption per capita in 2011. The farmed and captured shares of tropical shrimp products were almost equal, with consumption of farmed products at 54%, just slightly higher than wild products.

As concerns pangasius, whose data are available for 2010 and 2011 only, apparent consumption accounted for 0.80 kg per capita in 2011, recording a decrease by 16% with respect to the previous year (0.95 kg per capita).
In the EU, the 2009 per capita consumption of fish and seafood proteins covered 6% of the total protein intakes.

In the EU, the 2009 per capita consumption of protein from fish and seafood was at 6.8 grams per day, covering 6% of the total protein intake and 11% of animal proteins.

Meat and animal proteins (excluding fish and seafood) represented 52% of the total, accounting for 55 grams per capita per day, while vegetal proteins (43.4 grams per capita per day) covered 41%.
The EU balance of trade in fishery products in terms of value has shown a negative trend since 2001. This was caused by the increasing imports of fresh, frozen and prepared and preserved products between 2004 and 2007. These were the years in which the balance dropped more heavily, despite the growth in exports. In 2005, the balance dropped 16% from 2004, and then dropped another 18% from 2005 to 2006.

A very slight improvement was reported between 2008 and 2009 – the balance increasing 2% in 2008 compared with 2007, and 5% in 2009 compared with 2008 – but, for different reasons. In 2008, EU exports continued increasing at 8.6%, while the total value of imports slightly declined by 2% for all products, in particular smoked, salted, dried and frozen products. However, in 2009, total imports values decreased by 5.5% compared with 2008. On the other hand, exports decreased by 8.6% which, in absolute terms, reflected a sharp 5% increase on the balance. In 2010, despite total value of exports increasing by more than 18%, an imports increase of frozen and prepared-preserved products dropped the balance by 11%.

In 2012, the total value of trade recorded its highest score ever. Nonetheless, the balance reached one of its lowest levels. This was mainly due to the 62% increase of imported values of prepared products between 2011 and 2012.
4.2 Extra-EU imports

Volumes of extra-EU imports have stayed almost stable since 2006, averaging 5.7 million tonnes per year, with the highest level, 6 million tonnes, recorded in 2007. The 2012 volumes, reported at 5.5 million tonnes, represented an increase of 100,000 tonnes over the 2011 volumes and additional EUR 1.4 billion in value. Values of extra-EU imports increased significantly during the last four years, reaching their six-year peak in 2012 recording an amount of EUR 19.2 billion.

Most of this increase in value is due to a change in product mix: there has been an increase in import of salmon (from 555,000 tonnes in 2009 to 740,000 tonnes in 2012), while lower priced products such as “fish for non-food use”, herring and other marine fish products have decreased in volume over the last four years. There has also been an increase in prices for most products in this period. The average unit value for the 5 top-valued import categories in 2012 compared to 2009 are shown in Table 7.

Table 7

<table>
<thead>
<tr>
<th>Main commercial species</th>
<th>2009</th>
<th>2012</th>
<th>% variation 2012/2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salmon</td>
<td>3.90</td>
<td>4.23</td>
<td>8.5%</td>
</tr>
<tr>
<td>Miscellaneous tunas</td>
<td>3.00</td>
<td>4.23</td>
<td>41.0%</td>
</tr>
<tr>
<td>Cod</td>
<td>3.84</td>
<td>4.39</td>
<td>14.3%</td>
</tr>
<tr>
<td>Tropical shrimps</td>
<td>4.61</td>
<td>5.75</td>
<td>24.7%</td>
</tr>
<tr>
<td>Miscellaneous shrimps</td>
<td>4.81</td>
<td>6.26</td>
<td>30.1%</td>
</tr>
</tbody>
</table>

Source: EUMOFA based on elaboration of EUROSTAT data
Chart 13
Volumes of extra-EU imports by Member State in 2012 and % variation 2012/2011
Source: EUMOFA based on elaboration of EUROSTAT data

Chart 14
Values of extra-EU imports by Member State in 2012 and % variation 2012/2011
Source: EUMOFA based on elaboration of EUROSTAT data

Chart 15
Top extra-EU countries of origin - by volume (2012)
Source: EUMOFA based on elaboration of EUROSTAT data
At EU level, Norway and China are the main extra-EU countries from which fish products are imported. In 2012, imports from Norway reached more than 1 million tonnes for a value of almost EUR 4 billion. While this represented an increase in value terms of EUR 170 million for Norway, it was a decrease – albeit a minute decrease – of 10,000 tonnes in volume terms as compared with 2011.

EU imports of fish products from China had a value of EUR 1.55 billion and totalled 486,000 tonnes in volume in 2012, a decrease of 53,000 tonnes from 2011. Most of the fish products imported in the EU from China are filleted. Raw material used originated from EU countries, Norway (cod) and the Russian Federation (pollack).

The volumes of fish products imported from Peru increased strongly, reaching 450,000 tonnes with a value of EUR 640 million in 2012 which represented an increase of 80,000 tonnes and EUR 120 million from 2011.
While salmon was the most imported main commercial species, amounting to 740,000 tonnes in 2012, groundfish was the most important commodity group imported from extra-EU countries in volume. Groundfish represented 20% of total imports in 2012, and accounted for more than 1 million tonnes, as it has every year since 2006. Salmonids and non-food use accounted for 760,000 and 726,000 tonnes, which equalled 14% and 13%, respectively, of total EU imports from extra-EU countries. As for the significant percentage variation in volumes of miscellaneous aquatic products imported from extra-EU countries, it should be mentioned that no imports of seaweed and other algae were reported in 2011, but they totalled 53,000 tonnes in 2012.
However, other commodity groups showed a reduction in volume terms, especially other marine fish. In fact, the volumes of imported monk totalled 19,200 tonnes in 2012, a decrease of 2,600 tonnes from 2011.

Crustaceans values reached their peak at more than EUR 3,6 billion in 2012.

**Chart 18**

EU imports by group of species – by volume (2012)

*Source: EUMOFA based on elaboration of EUROSTAT data*

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**Chart 19**

EU imports by group of species – by value (2012)

*Source: EUMOFA based on elaboration of EUROSTAT data*
Almost 70% of extra-EU imports of groundfish originated from China, Norway, the United States and Iceland in 2012. This included 250,000 tonnes from China, 200,000 tonnes from Norway, 146,000 tonnes from the United States and 127,000 tonnes from Iceland, with a total value of EUR 2.4 billion. Germany, the Member State importing the most from those extra-EU countries, imported almost 190,000 tonnes, of which 104,000 tonnes were from China.

Pollack
Volumes of pollack imported in the EU in 2012 remained similar to 2011 imports, totalling 295,000 tonnes, of which 270,000 tonnes originated in China and the United States. This represented a value of EUR 660 million, based on an average price of 2.24 EUR/kg. The price showed a minor increase of 4% over the 2.15 EUR/kg price of 2011. The top EU importer, Germany, imported 86,000 tonnes of frozen pollack (fillets) from China, at a price of 2.29 EUR/kg, in line with the EU average (2.18 EUR/kg).

Cod
Volumes and values of cod imported in the EU in 2012 stayed flat at 380,000 tonnes and EUR 1.6 billion, at a price of 4.39 EUR/kg. Norway was the largest supplier, with 125,000 tonnes.

Salmonids
Salmonids imported in the EU in 2012 totalled 760,000 tonnes, for a value of EUR 3.2 billion. More than 80% of extra-EU imports of salmonids came from Norway, equalling 620,000 tonnes, with a total value of EUR 2.5 billion.

Salmon
Salmon was the species most imported in the EU in 2012, accounting for 740,000 tonnes. Salmon volumes, increasing since 2006, had a considerable boost of 19% between 2011 and 2012. Salmon imports registered a major increase between 2009 and 2010 in value, jumping from EUR 2.3 billion to almost EUR 3.0 billion with a parallel 28% rise in prices, as they moved from 3.90 EUR/kg to 5.00 EUR/kg. Norway was the major supplier, providing 618,000 tonnes of salmon to the EU in 2012, along with product from Faroe Islands, China and the United States, which accounted for 45,000, 31,000 and 24,000 tonnes, respectively, with a total value of EUR 530 million.
**Tuna and tuna-like species**

Extra-EU imports of tuna and tuna-like species\(^5\) totalled around 660,000 tonnes in 2012. Among these, tuna-like species – namely swordfish – accounted to 12,500 tonnes. About 17% of tuna and tuna-like species imported in the EU originated from Ecuador. Ecuador’s products were sold mostly in Spain (44,000 tonnes), Italy (almost 16,000 tonnes), the Netherlands (13,400 tonnes) and the United Kingdom (12,000 tonnes). In addition, imports from Mauritius and Thailand accounted for 63,000 and 56,000 tonnes respectively, with Thailand’s EU exports decreasing more than 40,000 tonnes between 2011 and 2012.

**Processed tuna**

Among its commodity group, tuna was the most imported species, 97% of which was sold processed. It is composed by canned tuna (77%), prepared and preserved loins (21%) and frozen miscellaneous tuna (2%) – totalling almost 483,000 tonnes, for a value of almost EUR 2 billion, which registered a strong increase of EUR 380 million from 2011 and was imported at an average price of 4.30 EUR/kg. The Member States importing the most canned tuna were the United Kingdom and Spain. Most UK imports originated from Mauritius (23,500 tonnes), at a price of 4.02 EUR/kg, while Spain imported the majority of its canned tuna (43,000 tonnes) from Ecuador, at a price of 4.46 EUR/kg.

**Crustaceans**

Crustaceans imports registered the highest value of all commodity groups in 2012, totalling EUR 3.63 billion for 600,000 tonnes. Ecuador accounted for 15% of total crustaceans imports with 87,000 tonnes valued at EUR 430 million. Greenland and India each accounted for 10% of the total (60,000 tonnes each) with a value of EUR 200 million and EUR 72 million, respectively. Among EU Member States, Spain had the highest crustaceans imports in 2012, covering 24% of the EU total with a value of EUR 744 million.

**Tropical shrimps**

Despite decreasing to the lowest level since 2006, tropical shrimps was still one of the most important species imported in 2012. The volume of 270,000 tonnes represented a decrease of 30,000 tonnes from 2011, for a

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\(^5\) The commodity group “Tuna and tuna-like species” includes the following main commercial species: albacore tuna, bigeye tuna, bluefin tuna, skipjack tuna, swordfish, yellowfin tuna, and the aggregation “miscellaneous tunas”.

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value of EUR 1.55 billion and an average price of 5.75 EUR/kg. Spain and France were the largest importers, mainly from Ecuador and India, with Spain importing 22,000 tonnes from Ecuador and 2,800 tonnes from India, and France importing 24,000 tonnes from Ecuador and 9,700 tonnes from India. In both Member States, imports of tropical shrimps from India had higher prices with respect to the ones from Ecuador. More in detail, Spain’s imports from India were at 5.06 EUR/kg while its imports from Ecuador were at 4.57 EUR/kg. As for France, imports from Ecuador were at 4.58 EUR/kg while the ones from India were at 6.03 EUR/kg.

Imported miscellaneous shrimps⁶ (mostly frozen) reached their peak values of the last six years in 2012, registering almost EUR 1.5 billion for a remarkable increase of EUR 872 million over 2011. In volume terms, imports totalled 237,000 tonnes, a 114,000 tonnes increase over 2011, and their average price increased by 25% to 6.26 EUR/kg. Argentina was the main country of origin, totalling 45,500 tonnes for a value of EUR 237 million, at 5.20 EUR/kg. At Member State level, Spain was the main importer, importing 68,000 tonnes for a total value of EUR 340 million, of which 36,700 tonnes were from Argentina and 17,000 tonnes from China, at prices of 5.07 EUR/kg and 4.17 EUR/kg, respectively, both lower than the EU average (6.26 EUR/kg).

Miscellaneous shrimps

⁶ “Miscellaneous shrimps” main commercial species is the result of the aggregation of six CN-8 codes, namely 03061799, 03062710, 03062799 (unspecified frozen shrimps and prawns), 16052110, 16052190 and 16052900 (unspecified shrimps, prepared or preserved, in different packaging).
Non-food use products (fish meal and oil mainly used for animal feeding and cosmetics) imported in 2012 totalled 726,000 tonnes, a decrease of 280,000 with respect to 2006 when they were over 1 million tonnes. Yet, despite a significant drop in volume terms, non-food use products were one of the top three commodity groups imported in the EU in 2012, with a value of EUR 920 million and an average price of 1.267 EUR/t.

Peru, the main country of origin, was responsible for almost half of the total, exporting 356,000 tonnes to EU Member States in 2012 with a value of EUR 419 million, at an average price of 1.17 EUR/kg. At Member State level, Denmark and Germany were the top EU importers, at 238,000 and 217,000 tonnes respectively, mainly from Peru. It has to be taken into account that Denmark is an important dealer of animal feed. As concerns Germany, these products are mostly used as poultry feed and for pig farming. More specifically, Denmark and Germany cover more than 1/3 of EU pig farming.
EU exports reached EUR 4.1 billion, an increase of 24% compared with 2011. Volumes of extra-EU exports were almost flat from 2006 until 2011, when there was an 8% decrease from 2010. However, between 2011 and 2012, the extra-EU exports increased by 270,000 tonnes or 16%, to reach almost 2 million tonnes.

EU exports are almost entirely composed of products from captured fisheries, representing 95% of the 2011 total. EU aquaculture production is destined for the EU market.

Chart 23
Values of extra-EU exports increased by 80% in the last 6 years

Chart 24
Volumes of extra-EU exports by Member State in 2012 and % variation 2012/2011
Between 2011 and 2012, all EU countries registered an increase of their extra-EU exports.

This included a strong preponderance of exports from the Netherlands and Spain, which together accounted for over 40% of total 2012 exports, with each reporting around 400,000 tonnes of fish products exported for a value of EUR 577 million and EUR 880,000, respectively.

In addition, all EU countries also reported increases in values between 2011 and 2012. Spain, France and the Netherlands reported the most significant variations in absolute terms, as their export values to extra-EU countries were boosted by EUR 189 million, EUR 103 million and EUR 100 million respectively.

Ireland and Poland registered remarkable increases, as shown in Chart 25.
In terms of volume, Nigeria and Norway were the main countries of destination, accounting for around 250,000 tonnes in 2012. Some 90% of exports to Norway were covered by non-food use products, destined for aquaculture plants. Total value amounted to EUR 395 million for Norway and almost EUR 250 million for Nigeria (mainly small pelagics), with both reaching their highest amount since 2006. Besides the United States, which accounted for EUR 413 million, Norway was the main country of destination in value terms. Exports to the Russian Federation totalled 170,000 tonnes in 2012, for a value of EUR 220 million. In the last five years, export values to the USA and Norway have been increasing, especially between 2010 and 2011, when they skyrocketed by 37% and 25%, respectively.
respectively. As for the Russian Federation, export values have been staying quite steady since 2005.

Table 10

<table>
<thead>
<tr>
<th>Commodity group</th>
<th>2011</th>
<th>2012</th>
<th>% variation 2012/2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small pelagics</td>
<td>665</td>
<td>707</td>
<td>6,3%</td>
</tr>
<tr>
<td>Non-food use</td>
<td>332</td>
<td>311</td>
<td>-6,3%</td>
</tr>
<tr>
<td>Tuna and tuna-like species</td>
<td>255</td>
<td>282</td>
<td>10,7%</td>
</tr>
<tr>
<td>Groundfish</td>
<td>84</td>
<td>193</td>
<td>129,6%</td>
</tr>
<tr>
<td>Other marine fish</td>
<td>114</td>
<td>112</td>
<td>-1,8%</td>
</tr>
<tr>
<td>Salmonids</td>
<td>81</td>
<td>97</td>
<td>20,8%</td>
</tr>
<tr>
<td>Miscellaneous aquatic products</td>
<td>10</td>
<td>84</td>
<td>778,5%</td>
</tr>
<tr>
<td>Crustaceans</td>
<td>71</td>
<td>72</td>
<td>1,5%</td>
</tr>
<tr>
<td>Flat fish</td>
<td>38</td>
<td>43</td>
<td>15,0%</td>
</tr>
<tr>
<td>Cephalopods</td>
<td>20</td>
<td>28</td>
<td>35,7%</td>
</tr>
<tr>
<td>Bivalves and other molluscs and aquatic invertebrates</td>
<td>7</td>
<td>15</td>
<td>119,1%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>7</td>
<td>11</td>
<td>61,3%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>1.683</strong></td>
<td><strong>1.957</strong></td>
<td><strong>16,3%</strong></td>
</tr>
</tbody>
</table>

Table 11

<table>
<thead>
<tr>
<th>Commodity group</th>
<th>2011</th>
<th>2012</th>
<th>% variation 2012/2011</th>
</tr>
</thead>
<tbody>
<tr>
<td>Small pelagics</td>
<td>650</td>
<td>793</td>
<td>22,1%</td>
</tr>
<tr>
<td>Tuna and tuna-like species</td>
<td>448</td>
<td>611</td>
<td>36,2%</td>
</tr>
<tr>
<td>Salmonids</td>
<td>479</td>
<td>511</td>
<td>6,8%</td>
</tr>
<tr>
<td>Non-food use</td>
<td>404</td>
<td>430</td>
<td>6,6%</td>
</tr>
<tr>
<td>Other marine fish</td>
<td>429</td>
<td>395</td>
<td>-8,0%</td>
</tr>
<tr>
<td>Groundfish</td>
<td>263</td>
<td>339</td>
<td>29,1%</td>
</tr>
<tr>
<td>Crustaceans</td>
<td>254</td>
<td>306</td>
<td>20,4%</td>
</tr>
<tr>
<td>Miscellaneous aquatic products</td>
<td>59</td>
<td>261</td>
<td>343,5%</td>
</tr>
<tr>
<td>Flat fish</td>
<td>161</td>
<td>192</td>
<td>18,9%</td>
</tr>
<tr>
<td>Cephalopods</td>
<td>80</td>
<td>115</td>
<td>44,4%</td>
</tr>
<tr>
<td>Bivalves and other molluscs and aquatic invertebrates</td>
<td>42</td>
<td>98</td>
<td>134,4%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>32</td>
<td>52</td>
<td>59,5%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>3.301</strong></td>
<td><strong>4.103</strong></td>
<td><strong>24,3%</strong></td>
</tr>
</tbody>
</table>

Miscellaneous aquatic products (mainly surimi), tuna and small pelagics registered a boost in export of EUR 200 million, EUR 160 million and EUR 140 million, respectively. In volume, the highest increase of export concerned groundfish (+110,000 tonnes).
Small pelagics is the main commodity group exported to extra-EU countries, both in volume and in value terms. Among EU Member States, the Netherlands was the main exporter, with 40% of EU total volume, accounting for 290,000 tonnes with a value of EUR 318 million. Nigeria, Egypt and the Russian Federation, the main extra-EU countries of destination, together imported 386,000 tonnes.

Horse mackerel is the most exported species to extra-EU countries, after non-food use products. Volumes of horse mackerel exported in 2012 amounted to 206,000 tonnes, increasing by almost 20,000 tonnes with respect to the previous year, for a value of EUR 226 million, at an average price of 1.10 EUR/kg. Egypt was the main country of destination, importing 60,000 tonnes from the EU, with a value of EUR 62 million.
The Netherlands accounted for over 50% of the horse mackerel volumes, totalling 107,000 tonnes with a value of EUR 122 million.

**Herring**

Together with horse mackerel and mackerel, herring is one of the top five commercial species exported in volume terms. In 2012, over 170,000 tonnes were exported to extra-EU countries, an increase of 54,000 tonnes with respect to 2011, for a value of EUR 175 million. It was mostly exported to Nigeria, at an average price of 0.98 EUR/kg, an increase of 15%.

**Mackerel**

Volumes of mackerel exported in 2012 totalled 137,000 tonnes, for a value of EUR 197 million, and at an average price of 1.44 EUR/kg. The Netherlands, Spain and the United Kingdom were the major exporters, exporting 48,000 tonnes, 31,000 tonnes and 26,500 tonnes, respectively, with values of EUR 68 million, EUR 33 million and EUR 46 million. In terms of prices, the UK exported mackerel at 1.73 EUR/kg, 20% higher than the EU average, the Netherlands at 1.41 EUR/kg, and Spain at 1.09 EUR/kg. Nigeria was the main destination country for EU mackerel exports.

With 311,000 tonnes exported in 2012, 16% of total exports, non-food use products were sold at an average price of 1.380 EUR/t. Denmark was the main exporter, totalling 204,000 tonnes in 2012, although registering a minor decrease of 8,000 tonnes from 2011. With a value of EUR 272 million, Danish exports were mostly directed to Norway (144,000 tonnes), with a value of EUR 187 million, and a unit price of 1.298 EUR/t.
The “European” tuna is mainly caught by the French and Spanish fleets which land the biggest part of their catches (fresh or frozen) in remote places close to the fishing areas, mainly of the Seychelles, Mauritius and Ecuador, where they are considered exports. A large part of these products are then exported to the EU as raw material or after processing (see imports section, page 22).

**Chart 30**

*Export flows of frozen and fresh tuna (volume, 2012)*

*Source: EUMOFA based on elaboration of EUROSAT data*

**Tuna and tuna-like species**

**Skipjack tuna**

Exports of skipjack tuna reached 132,000 tonnes in 2012, representing a minor decrease of 9,000 tonnes with respect to 2011, for a value of EUR 188 million with an average price of 1.42 EUR/kg. It was exported frozen by Spain, which exported 92,700 tonnes at an average price of 1.46 EUR/kg, and by France, which exported 36,000 tonnes at an average price of 1.32 EUR/kg, mostly to Mauritius and Côte d’Ivoire.

**Yellowfin tuna**

Yellowfin tuna exports reached 104,000 tonnes in 2012, an increase of 31,000 tonnes with respect to 2011, for a value of EUR 202 million and an average price of 1.94 EUR/kg. It was sold frozen by Spain and France, which accounted for 73,000 and 31,000 tonnes, respectively. Both exported mainly to Mauritius and Seychelles, although France also exported to Côte d’Ivoire.
Groundfish export volumes skyrocketed between 2011 and 2012, as they recovered from 2011 when the volume plummeted to 84,000 tonnes, a 45% decrease from 2010, and reaching the lowest level in six years. However in 2012, they reached a 6-year peak of 193,000 tonnes. This must be seen in relation to the availability of blue whiting from the EU’s own fishing fleet. As an example, the quota on blue whiting in the EU was 85,000 tonnes in 2010, whereas it dropped to only 11,000 tonnes in 2011, before increasing to 75,000 tonnes again in 2012.

Extra-EU export volumes of other groundfish species were more stable during the years 2006-2012.

The fluctuating trend of volume of groundfish exports, as shown in Chart 31, was the direct consequence of the changes in export volumes of blue whiting, especially in the period from 2008 to 2012. In 2012, volumes of blue whiting exported totalled 131,000 tonnes for a value of EUR 79 million, at an average price of 0.60 EUR/kg. Ireland and the Netherlands, the main exporters, accounted for 65,700 tonnes and 46,000 tonnes, with respective values of EUR 38 million and 28 million. Both countries exported blue whiting at a price in line with the EU average, mainly exporting to Nigeria (74,000 tonnes), China (29,000) and Cameroon (20,000 tonnes).
4.4 Intra-EU trade

Intra-EU trade plays an essential role in the whole EU fishery trade. In value and volume, it is similar to all extra EU imports. Intra-EU trade totalled almost 5.1 million tonnes in 2012 for a value of EUR 17.9 billion. While volumes trended almost flat during this period, values had been significantly increasing since 2009.

Intra-EU trade reached its highest level in 2012 at EUR 17.8 billion (+17% in three years)

The main exporters are Denmark, Spain, Sweden and the Netherlands. The main importers are France, Italy, Germany and Spain.
As shown in the map of Chart 33, Denmark and Sweden act as “trade hubs” for Norwegian exports. In fact, most of the products imported in these two countries are not consumed there. Instead, they are actually re-exported within the EU.

Norwegian exports to EU Member States are mostly composed of salmon (50%), herring (12%) and cod (11%).
All species are involved in intra-EU trade.

The strong growth in the intra-EU export value is a result of increasing unit prices for a large number of commodity groups, as well as volumes being shifted from lower-value categories to species of higher value. For instance, in the 2009–2012 period, the intra-EU exports of salmon increased by almost 200,000 tonnes — at increasing prices — while lower-valued items categorized under “non-food use” saw volumes decline by circa 225,000 tonnes in the same period.
Salmonids trade in 2012 reached 850,000 tonnes, an increase of 134,000 tonnes over 2011, for a value of EUR 4.2 billion. Their value totalled 23% of total exports and represented their peak of the last six years.

Salmon was the most traded main commercial species, trading 775,000 tonnes with a value of almost EUR 4 billion. Its volumes were 320,000 higher than those of non-food use products, which were the main commercial species traded until 2010. Its price, 5.04 EUR/kg, represented an 11% decrease with respect to 2011, when it was at 5.63 EUR/kg. Since the beginning of 2013, salmon’s price has grown by over 20% with respect to 2012, reaching 6.14 EUR/kg.

The majority of salmon exported within the EU was fresh (618,000 tonnes, covering almost 80% of the total), while frozen salmon accounted for about 8% of the total and smoked salmon products accounted for 11%.

Non-food use products were the most traded products at main commercial species level from 2006 to 2010. However, in 2012, they were the second most traded products after salmon, accounting for 450,000 tonnes with a value of EUR 630 million. Their 2012 price of 1.400 EUR/t represented a 30% increase with respect to 2011, when it was at 1.080 EUR/kg.

Small pelagics was the most important commodity group traded, covering 19% of the total volumes of intra-EU trade in 2012, reaching 970,000 tonnes with a value of EUR 1.5 billion. Although this meant a minor decrease of 12,000 tonnes in volume terms, it still presented a 13% increase in value of EUR 178 million with respect to 2011. Denmark and Germany were the main players, as their combined exports of small pelagics – 160,000 tonnes and 130,000 tonnes, respectively – accounted for 30% of the total accounting.

Herring has been one of the top three species traded since 2006. In 2012, it accounted for 434,000 tonnes, an increase of 41,000 tonnes over 2011, for a value of EUR 637 million, which represented a strong increase of more than EUR 120 million. In addition, herring’s price increased from 1.31 EUR/kg to 1.47 EUR/kg between 2011 and 2012, reaching its peak of the last six years.

7 Data refer to the first seven months of 2013.
Groundfish

Volumes of groundfish traded in 2012 reached 638,000 tonnes with a value of EUR 2.3 billion. No significant variations were reported with respect to 2011, with only small decreases of 1,000 tonnes, or 0.1%, and EUR 70 million, or 3%, registered.

Cod

Among groundfish, cod was the most traded species, totalling 300,000 tonnes for a value of EUR 1.4 billion. Cod volumes decreased by 27,000 tonnes with respect to 2011, while its values decreased by EUR 170 million, or 11%. Its 2012 price, 4.57 EUR/kg, represented a minor 3% decrease from 2011, when it was at 4.70 EUR/kg.
EU landings

Main findings

EU fishery production is characterized by a wide range of species. The volume of EU fishery products landed in 2011 was one of the lowest levels in the last decade. Registered at 4 million tonnes with a total value of EUR 6.75 billion, the 2011 level was 12%, or 0.53 million tonnes, less than in 2010. But the chart below shows a stabilization of EU landings at around 4 million tonnes.

Three commodity groups, small pelagics, groundfish and other marine fish, represented 77% of total volume. However, they also suffered a sharp decline, as shown in Table 12.

The small pelagics landings accounted for 48% of 2011 volumes, as shown in Chart 38. Within that group, four small pelagics species, namely sprat, herring, sardine and mackerel, accounted for 1.56 million tonnes or 39% of the total landings.

As regards the Netherlands, it has to be mentioned that: i) the majority of 2008 and 2009 data are confidential; ii) almost all data reported for 2010 and 2011 are estimates; iii) no 2011 data is reported for three important species, namely Black seabream, Jack and horse mackerel and Atlantic mackerel.
Chart 38
Composition of landings in the EU by Commodity group – volume, 2011
Source: EUMOFA based on elaboration of EUROSTAT data

Chart 39
Composition of landings in the EU by Commodity group – value, 2011
Source: EUMOFA based on elaboration of EUROSTAT data

Chart 40
Most important commercial species landed in the EU – volume and % of total, 2011
Source: EUMOFA based on elaboration of EUROSTAT data

- Herring: 529,438 tonnes, 13%
- Sprat (s-Brisling): 450,096 tonnes, 11%
- Mackerel: 301,501 tonnes, 8%
- Sardine: 280,212 tonnes, 7%
- Horse mackerel: 155,458 tonnes, 4%
- Cod: 125,501 tonnes, 3%
- Hake: 97,087 tonnes, 2%
- Anchovy: 93,044 tonnes, 2%
- Miscellaneous small pelagics: 88,600 tonnes, 2%
- Scallop: 88,148 tonnes, 2%
- Other main commercial species: 1,787,413 tonnes, 45%

Total: 4 million tonnes
The negative trend observed at EU level for landed products in 2011 is particularly present for Denmark, the most important fishing country, whose volumes plummeted by over 155,000 tonnes with respect to 2010. This fall was mainly attributable to a drop of 135,000 tonnes in industrial fishing (landings used exclusively for reduction to fish meal and fish oil), whereas landings for human consumption had a limited decline of 20,000 tonnes. As for Spain, United Kingdom, France, Germany and Italy which, together with Denmark, accounted for almost 66% of the 2011 total EU landed volumes, the trends observed were different. In Spain, UK and Italy, volumes landed went down by, respectively, 43,000 tonnes, 26,600 tonnes and 16,500 tonnes, a drop of around 6% for each of them. On the other hand, France and Germany recorded increases of 66,700 tonnes and 14,600 tonnes, respectively.
Small pelagics

Herring and horse mackerel

The pelagic species herring and horse mackerel presented decreases in volume, with herring dropping from 582,000 to 529,400 tonnes, and horse mackerel dropping from 310,700 to 155,000 tonnes. As for herring, while fishery supply decreased by 50% in terms of volume, there was a 36% increase as regards prices at EU level, which improved from 0,32 EUR/kg to 0,44 EUR/kg. Price in France (1,33 EUR/kg) was clearly above the EU average.

As shown in Table 13, herring unit prices increased remarkably in all main reporting Member States. At the same time, prices increased but at a lower level in almost all Baltic countries, especially in Estonia and Finland.

Table 13
Prices at landing stage of herring in main Member States (EUR/kg)

<table>
<thead>
<tr>
<th>Member State</th>
<th>2010</th>
<th>2011</th>
<th>% variation 2011/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Denmark</td>
<td>0,36</td>
<td>0,55</td>
<td>53%</td>
</tr>
<tr>
<td>Estonia</td>
<td>0,13</td>
<td>0,16</td>
<td>30%</td>
</tr>
<tr>
<td>Finland</td>
<td>0,14</td>
<td>0,19</td>
<td>35%</td>
</tr>
<tr>
<td>Latvia</td>
<td>0,17</td>
<td>0,23</td>
<td>33%</td>
</tr>
<tr>
<td>Poland</td>
<td>0,31</td>
<td>0,36</td>
<td>16%</td>
</tr>
<tr>
<td>Sweden</td>
<td>0,29</td>
<td>0,39</td>
<td>36%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>0,33</td>
<td>0,57</td>
<td>71%</td>
</tr>
</tbody>
</table>

At EU level, sardine volume increased from 0,27 million tonnes in 2010 to 0,28 million tonnes in 2011 (+3,5%). This was particularly significant in Germany, where volumes multiplied by 11 in 2011 to reach 20,200 tonnes, the main part of which was landed outside of Germany. On the other hand, Spain and Portugal reported decreases of more than 7,000 tonnes (-4,8%) and 6,500 tonnes (-10,3%), respectively, in terms of landed volumes.

Fresh sardine prices at landing stage at EU level registered a 7% growth over 2010, reaching 0,86 EUR/kg in 2011.
Looking at the historical price trend of sardine (see Chart 43), the 0.88 EUR/kg level reached in 2009 was the highest. In fact, it was almost 50% above the 0.60 EUR/kg registered in 2006, which was its lowest level.

Between 2010 and 2011, the most significant variation was observed in France, where, despite volumes going up by over 7,000 tonnes, price increased by a remarkable 79%, moving from 0.44 to 0.79 EUR/kg. On the other hand, in Portugal and Spain, the low volumes generated increases in sardine prices by 26% and 12% respectively. As a consequence, they reached a 10-year peak in Portugal, at 0.73 EUR/kg, and in Spain, at 1.02 EUR/kg. Greece was the Member State with the highest registered price (2.60 EUR/kg), well above the EU average.

**Sprat**

Volumes of sprat, one of the most important species landed in the EU, plummeted by almost 119,000 tonnes between 2010 and 2011 at EU level, generating a 25% price increase and reaching 0.22 EUR/kg. The collapse of sprat landings was mainly registered in Denmark and Sweden, which together represent around 70% of total EU landings. This occurrence was strictly linked to the 24% reduction of TACs for sprat in the Baltic Sea from 2010 to 2011.

It is important to note that most sprat landings are destined for use in fish meal. Especially in Sweden, 63% of the landed sprat went to meal factories in 2011.

**Groundfish**

**Cod**

EU cod landings in 2011 increased by 14,000 tonnes above 2010 levels, reaching a total of more than 125,000 tonnes, with prices basically stable at 2.28 EUR/kg. At Member State level, France volumes doubled – from 3,200 tonnes in 2010 to around 7,500 tonnes in 2011 – its highest result in the last ten years.

**Haddock**

France registered a strong increase of landings of haddock, jumping from less than 4,000 tonnes in 2010 to almost 7,500 tonnes in 2011. This generated a decrease in unit value from 1.59 EUR/kg to 1.35 EUR/kg.

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The landed volumes of hake in the EU had a remarkable 12% decrease, from more than 109,500 tonnes to around 97,000 tonnes in 2011. This decline was registered mainly in Spain and, to a lesser extent, in Italy and France, with each of the three markets reflecting the supply reduction in different ways (see Chart 44).

First sales of bivalves in the EU increased by almost 60,000 tonnes in 2011, reaching 249,000 tonnes with a total value of more than EUR 442 million, reaching 6% over EU total. The United Kingdom and France were the Member States that registered the highest volumes in 2011, respectively accounting for 76,300 tonnes and 57,000 tonnes. Among this commodity group, scallop was the most landed species in the EU, accounting for 35% of all bivalves landings, followed by wild mussels which represented 27%. It should be noted that the other species belonging to bivalves – oyster, clam and other molluscs and aquatic invertebrates – are mostly farmed in the EU, so a deeper analysis on their trend over the last decade is presented in Chapter 6: Aquaculture production.

Landed volumes of scallops increased by almost 23,000 tonnes in 2011, reaching a total of 88,000 tonnes at EU level. UK and France, which ranked first and second in volume among producing countries and together accounted for 96% of EU scallop production, both augmented their volumes sold. However, while 2011 prices of French scallops remained stable, at around 2.70 EUR/kg, the price of scallops landed in the UK was at 1.42 EUR/kg, compared with 1.50 EUR/kg in 2010.

The EU good result in first sales of bivalves was especially due to a 27,800 tonnes increase in wild mussels sold at EU level. With their value totaling EUR 16 million, mussels’ unit average price reached 0.24 EUR/kg in 2011, a sharp increase of 56% above 2010, when it was 0.15 EUR/kg.

We refer here only to fisheries. The shellfish farming production is not taken into account.
Denmark was the Member State with the highest amount of mussel landings (34,400 tonnes, representing 52% of the EU total). Germany and the United Kingdom together accounted for 41% of EU total, registering, respectively, 19,200 and 8,300 tonnes.

Other marine fish

Despite an overall 12% decrease in landed volumes at commodity level, some important species of other marine fish recorded strong increases, as shown in Chart 45. There also was a general reduction of unit prices, although with some variation at Member State level.

Chart 45

Some species of Other marine fish in 2011 – volume, % variation 2011/2010 and unit prices at landing stage

Source: EUMOFA based on elaboration of EUROSTAT data

Monk

In France, the unit price of monk jumped from 4.42 to 5.11 EUR/kg, while volumes increased by around 3,800 tonnes. In the UK, supply increased to around 3,600 tonnes, which pushed prices down from 5.64 EUR/kg to slightly below 4.10 EUR/kg.

Other seabreams

The group of species “other seabreams” mainly comprises sparidae which have a market importance for Mediterranean countries, but also for UK and Portugal. At the EU level, their landed volumes rose by around 7,000 tonnes between 2010 and 2011. A significant increase was registered in Spain (+5,300 tonnes) and, to a minor extent, in France and Italy, while in Portugal and the United Kingdom, landings basically remained at the 2010 level. The only remarkable variation in unit prices was felt in the UK, where prices skyrocketed from 0.96 to 1.81 EUR/kg, as a consequence of plummeting volumes, which decreased from 314 to 178 tonnes.

Ray

One of the few species reporting increased unit prices and volumes at EU level in 2011 was ray. Its most considerable result was recorded by Denmark and Malta, where landed volumes more than doubled. France also registered a significant increase, with volumes skyrocketing by 2,800 tonnes, for an 80% increase. Spain registered a drop in volumes of around -1,000 tonnes.
Seabass  The considerable price drop of seabass in France, from around 9.00 EUR/kg in 2010 to 7.07 EUR/kg, should also be noted. This collapse should not be attributed to increased volumes (1,600 tonnes more in 2011) given that in past years, high levels of production did not affect prices in such a robust way.

Table 14

<table>
<thead>
<tr>
<th>Main commercial species</th>
<th>2010</th>
<th>2011</th>
<th>variation 2011/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gilthead seabream</td>
<td>9.19</td>
<td>8.86</td>
<td>↓</td>
</tr>
<tr>
<td>Seabass</td>
<td>9.31</td>
<td>8.12</td>
<td>↓</td>
</tr>
<tr>
<td>Red mullet</td>
<td>7.92</td>
<td>7.30</td>
<td>↓</td>
</tr>
<tr>
<td>Shrimps</td>
<td>6.02</td>
<td>5.70</td>
<td>↓</td>
</tr>
<tr>
<td>Monk</td>
<td>5.26</td>
<td>4.80</td>
<td>↓</td>
</tr>
<tr>
<td>Clam</td>
<td>4.14</td>
<td>3.94</td>
<td>↓</td>
</tr>
<tr>
<td>Hake</td>
<td>3.48</td>
<td>3.53</td>
<td>↑</td>
</tr>
<tr>
<td>Oyster</td>
<td>2.57</td>
<td>2.98</td>
<td>↑</td>
</tr>
<tr>
<td>Cod</td>
<td>2.30</td>
<td>2.28</td>
<td>↓</td>
</tr>
<tr>
<td>Scallop</td>
<td>2.01</td>
<td>2.08</td>
<td>↑</td>
</tr>
<tr>
<td>Haddock</td>
<td>1.38</td>
<td>1.42</td>
<td>↑</td>
</tr>
<tr>
<td>Sardine</td>
<td>0.81</td>
<td>0.86</td>
<td>↑</td>
</tr>
<tr>
<td>Horse mackerel</td>
<td>0.64</td>
<td>0.69</td>
<td>↑</td>
</tr>
<tr>
<td>Herring</td>
<td>0.32</td>
<td>0.44</td>
<td>↑</td>
</tr>
<tr>
<td>Mussel</td>
<td>0.15</td>
<td>0.24</td>
<td>↑</td>
</tr>
</tbody>
</table>

The EU fishing fleet posted an overall profit in 2011 and showed improvement in all the main economic performance indicators analyzed. In particular, the fleet recorded a net profit of EUR 410 million, representing an increase of 28% from 2010.1

Fishing fleet structure. The EU fishing fleet was composed of 82,047 vessels in 2012, according to data from EUROSTAT and the EU fleet vessel register. This represented a decrease in overall capacity compared with 2008, including a 7% decrease in vessel numbers, 12% decrease in gross tonnage and 9% decrease in kilowatts.

Sector employment. The EU fleet employed 127,686 fishers in 2011, according to Data Collection Framework (excluding Cyprus, Estonia and Greece). This represented a 4.5% decrease over 2010, almost reaching 2008 levels.

Fishing activity and output. The EU fishing fleet spent just over 3,75 million days at sea in 2011, 95% of which were actual fishing days. Italian, French, UK and Portuguese fleets together accounted for 80% of the registered days at sea. The Italian fleet alone, at 47%, accounted for almost half of the EU fleet’s sea-days.

In addition, there was a 28% increase in the average price of fuel for the EU fleet compared with 2010, combined with a decrease in days at sea. Indeed, the average price of fuel increased in all MS except Lithuania.

The small-scale fleet generated 6.2% of the landings in weight but accounted for almost 15% of the landed value in 2011. The large-scale fleet landed 86.5% in volume and 80.4% in value, indicating lower valued products than those landed by the small-scale fleet.

1 Net profit is based on revenue (excluding subsidies and income from fishing rights) minus operating costs and capital costs.
In 2011, volumes of EU farmed products totalled 1.24 million tonnes. This was 16,000 tonnes, or 1%, lower than in 2010, and the lowest registered since 2003. The total value, EUR 3.51 billion, represented an increase of 6%, equal to almost EUR 180 million. This marked a 9-year peak, although production showed a downward trend.

Detailed analysis of the EU aquaculture sector and its economic performances are available in the Aquaculture Economic Report 2013.

Three commodity groups, salmonids, other marine fish and freshwater fish, which were responsible for almost 50% of 2011 volumes, showed the sharpest decline in absolute terms, registering decreases of 18,800 tonnes, 16,000 tonnes and 13,000 tonnes, respectively, from 2010. Bivalves, which made up 51% of total volumes, showed an increase of around 32,500 tonnes from 2010.

<table>
<thead>
<tr>
<th>Commodity group</th>
<th>2010</th>
<th>2011</th>
<th>% variation 2011/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bivalves and other molluscs and aquatic invertebrates</td>
<td>594,875</td>
<td>627,392</td>
<td>5%</td>
</tr>
<tr>
<td>Salmonids</td>
<td>376,342</td>
<td>357,497</td>
<td>-5%</td>
</tr>
<tr>
<td>Other marine fish</td>
<td>161,792</td>
<td>148,432</td>
<td>-8%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>106,108</td>
<td>89,927</td>
<td>-15%</td>
</tr>
</tbody>
</table>

For the detail of the sources used, refer to the Key Notes, page vi.

Table 16
Values of most farmed commodity groups in the EU (million euro)
(Slovakia is excluded from the 2010 aggregation)

<table>
<thead>
<tr>
<th>Commodity group</th>
<th>2010</th>
<th>2011</th>
<th>% variation 2011/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salmonids</td>
<td>1.171</td>
<td>1.268</td>
<td>8%</td>
</tr>
<tr>
<td>Bivalves and other molluscs and aquatic invertebrates</td>
<td>948</td>
<td>1.044</td>
<td>10%</td>
</tr>
<tr>
<td>Other marine fish</td>
<td>759</td>
<td>791</td>
<td>4%</td>
</tr>
<tr>
<td>Freshwater fish</td>
<td>260</td>
<td>230</td>
<td>-11%</td>
</tr>
</tbody>
</table>

At the main commercial species level, mussel, trout, salmon and oyster have been the most farmed every year since 2003. They remained the most farmed species in 2011, totalling 76% of total volumes. Among these species, 2011 production of trout was at the lowest level since 2003, totalling 183,000 tonnes. Volumes of farmed oysters totalled 98,600 tonnes, very distant from the quantities of more than 110,000 tonnes reached from 2003 to 2009. However, along with mussel and trout, it was one of the very few farmed species registering increases between 2010 and 2011. Mussel volumes were at 489,410 tonnes (+33,350 tonnes) while salmon volumes totalled 170,600 tonnes, slightly increasing with respect to the previous year but representing a peak since 2004.

Salmon registered its highest value in 2011, reaching EUR 752 million for a 31% increase over 2010 (+180,000 tonnes). Oysters also registered their highest value of the last eight years, increasing to EUR 437 million. Trout, on the other hand, plummeted in value. The 2011 trout value of EUR 493 million represented a 15% decline from 2010. Mussel, registering EUR 387 in 2010, reached EUR 426 million in 2011, for a 10% increase over the previous year.
Spain was the EU country registering the highest amount of farmed production at 274,000 tonnes, which represented an 8% increase with respect to 2010. Italy and France productions amounted to 164,000 tonnes and 207,000 tonnes respectively in 2011, showing slight increases compared with 2010. Italy’s volume registered a more than 50% increase between 2004 and 2005, but its volume trend has shown great fluctuation since 2005, while France has remained quite steady since 2004, with the exception of a 14% drop between 2009 and 2010. UK volumes started recovering in 2009, reaching 197,000 tonnes after a four-year period during which they had averaged 170,000 tonnes. In 2011, volumes of farmed species in the UK totalled around 200,000 tonnes.
In value terms, Spain, United Kingdom, Italy, France and Greece accounted for 77% of the 2011 EU total. Among these, only France stood stable at EUR 666 million, while the others saw their values increasing between 2010 and 2011. More in detail, UK’s production, led by Scottish salmon, skyrocketed by almost EUR 164 million, reaching EUR 740 million, which was the highest amount registered since 2003 in the EU.

### Table 17

<table>
<thead>
<tr>
<th>Member State</th>
<th>2010</th>
<th>2011</th>
<th>% variation 2011/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>United Kingdom</td>
<td>576</td>
<td>740</td>
<td>28%</td>
</tr>
<tr>
<td>France</td>
<td>667</td>
<td>667</td>
<td>0%</td>
</tr>
<tr>
<td>Greece</td>
<td>445</td>
<td>453</td>
<td>2%</td>
</tr>
<tr>
<td>Spain</td>
<td>414</td>
<td>447</td>
<td>8%</td>
</tr>
<tr>
<td>Italy</td>
<td>352</td>
<td>404</td>
<td>15%</td>
</tr>
</tbody>
</table>

Source: EUROMA based on elaboration of EUROSTAT, National sources and FEAP data

Bivalves and other molluscs and aquatic invertebrates

Mussel was the most farmed species in 2011. Production increased by 3%, mainly driven by Spain.

Oyster registered the second highest volumes in the commodity group in 2011, totaling 98,600 tonnes. France farmed the highest volume of oysters, reaching 84,400 tonnes, which represented an increase of 3,800 tonnes from 2010.

Not only did mussel show the highest volume among its commodity group, it was the most farmed species in 2011, totalling 489,410 tonnes with a value of EUR 426 million. This represented a 10% increase over 2010 total volume, driven mostly by Spain, which totalled almost 208,000 tonnes of farmed mussels in 2011 for a value of EUR 112 million. This represented an increase of 14,500 tonnes from 2010, when Spain volumes were at 189,000 tonnes. In value terms, France was the first-ranked Member State, registering EUR 140 million in mussel value in 2011. As regards unit prices, the EU average price stayed almost stable at 0.87 EUR/kg, while at Member State level, Portugal reported an increase of 48%, with mussel prices moving from 0.32 EUR/kg in 2010 to 0.47 EUR/kg in 2011. The Netherlands and France were the only two Member States in which unit prices were higher than the EU average, at 1.35 and 1.88 EUR/kg respectively.
Table 18
Prices of oyster in main Member States (EUR/kg)
Source: EUROMFA based on elaboration of EUROSTAT, National sources and FEEP data

<table>
<thead>
<tr>
<th>Member State</th>
<th>2010</th>
<th>2011</th>
<th>% variation 2011/2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>4,57</td>
<td>5,29</td>
<td>16%</td>
</tr>
<tr>
<td>France</td>
<td>4,3</td>
<td>4,67</td>
<td>9%</td>
</tr>
<tr>
<td>Ireland</td>
<td>2,96</td>
<td>3,74</td>
<td>26%</td>
</tr>
<tr>
<td>Spain</td>
<td>3,46</td>
<td>3,18</td>
<td>-8%</td>
</tr>
<tr>
<td>Portugal</td>
<td>2,01</td>
<td>2,79</td>
<td>39%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>1,44</td>
<td>1,43</td>
<td>-1%</td>
</tr>
<tr>
<td>Netherlands</td>
<td>1,08</td>
<td>1,15</td>
<td>6%</td>
</tr>
</tbody>
</table>

Clam
Volumes of farmed clams in the EU decreased by 4,000 tonnes, moving from 41,000 tonnes in 2010 to 37,000 tonnes in 2011. More than 85% of EU clams were farmed in Italy, reaching almost 32,300 tonnes in 2011, a decrease of 3,600 tonnes from 2010. Unit prices were significantly above the EU average of 4,63 EUR/kg in almost all reporting Member States. For example, Portugal reported a unit price of 11,26 EUR/kg, Spain and France each reported around 8,00 EUR/kg, and Italy reported 3,92 EUR/kg.

Salmonids

Salmon
Volumes of farmed salmon stood stable at 170,000 tonnes between 2010 and 2011. This was due to differing trends in the United Kingdom’s and Ireland’s supplies, with the UK totalling 158,000 tonnes in 2011, representing an increase of 3,000 tonnes over 2010, and Ireland accounting for 12,000 tonnes for a decrease of around 3,000 tonnes. Unit prices increased by over 30% at EU level, moving from 3,36 to 4,41 EUR/kg.

Trout
The EU registered an overall decrease of 19,000 tonnes, dropping from 202,000 tonnes in 2010 to 183,000 tonnes in 2011, which was its lowest level since 2003. This derived mainly from parallel decreases in volume for Germany, France, Italy, Finland and the United Kingdom: in Germany, volumes dropped from 20,500 to 10,000 tonnes, in France from 35,000 to 30,000 tonnes, in Italy from 38,600 to 36,300 tonnes, in Finland from 11,000 to 10,000 tonnes and in the UK from 14,000 to 12,600 tonnes. The average EU price of 2,69 EUR/kg represented a 6% decrease from the 2,87 EUR/kg average seen in 2010.
Gilthead seabream at EU level reported 73,000 tonnes for a value of EUR 370 million. This represented a decrease of 17,000 tonnes or 19% in volume from 2010, and a decrease of EUR 22 million, or 6%, in value. At Member State level, Greece farmed 67% of total EU volumes. However, its 49,000 tonnes volume in 2011 represented a decrease of 8,000 tonnes from 2010. While unit prices at EU level were reported at 5.08 EUR/kg, Italy showed a unit price of 6.63 EUR/kg, 30% higher than the EU average.

Seabass Between 2010 and 2011, seabass volumes at EU level increased by 2,500 tonnes, moving from 62,500 to 65,000 tonnes. Also values registered a significant boost, from EUR 316 million in 2010 to EUR 355 million in 2010. Greece was the Member State reporting the highest volumes in 2011 (36,000 tonnes), although this was a decrease of 4,000 tonnes with respect to the previous year. Greece was followed by Spain, which registered EUR 87 million value for 17,500 tonnes, making its unit price 4.97 EUR/kg, or 9% less than the EU average of 5.46 EUR/kg. It is worth noting that the 2011 price of seabass in Italy was 8.26 EUR/kg, which was 51% higher than the EU average.
While the volumes of processed fish products sold in the EU have fluctuated since 2008, their values have been steadily increasing at an average rate of 5% each year. In 2011, volumes of processed products sold in the EU totalled 4.26 million tonnes for a value of EUR 16.8 billion. With respect to 2010, 2011 volumes registered an increase of 310,000 tonnes and values increased by more than EUR 1 billion.

Miscellaneous aquatic products is composed of several different products (among which a pivotal role is played by whitefish) which are not ascribable to specific species, but only to macro-groups of products characterized by different preservation states and gradings. Therefore, the analysis will not focus on those: it rather will go deeper on the products belonging to other groups.
Chart 52
Composition of processed fish products sold in the EU (value, 2011)
Source: EUMOFA based on elaboration of EUROSTAT - PRODCOM data

Chart 53
Volumes of most important group of processed fish products sold and % variation (2010-2011)
Source: EUMOFA based on elaboration of EUROSTAT - PRODCOM data

Chart 54
Values of most relevant group of processed fish products sold and % variation (2010-2011)
Source: EUMOFA based on elaboration of EUROSTAT - PRODCOM data
Non-food use

In volume terms, non-food use products,¹³ a group of inedible processed fish products, totalled 756,000 tonnes in 2011 for a value of EUR 555 million, which represented increases of 338,000 tonnes and EUR 55 million, respectively, compared with 2010. Non-food use also recorded the greatest variation in volume between 2010 and 2011.

Tuna and tuna-like species

In value terms, tuna and tuna-like species (prepared and preserved tuna – Skipjack and Atlantic bonito¹⁴) were the second most important group of processed products sold in the EU, amounting to 13% of all processed products. The group accounted for 351,000 tonnes in 2011, staying almost flat with respect to 2010 but registering a 9% increase in value terms, reaching EUR 2.1 billion. The same increase was registered in terms of price, since it moved from 5.61 EUR/kg to 6.10 EUR/kg. Processed tuna and tuna-like species were mainly sold in Spain, which accounted for 70% of total EU sales. Volumes sold in Spain amounted to 248,366 tonnes (+4,400 tonnes compared to 2010) while values rose by EUR 165 million, reaching EUR 1.4 billion. Price moved up 10% from 5.33 EUR/kg in 2010 to 5.90 EUR/kg in 2011. In addition to the increases in Spain, the volumes of processed tuna and tuna like species sold in Italy reached 67,000 tonnes in 2011 for a value of almost EUR 490 million, and priced at 7.30 EUR/kg, (20% higher than the EU average). While volumes in Italy stood flat with respect to 2010, values increased by EUR 30 million and their price increased by 7% over the same period.

Small pelagics

Processed small pelagics sold in the EU totalled 355,000 tonnes with a value of EUR 1.18 billion. Among this group, prepared or preserved herrings¹⁵ had the highest sales, totalling 197,000 tonnes for a value of EUR 540 million, at a price of 2.74 EUR/kg. Highest sales of prepared and preserved herrings were in Poland and Germany, which together accounted for more than 90% of the EU total. Poland accounted for almost 100,000 tonnes in 2011 with a value of EUR 235 million, which represented an increase of 6,000 tonnes and EUR 10 million, but also a slight 2% decrease in price – from 2.41 EUR/kg in 2010 to 2.36 EUR/kg in 2011. However, Germany reported a volume of 78,000 tonnes, indicating a decrease of 2,500 tonnes, and a value of EUR 242 million, which was EUR 11 million lower than 2010. There was also a decrease in price paid, albeit a small one, dropping from 3.15 EUR/kg in 2010 to 3.11 EUR/kg in 2011.

¹³ Two are the items belonging to Non-food use group of products: Inedible fish products – PRODCOM code: 10204200 and Flours, meals and pellets of fish or of crustaceans, molluscs or other aquatic invertebrates, unfit for human consumption – PRODCOM code: 10204100.
¹⁴ PRODCOM code: 10202540
¹⁵ PRODCOM code: 10202520
Salmonids, the group of processed products sold in the EU with the highest average unit value, reported a price of 9.23 EUR/kg in 2011, which represented a 20% decrease from its 11.47 EUR/kg price in 2010. This group basically comprises prepared or preserved salmon and smoked salmon. In 2011, their volumes reached 41,500 tonnes and 90,000 tonnes, respectively, for a value of 88 million and EUR 1,1 billion. The prepared or preserved salmon (mainly canned Pacific salmon) was mostly sold in the United Kingdom, which acquired 80% of the EU total which equalled 33,500 tonnes with a value of EUR 25 million at a price of 0.76 EUR/kg. This price was more than 60% lower than the EU average of 2.13 EUR/kg. The smoked salmon was mainly sold in Poland, which acquired 38,400 tonnes, or 40%, of the total 90,000 tonnes sold in the EU. The value of Poland’s share was almost EUR 460 million, and its price of 11.93 EUR/kg was 5% lower than the EU average of 12.51 EUR/kg.

Bivalves registered increases in both volume and value in 2011. Their almost 190,000 tonnes in sales, with a value of EUR 786 million, represented an increase in volume of 24,000 tonnes and a EUR 163 million increase in value from 2010. Bivalves also reported a 10% increase in price, moving from 3.77 EUR/kg in 2010 to 4.16 EUR/kg in 2011. Spain provided the market for most (53%) of the processed bivalves, purchasing 99,400 tonnes in 2011, with a value of 417 million and at a price of 4.20 EUR/kg, which was in line with the EU average.

Crustaceans, which were mostly sold frozen, registered a small increase in volume, moving from 84,000 tonnes in 2010 to 88,000 tonnes in 2011. They also reported a EUR 71 million increase in value, from EUR 506 million in 2010 to EUR 577 million in 2011. Their price in 2011, 6.54 EUR/kg, marked an increase of 9% over their 2010 price of 6.00 EUR/kg. Spain purchased 50,000 tonnes, the highest of the EU Member States, which accounted for 60% of the EU total.
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