



Contextual information

to interpret market developments of the EU fishery and aquaculture sector

September 2021

26/10/2021

This document provides an overview of what happened in the European sea basins in September 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

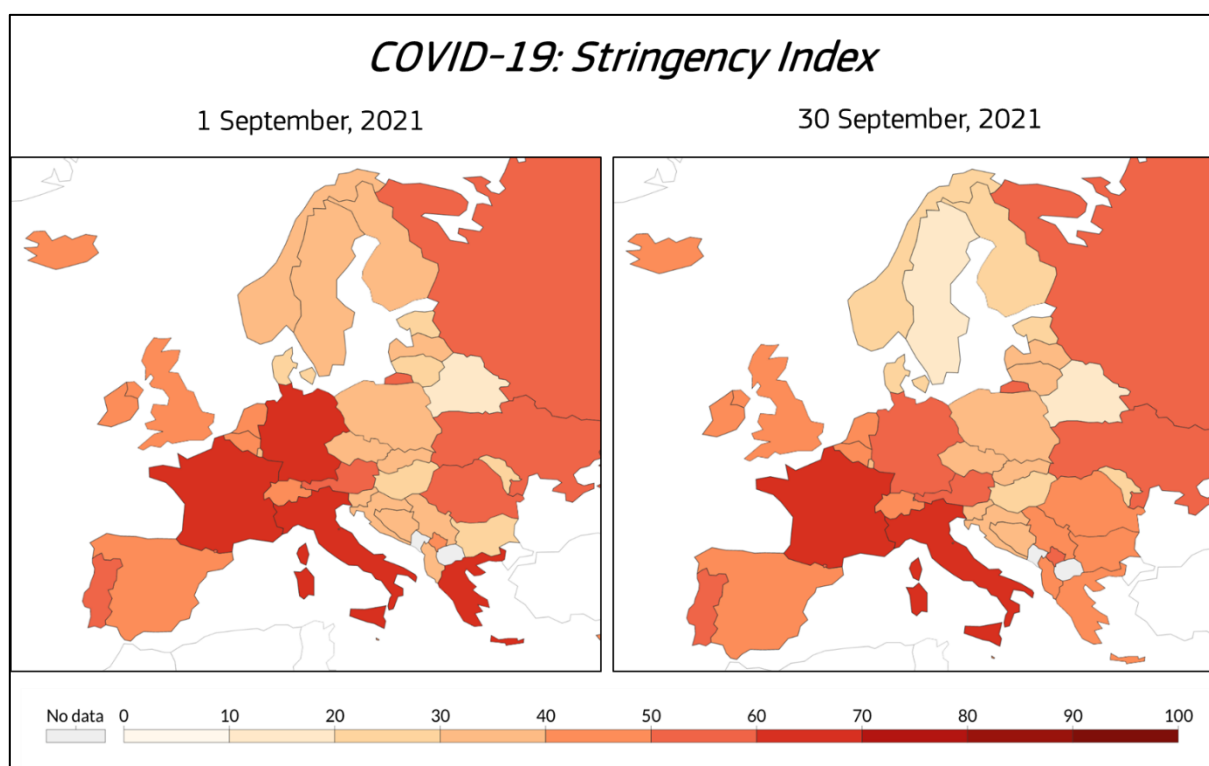
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Overview on COVID-19 response measures taken

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 September 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>.¹

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 Lithuania, while slightly lightened in Germany, Greece, Finland, Romania, Sweden, plus Norway.

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



Weather

The weather conditions in September 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 September 2021 compared with September 2020

Sea basin	Impact: low, medium, high	Comments
Baltic Sea		The weather conditions were appropriate for fishing.
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 conditions were appropriate for fishing.
North Sea		The weather conditions were appropriate for fishing, and warmer in the first part of the month compared to those registered in past years.



Fishing or market closures and openings

Baltic Sea

A new ICES Advice on fishing opportunities, catch, and effort has been published on 15 September 2021. It concerns Atlantic salmon (*Salmo salar*) in subdivisions 22–31 (Baltic Sea, excluding the Gulf of Finland), and advises “that according to the MSY approach the catch of salmon in the mixed-stock sea fisheries (both commercial and recreational) should be zero in 2022”.²

Mediterranean Sea

In most of the Ionian and south Tyrrhenian seas, 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 18/05/21.³

Black sea and Mediterranean Sea

On 17 September, the European Commission adopted a proposal for fishing opportunities for 2022 for certain fish stocks and groups of fish stocks applicable in the Mediterranean and Black Seas. This Regulation applies to Union fishing vessels exploiting several fish stocks, as detailed in article 2 of the document.⁴

North Sea

Further to the ICES Advice on fishing opportunities, catch, and effort published on 30 June 2021⁵, which proposed to decrease total allowable catch (TAC) for North Sea cod by 10,3% in 2022, discussions continue about the impact of that proposal⁶.

All EU Member States

On 23 September 2021, the European Commission has published the “Report from the Commission to the European Parliament and the Council: Implementation of the Technical Measures Regulation (Article 31 of Regulation (EU) 2019/1241)”. Building upon scientific assessments and contributions from the Scientific, Technical and Economic Committee for Fisheries (STECF) and the International Council for the Exploration of the Sea (ICES), the Regulation includes targets for technical measures to “reduce unwanted catches (especially of sensitive species); optimise exploitation patterns;

² ICES Advice on fishing opportunities, catch, and effort about concerns Atlantic salmon (*Salmo salar*) in subdivisions 22–31 (Baltic Sea, excluding the Gulf of Finland) is available at :

<https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2021/2021/sal.27.22-31.pdf>

³ More information about this 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>

⁴ Text of the proposal available at: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM:2021:548:FIN>

⁵ 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>

⁶ For more details, please visit <https://www.openseas.org.uk/news/are-scotlands-fish-stocks-in-good-condition/> and <https://fishingnews.co.uk/features/four-reasons-to-raise-north-sea-cod-quotas/>

contribute to improved yields; and ensure impacts of fishing on seabed habitats are in line with EU environmental".⁷

A new ICES Advice on fishing opportunities, catch, and effort has been published on 30 September 2021. It concerns mackerel (*Scomber scombrus*) in subareas 1–8 and 14, and in Division 9.a (Northeast Atlantic and adjacent waters). The ICES Advice states that “when the MSY approach is applied, catches in 2022 should be no more than 794.920 tonnes”.⁸

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 September 2021⁹.

Figure 3 - TAC uptake¹⁰

Sea basin	Species	Adapted quotas	Total catches	% consumed up to September 2021
Baltic sea	Cod	7.024	2.320	33%
	European plaice	26.139	6.292	24%
	Herring	300.619	172.934	58%
	Norway lobster	13.906	5.008	36%
Bay of biscay	Anchovy	15.005	11.416	76%
	Common sole	3.807	2.476	65%
	Hake	56.629	23.160	41%
	Norway lobster	4.792	2.980	62%
Black sea	Sprat (=Brisling)	11.475	3.436	30%
	Turbot	150	97	65%
Celtic sea	Common sole	5.251	2.675	51%
	Haddock	17.490	7.385	42%
	Monk	37.043	17.522	47%
	Norway lobster	15.766	6.221	39%
Mediterranean sea	Bluefin tuna	22.168	16.324	74%
	Swordfish	6.560	3.523	54%
North sea	Cod	9.287	4.387	47%
	Common sole	20.276	4.877	24%
	European plaice	109.909	19.175	17%
	Norway lobster	4.237	2.105	50%

⁷ The report is available at <https://op.europa.eu/en/publication-detail/-/publication/73b768f6-1c6f-11ec-b4fe-01aa75ed71a1/language-en>

⁸ ICES Advice on fishing opportunities, catch, and effort about mackerel (*Scomber scombrus*) in subareas 1–8 and 14, and in Division 9.a is available at: <https://www.ices.dk/sites/pub/Publication%20Reports/Advice/2021/2021/mac.27.nea.pdf>

⁹ Data provided by FIDES (Fisheries Data Exchange System).

¹⁰ Data for Cyprus, German, Greece, Malta, Netherlands and Portugal are not included in the table.



Other highlights

Bay of Biscay and Iberian coast

According to the weekly first sales data available¹¹, the top species in this sea basin in terms of value in September 2021 were the following.

Figure 4 - Top species in terms of value in selected locations in the Bay of Biscay and Iberian coast in September 2021 (weeks 35-39)







Weekly first sales		Time frame: W35-39		
Volume (KG)	2019	2020	2021	Trend
Hake	1.858.632	1.698.159	1.384.327	
Lobster, Norway	48.397	115.654	118.305	
Monk	682.004	771.099	467.441	
Octopus	248.481	166.876	272.114	
Sardine	554.394	2.369.161	3.563.808	
Value (EUR)	2019	2020	2021	Trend
Hake	8.855.521	7.427.359	5.661.870	
Lobster, Norway	865.719	1.632.330	1.632.765	
Monk	3.813.886	4.027.227	2.750.594	
Octopus	1.701.904	1.202.633	2.301.919	
Sardine	1.039.231	3.085.907	3.604.215	
Price (EUR/kg)	2019	2020	2021	Trend
Hake	4,76	4,37	4,09	
Lobster, Norway	17,89	14,11	13,80	
Monk	5,59	5,22	5,88	
Octopus	6,85	7,21	8,46	
Sardine	1,87	1,30	1,01	

¹¹ 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 September in Bulgaria¹². It appears that volumes of clams increased compared with the same month of 2019 and 2020, while volumes of red mullet remained stable compared with the same month of 2020.

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

Monthly first sales		Time frame: September			
Volume (KG)	2019	2020	2021	Trend	
Clam	376.154	381.712	499.764		
Red mullet	489.656	272.448	276.817		
Value (EUR)	2019	2020	2021	Trend	
Clam	1.036.703	905.555	1.120.634		
Red mullet	338.377	205.344	271.878		
Price (EUR/kg)	2019	2020	2021	Trend	
Clam	2,76 €	2,37 €	2,24 €		
Red mullet	0,69 €	0,75 €	0,98 €		

¹² The most recent monthly first sales data for September 2021 are available via the EUMOFA website and can be accessed [here](#).

Mediterranean Sea

According to the weekly first sales data available¹³, the top species in this sea basin in terms of value in September 2021, were the following.

Figure 6 - Top species in terms of value in selected locations in the Mediterranean Sea in in September 2021 (weeks 35-39)

Weekly first sales		Time frame: W35-39			
Volume (KG)	2019	2020	2021	Trend	
Mackerel	17.844	72.773	106.048		
Sardine	20.278	19.512	16.180		
Shrimp, miscellaneous	45.529	58.183	35.257		
Swordfish	30.995	81.204	59.251		
Value (EUR)	2019	2020	2021	Trend	
Mackerel	10.134	6.048	2.058		
Sardine	4.836	24.556	25.717		
Shrimp, miscellaneous	866.294	827.307	783.464		
Swordfish	298.485	386.655	296.935		
Price (EUR/Kg)	2019	2020	2021	Trend	
Mackerel	0,57	0,08	0,02		
Sardine	0,24	1,26	1,59		
Shrimp, miscellaneous	19,03	14,22	22,22		
Swordfish	9,63	4,76	5,01		

¹³ 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 September 2021

Price of gasoil¹⁴ in the monitored sea basins remained fairly stable between August and September 2021. A change was observed in the North Sea only, where gasoil prices increased by 2%.

Figure 7 - Marine gasoil prices (Eur/litre)

Sea basin	2021				
	July	August	September	August-September	%
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	0,41	0,41	=	0%
Mediterranean Sea	0,48	0,48	0,48	=	0%
North Sea	0,42	0,41	0,42	↑	2%

¹⁴ 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	
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	
European hake, whole, size 3	ES - Burela	2019-2020-2021
	PT - Matosinhos	
	PT - Olhão	
	PT - Peniche	
	PT - Sesimbra	
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 - Matosinhos	
	PT - Sesimbra	
	PT - Peniche	2020
	PT - Portimao	2021

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