

# Contextual information

## to interpret market developments of the EU fishery and aquaculture sector

August 2021

29/09/2021

This document provides an overview of what happened in the European sea basins in August 2021, highlighting the main factors that might have had an impact on the fisheries and aquaculture sector. It is a support document to better interpret and contextualise the variations described in the [EUMOFA's monitoring report](#). Indeed, looking at the market from different points of view might help better understand its variations. Currently, two events are having an impact on the fishery and aquaculture sector: the COVID-19 pandemic and the withdrawal of the United Kingdom from the European Union. While establishing whether the trends described in the report are due to COVID-19 and/or Brexit cannot be done with certainty, it is possible to exclude their involvement if other explanations can be provided.

Geographic coverage: Baltic Sea, Bay of Biscay and Iberian coast, Celtic Sea, Mediterranean Sea, North Sea, and Black Sea.

### Content

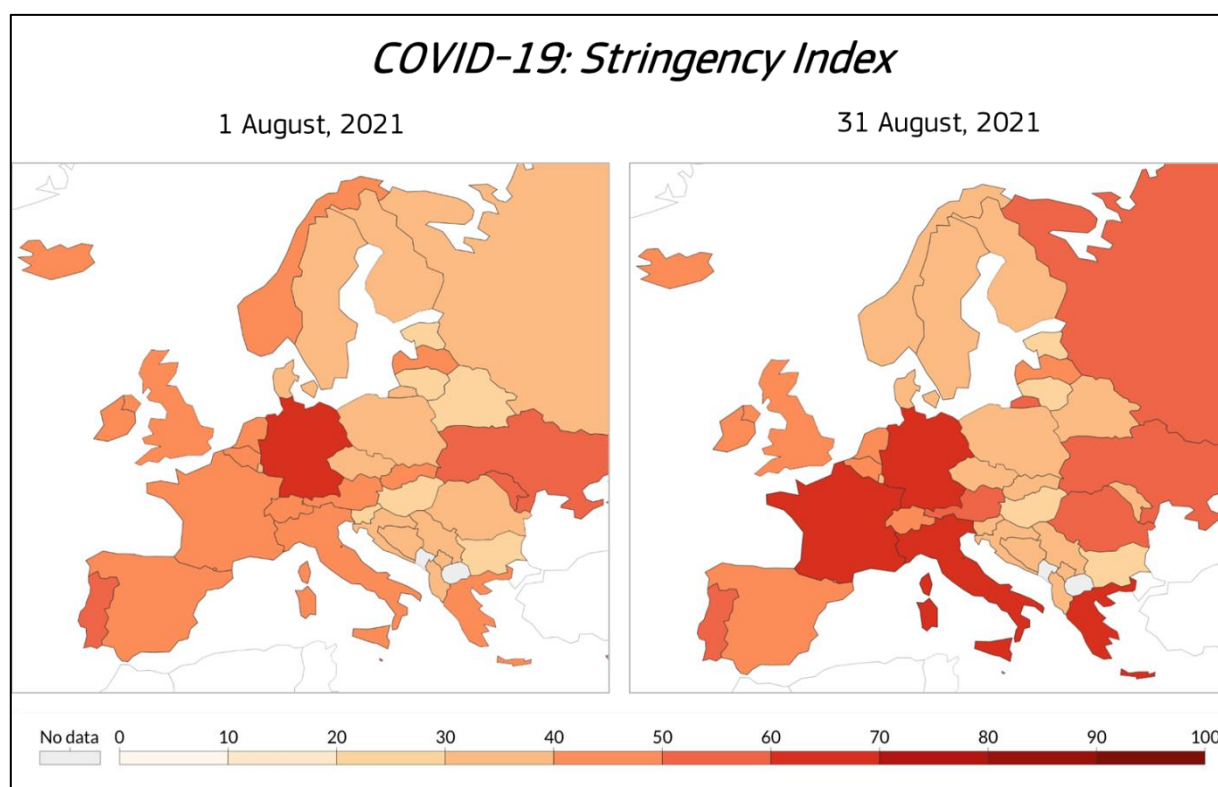
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## Overview on COVID-19 response measures taken

A quick overview of the measures undertaken by each country is provided through the “COVID-19 Stringency Index” developed by the University of Oxford’s Blavatnik School of Government. The Stringency Index measures the rigidity of measures adopted by governments to face the pandemic spread. This index is based on nine indicators including the closure of schools, workplaces, public transport, the ban on movement, gathering and all relevant actions that countries have been adopting since the start of the pandemic. The following maps show the situation at the beginning and at the end of August 2021.

Figure 1 - Response measures undertaken by countries in the European sea basins



Source: Stringency Index. Data published by: Thomas Hale, Noam Angrist, Rafael Goldszmidt, Beatriz Kira, Anna Petherick, Toby Phillips, Samuel Webster, Emily Cameron-Blake, Laura Hallas, Saptarshi Majumdar, and Helen Tatlow. (2021). “A global panel database of pandemic policies (Oxford COVID-19 Government Response Tracker).” *Nature Human Behaviour*. <https://doi.org/10.1038/s41562-021-01079-8>.<sup>1</sup>

According to the Stringency Index, measures adopted to face the COVID-19 pandemic spread remained stable in most of the EU Member States. Measures were slightly reinforced in Austria, France, Greece, Italy, Romania, and Slovenia, while slightly lightened in Slovakia and Norway.






<sup>1</sup> Map available at: <https://www.bsg.ox.ac.uk/research/research-projects/covid-19-government-response-tracker>



Weather

The weather conditions in August 2021 appeared to be similar to those recorded in the same month of the previous year. They do not seem to have had a major impact on the fishery activities.

Figure 2 - Weather conditions in August 2021 compared with August 2020

Sea basin	Impact: low, medium, high	Comments
Baltic Sea		The weather conditions were appropriate for fishing, with no extreme weather conditions registered.
Bay of Biscay and Iberian coast		The weather conditions were appropriate for fishing, and similar to those registered in past years
Celtic Sea		The weather conditions were appropriate for fishing, with no extreme weather conditions registered.
Mediterranean Sea		The weather was particularly warm in several Mediterranean countries, with surface temperatures above 50 degrees in many locations.
North Sea		The weather conditions were appropriate for fishing, with windy conditions at the beginning of the month, and a dry weather in the rest of the month.



## Fishing or market closures and openings

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### Baltic Sea

As for July 2021, the “Council Regulation (EU) No 2020/1579 of 29 October 2020 fixing for 2021 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Baltic Sea and amending Regulation (EU) 2020/123 as regards certain fishing opportunities in other waters” provides that in August 2021 it shall be prohibited to fish with any type of fishing gear in FAO areas 24, 25, and 26. An exemption from the prohibition applies to EU fishing vessels of less than 12 meters in length operating in waters with depth exceeding 20 meters.<sup>2</sup>

### Mediterranean Sea

In most of the Adriatic Sea, the Italian bottom otter trawl (OTB), beam trawl and otter twin trawl (OTT) fleets were not active in accordance with the compulsory temporary interruption of fishing activities foreseen by the Italian Ministerial Decree n. 229107 of 18/05/21.<sup>3</sup>

### North Sea

Further to the ICES Advice on fishing opportunities, catch, and effort published on 30 June 2021<sup>4</sup>, which proposed to decrease total allowable catch (TAC) for North Sea cod by 10.3% in 2022, concerns continue to be raised by sector Associations about the impact of that proposal<sup>5</sup>.

### All EU Member States

The Commission Regulation (EU) 2021/1376 of 13 August 2021 established a fisheries closure for redfishes in NAFO 3M area for vessels flying the flag of a Member State of the European Union, due to the exhaustion of the quota allocated for 2021.<sup>6</sup>

On 26 August 2021, the European Commission adopted its proposal<sup>7</sup> for a “Council Regulation fixing for 2022 the fishing opportunities for certain fish stocks and groups of fish stocks applicable in the Baltic Sea, and amending Regulation (EU) 2021/92 as regards certain fishing opportunities in other waters”<sup>8</sup>. The proposed total allowable catches (TACs) are based on the scientific advice from the International Council on the Exploration of the Seas (ICES) and follow the Baltic multiannual management plan, which was adopted by the European Parliament and the Council in

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<sup>2</sup> Council Regulation (EU) 2020/1579 of 29 October 2020: [https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L\\_.2020.362.01.0003.01.ENG](https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=uriserv:OJ.L_.2020.362.01.0003.01.ENG)

<sup>3</sup> More information about fishing closure is available at <https://www.politicheagricole.it/flex/cm/pages/ServeAttachment.php/L/IT/D/9%252F4%252Fd%252FD.c2bc5d8a18dbdf0a3bfb/P/BLOB%3AID%3D17050/E/pdf>

<sup>4</sup> ICES Advice on fishing opportunities, catch, and effort about “Cod (Gadus morhua) in Subarea 4, Division 7.d, and Subdivision 20 (North Sea, eastern English Channel, Skagerrak)”, available at: <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2021/2021/cod.27.47d20.pdf>

<sup>5</sup> For more details, please visit: <https://fisherynation.com/archives/103706> and <https://www.shetnews.co.uk/2021/08/18/record-stocks-disprove-claims-of-overfishing-association-says/>

<sup>6</sup> Text of the proposal available at <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2021:491:FIN>

<sup>7</sup> European Commission, Fishing opportunities in the Baltic Sea for 2022: improving long-term sustainability of stocks (26 August 2021), available at [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_21\\_4202](https://ec.europa.eu/commission/presscorner/detail/en/IP_21_4202)

<sup>8</sup> The text of the proposal for a Council Regulation is available at this link: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2021:491:FIN>

2016. The proposal concerned fishing opportunities for herring, sprat, plaice salmon and cod. As regards, the proposal will be updated as soon as scientific advice for western Baltic cod, western Baltic herring and salmon will be available.

### Total Allowable Catches uptake

The following table reports the Total Allowable Catches (TAC) uptake per sea basin and for selected species consumed and/or utilized up to August 2021.

Figure 3 - TAC uptake

Sea basin	Species	Adapted quotas	Total catches	% consumed up to August 2021
<i>Baltic sea</i>	Cod	6.550	2.067	32%
	European plaice	23.390	5.639	24%
	Herring	281.439	159.921	57%
	Norway lobster	12.382	4.261	34%
<i>Bay of biscay</i>	Anchovy	15.005	10.489	70%
	Common sole	3.399	2.343	69%
	Hake	50.911	21.909	43%
	Norway lobster	4.360	2.856	66%
<i>Black sea</i>	Sprat (=Brisling)	11.475	3.204	28%
	Turbot	150	95	63%
<i>Celtic sea</i>	Common sole	5.110	2.161	42%
	Haddock	15.903	6.376	40%
	Monk	33.941	16.064	47%
	Norway lobster	14.098	5.838	41%
<i>Mediterranean sea</i>	Bluefin tuna	22.168	16.111	73%
	Swordfish	6.560	3.096	47%
<i>North sea</i>	Cod	9.601	3.993	42%
	Common sole	18.525	4.846	26%
	European plaice	102.128	18.336	18%
	Norway lobster	3.093	1.675	54%



## Other highlights

## Bay of Biscay and Iberian coast

According to the weekly first sales data available<sup>9</sup>, the top species in this sea basin in terms of value in August 2021 were the following.

Figure 4 - Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in August 2021 (weeks 31-34)

Weekly first sales		Time frame: W31-34			
Volume (KG)	2019	2020	2021	Trend	
Hake	1.399.900	1.281.404	713.277		
Lobster, Norway	94.221	139.806	142.501		
Monk	583.318	670.065	270.949		
Octopus	271.242	160.432	209.438		
Sardine	1.994.859	2.462.420	2.797.937		
Value (EUR)	2019	2020	2021	Trend	
Hake	6.045.886	5.061.215	3.545.073		
Lobster, Norway	1.574.478	2.021.388	2.028.257		
Monk	3.457.594	3.291.303	1.655.975		
Octopus	1.762.900	1.065.482	1.755.063		
Sardine	4.929.401	3.802.622	3.273.443		
Price (EUR/kg)	2019	2020	2021	Trend	
Hake	4,32	3,95	4,97		
Lobster, Norway	16,71	14,46	14,23		
Monk	5,93	4,91	6,11		
Octopus	6,50	6,64	8,38		
Sardine	2,47	1,54	1,17		

<sup>9</sup> Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France, Portugal and Spain. Thus, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 3 refer to, please see Annex below in this document.

## Black sea

The following table reports monthly first sales data for August in Bulgaria<sup>10</sup>. It appears that volumes of red mullet and sprat strongly increased in 2021 compared with the same month of 2020, with sprat recovering from the drop reported in 2020. On the other hand, volumes of clam remained fairly stable compared with August 2020.

Figure 5 - Top species in terms of value for the month of August 2021

Monthly first sales		Time frame: August			
Volume (KG)	2019	2020	2021	Trend	
Clam	39.491	62.916	63.806		
Red mullet	20.125	17.577	68.187		
Sprat (=Brisling)	166.276	53.915	248.038		
Value (EUR)	2019	2020	2021	Trend	
Clam	62.147	143.401	121.400		
Red mullet	12.088	11.336	65.778		
Sprat (=Brisling)	52.835	17.159	78.450		
Price (EUR/kg)	2019	2020	2021	Trend	
Clam	1,57 €	2,28 €	1,90 €		
Red mullet	0,60 €	0,64 €	0,96 €		
Sprat (=Brisling)	0,32 €	0,32 €	0,32 €		

<sup>10</sup> The most recent monthly first sales data for August 2021 are available via the EUMOFA website and can be accessed [here](#).

## Mediterranean Sea

According to the weekly first sales data available<sup>11</sup>, the top species in this sea basin in terms of value in August 2021, were the following.

Figure 6 - Top species in terms of value in selected locations in the Mediterranean Sea in August 2021 (weeks 31-34)

Weekly first sales		Time frame: W31-34			
Volume (KG)	2019	2020	2021	Trend	
Mackerel	1.073	1.059	512		
Sardine	160.659	69.592	333.881		
Shrimp, miscellaneous	24.129	27.004	21.118		
Swordfish	30.995	81.204	59.251		
Value (EUR)	2019	2020	2021	Trend	
Mackerel	5.746	7.055	4.957		
Sardine	45.806	21.490	77.406		
Shrimp, miscellaneous	1.135.571	1.170.328	1.064.398		
Swordfish	191.601	516.593	453.483		
Price (EUR)	2019	2020	2021	Trend	
Mackerel	5,36	6,66	9,69		
Sardine	0,29	0,31	0,23		
Shrimp, miscellaneous	47,06	43,34	50,40		
Swordfish	6,18	6,36	7,65		

<sup>11</sup> Available weekly first sales data are only monitored for a selection of specific products of different species in specific places of sale in France and Spain. Therefore, the figures reported are not to be intended as total first sales of these species in the sea basin. To see which products in which locations the data in Figure 4 refer to, please see Annex below in this document.



### Marine gasoil prices in August 2021

Price of gasoil<sup>12</sup> in the monitored sea basins remained fairly stable between July and August 2021. A change was observed in the Celtic and North Seas, where gasoil prices decreased by 2%, respectively.

Figure 7 Marine gasoil prices

Sea basin	2021			
	June	July	August	July-August %
Baltic Sea	0,46 €	0,46 €	0,46 € =	0%
Bay of Biscay and Iberian	0,45 €	0,45 €	0,45 € =	0%
Celtic Sea	0,42 €	0,42 €	0,41 € ↓	-2%
Mediterranean Sea	0,48 €	0,48 €	0,48 € =	0%
North Sea	0,41 €	0,42 €	0,41 € ↓	-2%

<sup>12</sup> Data collected from Mabux: Marine bunker exchange and aggregated on a monthly basis.

## Annex

## Bay of Biscay and Iberian coast

Products and locations of the main commercial species analysed for the Bay of Biscay and Iberian coast sea basin in Figure 4.

MCS: Hake		
Product	Port	Year
Benguela hake	ES - Cadiz	2019-2020-2021
European hake, gutted, size 2	FR - Les Sables-d'Olonne	2019-2020-2021
	FR - Lorient	
	PT - Sesimbra	2019
European hake, whole, size 1	ES - Burela	2019-2020-2021
	ES - Cillero	
European hake, whole, size 2	ES - Burela	2019-2020-2021
	PT - Olhão	
	PT - Matosinhos	
	PT - Sesimbra	2020-2021
European hake, whole, size 3	PT - Peniche	2020
	ES - Burela	2019-2020-2021
	PT - Matosinhos	
	PT - Olhão	
	PT - Peniche	
	PT - Sesimbra	
PT - Portimao	2021	
European hake, whole, size 4	ES - Burela	2019-2020-2021
	ES - Pasajes	

MCS: Lobster, Norway		
Product	Port	Year
Norway lobster, alive, size 4	FR - Concarneau	2019-2020-2021
	FR - Guilvinec	
	FR - Lorient	

MCS: Monk		
Product	Port	Year
Blackbellied angler, size 1	ES - Vigo	2019-2020-2021
Blackbellied angler, size 2	ES - A Coruña	
Monk, gutted, size 2	FR - Guilvinec	
	FR - Lorient	

MCS: Octopus		
Product	Port	Year
Common octopus	ES - Isla Cristina	2019-2020-2021
	ES - Santa Eugenia Ribeira	
Common octopus, whole	PT - Matosinhos	2019-2020-2021
	PT - Olhão	
	PT - Peniche	
	PT - Portimao	
	PT - Sesimbra	

MCS Sardine		
Product	Port	Year
European pilchard(=Sardine), whole	ES - Barbate de Franco	2019-2020-2021
	ES - Isla Cristina	
Sardine, whole, size 2	PT - Matosinhos	2019-2020-2021
	PT - Peniche	
	PT - Portimao	
	PT - Sesimbra	
Sardine, whole, size 3	PT - Olhão	2019-2020-2021
	PT - Sesimbra	
	PT - Peniche	2019-2020
	PT - Portimao	2020-2021
	PT - Matosinhos	2020

### Mediterranean Sea

Products and locations of the main commercial species analysed for the Mediterranean Sea in Figure 6.

MCS: Mackerel		
Product	Port	Year
Atlantic mackerel, whole, size 2	FR - Agde	2019-2020-2021

MCS: Sardine		
Product	Port	Year
Round sardinella	ES - Mazarrón	2019-2020-2021
	ES - San Pedro del Pinatar	2019-2021

MCS: Shrimp, miscellaneous		
Product	Port	Year
Blue and red shrimp	ES - Blanes	2019-2020-2021
	ES - Palamós	
	ES - Palma de Mallorca	

MCS: Swordfish		
Product	Port	Year
Swordfish	ES - Roquetas de Mar	2019-2020-2021