

Monthly Highlights

No. 8 / 2020

EUMOPA

European Market Observatory for
Fisheries and Aquaculture Products

In this issue

Over the 36-month period from May 2017 to May 2020, the average first-sales price of European conger in Portugal was 2,72 EUR/kg, 27% higher than in Spain (2,14 EUR/kg), and 84% higher than in France (1,48 EUR/kg). The average first-sales price of ling in France was 2,63 EUR/kg, 19% higher than in Denmark (2,21 EUR/kg) and 20% more than in Spain (2,19 EUR/kg).

The price of frozen fillets of Nile perch imported from Tanzania into the EU was 5,72 EUR/kg in the last week of June. This was significantly higher than both the preceding four-week average (4,07 EUR/kg, +41%), and a year earlier (3,16 EUR/kg, +81%).

Over the past three years, Irish consumers spent the most for fresh hake (12,11 EUR/kg on average), 19% more than that spent by consumers in Italy (10,20 EUR/kg on average) and 12% more than in France (10,77 EUR/kg).

In 2019, EU imports of fisheries and aquaculture products from Thailand amounted to 63.000 tonnes, worth EUR 324 million. Squid and skipjack tuna were the most imported species, mainly imported by Italy and the UK, respectively.

In 2018, the EU-28 catches of Patagonian toothfish were 6.886 tonnes, of which France accounted for 80%. The rest was shared between Spain (4%) and the UK (16%).

In July 2020, the EU extended the protocol to the existing Fisheries Partnership Agreement (FPA) with the Islamic Republic of Mauritania for one year. This is the biggest FPA for the EU both in financial terms and in terms of fishing opportunities.



EUMOPA news page has just been launched and can be accessed [here](#).

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1. First sales in Europe

During **January–May 2020**, 13 EU Member States (MS), Norway, and the United Kingdom reported first-sales data for 10 commodity groups¹. First-sales data are based on sales notes and data collected from auction markets.

1.1. Compared to the same period last year

Increases in value and volume: First sales grew in both volume and value only in Norway due to increased sales of cod and herring. Volume-increases against value-decreases were seen in Lithuania and in the UK, while the opposite was seen in Estonia and Portugal. A higher value of eel contributed to the overall value increase in Estonia.

Decreases in value and volume: First-sales value and volume declined in Belgium, Denmark, France, Greece, Italy, Latvia, the Netherlands, Poland, Spain, and Sweden. The drops seen in France were primarily caused by reduced sales of monk and hake. In Poland, decreases were mainly due to European flounder and cod.

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

Country	January – May 2018		January – May 2019		January – May 2020		Change since January – May 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	6.151	25,44	5.684	23,83	4.993	23,33	-12%	-2%
Denmark	85.247	130,55	81.628	115,43	52.754	79,67	-35%	-31%
Estonia	29.791	6,59	33.217	6,88	29.879	7,55	-10%	10%
France	77.820	265,50	75.979	257,49	59.281	197,66	-22%	-23%
Greece	8.635	18,29	9.769	21,80	9.582	21,02	-2%	-4%
Italy**	33.247	127,08	32.772	135,45	26.287	104,03	-20%	-23%
Latvia	22.245	4,24	26.769	4,57	21.101	4,29	-21%	-6%
Lithuania	1.101	0,87	645	0,52	1.018	0,47	58%	-10%
Netherlands	154.115	217,52	113.527	169,73	101.436	142,65	-11%	-16%
Norway	1.675.394	1.212,36	1.275.823	1.049,57	1.500.659	1.234,04	18%	18%
Poland	58.424	16,72	64.336	16,24	49.604	11,36	-23%	-30%
Portugal	27.803	67,86	31.598	77,50	26.653	77,74	-16%	0,3%
Spain	183.013	516,30	202.871	574,98	195.109	508,77	-4%	-12%
Sweden	128.380	46,15	111.862	42,08	70.165	31,73	-37%	-25%
UK	98.451	175,84	109.235	233,16	109.864	180,18	1%	-23%

Source: EUMOFA (updated 20.07.2020). 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.

** Partial data: first-sales data for Italy cover 229 ports (approximately 50% of the total landings in the country).

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



1.2. In May 2020 compared with previous years

Increases in value and volume: Of the reporting countries only Estonia and Portugal experienced increases, owing to supply increases for herring and sprat in Estonia, and scabbardfish, albacore, and bigeye tuna in Portugal. Norway reported a volume-increase against a value-drop.

Decreases in value and volume: Belgium, Denmark, France, Greece, Italy, Latvia, Lithuania, the Netherlands, Poland, Spain, Sweden, and the UK experienced decreases in both value and volume. In Belgium, the decrease was primarily caused by a decline in the supply of European plaice and common sole. In the UK, first sales decreased mainly due to a reduced sales of Norway lobster and scallop.

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

Country	May 2018		May 2019		May 2020		Change since May 2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	668	2,53	1.075	4,41	689	3,13	-36%	-29%
Denmark	16.737	30,57	9.783	21,75	6.268	10,78	-36%	-50%
Estonia	7.057	1,76	4.456	1,12	9205	1,99	107%	77%
France	16.655	52,61	14.360	51,55	10.757	35,50	-25%	-31%
Greece	2.743	4,79	3.282	6,37	3.131	5,51	-5%	-14%
Italy**	10.353	37,14	8.631	34,98	6.240	24,03	-28%	-31%
Latvia	2.492	0,57	4.211	0,77	2.901	0,65	-31%	-15%
Lithuania	290	0,19	120	0,09	73	0,04	-39%	-58%
Netherlands	30.157	43,39	23.504	35,81	20.808	28,22	-11%	-21%
Norway	224.029	153,69	234.017	178,19	259.691	133,54	11%	-25%
Poland	5.121	1,30	10.845	2,86	3.157	0,65	-71%	-77%
Portugal	9.117	16,68	7.496	15,23	8.035	17,05	7%	12%
Spain	41.968	116,38	52.364	131,32	45.464	116,24	-13%	-11%
Sweden	22.237	9,70	16.328	7,78	11.479	6,51	-30%	-16%
UK	13.780	35,92	17.725	41,91	11.875	21,15	-33%	-50%

Source: EUMOFA (updated 20.07.2020). 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.

** Partial data: first-sales data for Italy cover 229 ports (approximately 50% of the total landings in the country).

The most recent weekly first-sales data (**up to week 35 of 2020**) are available via the EUMOFA website, and can be accessed [here](#).

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

1.3. First sales in selected countries


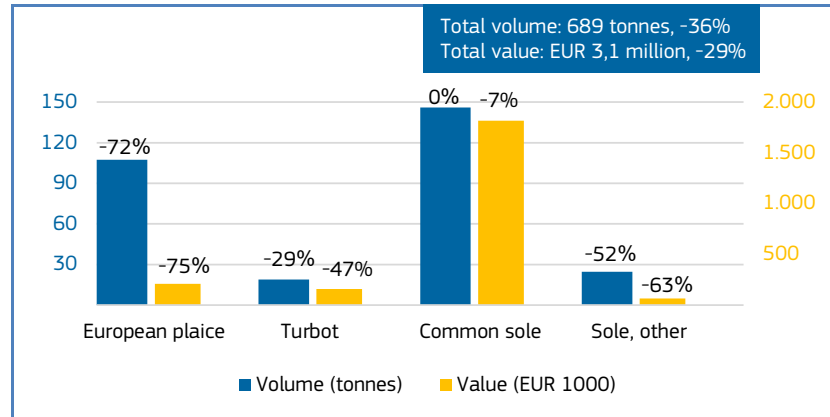
 In **Belgium**, in **January–May 2020** relative to the same period of the previous year, first-sales value and volume decreased by 2% and 12%, respectively, largely due to European plaice. In **May 2020**, European plaice, turbot, and common sole were the main species responsible for decreases in both value and volume relative to May 2019. Among these species, turbot recorded the highest average price decrease of 25% (8,43 EUR/kg).

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



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).


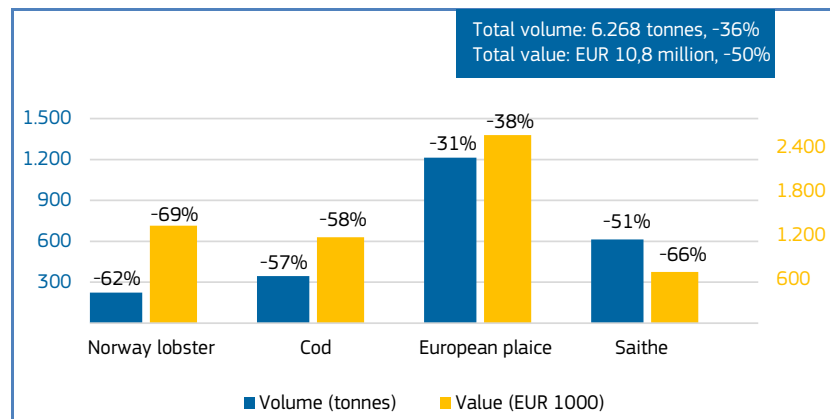
 In **Denmark**, in **January–May 2020**, first sales decreased by 31% in value (mainly due to cod and Norway lobster) and by 35% in volume (due to herring and clam), compared to January–May 2019. In **May 2020**, first sales decreased in both value and volume relative to May 2019. Norway lobster, cod, European plaice, and saithe were the primary species responsible for the decline. Among these species, the average price of saithe saw the sharpest decline (-29%), falling to 1,15 EUR/kg.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, MAY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).


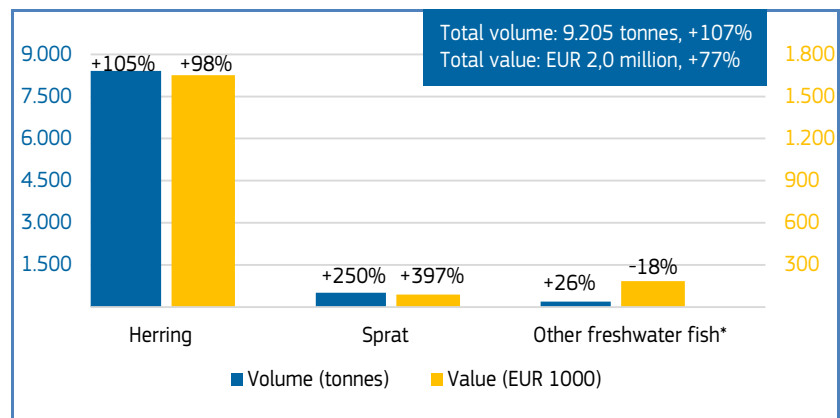
 In **January–May 2020** relative to January–May 2019, **Estonia** saw an increase in first-sales value (+10%) due to pike-perch and a decrease in volume (-10%) primarily caused by reduced supplies of herring. In **May 2020**, first sales were higher in both value and volume than they had been during the same month in 2019. This was primarily due to higher supplies of herring, sprat, and other freshwater fish*.

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, MAY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

* EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).


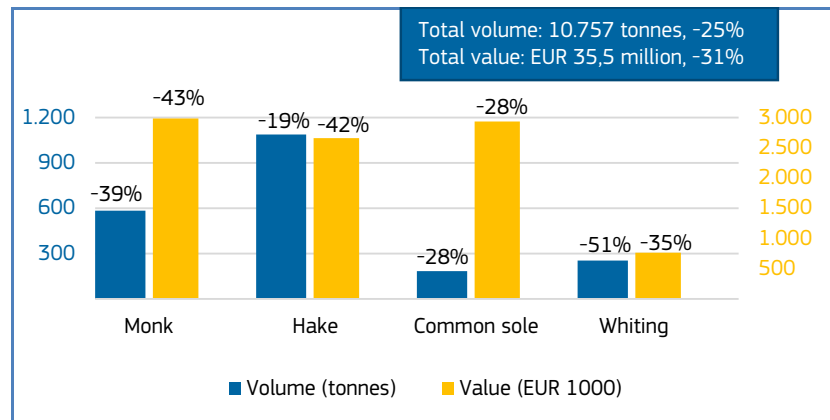
 In **France**, in **January–May 2020**, first sales decreased by 23% in value and 22% in volume compared to January–May 2019. The fall in value was caused by monk, while volume fell primarily due to reduced supplies of hake. In **May 2020**, first sales decreased in value and volume relative to May 2019. The main contributing species were monk, hake, common sole, and whiting. Of these species, hake registered a 28% decrease in average price, reaching 2,44 EUR/kg, while whiting registered 33% increase (3,01 EUR/kg).

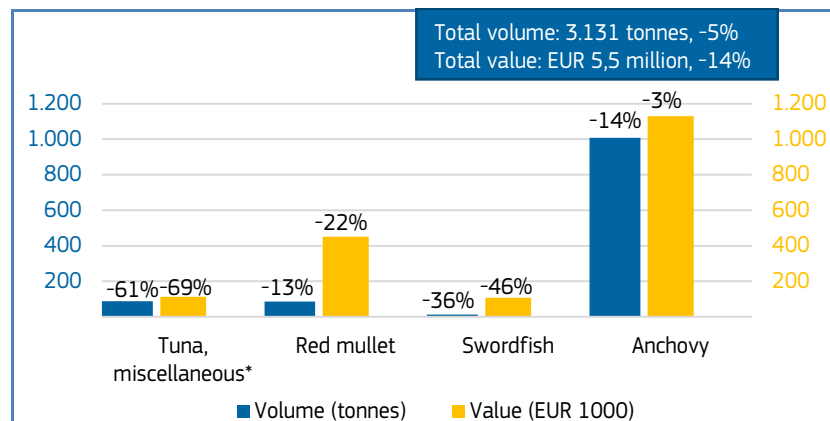
Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, MAY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

 In **Greece**, in **January–May 2020**, first-sales value fell by 4% relative to the same period in 2019, due to lower supplies of red mullet and swordfish. First-sales volume decreased by 2%, primarily due to anchovy. In **May 2020**, first-sales value and volume were lower than in May 2019, driven by miscellaneous tuna*, red mullet, swordfish, and anchovy.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE, MAY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).


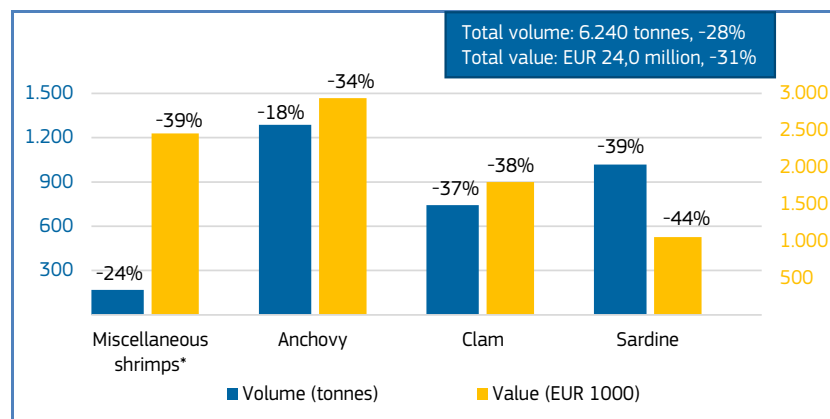
 In **Italy**, in **January–May 2020**, first sales fell by 23% in value and 20% in volume relative to the same period in 2019. Decreases in the value of miscellaneous shrimps* and anchovy, as well as reduced volumes of sardine and clam, were the main drivers behind the downward trend. In **May 2020**, first sales decreased in value and volume relative to May 2019, driven primarily by decreases in first sales of miscellaneous shrimps, anchovy, clam, and sardine.

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



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).


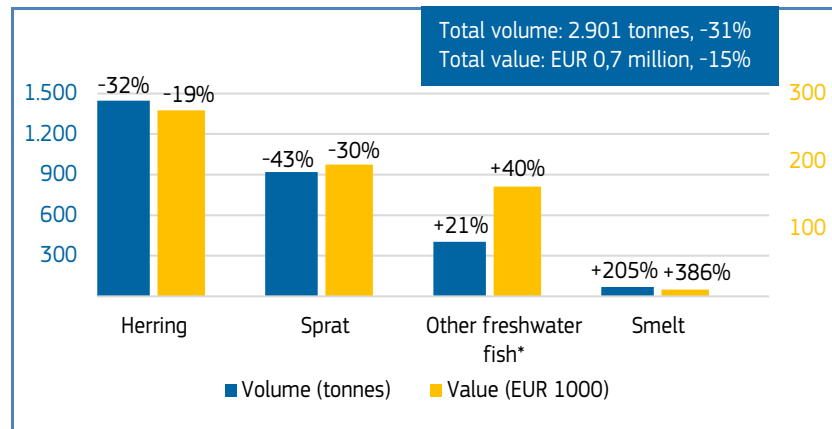
 In **Latvia**, in **January–May 2020**, sprat and herring were the key species responsible for decreases in first-sales value (–6%) and volume (–21%) relative to January–May 2019. In **May 2020**, first-sales value and volume continued to decline due to sprat and herring. Other freshwater fish* was one of the few commercial groups that recorded an increase in first sales, thus contributing to an offsetting of the overall trend. The average price of smelt increased by 60% to 0,14 EUR/kg, due to fish stock availability and stable market demand. Cod's sales in Latvia plummeted by 100% from May 2019 to May 2020 due to ban on cod fishery in subdivisions 25 and 26 of the Baltic Sea². As Latvian market suppliers mostly operate within the abovementioned subdivisions, this closure has impacted significantly Latvian activities.

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



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

* EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).


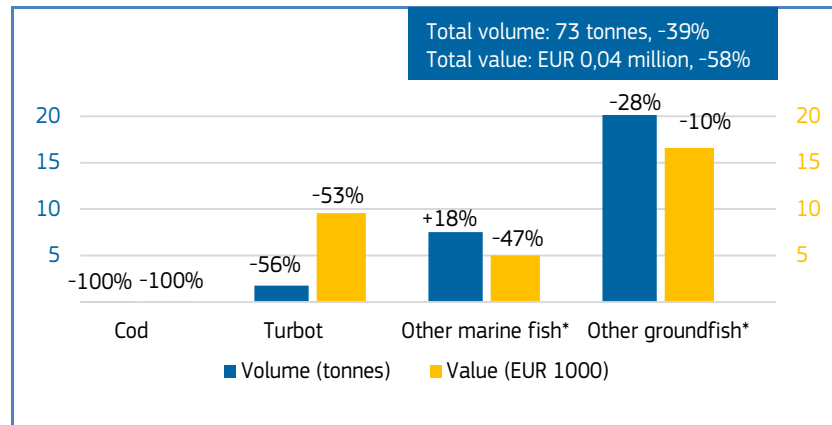
 In **Lithuania** in **January–May 2020**, first-sales value decreased by 10% due to smelt and cod, while volume increased by 58% (due to an increased supply of herring and sprat), relative to the same period in 2019. In **May 2020**, first-sales value and volume sharply fell due mainly to cod, turbot, other marine fish* (whose first sales were only down in value) and other groundfish compared to May 2019. There were very low sales of cod (caught only as by-catch) due to a ban on targeted fishing on eastern Baltic cod in 2020.

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



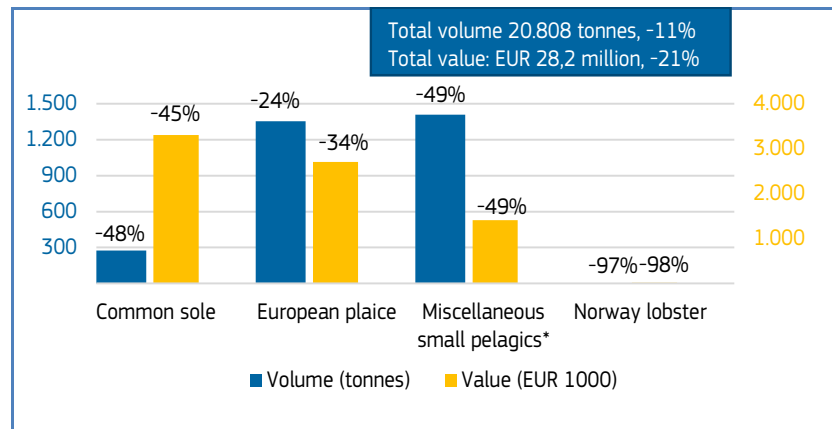
Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

* EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

² <https://www.consilium.europa.eu/en/press/press-releases/2019/10/15/baltic-sea-council-agreement-on-2020-catch-limits/>

 In the **Netherlands** in **January–May 2020**, first sales decreased by 16% in value (mainly due to common sole) and 11% in volume (due to blue whiting) compared to the same period in 2019. In **May 2020**, first sales exhibited the same downward trends in both value and volume relative to May 2019. This was mainly due to common sole, European plaice, miscellaneous small pelagics*, and Norway lobster. The latter recorded the greatest price decrease (–33%), reaching 3,91 EUR/kg. Of other species, the shrimp fishery in the Netherlands partially ceased because of lack of peeling capacity in Morocco due to COVID-19 restrictions. This is reflected in the data with a 46% decline in volumes. The low supply increased the price which was 61% higher than last year.

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

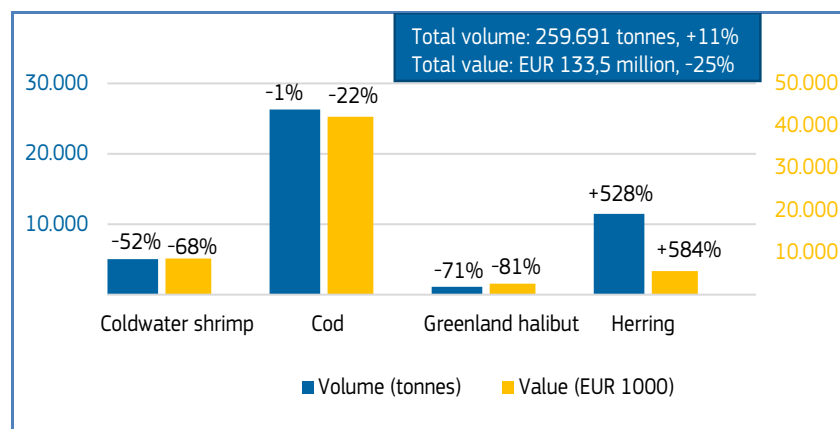


Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).

 In **Norway** in **January–May 2020**, first-sales value and volume increased by 18% compared to January–May 2019, due to cod and mackerel. In **May 2020**, first-sales value decreased relative to the same month in 2019, caused by coldwater shrimp, cod, and Greenland halibut. Total first-sales volume increased due to herring, other groundfish* and redfish. Of these species, redfish exhibited the most significant decrease in average price (–73%), falling to 0,27 EUR/kg.

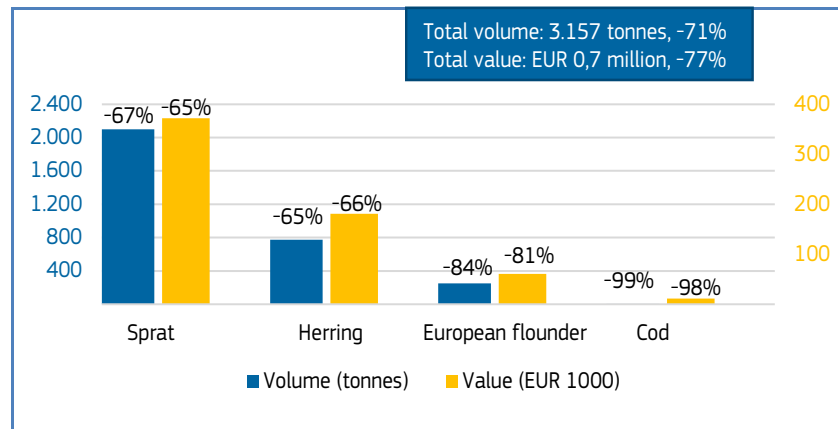
Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NORWAY, MAY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

 In **Poland** in **January–May 2020**, first sales decreased by 30% in value and 23% of volume relative to the same period of 2019. This was caused by reduced sales of cod, sprat, European flounder, and herring. In **May 2020**, first-sales value and volume were significantly lower than in May 2019, due to a sharp decline in first sales of sprat, herring, European flounder, and cod. The ban on targeted fishing of eastern Baltic cod (with by-catch still permitted) triggered a 71% increase in its average price, causing it to reach 2,43 EUR/kg.

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



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).


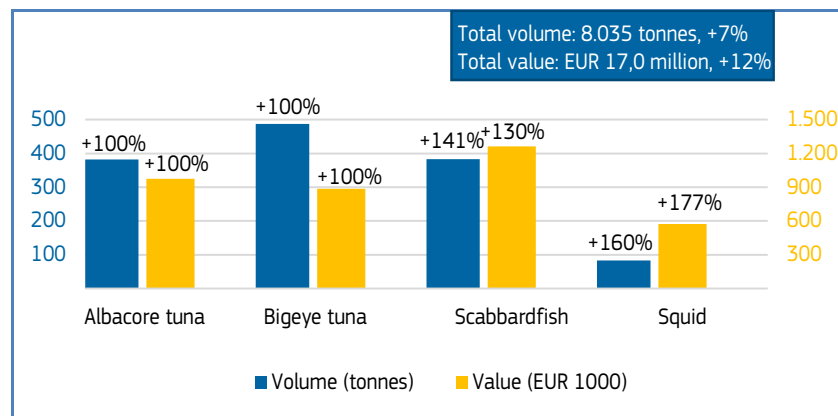
 In **Portugal** in **January–May 2020**, first sales remained stable in value and decreased by 16% (due to anchovy) in volume compared to the same period in 2019. In **May 2020**, relative to the same month of 2019, first-sales value and volume increased, with albacore tuna, bigeye tuna, scabbardfish, and squid as the biggest contributors. To be noted that first sales of albacore and bigeye tuna increased by 100% in May 2020 as there were no any registered sales in May 2019.

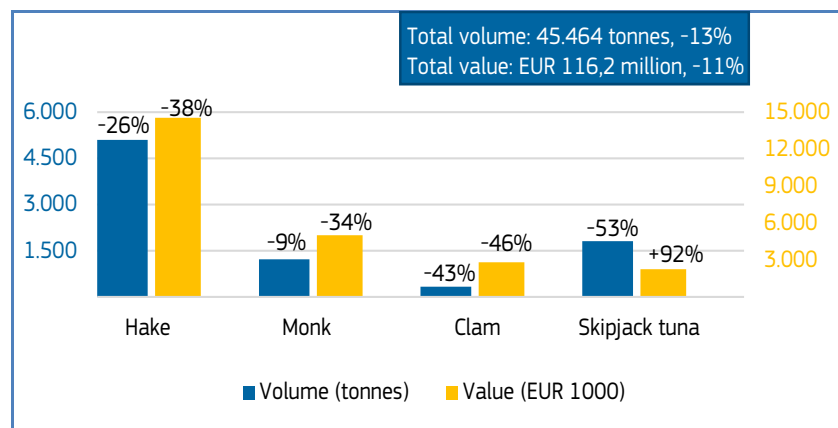
Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, MAY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

 In **Spain** in **January–May 2020**, relative to the same period of 2019, first sales showed a decrease in value (-12%) and volume (-4%) due to hake and anchovy. In **May 2020**, first sales continued on a downward trend, decreasing in value primarily due to hake, monk and clam. Skipjack tuna, bigeye tuna, and yellowfin tuna recorded the highest fall in volume. Monk recorded an average price decrease of 28%, falling to 4,10 EUR/kg.

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



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).


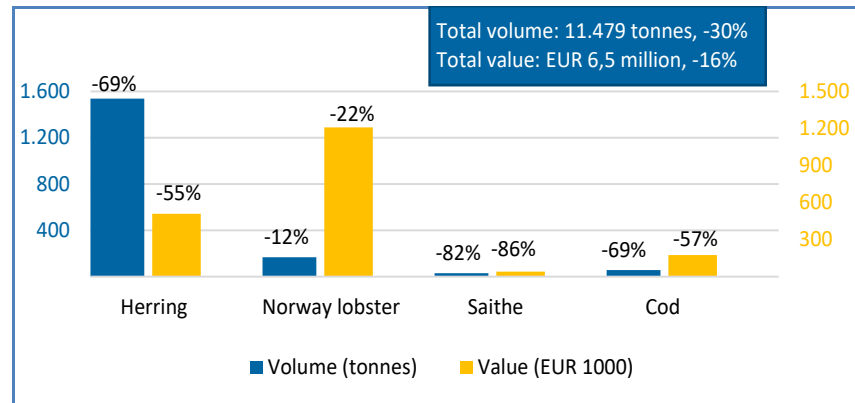
 In **Sweden** in **January–May 2020**, first sales dropped in both value (-25%) and volume (-37%) compared to January–May 2019, mainly due to herring and sprat. In **May 2020** relative to May 2019, first-sales value and volume fell due to herring, Norway lobster, saithe, cod, and sprat. The grouping of other groundfish* was a high contributor to overall fell in volume. Among these main commercial species, herring recorded the highest average price increase (+44%, to reach 0,33 EUR/kg).

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



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

*EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>).


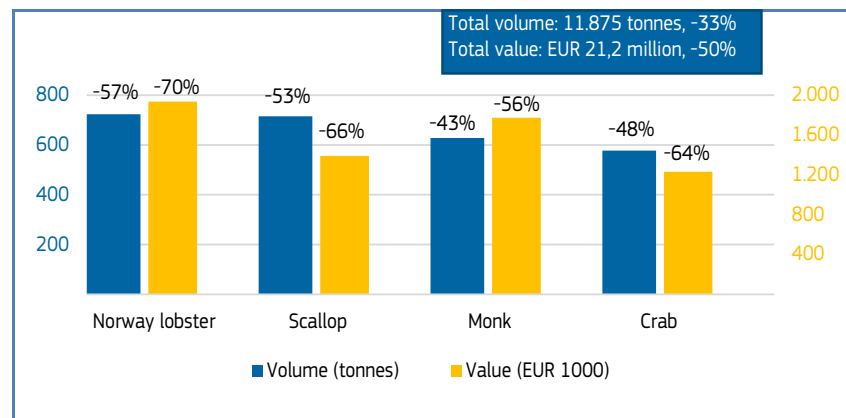
 In the **UK** in **January–May 2020** relative to the same period in previous year, first-sales value decreased by 23% mainly due to Norway lobster, while volume slightly increased by 1% due to mackerel and blue whiting. In **May 2020**, first-sales value and volume decreased relative to May 2019. The major species that caused this decline include Norway lobster, scallop, cod, and haddock. Norway lobster and crab recorded the decreases in average price (-31%) falling to 2,68 EUR/kg and 2,13 EUR/kg, respectively.

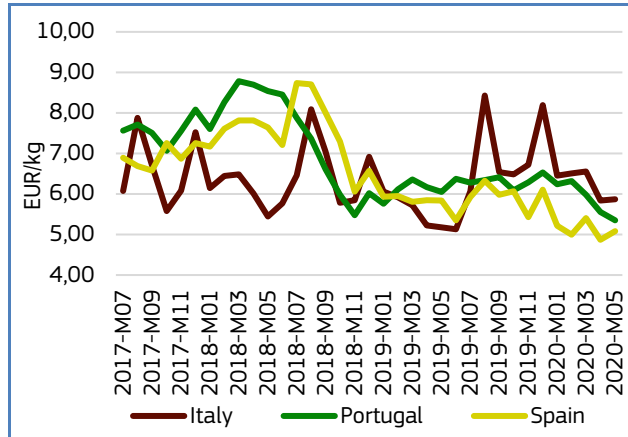
Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UK, MAY 2020**



Percentages show change from the previous year. Source: EUMOFA (updated 20.07.2020).

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

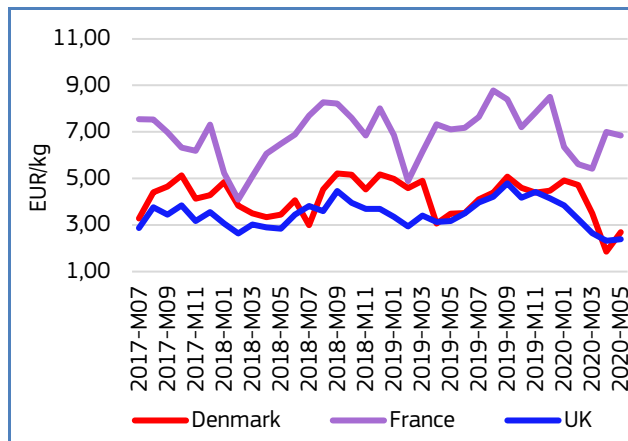
Figure 16. **FIRST-SALES PRICES OF OCTOPUS IN ITALY, PORTUGAL, AND SPAIN**



Source: EUMOFA (updated 17.07.2020).

First sales of **octopus** occur primarily in **Spain**, as well as in **Portugal** and **Italy**. The average prices in May 2020 (the most recent available data) were 5,87 EUR/kg in Italy (up from both April 2020 and May 2019 by 1% and 13%, respectively); 5,35 EUR/kg in Portugal (down from both the previous month and year by 4% and 12%, respectively). In Spain, the average price was 5,08 EUR/kg (up by 4% up from April 2020 and down by 13% from May 2019). First-sales volume decreased in Portugal and Spain (by 10% and 1%, respectively) and increased in Italy (by 15%). Octopus fisheries are seasonal, with different peaks for each of the three countries. Over the 36-month period, prices increased in Italy and decreased in Portugal and Spain. During the same period, supply increased in Portugal and Spain, and decreased in Italy.

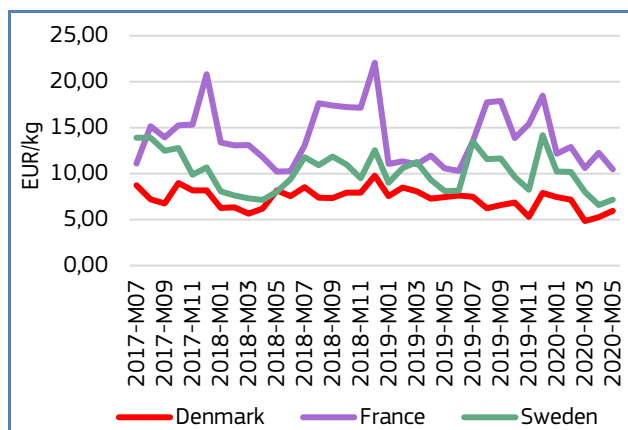
Figure 17. **FIRST-SALES PRICES OF POLLACK IN DENMARK, FRANCE, AND THE UK**



Source: EUMOFA (updated 17.07.2020).

First sales of **pollack** in Europe occur predominately in **France**, as well as in **the UK** and **Denmark**. In May 2020, the average first-sales prices of pollack were: 2,69 EUR/kg in Denmark (45% up from the previous month and down by 23% from the previous year); 6,84 EUR/kg in France (down from April 2020 and May 2019 by 2% and 4%, respectively); and 2,39 EUR/kg in the UK (4% higher than April 2020, and down by 24% from May 2019). In Denmark, the price increase in May 2020 was due to a sudden fall in supply (-41%). In France and the UK, supply increased by 13% and 50%, respectively. Over the 36-month period, pollack prices increased in both France and the UK, and decreased in Denmark. Over the same period, volume decreased in all markets. First-sales volume is seasonal, with peaks between April and June in Denmark, and between January and March in France and the UK.

Figure 18. **FIRST-SALES PRICES OF NORWAY LOBSTER IN DENMARK, FRANCE, AND SWEDEN**



Source: EUMOFA (updated 17.07.2020).

EU first sales of **Norway lobster** occur in many countries, including **Denmark**, **France**, and **Sweden**. In May 2020, the average first-sales prices of Norway lobster were: 5,96 EUR/kg in Denmark (up by 13% from the previous month, and down by 20% from the previous year); 10,48 EUR/kg in France (down from both the previous month and year by 15% and 1%, respectively); 7,17 EUR/kg in Sweden (9% higher than the previous month but 12% lower than the previous year). In May 2020 supply decreased in Denmark (-3%) and increased in France (+85%), as well as in Sweden (+18%). Over the past 36-month period, prices remained relatively stable in France and decreased in Denmark and Sweden. Over the past three years, supply decreased in all markets. Supply is seasonal, with peaks between August and September in Denmark and Sweden, and between May and June in France.



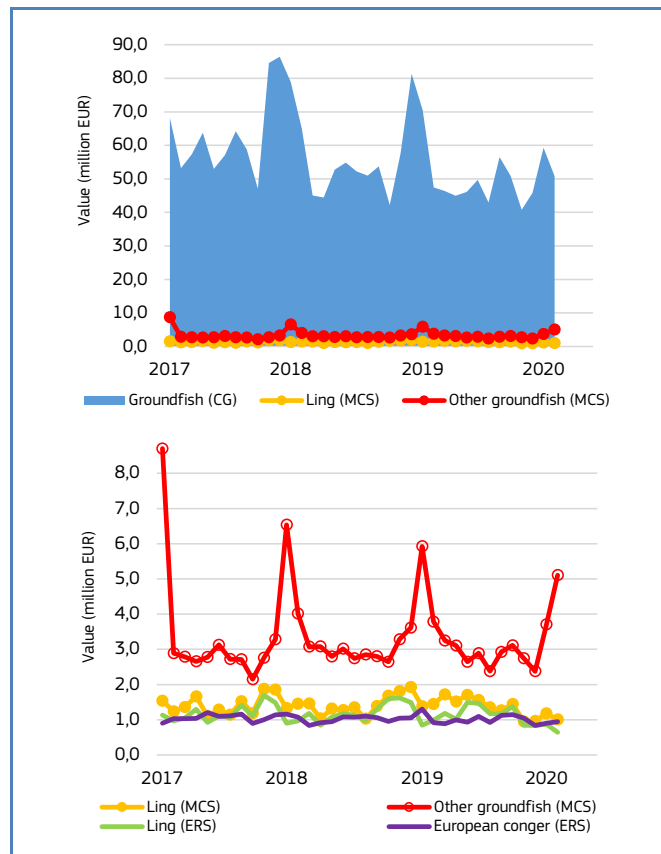
1.5. Commodity group of the month: groundfish³

The “groundfish” commodity group (CG⁴) ranked first in value and second in volume for first sales of the 10 CGs in May 2020⁵. First sales of groundfish reached 38.869 tonnes at a value of EUR 50,7 million, representing decreases of 16% and 28%, respectively, when compared to May 2019. In the past 36 months the highest first-sales value of groundfish was registered at EUR 86,3 million (March 2018).

The groundfish commodity group includes 14 main commercial species (MCS): Alaska pollock, blue whiting, cod, grenadier, haddock, hake, ling, pollack, pouting, redfish, saithe, toothfish, whiting, and grouping of the other groundfish species⁶.

At Electronic Recording and Reporting System (ERS) level, European conger (1%) and ling (2%) together accounted for 3% of the total reported first-sales value of the groundfish commodity group in May 2020.

Figure 19. **FIRST-SALES VALUE COMPARISON AT CG LEVEL, MCS LEVEL AND ERS LEVEL FOR REPORTING COUNTRIES* (JUNE 2017 – MAY 2020)**



*Norway and the UK are excluded from the analyses.

Source: EUMOFA (updated 20.07.2020).

1.6. Focus on European conger



The European conger (*Conger conger*) is a species of conger of the family Congridae. It is the largest eel in the world and can be found at 0–500 m of depth in the eastern Atlantic from Norway and Iceland to Senegal, and in the Mediterranean and Black Seas. It is usually present on rough, rocky, broken ground close to the coast when young, moving to deeper waters

when adult. It has an average adult length of 1,5 m and average weight of 2,5 to 25 kg. The maximum length is 3 m and maximum weight about 65 kg. When it reaches sexual maturity at an age of 5-15 years, it migrates to spawning areas in the Mediterranean and the Atlantic where it reproduces only once in its life. It feeds on fish, crustaceans, and cephalopods⁷.

³ EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

⁴ Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

⁵ More data on commodity groups can be found in Table 1.2 of the Annex.

⁶ Most sold other groundfish species at ERS level include blackbelly rosefish, European conger, greater forkbeard, sandells, etc.

⁷ <http://www.fao.org/fishery/species/2994/en>



The species is caught by bottom trawls, spears, hooks, and bottom set longlines. These fishing methods produce high by-catch rates, making it a frequent by-catch in fisheries targeting other species. France and Spain have the highest catch of European conger in the EU. At the EU level, there are no specific management measures for this species.

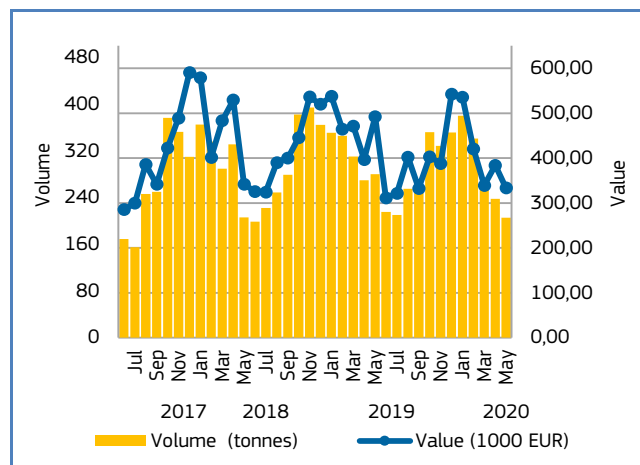
Selected countries

In **France** in January–May 2020, first sales decreased by 15% in value and by 21% in volume relative to the same period of 2019. Compared to 2018, first sales were lower by 14% in value and 20% in volume. France has the highest catch of conger among the surveyed countries. Usually, supply is highest in winter, and lowest in summer.

Of groundfish first sales in May 2020, European conger accounted for 5% of total value and 7% of total volume.

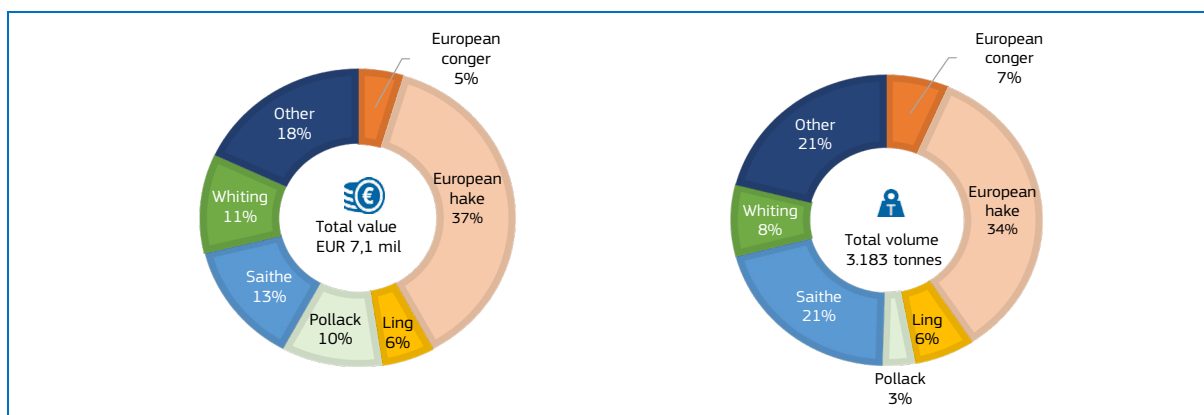
Quiberon, Guilvinec, and Noirmoutier-en-l'Île in the Bay of Biscay were the ports with the highest reported levels of European conger first sales in January–May 2020.

Figure 20. **EUROPEAN CONGER: FIRST SALES IN FRANCE**



Source: EUMOFA (updated 20.07.2020).

Figure 21. **FIRST SALES: COMPARISON OF GROUNDFISH (ERS) IN FRANCE, VALUE AND VOLUME, MAY 2020**



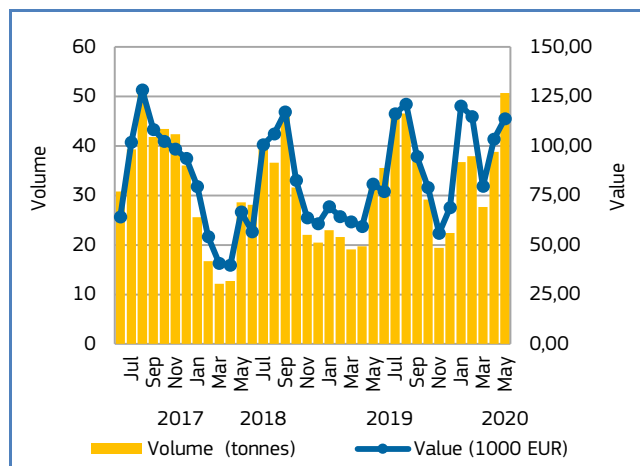
Source: EUMOFA (updated 20.07.2020).

In **Portugal** in January–May 2020, first sales of conger increased by 59% in value and 22% in volume relative to the same period in 2019. Compared with January–May 2018, value and volume increased by as much as 89% and 47% respectively. Of the surveyed countries, Portugal recorded the lowest first-sales volume of conger, which explains the tendency for fluctuations in value and volume, as seen in Figure 22.

Of groundfish sold at first sales stage in May 2020, European conger accounted for 12% of value and 10% of volume.

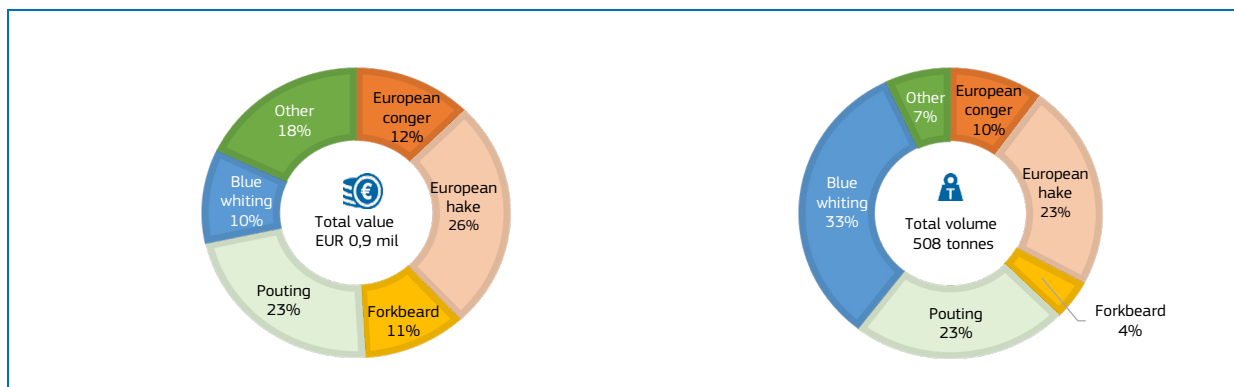
Ribeira Grande, Matosinhos, and Nazaré were the top three ports in the Bay of Biscay for first-sales value in January–May 2020.

Figure 22. **EUROPEAN CONGER: FIRST SALES IN PORTUGAL**



Source: EUMOFA (updated 20.07.2020).

Figure 23. **FIRST SALES: COMPARISON OF GROUNDFISH (ERS) IN PORTUGAL, VALUE AND VOLUME, MAY 2020**



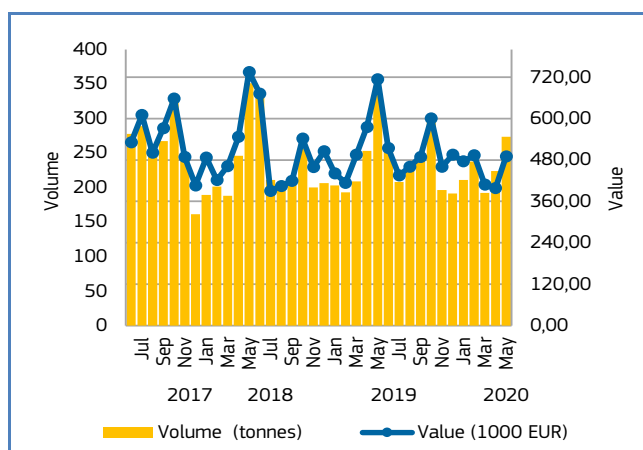
Source: EUMOFA (updated 20.07.2020)

In **Spain** in January–May 2020, first sales of European conger decreased by 14% in value and 28% in volume relative to the same period in 2019. Compared with January–May 2018, value and volume decreased by 15% and 26%, respectively.

Of groundfish sold in May 2020, European conger accounted for 3% of total first-sales value and volume. Of other species, European hake was responsible for 71% of total groundfish value and 50% of volume.

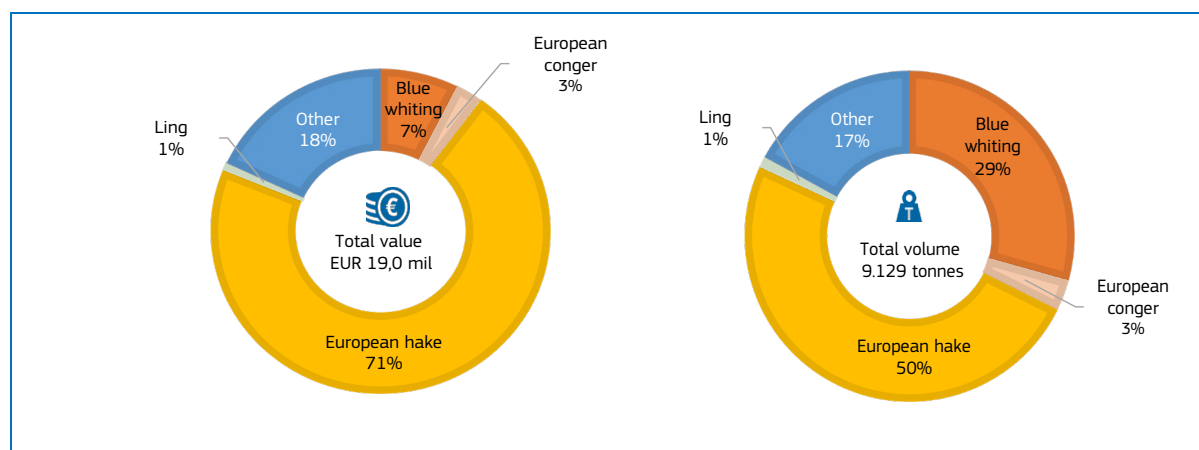
Ondárroa, A Coruña, and Vigo were the ports in the Bay of Biscay and Iberian coast responsible for nearly 60% of total first-sales value in January–May 2020.

Figure 24. **EUROPEAN CONGER: FIRST SALES IN SPAIN**



Source: EUMOFA (updated 20.07.2020).

Figure 25. **FIRST SALES: COMPARISON OF GROUNDFISH (ERS) IN SPAIN, VALUE AND VOLUME, MAY 2020**

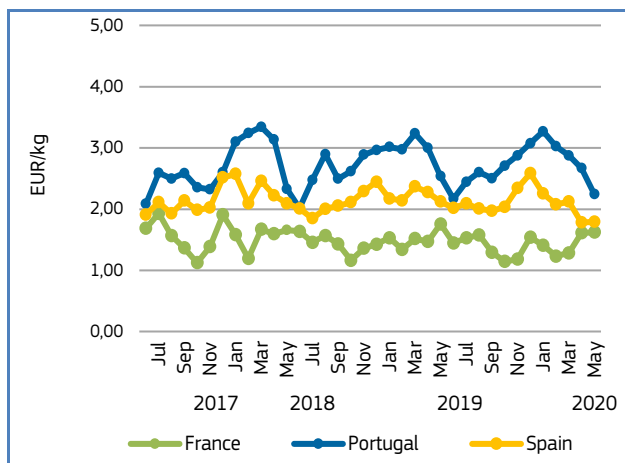


Source: EUMOFA (updated 20.07.2020).



Price trend

Figure 26. **EUROPEAN CONGER: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 20.07.2020).

Over the 36-month observation period (June 2017–May 2020), the average first-sales price of European conger in **Portugal** was 2,72 EUR/kg, which was 27% higher than in **Spain** (2,14 EUR/kg), and 84% higher than in **France** (1,48 EUR/kg).

In **France** in May 2020, the average first-sales price of European conger (1,62 EUR/kg) decreased by 8% relative to May 2019, and by 2% relative to May 2018. During the past 36 months, the average price varied from 1,12 EUR/kg for 376 tonnes in October 2017, to 1,93 EUR/kg for 155 tonnes in July 2017.

In **Portugal** in May 2020, the average first-sales price of European conger (2,24 EUR/kg) decreased by 12% compared to May 2019 and by 4% relative to May 2018. Over the observed period, the lowest average prices were seen in June 2018 at 2,01 EUR/kg for 28 tonnes. The highest average price was recorded in March 2018 at 3,34 EUR/kg for 12 tonnes.

In **Spain** in May 2020, the average price of European conger was 1,80 EUR/kg, a decrease of 15% compared to May 2019, and 14% compared to May 2018. The lowest price in the observed period was recorded in April 2020 at 1,78 EUR/kg for 224 tonnes. The highest price (2,59 EUR/kg for 192 tonnes) was observed in December 2019.

1.7. Focus on ling



The common ling (*Molva molva*), is the largest member of the family Lotidae, a group of cod-like fishes. It is found from the Barents Sea to the northern Atlantic, mainly of Europe, and in the Mediterranean Basin. It is a demersal, solitary, and benthic species, which hides among rocks, crevices, and wrecks, and lives at depths of 15 to 600 m or more, most commonly from 100 to 400 m. It feeds primarily on fish (cod, herring, flatfish) and crustaceans. The maximum age is 10 years for males and 14 for females, and it can reach 200 cm in total length and 30 kg in weight. In general, the gears used to catch ling are bottom trawls, longlines, gillnets, and handlines. EU vessels catch ling mainly with longlines or nets in open sea, in mixed fisheries, and with other groundfish species; or as by-catch, typically when the main target is Atlantic cod⁸.

Ling stocks are managed by the EU alone or in cooperation with third-party countries, such as Norway. Management includes yearly precautionary fishing quotas established on the basis of independent scientific advice received from the International Council for the Exploration of the Sea (ICES). There is a minimum conservation reference size of 63 cm in the North Sea and south-western waters⁹.

⁸ <http://www.fao.org/fishery/species/2220/en>

⁹ Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R1241&from=EN>

Ling is marketed in fresh, salted, or dried forms, and is also used as fishmeal. The salted roe of ling is considered a delicacy in Spain¹⁰.

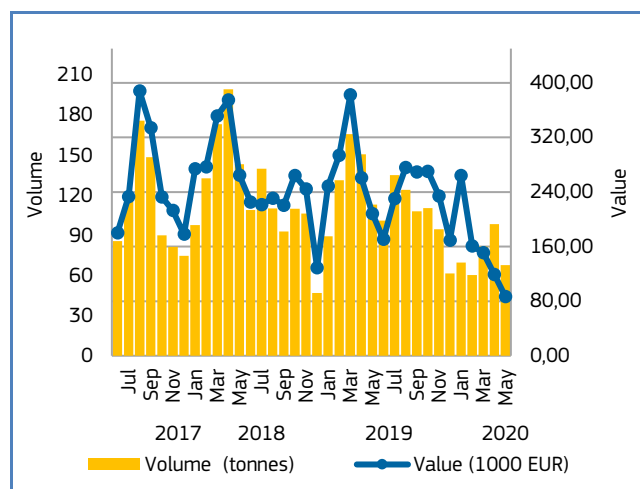
Selected countries

In **Denmark** in January–May 2020, first sales of ling decreased by 44% in value and 52% in volume relative to the same period of 2019. Compared to 2018, first sales declined by 49% in value and 58% in volume. Highest catches were usually recorded in spring, while low catches occurred in winter, when weather conditions are rough.

Of groundfish sold in May 2020, ling accounted for 3% of first-sales value and 5% of first-sales volume. The highest recorded first sales for groundfish were taken by Atlantic cod in terms of value (42%) and saithe in terms of volume (44%).

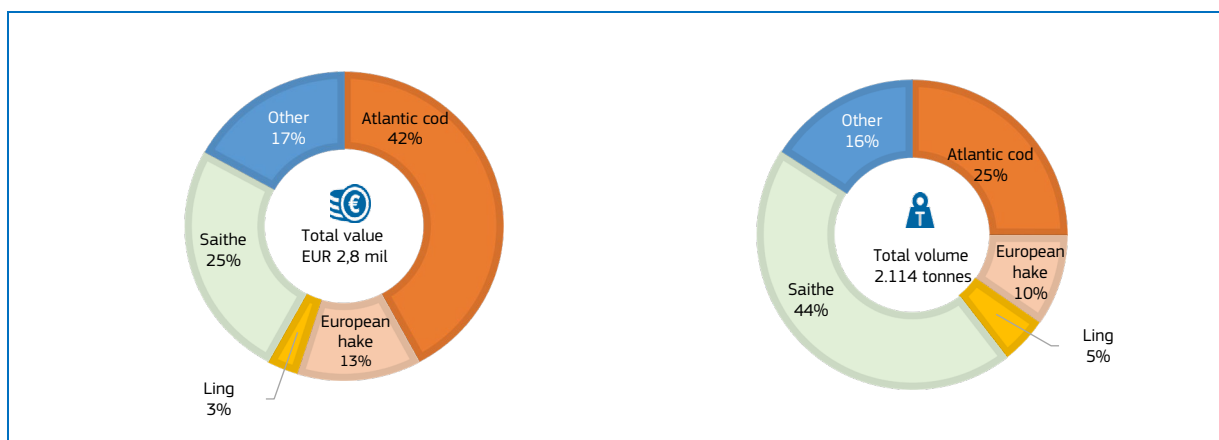
The ports of Hanstholm and Thyborøn in the North Sea accounted for 91% of reported first-sales value of ling in January–May 2020.

Figure 27. **LING: FIRST SALES IN DENMARK**



Source: EUMOFA (updated 20.07.2020).

Figure 28. **FIRST SALES: COMPARISON OF GROUNDFISH (ERS) IN DENMARK, VALUE AND VOLUME, MAY 2020**



Source: EUMOFA (updated 20.07.2020).

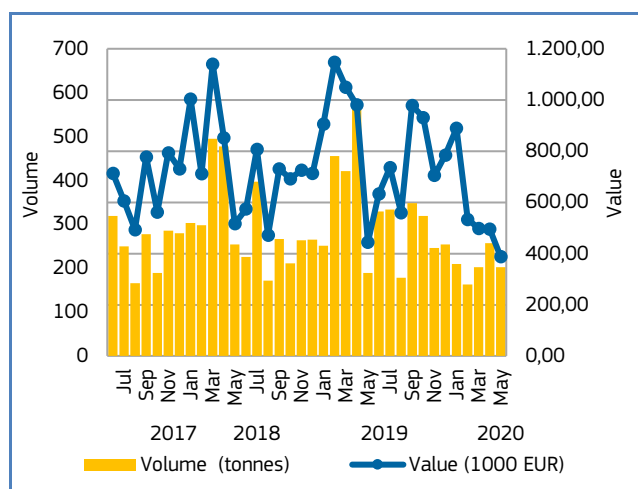
¹⁰ <http://www.playasdetrafalgar.com/comer/5-delicatessen-tipicas-de-la-zona/>

In **France** in January–May 2020, first sales of ling decreased by 38% in value and 56% in volume relative to the same period in 2019. Compared with 2018, value and volume fell by 34% and 54%, respectively. First sales fluctuated throughout the year, with the highest sales occurring in spring months, and the lowest sales taking place in August.

Ling accounted for 6% of total first-sales value and volume of groundfish sold in May 2020 (see figure 21).

The ports of Lorient and Guilvinec in the Bay of Biscay, and Boulogne-sur-Mer in the English Channel were responsible for 89% of total first-sales value in January–May 2020.

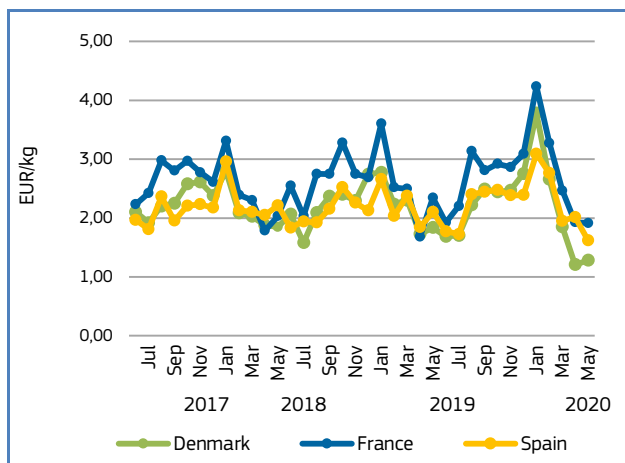
Figure 29. **LING: FIRST SALES IN FRANCE**





Price trends

Figure 31. **LING: FIRST-SALES PRICE IN SELECTED COUNTRIES**



Source: EUMOFA (updated 20.07.2020).

We have covered **ling** in previous *Monthly Highlights*

First sales: MH 11/2017 (Denmark, Norway, the United Kingdom), MH 10/2016 (Norway)

Over the 36-month observation period (June 2017–May 2020), the average first-sales price of ling in **France** was 2,63 EUR/kg, 19% higher than in **Denmark** (2,21 EUR/kg) and 20% more than in **Spain** (2,19 EUR/kg).

In **Denmark** in May 2020, the average first-sales price of ling (1,28 EUR/kg) decreased by 30% relative to May 2019, and by 31% relative to May 2018. Over the 36-month period, the average price varied from 1,21 EUR/kg for 99 tonnes in April 2020, to 3,78 EUR/kg for 70 tonnes in January 2020.

In **France** in May 2020, the average first-sales price of ling (1,92 EUR/kg) decreased by 18% relative to May 2019, and by 6% relative to May 2018. Over the observed period, the lowest average price was recorded in April 2019 at 1,68 EUR/kg for 583 tonnes. This is the period when the supply was the highest in the observed timeframe. The highest average prices were seen in January 2020 at 4,24 EUR/kg for 210 tonnes.

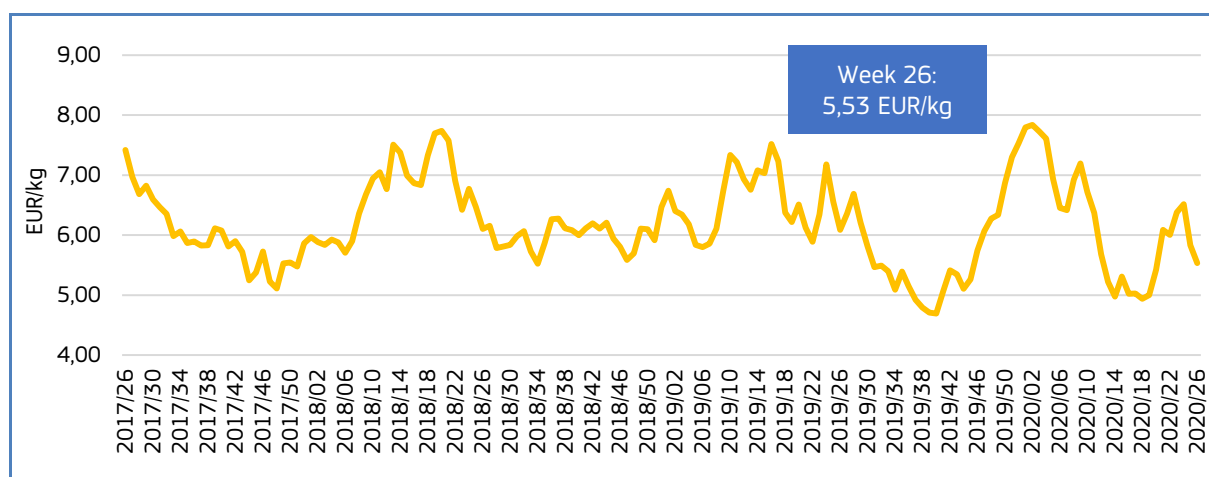
In **Spain** in May 2020 the average first-sales price of ling was 1,62 EUR/kg, 23% lower than in May 2019, and 27% lower compared to the same month of 2018. The lowest price in the observed period was recorded in May 2020 at 1,62 EUR/kg for 99 tonnes. The highest price (3,09 EUR/kg for 65 tonnes) was observed in January 2020.

2. Extra-EU imports

Each month, the weekly extra-EU import prices (average values per week, in EUR per kg) are examined for nine species. Every month, the three species that are the most relevant in terms of value and volume are examined: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (genus *Penaeus*) from Ecuador. The other six species change every month: three are from the commodity group of the month (in this issue, groundfish). This month, the featured commodity species are fresh or chilled haddock from Norway, frozen Alaska pollock from the USA, and cod, salted (not dried) or smoked and in brine from Norway. The remaining three species are randomly selected and, this month, are frozen fillets of Nile perch from Tanzania, fresh or chilled swordfish from Morocco, and live lobsters from the USA.

The weekly price of **fresh, whole Atlantic salmon** (*Salmo salar*, CN code 03021400) imported from **Norway** reached 5,53 EUR/kg in **week 26** (commencing 22nd June). This price decreased from both the preceding four-week average (6,18 EUR/kg) and the previous year (6,09 EUR/kg), by 10% and 9%, respectively. It was down by 5% from the previous week (week 25), corresponding to a 2% increase in volume. Imports in week 26 totalled 12.400 tonnes, 8% more than the preceding four-week average, and up by 2% from the previous year. Higher demand led to decrease in the import price. Over the past three years, both price and volume have exhibited a downward trend, with volume falling at a faster pace. In 2020, price fluctuated considerably, from a peak of 7,84 EUR/kg in week 2 (commencing 6th January) to a low of 4,98 EUR/kg in week 14 (week commencing 30th March).

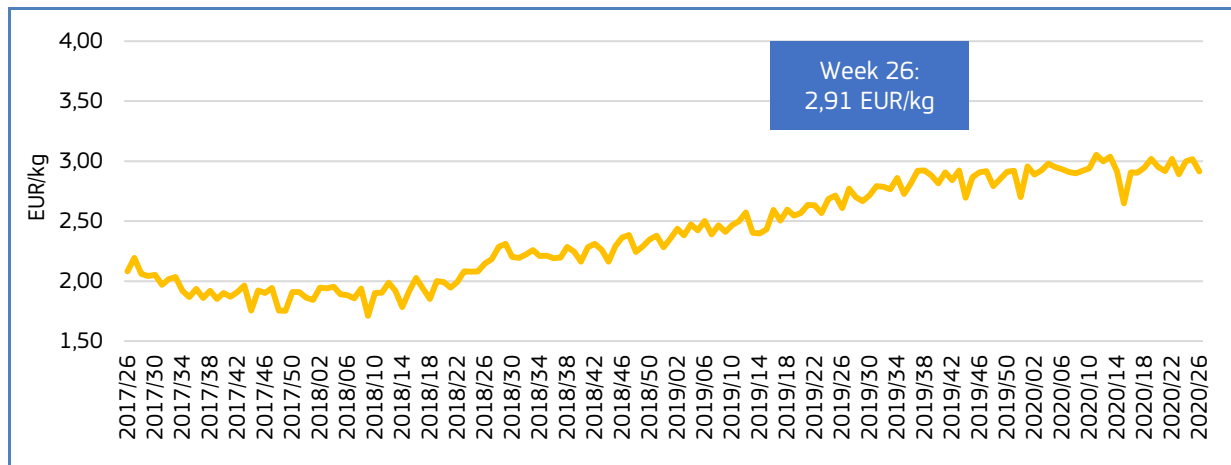
Figure 32. **IMPORT PRICE OF ATLANTIC SALMON, FRESH AND WHOLE FROM NORWAY**



Source: European Commission (updated 20.07.2020).

For **frozen fillets of Alaska pollock** (*Theragra chalcogramma*, CN code 03047500) imported from **China**, the price in **week 26** was 2,91 EUR/kg, 2% lower than the preceding four-week average (2,98 EUR/kg), and 12% higher than the same week in 2019 (2,61 EUR/kg). It was 3% lower than the previous week (week 25), corresponding to a 21% decrease in volume which can be related to the fall in demand for products imported from China during the Covid-19 outbreak. Volume totalled 2.410 tonnes, which was 17% lower than the preceding four-week average, and 43% lower than the same week in 2019. Since the beginning of 2020, the price of Alaska pollock fillets has fluctuated considerably and presented a slight increasing trend; over the same period, volume fell.

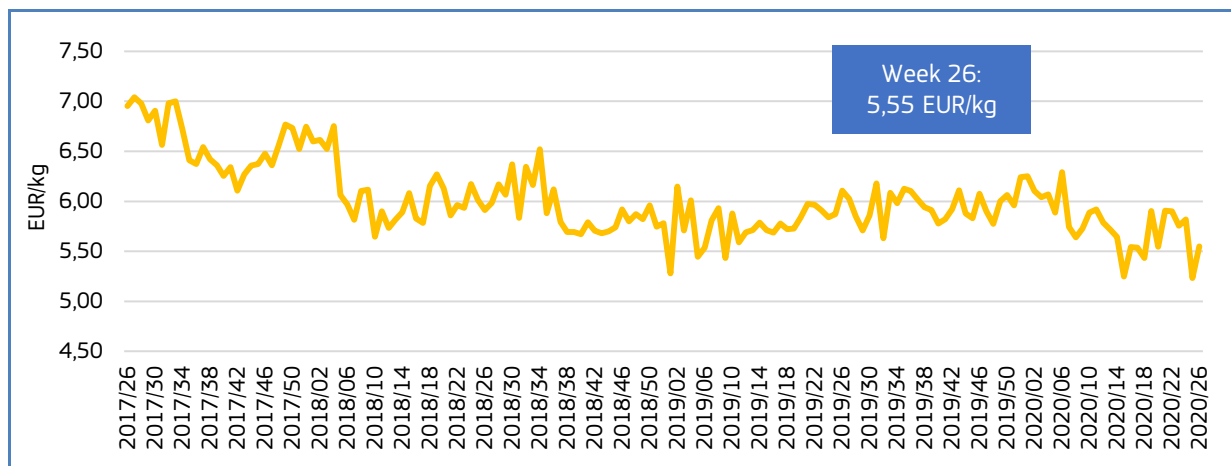
Figure 33. **IMPORT PRICE OF ALASKA POLLOCK, FROZEN FILLETS FROM CHINA**



Source: European Commission (updated 20.07.2020).

The price of **frozen tropical shrimp** (genus *Penaeus*, CN code 03061792) from **Ecuador** was 5,55 EUR/kg in **week 26**, 2% down from the average of the preceding four weeks (5,68 EUR/kg), and down 9% from the same week in 2019 (6,11 EUR/kg). The price was 6% up from the previous week (week 25), corresponding to a 6% decrease in volume. The volume in week 26 (1.500 tonnes) represented an 18% increase from the previous four-week average and a 4% decrease from the same week in 2019. This product experienced high fluctuations in supply. Over the past three years, its price has exhibited a general downward trend. In 2020, it fluctuated from 5,23 EUR/kg in week 25 to a peak of 6,29 EUR/kg in week 6 (commencing 3rd February). Price was lowest in week 26 of 2020 compared with prices in week 26 of 2018 and 2019 (5,91 EUR/kg and 6,11 EUR/kg, respectively).

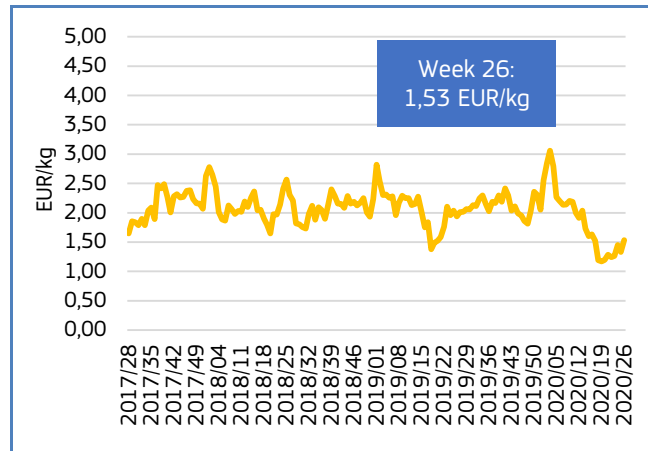
Figure 34. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR**



Source: European Commission (updated 20.07.2020).

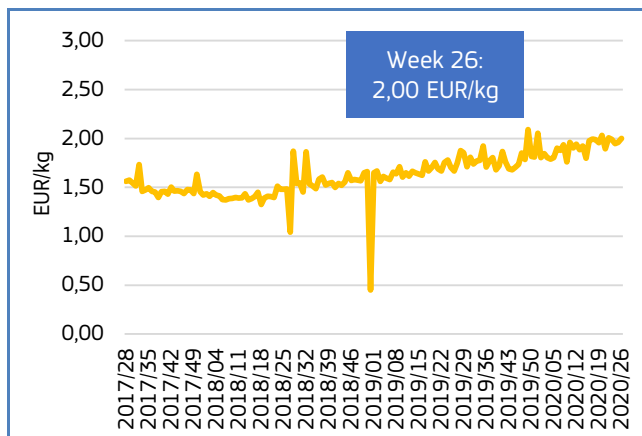
The price of **fresh or chilled haddock** (*Melanogrammus aeglefinus*, CN code 03025200) imported from **Norway** was 1,53 EUR/kg in **week 26**. This was higher (+16%) than the preceding four-week average of 1,32 EUR/kg, and 21% lower than the same week in 2019, when price was 1,94 EUR/kg. The spike in price (3,06 EUR/kg in week 3 of 2020) does not correspond to the lowest supply. The volume recorded in week 26 (191 tonnes) was lower than both the preceding four-week average (238 tonnes, -20%), and the previous year (302 tonnes, -37%). Setting aside the outlying spike, price fluctuated between 1,17 (week 10 of 2020) to 2,85 EUR/kg (week 2 of 2020) and tended to peak in mid-winter and decline by the end of spring. Over the past 36 weeks, price decreased while volume increased. Since week 1 of 2020, price has declined sharply, while volume remained relatively stable. Denmark and Sweden are the EU's top importers.

Figure 35. **IMPORT PRICE OF FRESH OR CHILLED HADDOCK FROM NORWAY**



Source: European Commission (updated 20.07.2020).

Figure 36. **IMPORT PRICE OF FROZEN ALASKA POLLACK FROM THE USA**

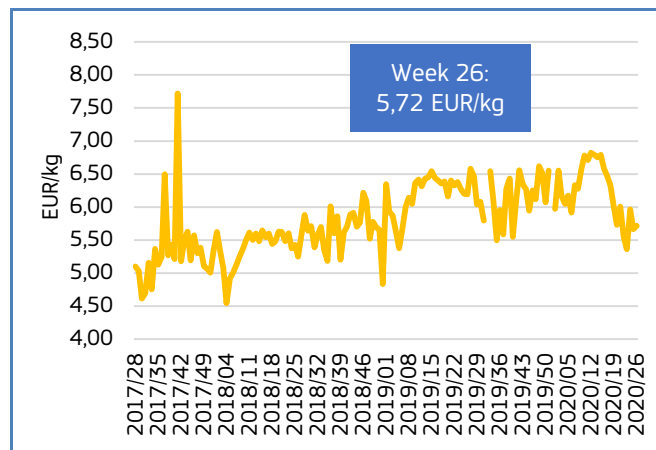


Source: European Commission (updated 20.07.2020).

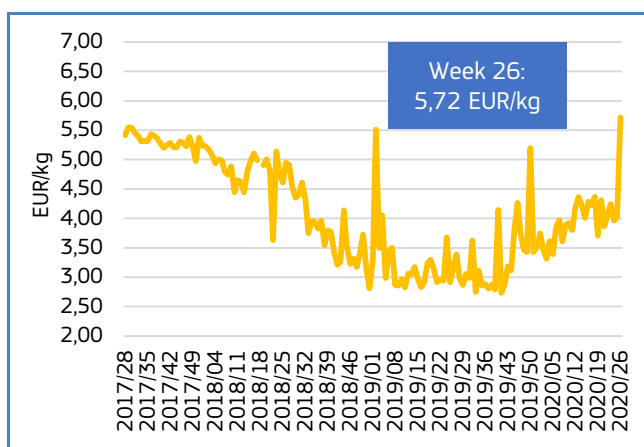
The price of **frozen Alaska pollack** (*Theragra chalcogramma*, CN code 03049490) from the **USA** was 2,00 EUR/kg in **week 26**. This was higher than both the preceding four-week average (1,98 EUR/kg, +1%), and a year earlier (1,67 EUR/kg, +20%). Price has exhibited an increasing trend over the past three years, while volume has decreased. The recorded volume of 80 tonnes in week 26 was significantly lower than both the preceding four-week average (311 tonnes, -74%), and the previous year (648 tonnes, -88%). The lowest prices recorded in weeks 27 and 52 of 2018 (1,04 EUR/kg and 0,45 EUR/kg respectively), were not related to an increase in supply, where volume was 49 tonnes and 0,02 tonnes, respectively. France and the UK were the EU's top importers.

For **cod, salted (not dried) or smoked and in brine** (*Gadus morhua*, *Gadus ogac*, *Gadus macrocephalus*, CN code 03056200) from **Norway**, the price in **week 26** was 5,72 EUR/kg, representing a slight increase from the preceding four-week average (5,63 EUR/kg, +1%), and a reduction of 8% from the previous year (6,19 EUR/kg). The spike in price (7,72 EUR/kg in week 41 of 2017) corresponds to a drop in supply (133 tonnes) from the preceding week (week 40, in which volume was 256 tonnes). The recorded volume of 179 tonnes in week 26 was significantly lower than both the four-week average (353 tonnes, -49%), and the previous year (335 tonnes, -47%). Excluding the spike, price fluctuated from 4,55 (week 4 of 2018) to 6,82 EUR/kg (week 12 of 2020), and they exhibited a clear upward trend in the observed period. At the same time, supply also increased. Sweden is the EU's top importer.

Figure 37. **IMPORT PRICE OF SALTED OR SMOKED AND IN BRINE COD FROM NORWAY**

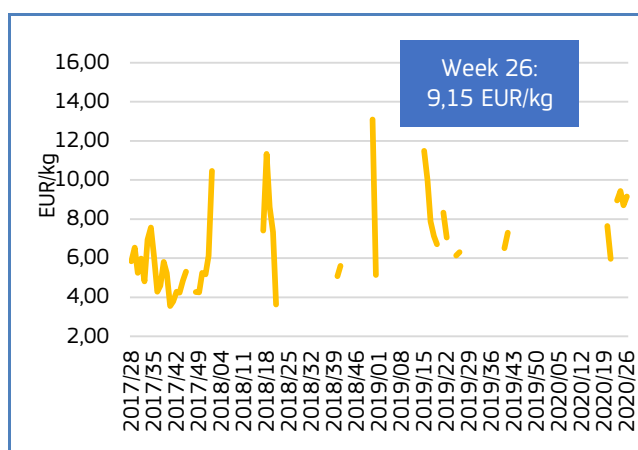


Source: European Commission (updated 20.07.2020).

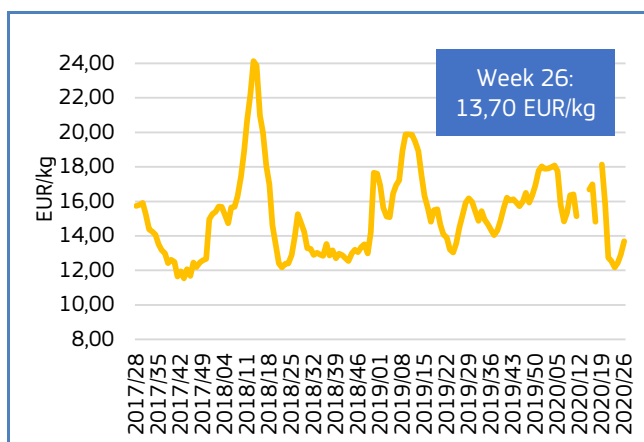
Figure 38. **IMPORT PRICE OF FROZEN FILLETS OF NILE PERCH FROM TANZANIA**

Source: European Commission (updated 20.07.2020).

The price of **fresh or chilled swordfish** (*Xiphias gladius*, CN code 03024700) from **Morocco** reached 9,15 EUR/kg in **week 26**. This was slightly higher than the preceding three-week average (9,03 EUR/kg, +1%), and up 45% from a year earlier (when price was 6,30 EUR/kg). Price and volume were sporadic and exhibit high weekly fluctuations, and the majority of prices ranged between 4,00 and 8,00 EUR/kg. Price has exhibited an increasing trend over the past three years, while volume has decreased slightly. The recorded volume of 4 tonnes in week 26 was down 88% from the preceding three-week average (32 tonnes) and significantly higher than the previous year (1 tonne, +213%). Spain is the EU's sole importer of this product.

Figure 39. **IMPORT PRICE OF FRESH OR CHILLED SWORDFISH FROM MOROCCO**

Source: European Commission (updated 20.07.2020).

Figure 40. **IMPORT PRICE OF LIVE LOBSTERS FROM THE USA**

Source: European Commission (updated 20.07.2020).

The price of **frozen fillets of Nile perch** (*Lates niloticus*, CN code 03046300) from **Tanzania** was 5,72 EUR/kg in **week 26**; significantly higher than both the preceding four-week average (4,07 EUR/kg, +41%), and a year earlier (3,16 EUR/kg, +81%). Price and volume exhibit high weekly fluctuations, and the peak in price in week 26 of 2020 does not correspond to a drop in supply. Both price and volume have exhibited a decreasing trend over the past three years. However, since week 1 of 2020, the previously downward price trend has reversed, while supply exhibited a slight downward trend. The recorded volume of 179 tonnes was significantly higher than the preceding four-week average (37 tonnes, +377%), and down from the previous year (213 tonnes, -16%). Spain, the Netherlands, and Greece are the EU's top importers.

The price of **live lobsters** (*Homarus* spp., CN code 03063210), from the **USA** was 13,70 EUR/kg in **week 26**. This was 9% up from the preceding four-week average (12,52 EUR/kg), and 5% down from the previous year (14,46 EUR/kg). Price oscillated from 11,54 (week 43 of 2017) to 24,14 EUR/kg (week 13 of 2018) and exhibited a generally increasing trend over the past three years, parallel to a decrease in supply. Price and volume exhibit weekly fluctuations and the spike in price is not related to a decrease in supply from the preceding week. The recorded volume of 10 tonnes in week 26 was lower from both the preceding four-week average (13 tonnes, -20%) and the previous year (21 tonnes, -51%). Italy is the EU's top importer.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

In May 2020, relative to May 2019, the household consumption of fresh fisheries and aquaculture products increased in both volume and value in most of the EU Member States analysed. However, consumption decreased in both volume and value in Hungary, Italy, and Poland.

The drop seen in Italy was mainly due to reduced consumption of anchovy and octopus (-21% and -35%, respectively).

On the other hand, a rise in cod and salmon consumption (+111% and 40%, respectively) contributed to the increases seen in Sweden, while salmon and trout were the primary drivers for increased consumption in Germany (+56% each).

Table 3. **MAY OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita consumption 2017* (live weight equivalent, LWE) kg/capita/year	May 2018		May 2019		May 2020		May 2020		Change from May 2019 to May 2020	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	27,0	905	13,77	977	15,74	1.304	21,76	1.179	20,27	21%	29%
France	33,7	14.270	169,95	15.145	193,74	12.821	180,76	15.973	204,64	5%	6%
Germany	13,4	4.251	62,31	4.076	64,31	6.042	100,98	5.448	88,50	34%	38%
Hungary	5,6	302	1,58	348	2,36	414	2,18	292	1,45	16%	39%
Ireland	23,0	920	13,08	958	14,23	981	14,83	1.009	15,34	5%	8%
Italy	30,9	24.971	246,83	26.171	263,69	19.753	207,52	24.254	251,14	7%	5%
Netherlands	21,1	2.285	38,99	2.199	38,01	2.647	48,22	2.555	44,68	16%	18%
Poland	15,0	2.884	17,58	3.870	25,75	3.248	21,01	3.195	21,60	17%	16%
Portugal	56,8	3810	24,25	5.670	35,55	6.891	48,59	6.812	43,89	20%	23%
Spain	45,6	50.775	380,69	50.336	403,61	59.159	496,98	60.770	501,03	21%	24%
Sweden	26,6	564	7,65	725	9,67	951	12,25	1.038	12,83	43%	33%

Source: EUMOFA, based on Europanel (updated 16.07.2020).

* Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: https://eumofa.eu/documents/20178/157549/EN_The+EU+fish+market_2020.pdf

Over the past three years, the average household consumption of fresh fisheries and aquaculture products in May has been below the annual average in both volume and value in most of the EU Member States analysed. The only exceptions were seen in Denmark, Portugal, and Spain, where the opposite trend was observed, and in Germany where value was lower but volume was higher than average in May.

The most recent weekly consumption data (up to week 32 of 2020) are available on the EUMOFA website, and can be accessed [here](#).

3.2. Fresh hake

Habitat: A demersal species, inhabiting waters between 75 and 400 m, living close to the seabed¹¹.

Catch and production areas: North Sea, Skagerrak, and off the Atlantic coasts of the UK, Ireland and France, Spain and Portugal, western North Africa, the Mediterranean Sea, and the south coast of the Black Sea¹².

Producing countries in the EU: Spain, France, Portugal.

Production method: Caught.

Main consumers in the EU: Spain, France, Portugal.

Presentation: Whole gutted, filleted.

Preservation: Fresh, frozen.

Means of preparation: Grilled, baked.



3.2.1. General overview of household consumption in France, Ireland, and Italy

France and Italy are among the EU Member States with the highest per capita apparent consumption¹³ of fisheries and aquaculture products. In 2017, this amounted to 33,7 kg and 30,9 kg per capita, respectively. French consumption was 39% higher than the EU average of 24,3 kg per capita, while in Italy it was 27% lower. Relative to 2016, apparent consumption in France increased by 1,5%. In Italy, it decreased by 0,6%.

Per capita apparent consumption of fisheries and aquaculture products in Ireland was 5% below the EU average in 2017 (23,0 kg). Compared to Portugal, the Member State with the highest per capita apparent consumption (56,8 kg), Ireland was 60% lower. However, Ireland was the only Member State whose consumption remained stable relative to 2016. See more on per capita apparent consumption in the EU in Table 3.

Over the past three years, household consumption of fresh hake in Italy was nearly four times higher than that of France. Ireland exhibited the lowest consumption of the three countries analysed. However, Irish consumers spent the most for a kilogram of fresh hake (12,11 EUR/kg on average), 19% more than that spent by consumers in Italy (10,20 EUR/kg on average) and 12% more than in France (10,77 EUR/kg).

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

First sales: France **2/2018**, **1/2016**; Greece **7/2016**, **3/2014**; Italy **2/2018**, Portugal **5/2015**; Spain **2/2018**.

Consumption: France **9/2018**, **9/2016**, **4/2016**, **7/2015**, **6/2014**; Greece **9/2016**, **4/2016**, **7/2015**; Ireland **9/2016**; Italy **7/2015**, **6/2014**; Portugal **9/2018**, **9/2016**, **4/2016**, **6/2014**; Spain **9/2018**, **9/2016**, **4/2016**, **7/2015**, **6/2014**; Sweden **6/2014**; the UK **6/2014**.

Extra-EU Import: Chile **4/2020**, **6/2018**; Namibia **1/2020**, **6/2019**, **1/2018**; South Africa **5/2019**, **6/2018**, **2/2018**, **1/2018**; Norway **1/2019**.

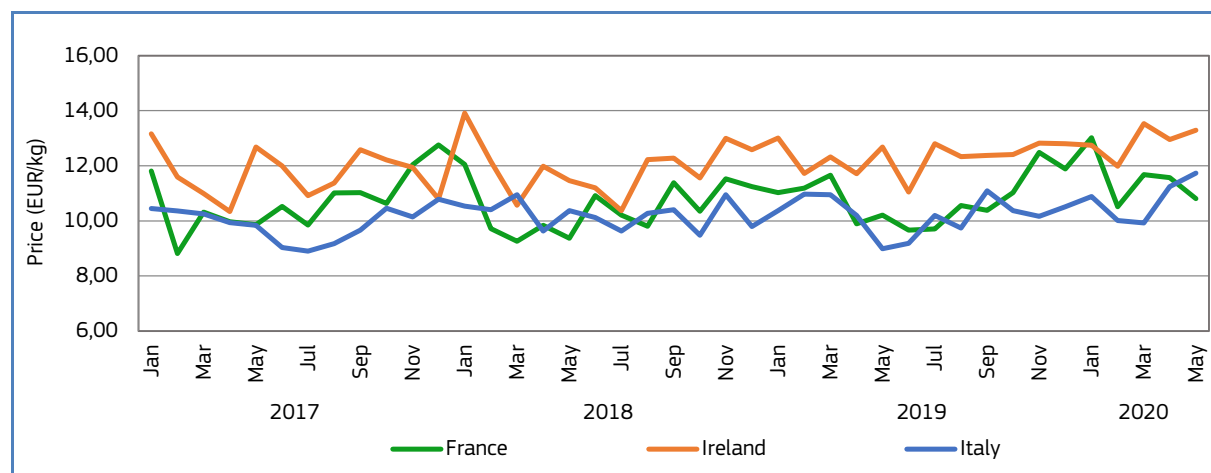
Topic of the month: First sales of European hake in major places of sale **7/2019**; Hake in Spain **8/2015**; Hake in France **2/2015**.

¹¹ <https://www.eumofa.eu/documents/20178/132584/MH+9+2018+EN.pdf>

¹² <http://www.fao.org/fishery/species/2238/en>

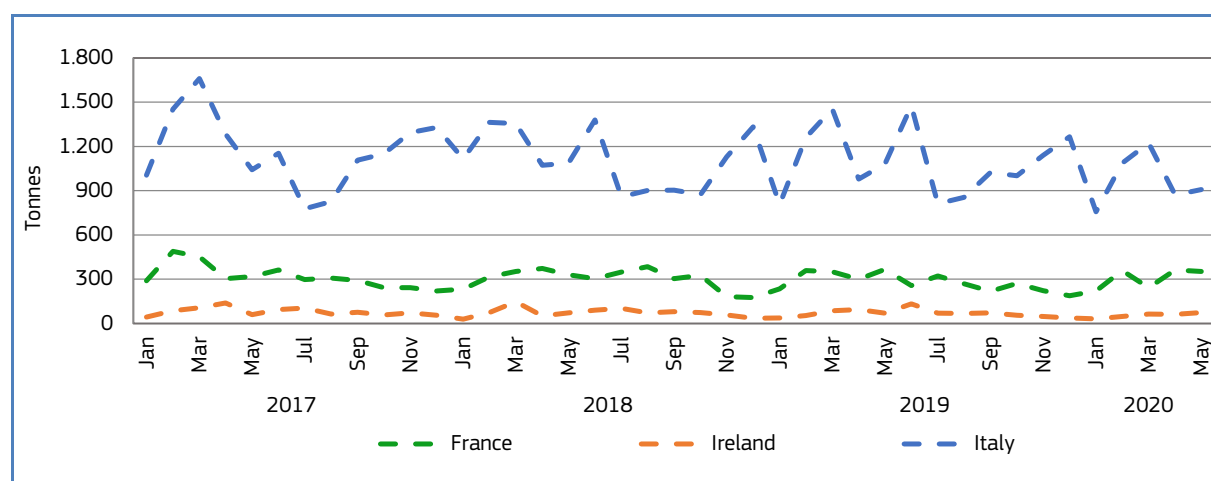
¹³ "Apparent consumption" is calculated by using the supply balance sheet that provides an estimate of the supply of fisheries and aquaculture products available for human consumption at EU level. The calculation of the supply balance sheet is based on the equation: *Apparent consumption* = [(total catches – industrial catches) + aquaculture + imports] – exports. Catches targeted for fishmeal (industrial catches) are excluded. Non-food use products are also excluded from imports and exports.

Figure 41. **PRICES OF FRESH HAKE PURCHASED BY HOUSEHOLDS**



Source: EUMOFA, based on Europanel (updated 22.05.2020).

Figure 42. **HOUSEHOLD PURCHASES OF FRESH HAKE**



Source: EUMOFA based on Europanel (updated 22.05.2020).

3.2.2. Consumption trends in France

Long-term trend (January 2017 to May 2020): Increasing in price and decreasing in volume.

Yearly average price: 10,72 EUR/kg (2017), 10,47 EUR/kg (2018), 10,80 EUR/kg (2019).

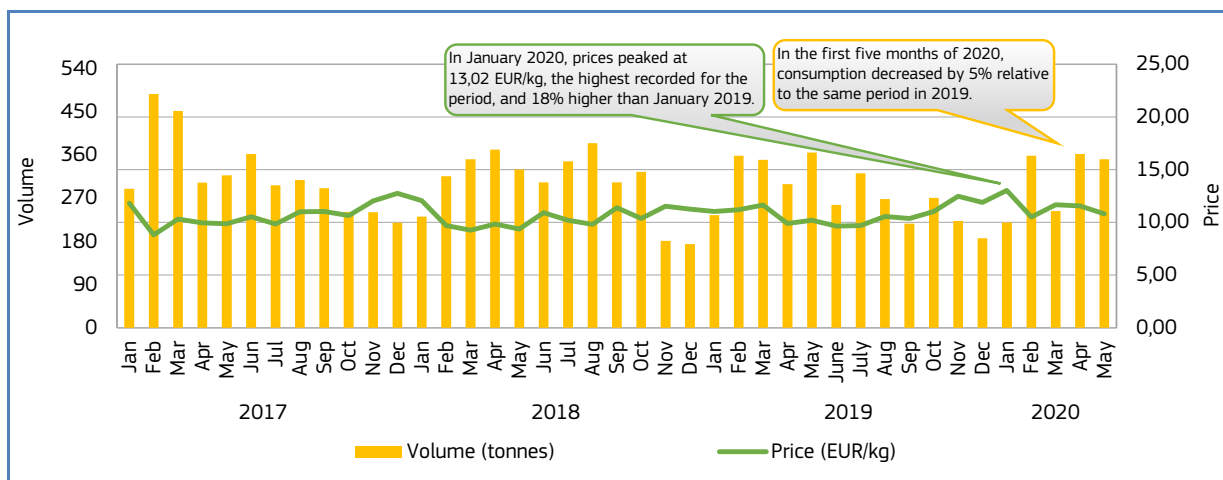
Yearly consumption: 3.813 tonnes (2017), 3.622 tonnes (2018), 3.356 tonnes (2019).

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

Average price: 11,52 EUR/kg.

Average consumption: 1.536 tonnes.

Figure 43. **RETAIL PRICE AND VOLUME OF FRESH HAKE PURCHASED BY HOUSEHOLDS IN FRANCE**



Source: EUMOFA, based on Europanel (updated 22.05.2020).

3.2.3. Consumption trends in Ireland

Long-term trend (January 2017 to May 2020): Increasing in price and decreasing in volume.

Yearly average price: 11,71 EUR/kg (2017), 11,94 EUR/kg (2018), 12,34 EUR/kg (2019).

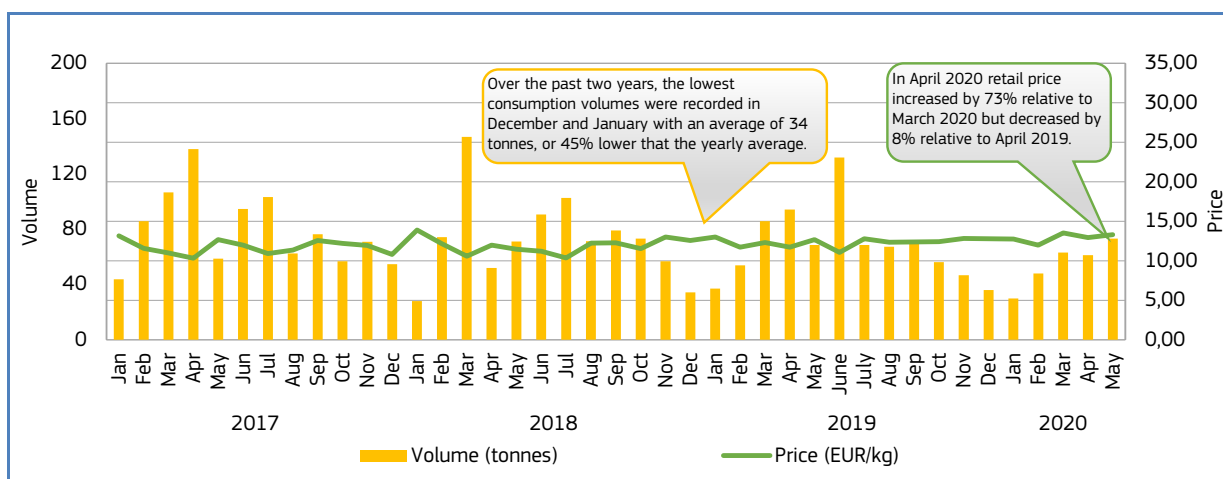
Yearly consumption: 952 tonnes (2017), 880 tonnes (2018), 818 tonnes (2019).

Short-term trend (January 2020 to May 2020): Seasonal increase in both price and volume.

Average price: 12,90 EUR/kg.

Average consumption: 275 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME OF FRESH HAKE PURCHASED BY HOUSEHOLDS IN IRELAND**



Source: EUMOFA, based on Europanel (updated 22.05.2020).

3.2.4. Consumption trends in Italy

Long-term trend (January 2017 to May 2020): Increasing in price and decreasing in volume.

Yearly average price: 9,92 EUR/kg (2017), 10,21 EUR/kg (2018), 10,23 EUR/kg (2019).

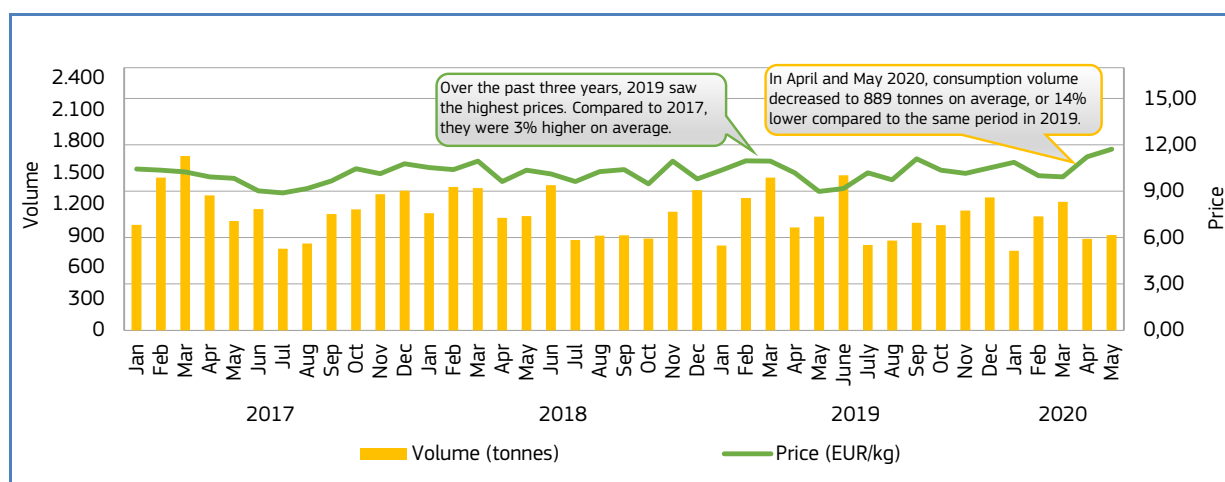
Yearly consumption: 14.088 tonnes (2017), 13.375 tonnes (2018), 13.151 tonnes (2019).

Short-term trend (January 2020 to May 2020): Seasonal increase in both price and volume.

Average price: 10,76 EUR/kg.

Average consumption: 4.844 tonnes.

Figure 45. RETAIL PRICE AND VOLUME OF FRESH HAKE PURCHASED BY HOUSEHOLDS IN ITALY



Source: EUMOFA, based on Europanel (updated 22.05.2020).

4. Case study – Fisheries and aquaculture in Thailand

4.1. Introduction

Thailand is a kingdom located in Southeast Asia, bordering Cambodia, Myanmar, Burma and Malaysia. The country's long coastline extends along the Gulf of Thailand in the east, and the Andaman Sea (Indian Ocean) in the west, with several territorial islands close to its shore.

The population of Thailand is approximately 70 million people (2020)¹⁴. As a coastal state, the seafood industry plays a particularly important role: it is estimated that more than 650.000 people worked in the seafood industry in 2017¹⁵, and the low price of seafood means that it is the most accessible source of animal protein for the country's citizens¹⁶.

The majority of Thailand's seafood production is derived from fisheries, with aquaculture accounting for roughly 35% of total production. Despite producing lower volumes, aquaculture dominates in terms of value. Marine species are the most important for both capture and aquaculture¹⁷ with tuna and shrimp as the primary contributors for capture and aquaculture production, respectively. In terms of trade, Thailand ranks amongst the top 10 seafood trading countries in the world, in terms of both imports and exports¹⁸.

Thailand's fishing industry is dominated by small-scale, artisanal vessels. Similarly, the country's aquaculture industry has a fragmented infrastructure which is largely comprised of small operations.

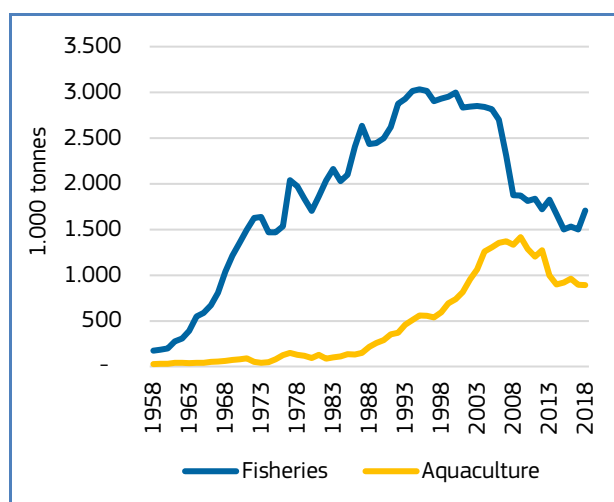


Source: World Factbook

4.2. Fisheries and aquaculture

Total volume of wild catch steadily increased from 1958 until the year 2000, when the trend began to decline. Volume of wild catch has since continued to decrease. Conversely, production in the aquaculture sector remained stable until 1988 when volume began to increase. The trend peaked in 2010, after which total production volume fell by 30%.

Figure 46. **WILD CATCH AND AQUACULTURE PRODUCTION IN THAILAND (volume in 1.000 tonnes)**



Source: FAO.

¹⁴ <https://www.worldometers.info/world-population/thailand-population/>

¹⁵ <http://www.seafdec.org/fisheries-country-profile-thailand/>

¹⁶ *Ibidem*.

¹⁷ <http://www.seafdec.org/fisheries-country-profile-thailand/>

¹⁸ <https://research.rabobank.com/far/en/sectors/animal-protein/world-seafood-trade-map.html>

Overfishing could be identified as a possible cause for the decline in production volume. Poorly regulated fishing has resulted in limited stock sizes for several main commercial species¹⁹ (MCS), which in turn has reduced catch sizes from the year 2000 onwards. In the absence of large catch volumes from fisheries, the aquaculture sector has flourished, gradually supplying larger quantities which have stabilised in recent years.

Fisheries

According to FAO, the total volume from wild catch in Thailand in 2018 was 1,71 million tonnes. From 2014 to 2018 the total annual volume of wild catch remained relatively stable, yielding a modest increase of roughly 2% throughout the period. Marine fishes nei ('not elsewhere included'), anchovies, and freshwater species nei were the largest categories in terms of volume²⁰.

Table 4. **WILD CATCH IN THAILAND, MAIN SPECIES (volume in 1.000 tonnes)**

Species	2014	2015	2016	2017	2018
Marine fishes nei	459	406	389	371	448
Anchovy	128	102	130	121	165
Freshwater fishes nei	94	97	98	96	98
Common squid nei	68	68	86	68	87
Indian scad	36	40	55	56	83
Carangidae	44	51	68	97	83
Sardinella	75	81	73	72	79
Indian mackerel	50	47	50	49	66
Other species	716	610	583	570	599
Total	1.670	1.502	1.532	1.500	1.708

Source: FAO.

Historically, Thailand's fisheries sector has faced problems as a result of overfishing and conflict between fishermen over limited fish stocks. Elevated costs of labour and fuel, in conjunction with low bargaining power, lead to reduced profitability and further exacerbate the situation.

Illegal, unreported, and unregulated (IUU) fishing is a significant problem in Thailand. This leads to over-exploited fish stocks and has resulted in restrictions being imposed for several species. In 2015, the European Union issued a warning that they would impose a trade ban if Thai authorities did not take action against IUU fishing. The EU subsequently issued a "yellow card", highlighting that Thailand was not taking sufficient steps to combat IUU fishing. This may have led to a trade ban if the necessary measures were not implemented within the set period.

Following improvements to fishing regulation and enforcement, the EU rescinded the yellow card²¹. Such improvements heralded benefits to the industry as a whole, and could continue to change market dynamics and improve the sustainability of threatened species (e.g. tuna)²².

Aquaculture

In 2018, Thailand's aquaculture production surpassed 890.000 tonnes, according to FAO. From 2014 to 2016, total aquaculture production in Thailand increased by 7%. Conversely, the period from 2017 to 2018 yielded a decrease of 8% in total production. Overall, total production of aquaculture products has slightly decreased from 2014 to 2018 in terms of volume. The most heavily-farmed species in Thailand is whiteleg shrimp (*Litopenaeus vannamei*), which accounted for 39% of total production in 2018, followed by Nile tilapia and African bighead catfish.

¹⁹ EUMOFA aggregation for species (Metadata 2, Annex 3: <https://eumofa.eu/supply-balance-and-other-methodologies>)

²⁰ The first and the latter are general categories for various types of species, which is "not elsewhere included", thereof nei.

²¹ https://ec.europa.eu/fisheries/press/commission-lifts-%E2%80%9Cyellow-card%E2%80%9D-thailand-its-actions-against-illegal-fishing_en

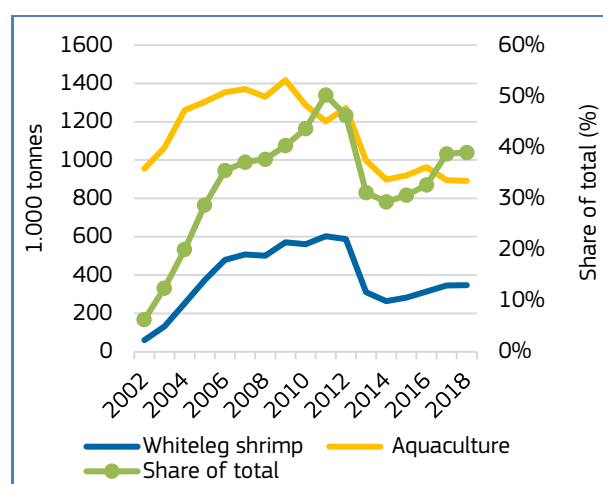
²² http://agri.eco.ku.ac.th/cv_detail/Kulapa_Supongpa_%20Kuldilok_s_Thesis.pdf

Table 5. **AQUACULTURE PRODUCTION IN THAILAND, MAIN SPECIES (volume in 1.000 tonnes)**

Species	2014	2015	2016	2017	2018
Whiteleg shrimp	263	282	314	346	347
Nile tilapia	190	203	208	218	211
African bighead catfish (hybrid) ²³	114	109	112	105	112
Green mussel	117	116	115	50	45
Blood cockle	54	59	62	26	27
Silver barb	29	30	31	24	25
Giant river prawn	17	16	15	21	22
Barramundi	17	17	18	20	20
Other species	98	88	88	83	81
Total	899	920	963	893	890

Source: FAO.

Production volume of whiteleg shrimp has fluctuated since farming began in the early 2000s. In 2012, the shrimp industry experienced an extensive disease outbreak. This led to a stock reduction of over 50% and caused closures to aquaculture sites used for shrimp farming. The mortality from disease and reduced stocking, combined with export bans and unfavourable trade terms reduced Thailand's production by more than half in 2013 and 2014²⁴. In 2014, the Seafood Task Force, an international industry coalition, was formed to lead Thailand's seafood supply chain toward a more sustainable pathway²⁵. In 2016, the first whiteleg shrimp farm in Thailand was granted Aquaculture Stewardship Council (ASC) certification²⁶. Since then, an additional eight farms have received ASC certification²⁷, indicating an increased focus on sustainably-farmed prawns with reduced impact on crucial habitats.

Figure 47. **COMPARISON OF WHITELEG SHRIMP FARMING AND TOTAL AQUACULTURE PRODUCTION IN THAILAND (volume in 1000 tonnes)**

Source: FAO, Kontali.

Whiteleg shrimp accounts for a significant portion of total aquaculture production in Thailand, meaning that total production volumes from aquaculture are highly correlated with the welfare of the shrimp farming industry. Prevalence of disease in aquaculture has caused issues in the long term, and was a key driver behind industry players switching production from giant tiger prawn (*Penaeus monodon*) to whiteleg shrimp²⁸.

²³ The African bighead catfish is a hybrid between North African catfish (*Clarias gariepinus*) and bighead catfish (*C. macrocephalus*).²⁴ <https://media-publications.bcg.com/BCG-A-Strategic-Approach-to-Sustainable-Shrimp-Production-Thailand-July-2019.pdf>²⁵ Ibidem²⁶ <https://www.asc-aqua.org/news/latest-news/asc-welcomes-first-certified-shrimp-farm-in-thailand/>²⁷ <https://www.asc-aqua.org/find-a-farm/>²⁸ <https://www.aquaculturealliance.org/advocate/thailands-white-shrimp-revolution/>

4.3. Imports

In 2019, imports of fisheries and aquaculture products to Thailand amounted to 1,98 million tonnes with a value of EUR 3,35 billion. The most imported species was skipjack tuna (486.075 tonnes, valued at EUR 604 million). Salmon was the second most imported species, coming primarily from Norway and Chile.

A large proportion of skipjack tuna imports come as landings by foreign vessels from Taiwan, South Korea, and The Federal States of Micronesia. It is imported to Thailand for processing (canning) before being re-exported. Total imports of tuna by tuna canning factories is estimated to amount to 700.000-800.000 tonnes annually²⁹.

Table 6. **IMPORTS TO THAILAND BY SPECIES (volume in 1000 tonnes, value in million EUR)**

Main commercial species	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Tuna, skipjack	479	514	529	681	475	748	588	754	486	604
Salmon	48	192	40	194	49	262	47	259	54	288
Tuna, albacore	34	93	38	100	44	115	47	133	53	187
Tuna, miscellaneous	38	102	52	133	50	109	54	127	69	164
Tuna, yellowfin	127	161	122	181	123	227	105	174	84	145
Mackerel	94	78	114	102	88	86	105	100	119	139
Other	777	1.185	951	1.461	1.095	1.688	1.180	1.839	1.118	1.826
Total	1.597	2.325	1.846	2.852	1.923	3.236	2.125	3.387	1.983	3.352

Source: EUMOFA.

China, Vietnam, Taiwan, India, and Norway are the top five countries in terms of import value to Thailand. Norway and Taiwan provide salmon and skipjack tuna, while China supplies substantial volumes of cephalopods and mackerel. Vietnam is the second largest supplier to Thailand, mainly exporting various types of marine fishes and freshwater catfish.

Table 7. **IMPORTS TO THAILAND BY COUNTRY OF ORIGIN (volume in 1000 tonnes, value in million EUR)**

Country	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
China	238	348	266	424	198	364	194	358	206	407
Vietnam	101	212	146	271	130	256	127	275	129	279
Taiwan	145	181	152	225	129	232	136	218	133	221
India	57	121	77	168	128	243	150	295	91	218
Norway	27	99	29	132	28	143	31	148	37	199
Japan	111	151	86	133	94	151	149	205	128	195
Myanmar	60	29	253	103	325	143	328	156	330	184
Korea, South	91	110	98	174	71	183	88	188	102	172
United States	126	190	104	184	108	212	94	210	77	167
Pakistan	26	47	27	52	48	76	56	98	78	150
Other countries	614	838	605	984	664	1.231	772	1.236	671	1.160
Total	1.597	2.325	1.846	2.852	1.923	3.236	2.125	3.387	1.983	3.352

Source: EUMOFA.

²⁹ <http://www.fao.org/fishery/facp/THA/en>

4.4. Processing

The fish processing industry in Thailand has grown in recent years, and a significant amount of the country's population is employed in processing plants (184.000 people)³⁰. The most common plants are small and traditional, and freezing and canning are the main methods used³¹.

Large volumes of seafood imported to Thailand are processed before being re-exported (primarily tuna)³².

According to the United Nations' International Labour Organization (ILO), recent improvements have been made to working conditions in Thailand's fishing and seafood processing sectors. Such changes may be a result of EU pressure on Thailand regarding IUU fishing³³, although the ILO did find some outstanding issues regarding forced labour, indicating that the industry still has areas for improvement³⁴.

4.5. Exports

Two major MCS, namely miscellaneous tuna and miscellaneous shrimp, accounted for 67% of total export value and 55% of total export volume from Thailand in 2019.

Table 8. **EXPORTS FROM THAILAND BY SPECIES (volume in 1000 tonnes, value in million EUR)**

Main commercial species	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Tuna, miscellaneous	566	1.802	565	1.821	489	1.845	518	1.938	537	1.970
Shrimp, miscellaneous	170	1.479	207	1.763	213	1.807	188	1.527	180	1.491
Salmon	25	179	22	148	22	164	17	144	20	162
Miscellaneous small pelagics	76	145	56	110	53	101	65	125	61	137
Fishmeal	156	184	154	157	79	78	105	109	108	102
Mackerel	36	74	30	67	27	59	33	75	33	101
Other	447	1.205	403	1.184	396	1.209	388	1.161	366	1.184
Total	1.476	5.069	1.437	5.251	1.278	5.262	1.313	5.080	1.305	5.147

Source: EUMOFA.

Thailand's main export markets are the United States and Japan, which together accounted for 29% of export volume and 42% of export value in 2019. These two markets are followed by China, accounting for 10% of export volume and 9% of export value. According to Thailand's export statistics, the EU accounted for 4% of the export volume and 5% of the value in 2019.

³⁰ <http://www.seafdec.org/fisheries-country-profile-thailand/>

³¹ <http://www.fao.org/fishery/facp/THA/en>

³² *Ibidem*.

³³ https://ec.europa.eu/commission/presscorner/detail/en/IP_19_61

³⁴ <https://www.seafoodsource.com/news/environment-sustainability/ilo-finds-improvements-in-thailand-seafood-sector>

Table 9. **EXPORTS FROM THAILAND BY DESTINATION COUNTRY (volume in 1000 tonnes, value in million EUR)**

Country	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
United States	196	1.139	202	1.236	201	1.284	183	1.031	190	1.075
Japan	205	1.003	195	1.043	175	1.029	186	1.033	192	1.062
China	109	201	119	224	83	215	105	318	136	450
Australia	60	267	65	286	66	314	68	313	59	280
Canada	44	214	48	242	42	228	42	205	39	200
Libya	21	67	30	97	24	87	25	93	38	134
Saudi Arabia	35	106	33	101	27	92	44	123	44	129
South Korea	28	145	24	130	26	158	25	148	21	126
Egypt	73	160	63	144	30	73	52	139	47	124
Italy	30	120	26	126	22	118	21	109	20	113
Other countries	674	1.648	632	1.622	582	1.664	562	1.568	517	1.454
Total	1.476	5.069	1.437	5.251	1.278	5.262	1.313	5.080	1.305	5.147

Source: EUMOFA.

4.6. EU-28 imports from Thailand

EU imports from Thailand amounted to 63.000 tonnes in 2019, with a value of EUR 324 million. Squid (mainly frozen) was the most imported MCS in terms of value and was primarily imported by Italy (91% of the total value). In terms of volume, skipjack tuna was the largest MCS (and the second largest in terms of value). The United Kingdom, Finland, the Netherlands, France and Sweden were the main importers of skipjack tuna, respectively accounting for 28%, 15%, 14%, 10%, and 9% of the total volume.

Table 10. **EU-28 IMPORTS FROM THAILAND, BY SPECIES (volume in 1000 tonnes, value in million EUR)**

Main commercial species	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Squid	17	85	16	95	15	107	13	85	13	87
Tuna, skipjack	34	124	29	106	23	104	16	74	14	64
Shrimp, warmwater	3	28	3	30	3	30	3	27	3	29
Shrimp, miscellaneous	6	66	5	52	4	44	4	36	3	27
Surimi	10	27	9	23	9	24	10	24	9	23
Tuna, miscellaneous	15	46	9	31	8	28	7	24	6	22
Other	28	112	24	96	20	78	20	81	16	71
Total	114	489	96	433	83	415	72	351	63	324

Source: EUMOFA.

Table 11 depicts the preservation state of the various species and products exported to the EU from Thailand. The majority of products are prepared/preserved or frozen. Prepared products include various types of cuts, fillets, or packaging states (e.g. canned tuna).

Table 11. **EXPORTS FROM THAILAND TO EU-28 MEMBER STATES, BY PRESERVATION STATE (volume in 1000 tonnes, value in million EUR)**

Preservation	2015		2016		2017		2018		2019	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Prepared/Preserved	81	313	65	256	56	234	46	190	40	167
Frozen	31	162	28	162	25	165	24	148	22	143
Other	2	14	2	15	2	16	1	13	1	13
Total	114	489	96	433	83	415	72	351	63	324

Source: EUMOFA.

4.7. Trade balance between EU-28 and Thailand

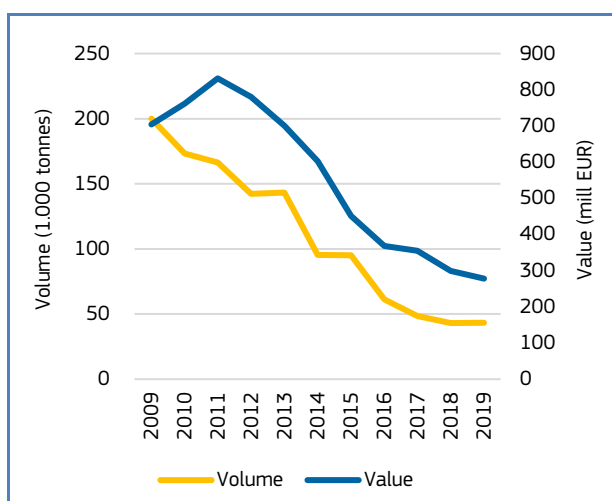
The EU trade deficit with Thailand has been narrowing over the recent years due to decreasing EU import from Thailand. The decrease concerns all Commodity Groups, but most prominently tuna and tuna-like species, crustaceans and cephalopods, which accounted for more than 80% of the decrease in terms of volume.

In 2019, EU import of tuna and tuna-like species from Thailand was 86.000 tonnes lower compared to 2009. This decline is more than offset by increased import from Ecuador, Papa New Guinea and China.

EU imports of crustaceans from Thailand were almost 47.000 tonnes lower in 2019 compared to 2009. Over the same period, imports from Ecuador, Argentina and Vietnam increased by almost 100.000 tonnes.

Regarding cephalopods, EU imports from Thailand had decreased by 19.000 tonnes from 2009 to 2019, while imports from Peru increased 60.000 tonnes.

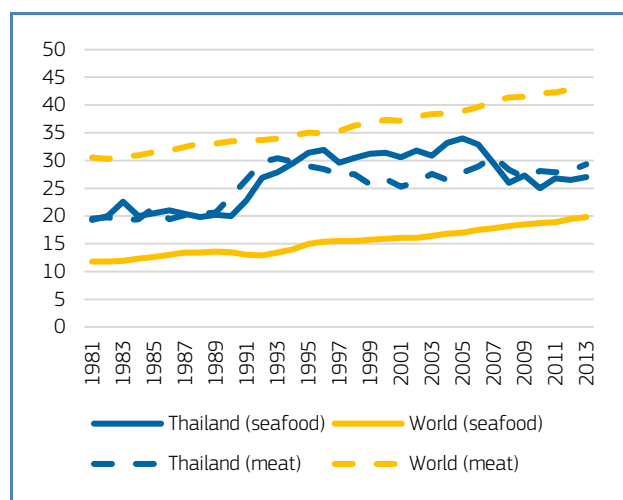
Figure 48. **THAILAND'S TRADE BALANCE WITH EU-28 (volume in 1000 tonnes, value in million EUR)**



Source: EUMOFA.

4.8. Consumption

Figure 49. **CONSUMPTION PER CAPITA OF SEAFOOD IN THAILAND VS. THE REST OF THE WORLD (volume in kilogram)**



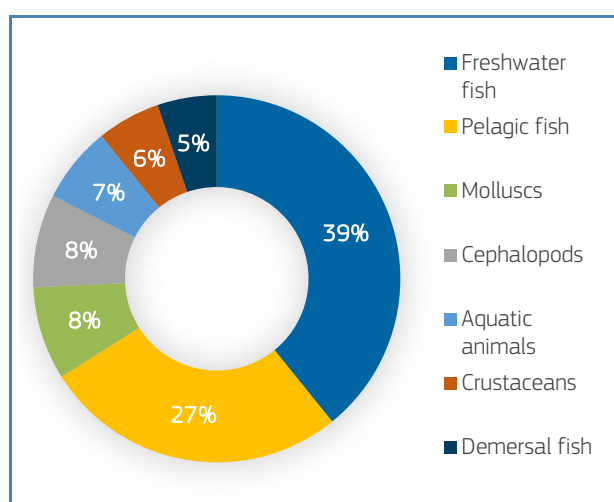
Source: FAO.

Figure 49 depicts consumption per capita of seafood and meat in Thailand relative to the rest of the world from 1981 up until 2013. While the global trend has shown increasing consumption per capita during the period, Thailand's consumption per capita has fluctuated, with an overall increase.

Furthermore, compared to the world average, seafood is a relatively more important food source than meat in Thailand. While seafood consumption per capita is around the same level or higher than meat consumption in Thailand, the latter is more than twice that of seafood in the rest of the world.

Consumers in Thailand have a low consumption of marine fish, primarily opting for freshwater and pelagic species. Tilapia is the preferred freshwater species, followed by Thai silver barb and striped snakehead. It is worth noting that there are significant geographical trends within fish consumption in Thailand, with people in coastal areas consuming significantly more seafood than those inland.

Figure 50. **SHARE OF CONSUMPTION BY CATEGORY IN THAILAND IN 2013**



Source: FAO.

5. Case study – Patagonian toothfish in the EU

Patagonian toothfish (*Dissostichus eleginoides*), also known as Chilean seabass, is one of the most expensive fish on the global market and is considered a high-end product in Japan, the USA and the EU. In the EU, it is caught by large freezer longline vessels operating in the distant waters of the southern Indian and Atlantic Oceans. In 2018, EU catches reached 6.886 tonnes, mostly attributable to the French distant water fleet based in Réunion Island, where most of the catch is processed and re-exported to main consumption markets: the USA, Asia and to a lesser extent the EU. Patagonian toothfish is normally landed frozen, headed and gutted, and its first-sales price can reach up to 20,00 EUR/kg.

5.1. Biology, exploitation and management

Biology



Patagonian toothfish is a large, demersal fish species that can grow up to 2 metres in length and live for up to 50 years. It becomes sexually mature when it reaches 70 to 95 cm (6 to 9 years of age). It can be found in temperate waters (28° to 55° south of the equator), between 50 and 2.500-3.000 metres deep. The species has relatively low fecundity, so its resilience is very

low³⁵. A close relative, the Antarctic toothfish (*Dissostichus mawsoni*), is found further south around the edges of the Antarctic ice shelf.

Patagonian toothfish spawns in deep water (around 1.000 metres) during the austral winter, producing pelagic eggs and larvae. When larvae are about a year old, they switch to a demersal habitat at around 100 metres and inhabit relatively shallow water (<300 metres) until 6–7 years of age, when they begin a gradual migration into deeper water. As juveniles in shallow water, toothfish is primarily piscivorous, consuming the most abundant suitably-sized local prey. With increasing size and habitat depth, the diet diversifies and includes increased scavenging of squid, fish, and crustaceans³⁶.

Exploitation and management by the EU

The long lifespan and late sexual maturity of Patagonian toothfish make it highly vulnerable to overfishing. Stocks have been experiencing high levels of exploitation due to high international demand for what is considered to be high-end seafood in the USA, the Japan and the EU. The Patagonian toothfish fishery represents the most lucrative fishery in Antarctic and Subantarctic waters and occurs in the Exclusive Economic Zones (EEZ) of southern Chile and Argentina, and Subantarctic islands under the sovereignty of Australia, France, New Zealand, South Africa and the United Kingdom³⁷. It is mainly caught using bottom-set longlines in depths of 1.200–1.800 metres, and to a lesser extent with bottom trawls. The average weight of a commercially caught Patagonian toothfish is 7–10 kg, depending on the fishery, with large adults occasionally exceeding 100 kg.

Most toothfish fisheries are managed in accordance with the Commission for the Conservation of Antarctic Marine Living Resources (CCAMLR) regulations and conservation measures. Management adopts an “ecosystem approach”, which requires that all other living resources of the Antarctic Ocean are treated as an integrated system where effects on predators, prey, and related species are considered, and decisions on sustainable harvesting levels are made on the basis of robust,

³⁵ <http://www.fao.org/3/y5261e/y5261e09.htm>

³⁶ <https://www.sciencedirect.com/science/article/pii/B9780123810151000046?via%3Dihub>

³⁷ <http://www.fao.org/3/y5261e/y5261e09.htm>

internationally peer-reviewed scientific advice³⁸. Moreover, several management measures have been implemented to limit the catches and to minimise interactions with, and risks to, seabirds, especially for longliners: these measures influence TAC and quotas, vessel licensing, monitoring of transshipments, control measures, and automated satellite-linked monitoring systems.

France regulates Patagonian toothfish in the waters surrounding the French islands of the southern Indian Ocean, with scientific oversight from the National Museum of Natural History. These fisheries are located around the Kerguelen Islands (CCAMLR Statistical Division 58.5.1) and the Crozet Islands (CCAMLR Statistical Division 58.6). Fishing authorisations have been granted to six fishing companies based out of Réunion Island. The Kerguelen Islands fishery was certified by the Marine Stewardship Council (MSC) in September 2013 (recertified in 2018) and the Crozet Islands fishery was certified by the MSC in 2017³⁹. Several other extra-EU fishing fleets targeting Patagonian toothfish are also certified by the MSC⁴⁰.

5.2. Production

Catches

Global production of Patagonian toothfish amounted to 22.811 tonnes in 2018. The leading producer was by far the EU-28, with 6.886 tonnes caught in 2018 (30% of global production). The other main producers were Argentina, Australia, and Chile, which provided 16%, 15%, and 13% of the total world production, respectively. They were followed by South Korea (10%), Uruguay (5%), and the Falkland Islands (5%). By comparison, the world catches of Antarctic toothfish amounted to 4.197 tonnes in 2018, and the EU-28 accounted for 16% of this total.

Over the last decade (2009-2018), world catches of Patagonian toothfish experienced a 4% decrease with different trends observed among major producing countries: decreases for the fleets of the EU (-19%) and Chile (-42%) and increases for Argentina (+52%), Australia (+19%), and South Korea (+59%).

Table 12. **WORLD CATCHES OF PATAGONIAN TOOTHFISH (volume in tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
EU-28	8.500	7.753	7.342	7.048	7.514	7.824	6.521	8.174	7.892	6.886
Argentina	2.434	3.015	2.989	3.266	3.464	3.897	3.719	3.656	3.669	3.705
Australia	2.916	2.956	2.742	3.077	3.060	3.217	4.537	3.158	3.665	3.465
Chile	5.221	5.297	4.786	4.656	4.090	2.707	3.768	5.271	3.649	3.007
South Korea	1.382	977	2.067	1.386	2.069	1.815	2.003	2.049	2.398	2.200
Uruguay	548	609	389	208	248	385	553	1.239	1.023	1.047
Falkland Is.(Malvinas)	1.211	1.031	1.286	1.151	1.351	911	1.134	1.122	833	1.045
Others	1.619	1.121	1.249	999	1.239	972	1.033	910	1.096	1.456
Total	23.831	22.759	22.850	21.791	23.035	21.728	23.268	25.579	24.225	22.811

Source: FAO.

In the EU-28, only three countries catch Patagonian toothfish: France, the UK, and Spain. In 2018, France accounted for 80% of EU catches with 5.515 tonnes of Patagonian toothfish caught, a 12% reduction compared to 2017. The UK and Spain accounted for 16% and 4% of total EU catches in 2018, respectively.

³⁸ <https://www.ccamlr.org/en/fisheries/toothfish-fisheries>

³⁹ <https://www.msc.org/media-centre/press-releases/french-toothfish-fishers-get-msc-certification>

⁴⁰ <https://fisheries.msc.org/en/fisheries/@@search?q=toothfish&search>

Table 13. **EU-28 CATCHES OF PATAGONIAN TOOTHFISH (volume in tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
France	6.123	5.814	5.938	5.608	6.188	6.462	5.237	6.585	6.260	5.515
United Kingdom	1.364	897	1.118	1.001	1.209	1.312	1.164	1.165	1.154	1.133
Spain	1.013	1.042	286	439	117	50	120	424	478	238
Total	8.500	7.753	7.342	7.048	7.514	7.824	6.521	8.174	7.892	6.886

Source: FAO.

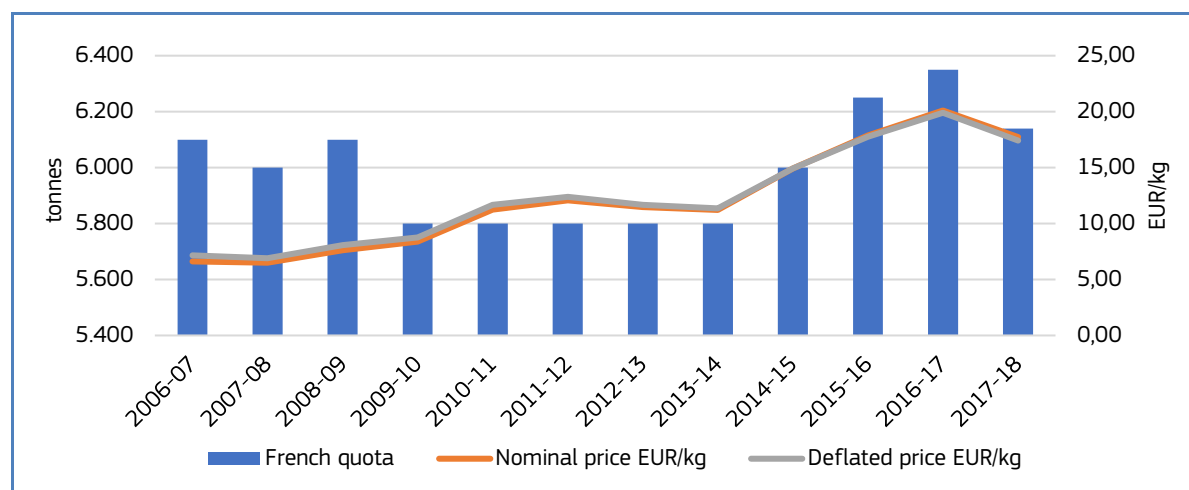
Processing and marketing

Patagonian toothfish is normally headed, gutted and frozen onboard, then further processed after it is landed. It is marketed as frozen fillets or thawed, sold ready to cook⁴¹. In markets and restaurants, it is typically marketed as “Chilean seabass”. Commercial fishing and consumption of the species started in the 1990s. Appreciated for its white and tender flesh, toothfish stimulated a high level of demand, which led to a significant rise in illegal fishing activities. Its fatty flesh can be eaten raw in the form of sushi or sashimi. It is particularly popular in Asia and the United States, where it is sold at high prices⁴².

5.3. First-sales prices

Patagonian toothfish prices have followed a strong increasing trend over the 2006–2017 period, tripling in ten years. Since the French quota was increased following the 2014–2015 campaign⁴³, prices rose from 12,00 EUR/kg in 2014–2015 to a peak of 20,00 EUR/kg in 2016–2017. Prices subsequently fell slightly in 2017–2018, albeit remaining at high levels (18,00 EUR/kg), largely due to lower demand from China and increased administrative burden to access the US market⁴⁴.

Figure 51. **FIRST-SALES PRICES OF PATAGONIAN TOOTHFISH CAUGHT BY THE FRENCH SOUTHERN FLEET**



Source: TAAF (French Southern Territories administration). Deflated price is calculated with GDP deflator (base year 2015).

⁴¹ <https://pdm-seafoodmag.com/guide/poissons/details/product/L%C3%A9gine.html>

⁴² <http://www.guidedesespèces.org/fr/legine-australe>

⁴³ The fishing season takes place during the austral summer (the campaign usually starts in September), so quotas and catches are reported straddling two calendar years.

⁴⁴ <https://taaf.fr/content/uploads/2019/11/Rapport-CGefi-l%C3%A9gine-envoy%C3%A9-le-11.02.19.2.pdf>

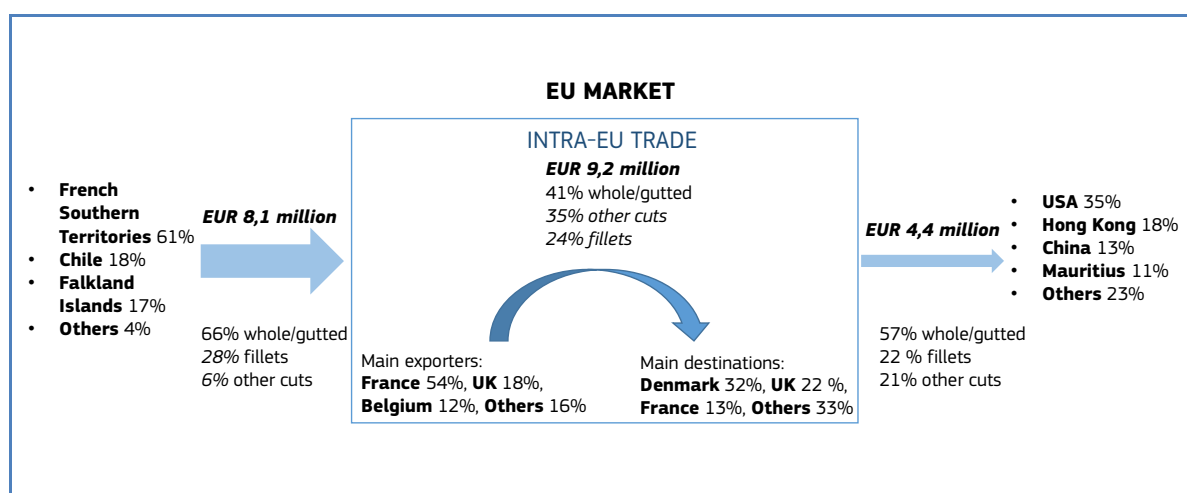
5.4. Trade

Patagonian toothfish is traded exclusively as frozen products, whole and gutted or in cuts or fillets. In 2019, the EU trade deficit for toothfish was EUR 3,7 million. The deficit is attributable to the imports of frozen toothfish from French Southern Territories, Chile, and the Falkland Islands. In 2019, extra-EU imports of toothfish reached 475 tonnes with a value of EUR 8,1 million, mostly originating from French Southern Territories (61%), Chile (18%), and the Falkland Islands (17%).

In 2019, intra-EU exports reached EUR 9,2 million for 1.442 tonnes, of which 41% (in value terms) were frozen whole/gutted products, followed by other frozen cuts (35%) and frozen fillets (24%). France is by far the main toothfish supplier in intra-EU trade (54% of total intra-EU export value), whereas Denmark (32%) and the UK (22%) are the main destinations for exports on the intra-EU trade market.

Extra-EU exports are relatively low (EUR 4,4 million for 269 tonnes in 2019), and the main destinations are the USA (35% in value terms), Hong Kong (18%) and China (13%).

Figure 52. **THE PATAGONIAN TOOTHFISH TRADE MARKET IN THE EU (2019)**



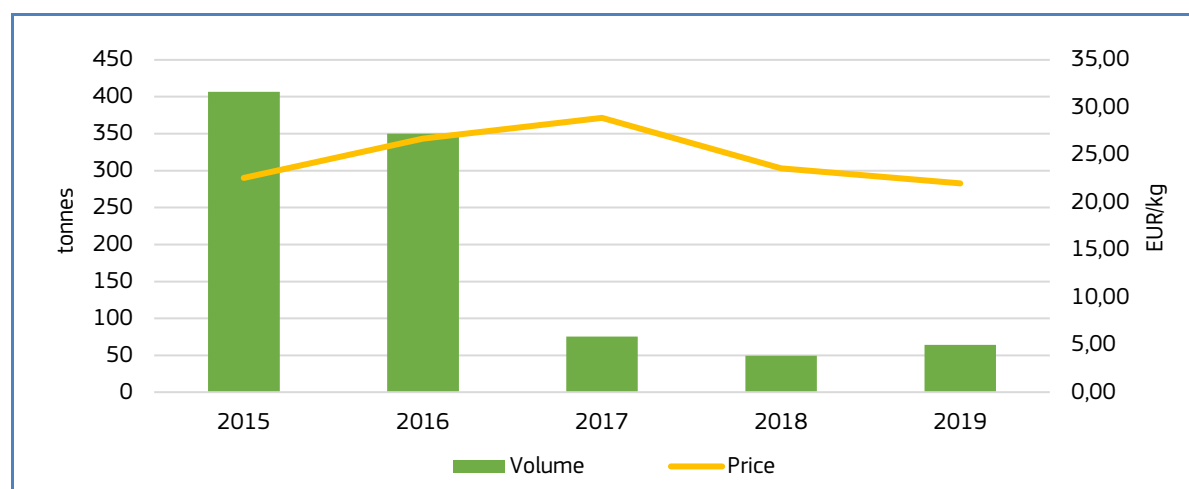
Source: EUMOFA.

However, the relatively low volumes and values of EU trade flows of toothfish products compared to EU catch levels are due to the fact that EU austral fishing fleets land in France (Réunion Island) or UK (Falkland Islands) territories for further processing, packing and exports to the main consumption markets of Asia and the USA.

5.5. Import and export prices

Although volumes traded in the EU are low compared to what is exported directly from French Southern Territories and the Falkland Islands, EU trade data show that EU export prices followed the same decreasing trend in 2018 and 2019 as first-sales prices. As an example, EU export prices to the USA of frozen whole/gutted toothfish have decreased in 2018 and 2019, after a peak at 29,00 EUR/kg in 2017.

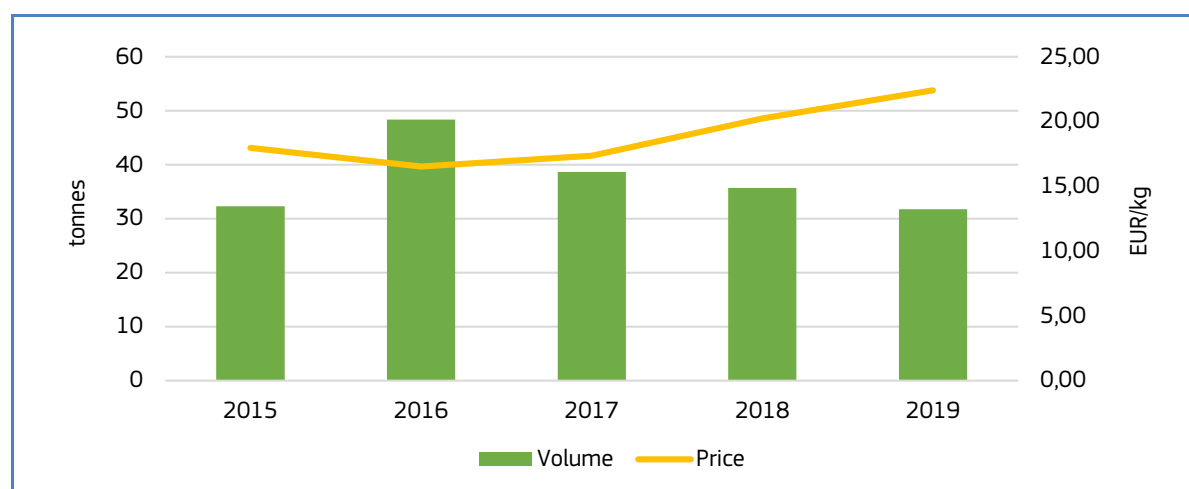
Figure 53. **PATAGONIAN TOOTHFISH (FROZEN WHOLE/GUTTED): EU EXPORTS TO THE USA**



Source: EUMOFA.

However, EU imports data show that for toothfish frozen fillets, prices have kept increasing in 2018 and 2019. As an example, frozen fillets of toothfish from French Southern Territories have followed an increasing trend in recent years and reached 22,00 EUR/kg in 2019.

Figure 54. **PATAGONIAN TOOTHFISH FILLETS: EU IMPORTS FROM FRENCH SOUTHERN TERRITORIES**



Source: EUMOFA.

It has to be underlined that EU trade data for toothfish should be considered with caution as prices may strongly vary between different years and origins/destinations.

6. Global highlights

EU / Fisheries: The European Commission plans to increase transparency in the negotiating process for annual fishing opportunities (Total Allowable Catches and quotas). In the future, all elements of Commission documents relating to the proposals on fishing opportunities, such as “non-papers”, will be made public when they are transmitted to the Council. Non-papers on fishing opportunities supplement the initial Commission proposals through the addition of new scientific advice or the results of international negotiations, which were not yet available when the initial proposal was adopted⁴⁵.

EU / Mauritania / Fisheries: In July, the EU has extended the protocol to the existing Fisheries Partnership Agreement (FPA) with the Islamic Republic of Mauritania for one year. The protocol promotes responsible fishing and sustainable management of fishing resources, including enhanced transparency measures. The extension ensures continuity in cooperation and further progress towards sustainable fishing. The fisheries partnership agreement with Mauritania is the biggest mixed agreement for the EU both in financial terms and in terms of fishing opportunities. Under the current framework with Mauritania, the EU fleet is authorized to fish in Mauritanian waters for shrimp, demersal fish, tuna, and small pelagics, up to around 287.000 tonnes per year⁴⁶.



Croatia / Fisheries: In 2019, Croatia's total production of marine fish and other sea organisms decreased by 5.475 tonnes (-6,3%) compared to 2018. The total value of fishery products decreased by 3,1% compared to 2018, while the total production of freshwater fish increased by 201 tonnes (+6.9%), or by +5.3% in total value. The number of fishermen engaged in maritime fishing decreased by 0,9% in 2019, while the total number of vessels increased by 0,5%, compared to 2018⁴⁷.

World / Mussel / Supply: World mussel trade was stable in 2019, remaining at the levels reached in 2018. About 370.000 tonnes entered international trade. The main importing countries were France, the Netherlands, and Italy. Chile is the main export country, with 76.000 tonnes exported in 2019. The European Union is one of the main markets for live mussels, but imports decreased in 2019. About 216.000 tonnes were imported by the European Union last year, which is 4.000 tonnes lower than in 2018⁴⁸.

UK / Crab / COVID-19: The United Kingdom's exports of brown crab to China were negatively affected by COVID-19, as imports into China dried up. This happened just before the Chinese New Year, which is normally the peak season for crab consumption in China, and for crab exports from Scotland. Each year, exports of brown crab to China amount to about 5.000 tonnes, so the decline of this trade highly affected the business of British crab exporters⁴⁹.

Russia / Supply: In the Russian Federation in January-April 2020, total export volume of fisheries products decreased by 4,5%, and its value by 3,8%, compared to the same period in 2019. Average prices for Russia's main export product, frozen fish, increased by 1%. Imports decreased by 6,2% in volume and by 0,3% in value. Average prices of imports for chilled fish and fillets decreased by 1,5% and 6,7% but increased for frozen fish by 10%⁵⁰.

Scotland / COVID-19: The Scottish Government scheme, funded by the European Maritime and Fisheries Fund, compensated finfish and shellfish farmers affected by the collapse of export markets due to Covid-19, for the cost of transporting, freezing and storing salmon, trout, and shellfish until the end of 2020⁵¹.

⁴⁵ https://ec.europa.eu/fisheries/press/commissioner-sinkevi%C4%8Dius-announces-more-transparency-its-proposals-fishing-opportunities_en

⁴⁶ https://ec.europa.eu/fisheries/press/sustainable-fisheries-cooperation-mauritania-continues_en

⁴⁷ https://www.dzs.hr/Hrv_Eng/publication/2020/01-04-01_01_2020.htm

⁴⁸ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1296657/>

⁴⁹ <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1296660/>

⁵⁰ <http://www.fish.gov.ru/obiedinennaya-press-sluzhba/novosti/30872-rybnye-ryady-v-rossii-prodolzhaet-deshevet-ryad-vidov-morozhenoj-ryby>

⁵¹ <https://www.fishfarmingexpert.com/article/fish-and-shellfish-farmers-given-125m-aid-to-freeze-stock/>

7. Macroeconomic Context

7.1. Marine fuel

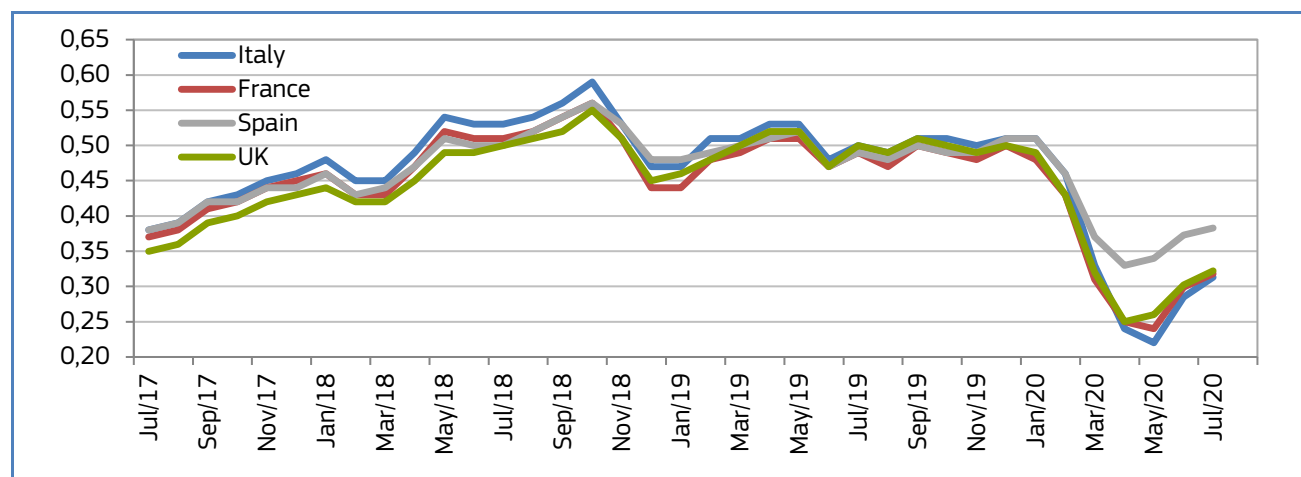
Average prices for marine fuel in **July 2020** ranged between 0,31 and 0,38 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices increased about 6% compared with the previous month but decreased 33% compared with the same month in 2019.

Table 14. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Jul 2020	Change from Jun 2020	Change from Jul 2019
France (ports of Lorient and Boulogne)	0,32	6%	-35%
Italy (ports of Ancona and Livorno)	0,31	10%	-37%
Spain (ports of A Coruña and Vigo)	0,38	3%	-22%
The UK (ports of Grimsby and Aberdeen)	0,32	7%	-36%

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

Figure 55. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**



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

7.2. Consumer prices

The EU annual inflation rate was at 0,8% in June 2020, up from 0,6% in May. A year earlier, the rate was 1,6%.

Inflation: lowest rates in June 2020, compared with May 2020.



Inflation: highest rates in June 2020, compared with May 2020.

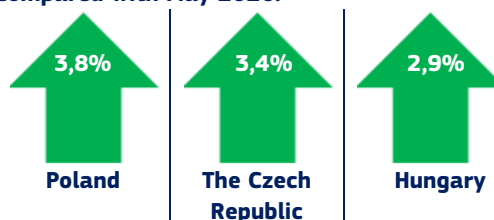


Table 15. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU** (2015 = 100)

HICP	Jun 2018	Jun 2019	May 2020	Jun 2020	Change from May 2020	Change from Jun 2019
Food and non-alcoholic beverages	104,71	106,87	111,01	110,60	↓ 0,4%	↑ 3,5%
Fish and seafood	108,75	110,66	113,74	113,53	↓ 0,2%	↑ 2,6%

Source: Eurostat.

7.3. Exchange rates

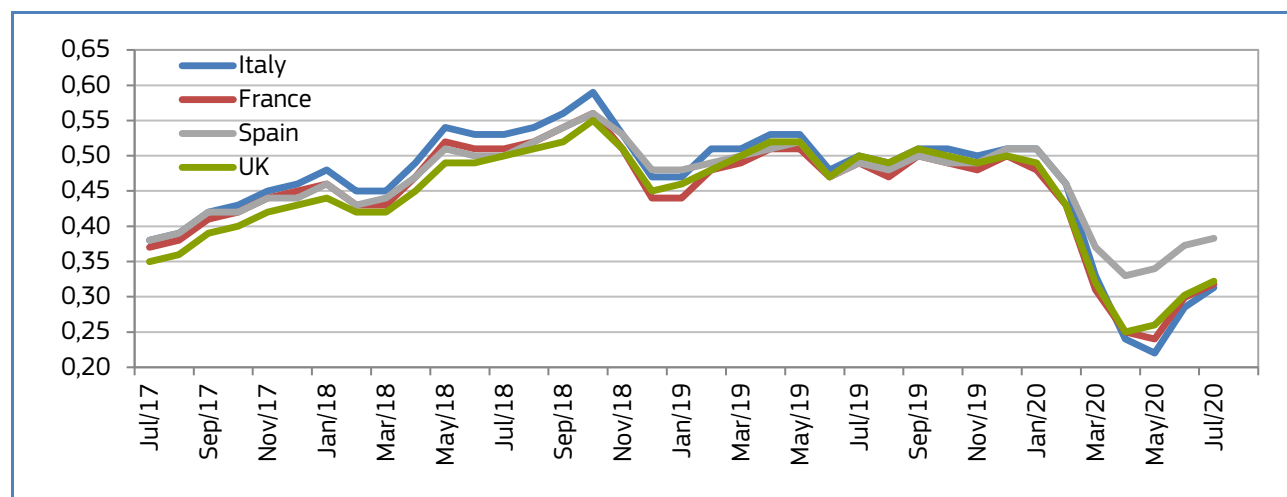
Table 16. **EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Jul 2018	Jul 2019	Jun 2020	Jul 2020
NOK	9,5338	9,7778	10,9120	10,7323
JPY	130,84	121,04	120,66	124,31
USD	1,1736	1,1151	1,1198	1,1848

Source: European Central Bank.

In July 2020, the euro appreciated against the Japanese yen and the US dollar (+1,1% and +0,1%, respectively), and depreciated against the Norwegian krone (-1,6%) relative to the previous month. For the past six months, the euro has fluctuated around 10,92 against the Norwegian krone. Compared with July 2019, the euro has appreciated 0,2% against the Japanese yen, 9,8% against the Norwegian krone, and 6,3% against the US dollar.

Figure 56. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

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First sales: The Council of European Union, European Commission, FAO.

Consumption: EUROPANEL.

Case studies: Worldometer, SEAFDEC, Rabobank, European Commission, Department of Agriculture and Resource Economics of Kasetsart University, FAO, Kontali, Boston Consulting Group, ASC, Aquaculture Alliance, Seafood Source, ScienceDirect, Commission for the Conservation of Antarctic Marine Living Resources, Marine Stewardship Council, French Southern Territories administration (TAAF).

Global highlights: DG-Mare European Commission, FAO, Croatian Bureau of Statistics, fishfarmingexpert.com, Federal Agency for Fishery of the Russian Federation.

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

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

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

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

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

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

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

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