

# Monthly Highlights

No. 5 / 2021

E U M O F A

European Market Observatory for  
Fisheries and Aquaculture Products

## In this issue

*In February 2021, according to data collected by EUMOFA from 13 EU Member States, Atlantic herring and Atlantic horse mackerel together accounted for 39% of "small pelagics" total first-sales value.*

*In 2018 – 2021, the price of frozen fillets of mackerel from Iceland fluctuated from 1,86 to 12,07 EUR/kg.*

*From March 2018 to February 2021, French consumers spent 51% more for a kilogram of fresh monk (17,76 EUR/kg on average) than Spanish consumers (11,74 EUR/kg).*

*25% of all offshore catches in Greenland are landed in towns and settlements by law to support the local labour markets. The remaining 75% of offshore catches are processed on board.*

*Canned sardine products are among the most consumed preserved fish products in EU and include more than just sardine (*Sardina pilchardus*). In 2019, EU produced 73.669 tonnes of canned sardine, sprat and sardinella (all species combined).*

*On 22 April 2021, the EU and Greenland have signed a new sustainable fisheries partnership agreement (SFPA) and protocol.*



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[www.eumofa.eu](http://www.eumofa.eu)

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## 1. First sales in Europe

During **January–February 2021**, 13 EU Member States (MS), the United Kingdom, and Norway reported first-sales data for 10 commodity groups<sup>1</sup>. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section “*First sales in Europe*” are extracted from EUMOFA<sup>2</sup>.

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

**Increases in value and volume:** Denmark, Estonia, Latvia, Lithuania, and Sweden were the countries that recorded an increase in both first-sales value and volume. Small pelagics species, namely herring and sprat, were principally responsible for increases in the Baltic Sea.

**Decreases in value and volume:** Belgium, Bulgaria, Italy, the Netherlands, Poland, Portugal, Spain, and the United Kingdom recorded decreases in first-sales value and volume. Bulgaria stood out with the most significant drop, which was due to a lower supply of clam.

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

Country	January - February 2019		January - February 2020		January - February 2021		Change from January - February 2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	2.589	9,59	2.246	10,66	2.121	7,59	-6%	-29%
Bulgaria	121	0,14	93	0,21	53	0,11	-43%	-49%
Denmark	153.112	77,21	57.157	50,91	101.136	52,24	77%	3%
Estonia	11.103	2,00	8.415	3	17.097	3,86	103%	54%
France	32.294	106,15	27.561	97	27.426	90,76	0%	-6%
Italy	11.667	48,3	12.982	50,2	10.170	41,17	-22%	-18%
Latvia	9.943	1,7	7.708	1,4	9.384	2,02	22%	43%
Lithuania	233	0,3	325	0,2	719	0,41	121%	97%
Netherlands	31.020	53,9	33.863	52,3	26.858	36,38	-21%	-30%
Poland	21.900	5,6	19.884	4,8	14.416	3,40	-28%	-29%
Portugal	14.437	37,5	9.625	34,0	7.800	28,59	-19%	-16%
Spain	66.529	212,4	61.731	202,7	48.332	163,32	-22%	-19%
Sweden	54.262	18,8	22.000	10,8	44.485	14,56	102%	35%
Norway	525.532	481,0	566.543	592,7	572.767	515,39	1%	-13%
United Kingdom	61.078	120,2	62.769	112,3	61.785	87,41	-2%	-22%

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

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

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

<sup>2</sup> First sales data updated on 16.4.2021.



## 1.2. February 2021 compared to February 2020

**Increases in value and volume:** First sales increased in Denmark, Estonia, France, Latvia, Lithuania, and Sweden. Herring and sprat were behind the sharp increases in Estonia, Lithuania, and Sweden, while herring and blue whiting were the main causes of higher first sales (mainly in terms of value) in Denmark.

**Decreases in value and volume:** First sales decreased in Bulgaria, Italy, the Netherlands, Poland, Portugal, Spain, Norway, and the United Kingdom. Bulgaria saw decreases due to clam, Poland due to sprat and herring, while mackerel was among the key species behind the decline in the United Kingdom.

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

Country	February 2019		February 2020		February 2021		Change from February 2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.123	4,5	924	4,9	1.139	4,2	23%	-16%
Bulgaria	95	0,08	50	0,1	27	0,06	-46%	-46%
Denmark	81.399	35,1	30.144	19,6	50.398	22,5	67%	15%
Estonia	4.894	0,9	2.739	0,6	7.693	1,7	181%	162%
France	16.646	53,1	13.021	45,5	13.782	46,5	6%	2%
Italy	5.933	24,6	6.353	24,4	5.657	22,5	-11%	-8%
Latvia	5.183	0,9	3.888	0,7	5.555	1,2	43%	71%
Lithuania	108	0,1	191	0,1	370	0,2	94%	141%
Netherlands	19.668	30,6	21.396	30,0	20.060	22,2	-6%	-26%
Poland	12.358	3,2	12.610	3,0	6.457	1,5	-49%	-50%
Portugal	7.169	18,0	5.128	17,9	3.662	13,6	-29%	-24%
Spain	35.323	100,2	33.738	100,6	24.850	83,2	-26%	-17%
Sweden	29.828	9,7	10.545	5,1	22.661	7,3	115%	43%
Norway	268.159	244,0	337.299	341,8	305.704	297,3	-9%	-13%
United Kingdom	20.740	44,2	29.613	50,1	15.154	26,1	-49%	-48%

Possible discrepancies in % changes are due to rounding.

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

The most recent weekly first-sales data (up to week 21 of 2021) are available via the EUMOFA website, and can be accessed [here](#).

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

### 1.3. First sales in selected countries

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

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


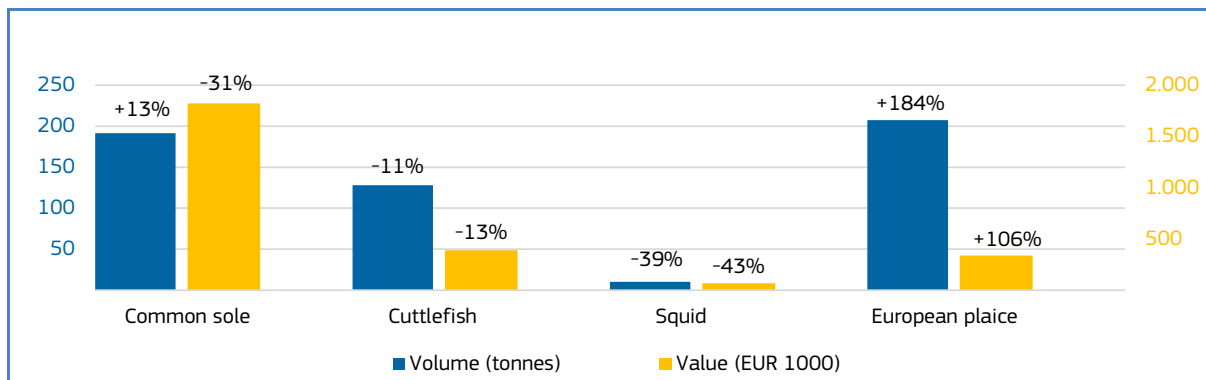

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 7,6 million, -29%	2.121 tonnes, -6%	Common sole, squid, cuttlefish, ray, megrim.	The increase in first sales of <b>European plaice</b> was due to changes in fishing zones and targeted fishery. The increase in first-sales value (+106%) did not follow volume (+184%) due to a 27% drop of the first-sales price (1,63 EUR/kg in February 2021 compared to 2,24 EUR/kg in February 2020). This can be explained by the following reasons: 1) due to post-Brexit negotiations including fishing licenses, medium size trawlers were not allowed in the British 6-12 nm zone until the end of January, which delayed decisions to enter British waters in early February. 2) Some large beam trawlers opted to go to the North Sea instead of British waters where they caught more plaice and less sole. 3) Unfavourable weather conditions, especially in early and mid-February.
<b>Feb 2021 vs Feb 2020</b>	EUR 4,2 million, -16%	1.139 tonnes, +23%	<b>Value:</b> Common sole, cuttlefish, squid, <b>Volume:</b> European plaice, gurnard.	

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



Percentages show change from the previous year.

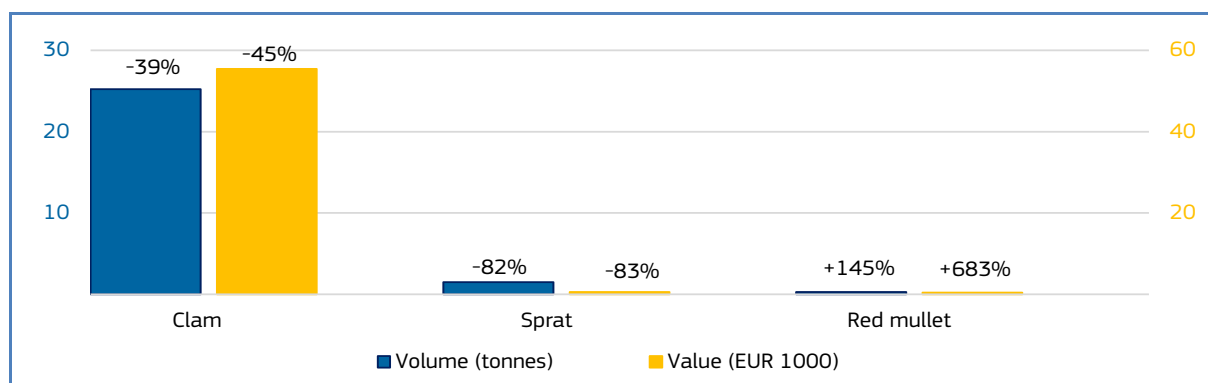
Table 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA**

 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 0,1 million, -49%	53 tonnes, -43%	Clam, sprat, other molluscs and aquatic invertebrates*.
<b>Feb 2021 vs Feb 2020</b>	EUR 0,06 million, -46%	27 tonnes, -46%	Clam, sprat. Red mullet slightly offset the decline.

<sup>3</sup> First-sales data updated on 16.4.2021.

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

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

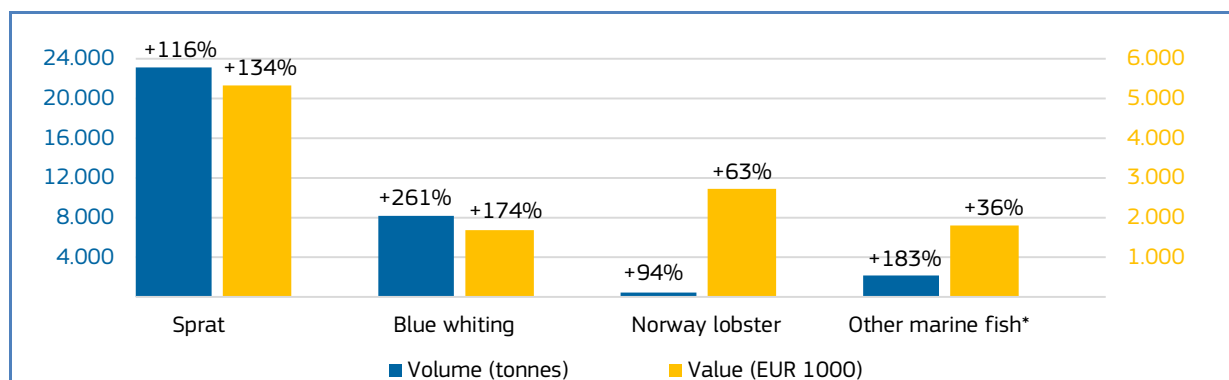


Percentages show change from the previous year. \*EUMOFA aggregation for species.

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Feb 2021 vs Jan-Feb 2020	EUR 52,2 million, +3%	101.136 tonnes, +77%	Sprat, herring, mussel Norway lobster, blue whiting, other marine fish*.	First sales of <b>blue whiting</b> in February 2021 (8.200 tonnes) were significantly higher than the production recorded in February 2020 (around 2.300 tonnes) but is closer to the production recorded in February 2017 (10.300 tonnes). While the changes in volume observed between the months of February look important in relative terms, it should be noted that they are low in absolute terms compared to other periods (99.000 tonnes in March-April 2020). First sales of <b>sprat</b> , which is assessed as being at full reproductive capacity <sup>5</sup> , is back to levels observed in February 2019, and in line with the production recorded in February 2017 and 2018.
Feb 2021 vs Feb 2020	EUR 22,5 million, +15%	50.398 tonnes, +67%	Sprat, blue whiting, Norway lobster, other marine fish*.	

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, FEBRUARY 2021**



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

<sup>5</sup> ICES Advice 2020 – spr.27.22-32 – <https://doi.org/10.17895/ices.advice.5879>



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


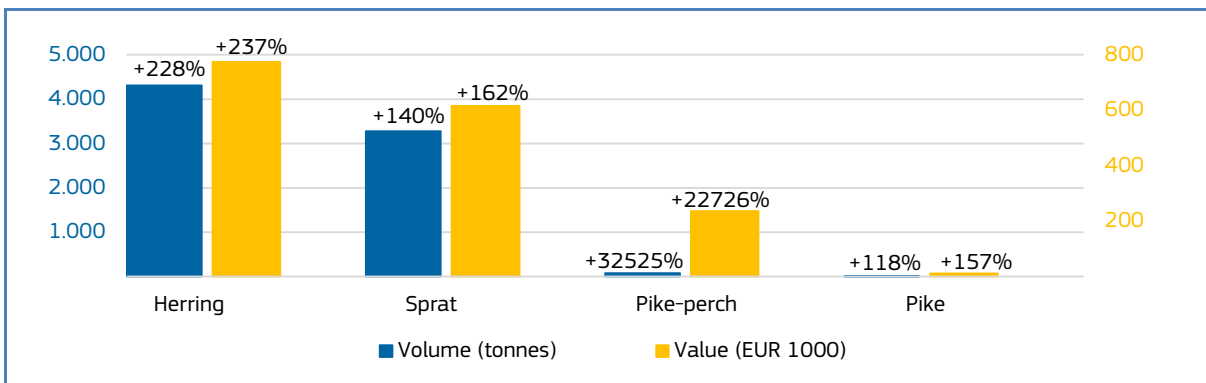
 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 3,9 million, +54%	17.097 tonnes, +103%	Herring, smelt.	The sharp increase in first sales of <b>pike-perch</b> in February 2021 over February 2020 is due to a broader distribution of sales in January and February 2021, compared to 2020 when most sales occurred in January only. Favourable weather conditions on Lake Peipsi have made it possible to fish for the semi-annual pike perch quota of 2021 already in the first half of February. <b>Herring</b> sales increased due to better weather conditions in February 2021 compared with February 2020, and were also aided by existing resources in fishing capacity, market demand and total allowable catches.
<b>Feb 2021 vs Feb 2020</b>	EUR 1,7 million, +162%	7.693 tonnes, +181%	Herring, sprat, pike-perch, pike.	

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, FEBRUARY 2021**



Percentages show change from the previous year.

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


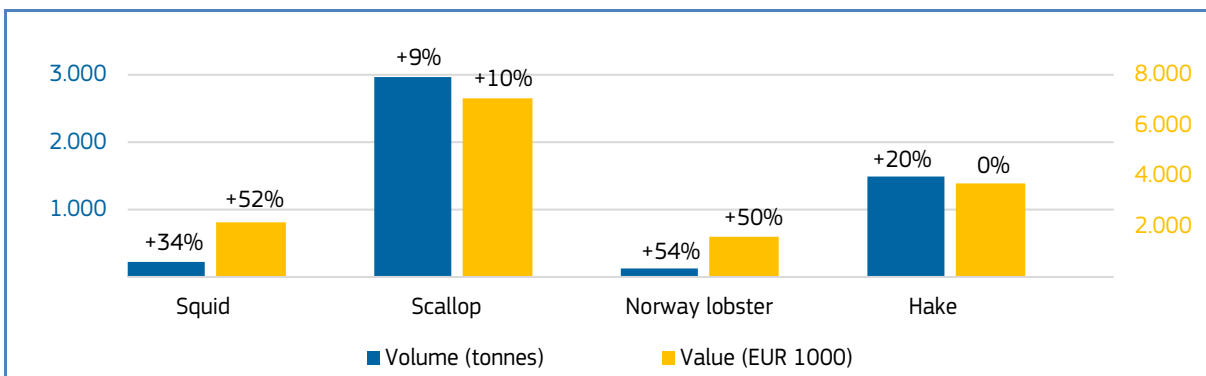
 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 90,8 million, -6%	27.426 tonnes, 0%	<b>Value:</b> Common sole, hake, monk. <b>Volume:</b> Scallop, hake, monk, saithe, herring.
<b>Feb 2021 vs Feb 2020</b>	EUR 46,5 million, +2%	13.782 tonnes, +6%	Squid, scallop, Norway lobster, hake.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, FEBRUARY 2021**



Percentages show change from the previous year.



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


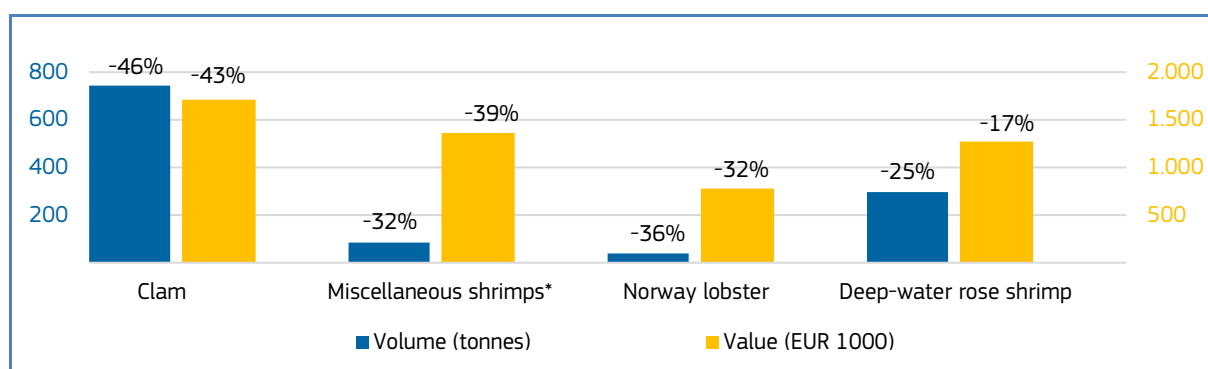
 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 41,2 million, -18%	10.170 tonnes, -22%	Clam, miscellaneous shrimps*, deep-water rose shrimp, hake.
<b>Feb 2021 vs Feb 2020</b>	EUR 22,5 million, -8%	5.657 tonnes, -11%	Clam, miscellaneous shrimps*, Norway lobster, deep-water rose shrimp.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, FEBRUARY 2021**



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

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


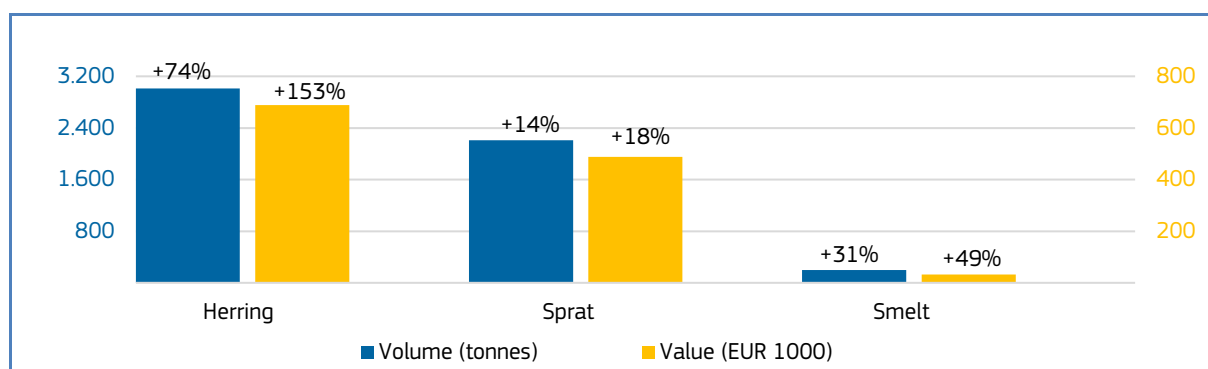
 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 2,0 million, +43%	9.384 tonnes, +22%	Herring, sprat, smelt, other marine fish*.
<b>Feb 2021 vs Feb 2020</b>	EUR 1,2 million, +71%	5.555 tonnes, +43%	Herring, sprat, smelt.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, FEBRUARY 2021**



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



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


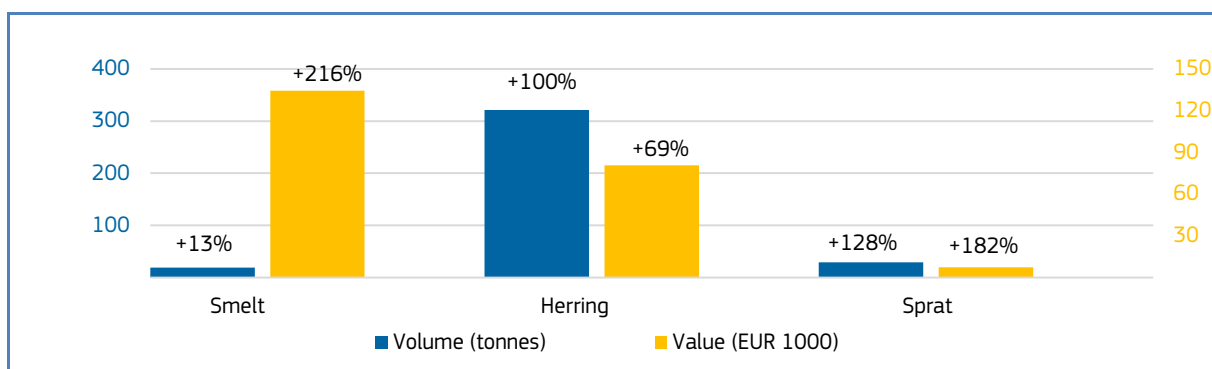
 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species	Notes
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 0,4 million, +97%	719 tonnes, +121%	Smelt, herring, sprat.	<b>Herring</b> first sales increased due to higher fishing activities, market demand, and good weather conditions in February 2021. In addition to the increase of catches, Latvian and Estonian fish processing companies expanded and acquired a subsidiary fish company in Lithuania; landings recorded in Lithuania increased and, therefore, sales increased by 100%.
<b>Feb 2021 vs Feb 2020</b>	EUR 0,2 million, +141%	370 tonnes, +94%	Smelt, herring, sprat.	

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, FEBRUARY 2021**



Percentages show change from the previous year.

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


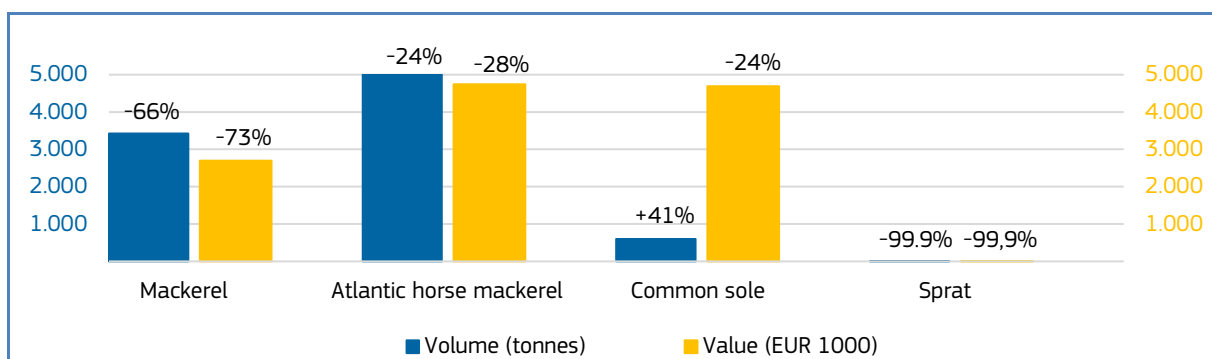
 the Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 36,4 million, -30%	26.858 tonnes, -21%	Mackerel, herring, common sole, Atlantic horse mackerel.
<b>Feb 2021 vs Feb 2020</b>	EUR 22,2 million, -26%	20.060 tonnes, -6%	Mackerel, Atlantic horse mackerel, common sole, sprat.

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, FEBRUARY 2021**



Percentages show change from the previous year.





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


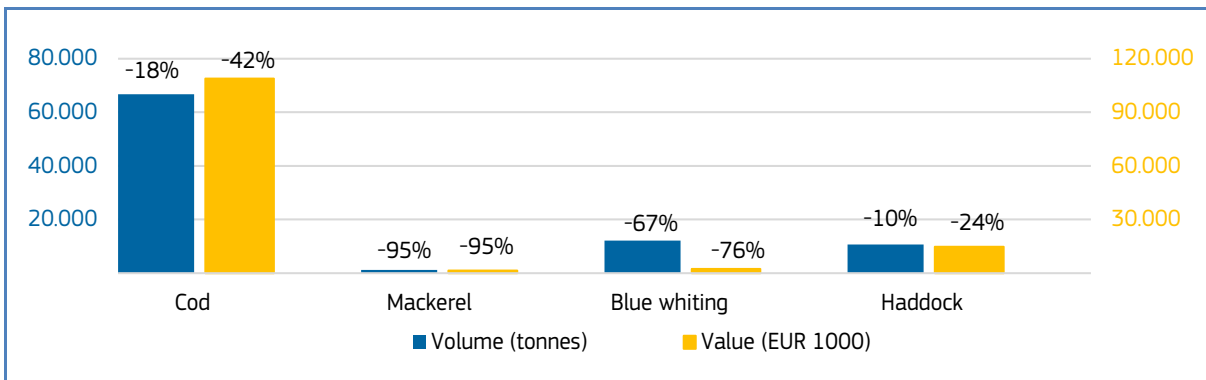
 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 515,4 million, -13%	572.767 tonnes, +1%	<b>Value:</b> cod, mackerel, haddock. <b>Volume:</b> miscellaneous small pelagics*, herring, seaweed and other algae*.
<b>Feb 2021 vs Feb 2020</b>	EUR 297,3 million -13%	305.704 tonnes, -9%	Cod, mackerel, blue whiting, haddock.

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, FEBRUARY 2021**



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

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


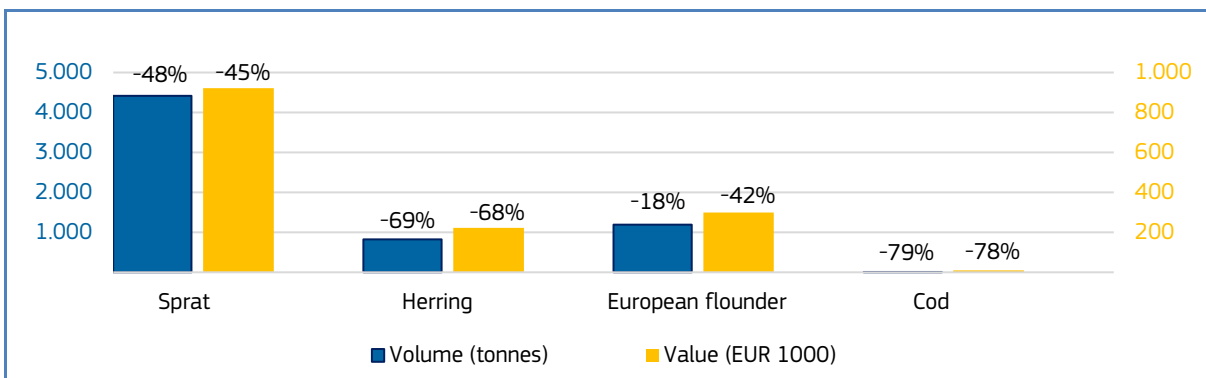
 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 3,4 million, -29%	14.416 tonnes, -28%	Sprat, herring, European flounder, European plaice.
<b>Feb 2021 vs Feb 2020</b>	EUR 1,5 million -50%	6.457 tonnes, -49%	Sprat, herring, European flounder, cod.

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, FEBRUARY 2021**



Percentages show change from the previous year.



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


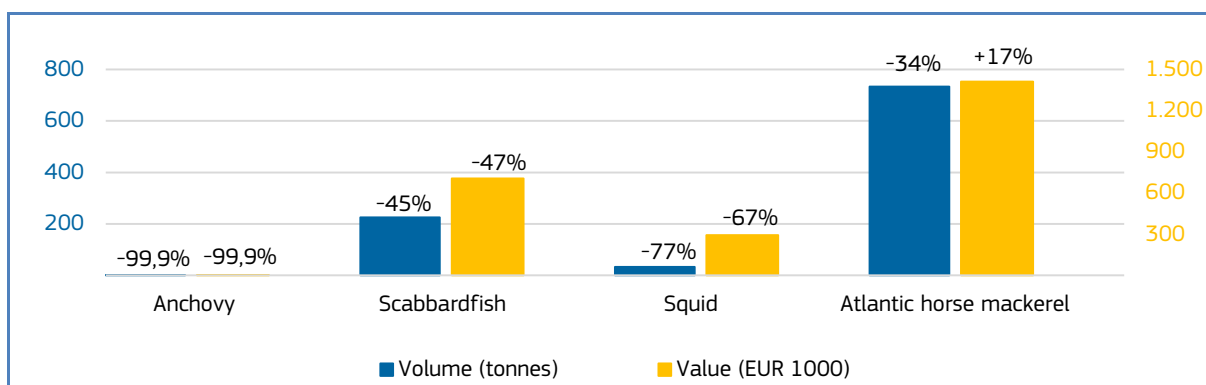

 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 28,6 million, -16%	7.800 tonnes, -19%	Squid, anchovy, seabream* (other than gilthead), Atlantic horse mackerel.	Higher first sales value of Atlantic horse mackerel relative to decreased volume was due to its average first-sales price increase (+77%). Since this species can be considered a low-price product, the combination of high seafood consumption, low prices, and benefits to health generates a higher demand of this product and, therefore, is driving price increases. The peak of catches for this species is concentrated in springtime (and to a lesser extend in autumn), so catches in February will probably be compensated for in the forthcoming months.
<b>Feb 2021 vs Feb 2020</b>	EUR 13,6 million -24%	3.662 tonnes, -29%	Anchovy, scabbardfish, squid, Atlantic horse mackerel, mackerel.	

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, FEBRUARY 2021**



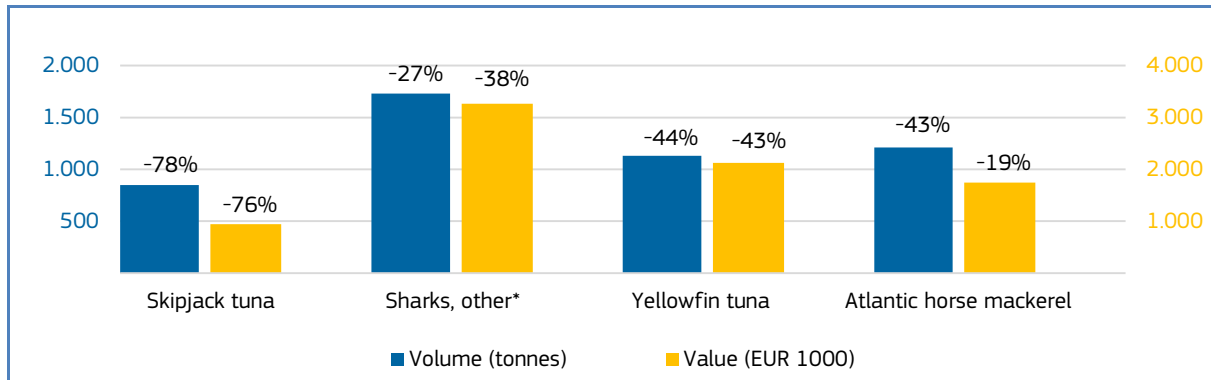
Percentages show change from the previous year. \*EUMOFA aggregation for species.

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

 Spain	First-sales value / trend in %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 163,3 million, -19%	48.332 tonnes, -22%	Hake, clam, other sharks*, skipjack tuna, Atlantic horse mackerel.	The first sales decrease of both value and volume for skipjack tuna could be explained by the adaptation of fishing operations to adjusted management measures and the fishing season. Regarding the management adjustments, in January 2021 the Spanish Fisheries Department released a set of management measures with reduction for tuna species including skipjack for the fleet operating in the Indian Ocean Tuna Commission area (IOTC <sup>6</sup> ). The adaption of catches to the fishing season also explains this abrupt decrease.
<b>Feb 2021 vs Feb 2020</b>	EUR 83,2 million -17%	24.850 tonnes, -26%	Skipjack tuna, other sharks*, yellowfin tuna, Atlantic horse mackerel.	

<sup>6</sup> <https://www.iotc.org/>

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, FEBRUARY 2021**



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

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


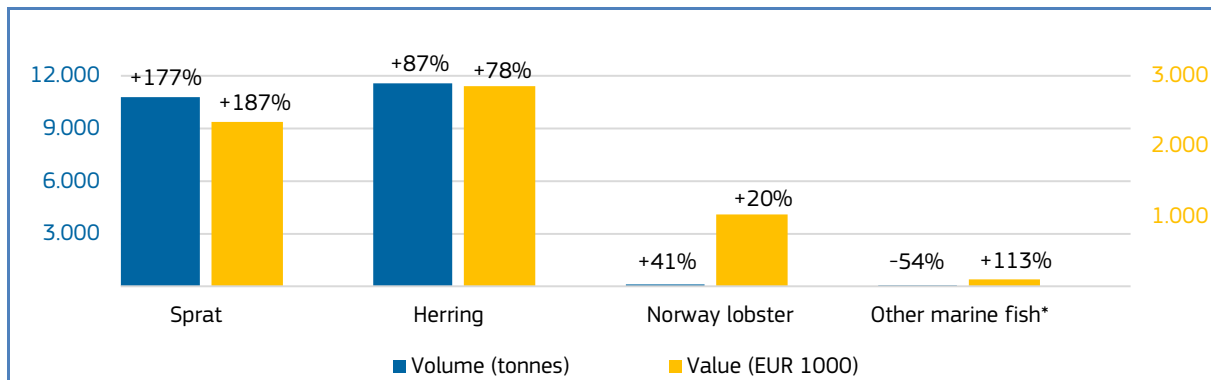
 Sweden	First-sales value / trend in %	First-sales volume / trend in %	Main contributing species	Notes
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 14,6 million, +35%	44.485 tonnes, +102%	Sprat, herring, Norway lobster,	Favourable weather conditions in February 2021 allowed for a rise in fishing activities targeting <b>sprat</b> , and therefore led to an increase in its first sales compared to 2020. In February 2021, the volume of sprat landed was similar to February 2019. As such, the abnormal supply was in February 2020, when sprat catches decreased significantly due to bad weather that prevented usual fishing activities.
<b>Feb 2021 vs Feb 2020</b>	EUR 7,3 million, +43%	22.661 tonnes, +115%	Sprat, herring, Norway lobster, other marine fish*.	

Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, FEBRUARY 2021**



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

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


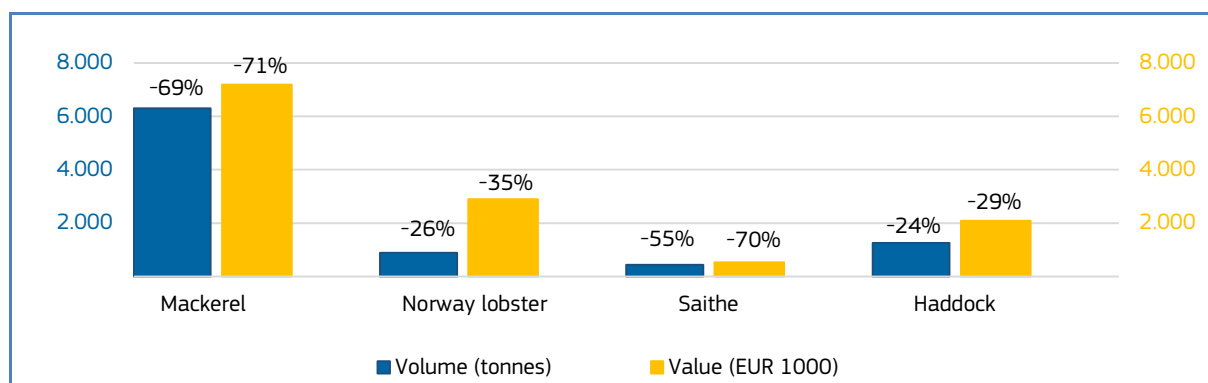
 The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Feb 2021 vs Jan-Feb 2020</b>	EUR 87,4 million, -22%	61.785 tonnes, -2%	Mackerel, scallop, Norway lobster, haddock.
<b>Feb 2021 vs Feb 2020</b>	EUR 26,1 million, -48%	15.154 tonnes, -49%	Mackerel, Norway lobster, saithe, haddock.

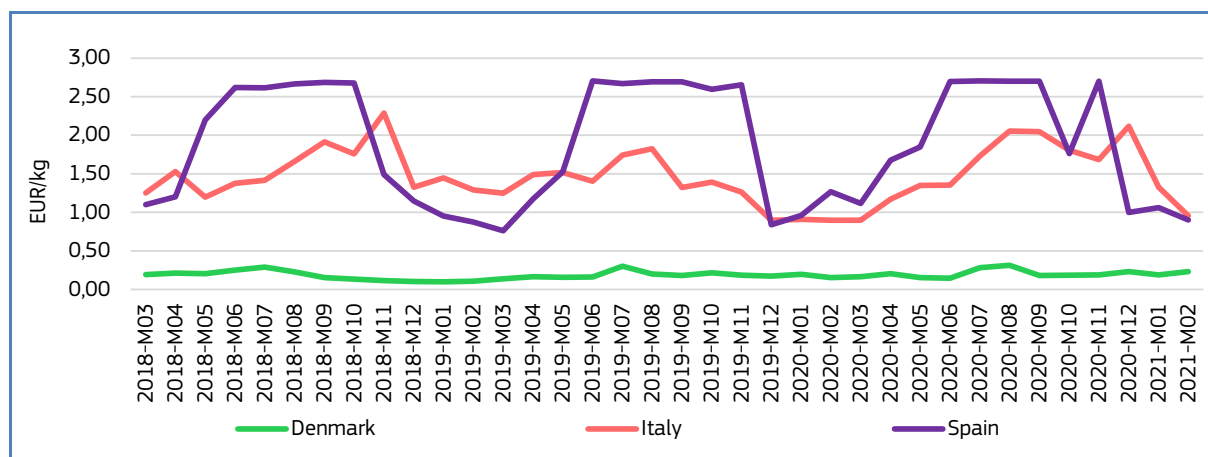
Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, FEBRUARY 2021**



Percentages show change from the previous year.

#### 1.4. Comparison of first-sales prices of selected species in selected countries<sup>7</sup>

Figure 16. **FIRST-SALES PRICES OF MUSSEL MYTILUS SPP. IN DENMARK, ITALY, AND SPAIN**



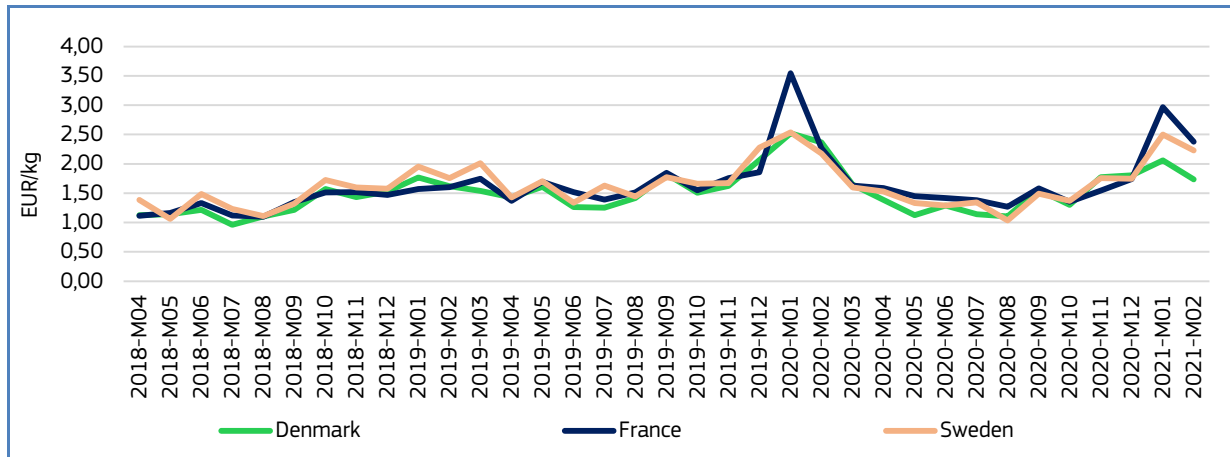
EU first sales of **mussel *Mytilus spp.*** occur predominantly in **Denmark**, as well as in **Italy** and **Spain**. Average prices in February 2021 (the most recent available data) were 0,23 EUR/kg in Denmark (up from both the previous month and year by 22% and 49%, respectively), and 0,95 EUR/kg in Italy (-28% from January 2021 and +6% from February 2020). The high difference in mussel *Mytilus spp.* prices between analysed countries is because blue mussel (*Mytilus edulis*) is sold in Denmark, while Italy and Spain see sales of the more valued Mediterranean mussels (*Mytilus galloprovincialis*). In Spain, the average price was 0,90 EUR/kg (down from both the previous month and year by 15% and 29%, respectively). In February 2021, supply increased remarkably in Italy (+189%), and decreased in Denmark (-57%), and Spain (-86%) compared to February 2020. Supply is seasonal with peaks between March–May in Denmark, March–April in Spain, and June–July in Italy. First sales of blue mussel in Denmark amount to almost 93.000 tonnes, while first sales of Mediterranean mussel amounted to 2.500

<sup>7</sup> First sales data updated on 16.4.2021.



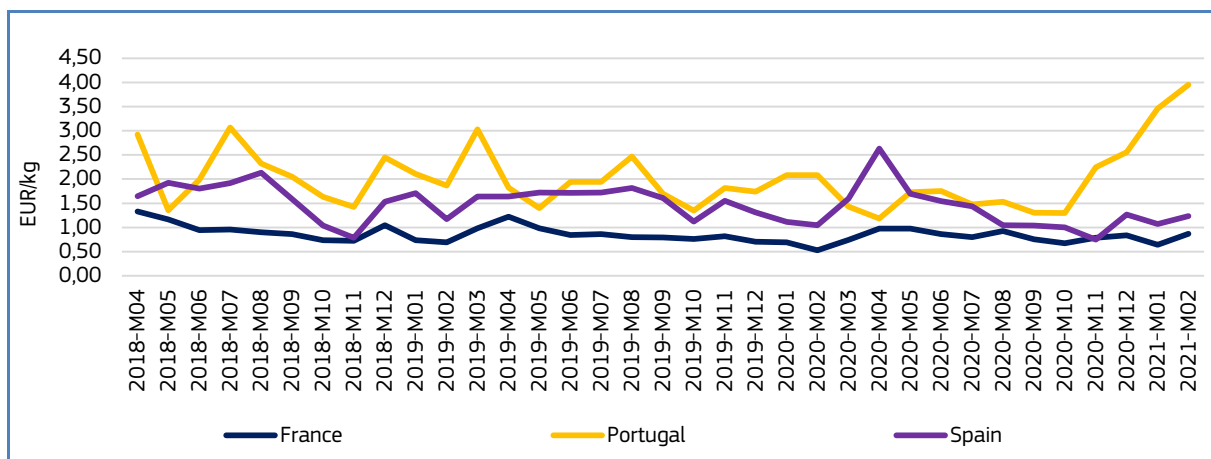
tonnes in Italy and 382 tonnes in Spain. Over the 36-month period, mussel *Mytilus* spp. prices exhibited different trends in all three countries: a stable trend in Denmark and in Italy (despite monthly fluctuations), and a slightly decreasing trend in Spain (with fluctuations). During the same period, supply showed a decreasing trend in all the three countries, especially in Denmark.

Figure 17. **FIRST-SALES PRICES OF SAITHE IN DENMARK, FRANCE, AND SWEDEN**



EU first sales of **saithe** occur in multiple countries, including **Denmark**, **France**, and **Sweden**. In February 2021, the average first-sales prices of saithe were: 1,73 EUR/kg in Denmark (down from both the previous month and year by 16% and 27%, respectively); 2,38 EUR/kg in France (20% lower than January 2021, and 5% higher than February 2020); and 2,23 EUR/kg in Sweden (11% down from the previous month and 3% up from the previous year). In France and Sweden, the price spikes in both January 2020 and 2021 correlated with drops in supply. In Denmark, the price spikes occur mainly in January, and are not due to drops in supply, but rather an increase in demand. In February 2021, supply decreased in all three countries: -2% in Denmark, -94% in Italy, and -89% in Sweden, relative to the previous year. Volumes sold in the three markets are seasonal. In Denmark and France, they peak in March–April, and in Sweden in October–November. Over the past 36 months, saithe prices showed an upward trend. At the same time, supply had an opposite trend in all the three countries.

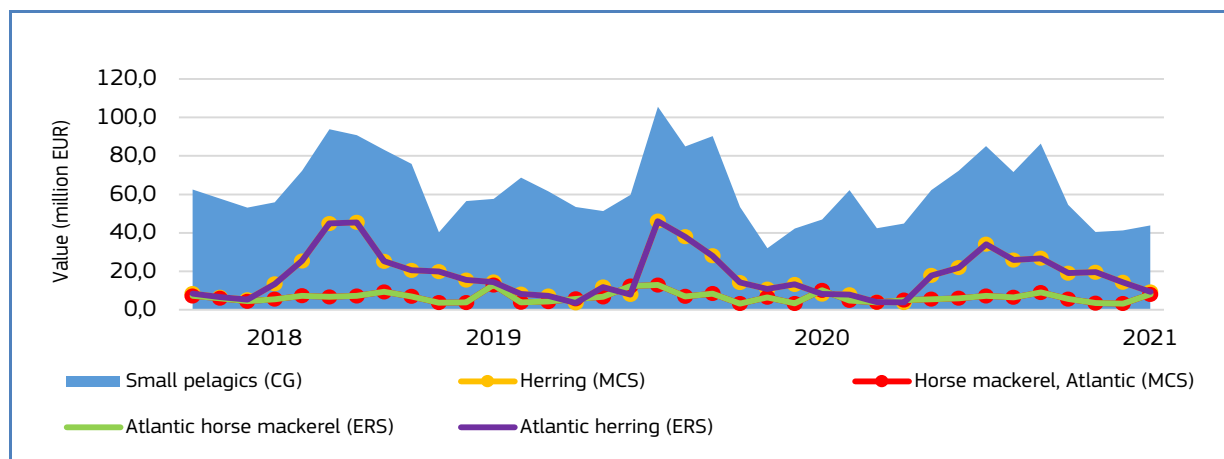
Figure 18. **FIRST-SALES PRICES OF SARDINE IN FRANCE, PORTUGAL, AND SPAIN**



EU first sales of **sardine** occur predominantly in **Spain**, as well as in **France** and **Portugal**. In February 2021, the average first-sales prices of sardine were: 0,87 EUR/kg in France (up from both the previous month and year by 36% and 65%, respectively); 3,95 EUR/kg in Portugal (+14% from January 2021, and +90% from February 2020); and 1,24 EUR/kg in Spain (15% higher than January 2021, and 18% up from February 2020). In February 2021, supply decreased in all three countries: -22% in France, -78% in Portugal, and -14% in Spain, compared to February 2020. Supply is seasonal with peaks between July–August in France, June–September in Portugal, and October–November in Spain. Prices exhibited a downward trend in France and Spain, while a strong downward trend from March 2018 to October 2020 which recovered slightly between November 2020 and February 2021 was observed in Portugal. Over the past three years, supply was stable in Spain and had a slight upward trend in France and Portugal.

## 1.5. Commodity group of the month: small pelagics<sup>8</sup>

Figure 19. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES<sup>9</sup>, MARCH 2018 - FEBRUARY 2021**



The “**small pelagics**” commodity group (CG<sup>10</sup>) recorded the highest first-sales value and volume out of the 10 CGs recorded in February 2021<sup>11</sup>. Of reporting countries covered by EUMOFA database, first sales of “small pelagics” reached a value of EUR 43,8 million and a volume of 95.474 tonnes, representing a value decrease of 7% and a volume increase of 20% compared to February 2020.

In the past 36 months, the highest first-sales value of small pelagics was registered at EUR 105,6 million (August 2019).

The “small pelagics” commodity group includes seven main commercial species (MCS): anchovy, herring, horse mackerel, mackerel, sardine, sprat, and miscellaneous small pelagics<sup>12</sup>.

At Electronic Recording and Reporting System (ERS) level, Atlantic herring (21%) and Atlantic horse mackerel (18%) together accounted for 39% of “small pelagics” total first-sales value recorded in February 2021.

<sup>8</sup> First sales data updated on 16.4.2021.

<sup>9</sup> Norway and the UK excluded from the analyses.

<sup>10</sup> **Annex 3:** <http://eumofa.eu/supply-balance-and-other-methodologies>

<sup>11</sup> More data on commodity groups can be found in Table 1.2 of the Annex.

<sup>12</sup> Greater argentine accounts for the highest first-sales value and volume within the miscellaneous small pelagics category.



## 1.6. Focus on Atlantic herring



Atlantic herring (*Clupea harengus*) is economically the most important herring species in the family Clupeidae. It is widely distributed in the Northwest and Northeast Atlantic, congregates in large schools, and migrates between spawning and wintering grounds in coastal areas and feeding grounds in open waters. Atlantic herring can live for up to 10 years and reach 40 cm in length (average size is 20-30 cm) and almost 700 g in weight. They are demersal spawners, depositing their sticky eggs on coarse sand, gravel, shells and small stones at depths of 15--40 m. Herring represent an important prey species for many predators, including cod, dogfish and other sharks, marine mammals, and seabirds<sup>13</sup>.

Atlantic herring is mainly caught by pelagic trawlers (mid-water, pair and otter trawl) and purse seiners. The main stocks fished in EU waters are found in the Baltic, the North Sea, and West of Scotland. Herring catches are seasonal and subject to total allowable catches (TACs) set based on precautionary considerations. In the Baltic Sea, according to Council Regulation (EU) 2019/1838 of 30 October 2019, in subdivisions 25 and 26, it was prohibited to fish cod quota from 1 May to 31 August 2020 for all vessels, with derogation for small-scale vessels (less than 12 metres in length) that use passive and other allowed gear in waters less than 20 metres deep. This restriction also affected the herring fishery as it was not possible to avoid cod by-catch in such fisheries<sup>14</sup>.

Gear restrictions and a minimum conservation reference size (20 cm) limit are also in place in the EU waters<sup>15</sup>. In Norway there is a minimum size of 25cm<sup>16</sup> for spring-spawning herring. The North Sea Atlantic herring fisheries are managed jointly through a trilateral agreement by the EU, Norway, and the United Kingdom, through long-term management plans which are based on a catch quota system which is set annually<sup>17</sup>.

Denmark, Norway, Iceland, and the United Kingdom are among the main fishing nations of Atlantic herring. On the market, herring is sold mainly whole, fresh, marinated and smoked.

We have covered **Atlantic herring** in the following *Monthly Highlights*:

**First sales:** MH 3/2019 (Denmark, the Netherlands, Sweden)

**Topic of the month:** "Atlantic herring in the EU" MH4/2018.

## Selected countries

Table 18. **COMPARISON OF ATLANTIC HERRING FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "SMALL PELAGICS" IN SELECTED COUNTRIES**

Atlantic herring		Changes in Atlantic herring first sales Jan-Feb 2021 (%)		Contribution of Atlantic herring to total "small pelagics" first sales in February 2021 (%)	Principal places of sale Jan-Feb 2021 in terms of first-sales value
		Compared to Jan-Feb 2020	Compared to Jan-Feb 2019		
Estonia	Value	+147%	+68%	56%	Haapsalu, Lemmetsa, Paldiski Lõunasadam.
	Volume	+134%	+56%	57%	
Latvia	Value	+102%	+75%	59%	Roja, Ventspils, Skulte.
	Volume	+43%	+34%	58%	
Poland	Value	-33%	-30%	19%	Kolobrzeg, Hel, Wladyslawowo.
	Volume	-43%	-49%	16%	

<sup>13</sup> <https://www.ices.dk/about-ICES/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20ofactsheet-herring.pdf>

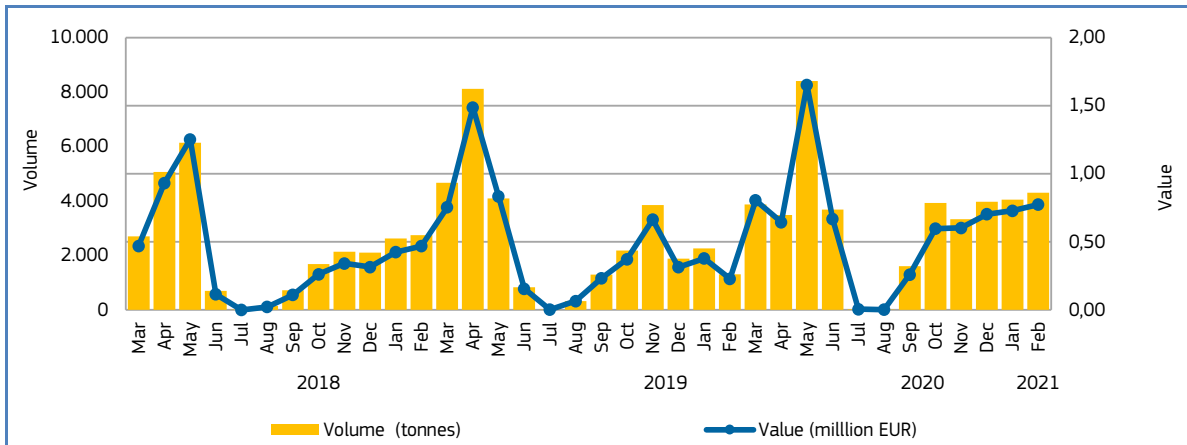
<sup>14</sup> Council Regulation (EU) 2019/1838 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019R1248%20>

<sup>15</sup> Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02019R1241-20210101>

<sup>16</sup> <https://www.fiskeridir.no/English/Fishing-in-Norway/Minimum-sizes>

<sup>17</sup> [https://ec.europa.eu/commission/presscorner/detail/en/IP\\_21\\_1206](https://ec.europa.eu/commission/presscorner/detail/en/IP_21_1206)

Figure 20. ATLANTIC HERRING: FIRST SALES IN ESTONIA, MARCH 2018 - FEBRUARY 2021



Over the past 36 months, the highest first-sales value of Atlantic herring in **Estonia** occurred in May 2020. There were low sales in July-August due to restrictions set by the EU. Typically, first sales were higher in spring, when fishing activities are more intensive. The Estonian fleet fishes for herring in the Gulf of Riga using both trawls and trap nets<sup>18</sup>.

Figure 21. FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN ESTONIA IN VALUE AND VOLUME, FEBRUARY 2021

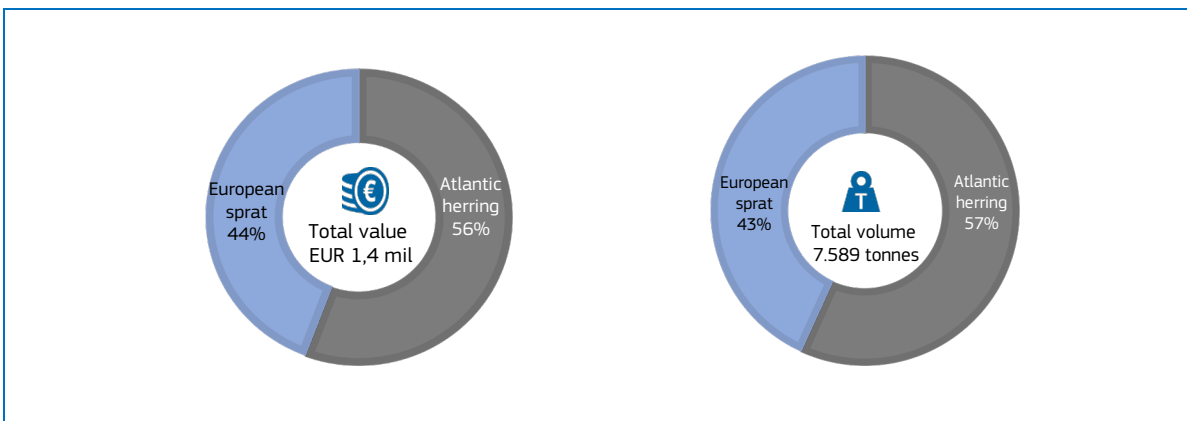
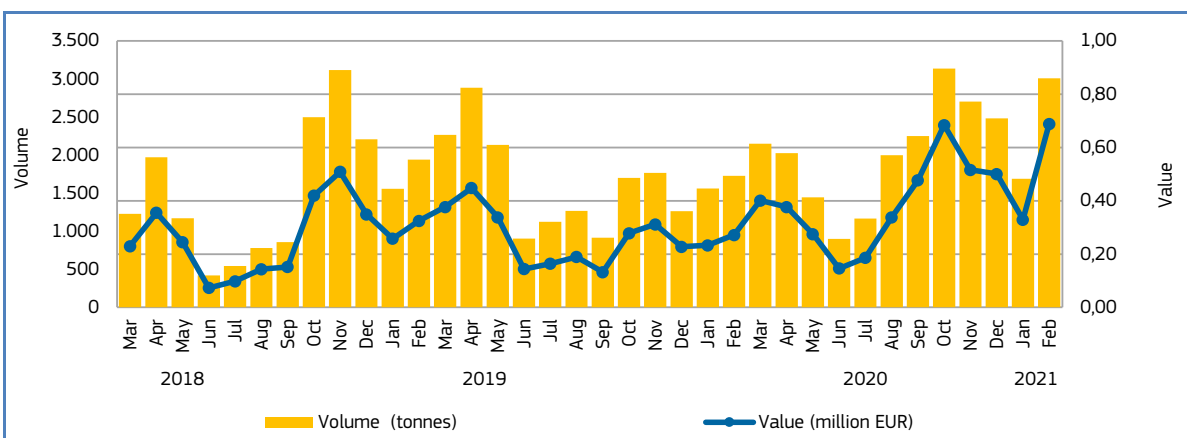


Figure 22. ATLANTIC HERRING: FIRST SALES IN LATVIA, MARCH 2018 - FEBRUARY 2021



<sup>18</sup> <http://firms.fao.org/firms/resource/10469/164147/en>





Over the past 36 months in **Latvia**, the highest first-sales volume of Atlantic herring was in October 2020 when 3.138 tonnes were sold. About 85% of the total Latvian herring catches are taken by pelagic trawls and 15% trap-nets. Latvian fleets fish in the Gulf of Riga and in Subdivisions 26 and 28.2 of the Baltic Proper<sup>19</sup>.

Figure 23. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN LATVIA IN VALUE AND VOLUME, FEBRUARY 2021**

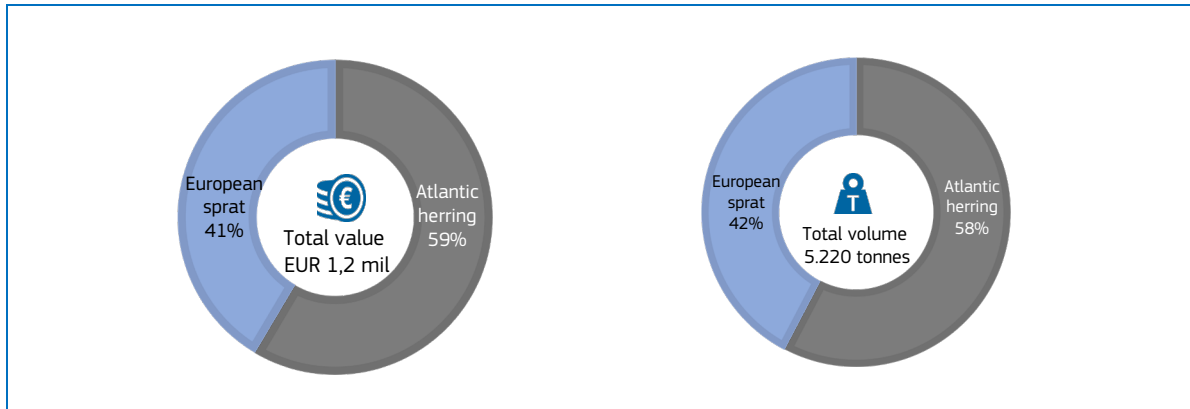
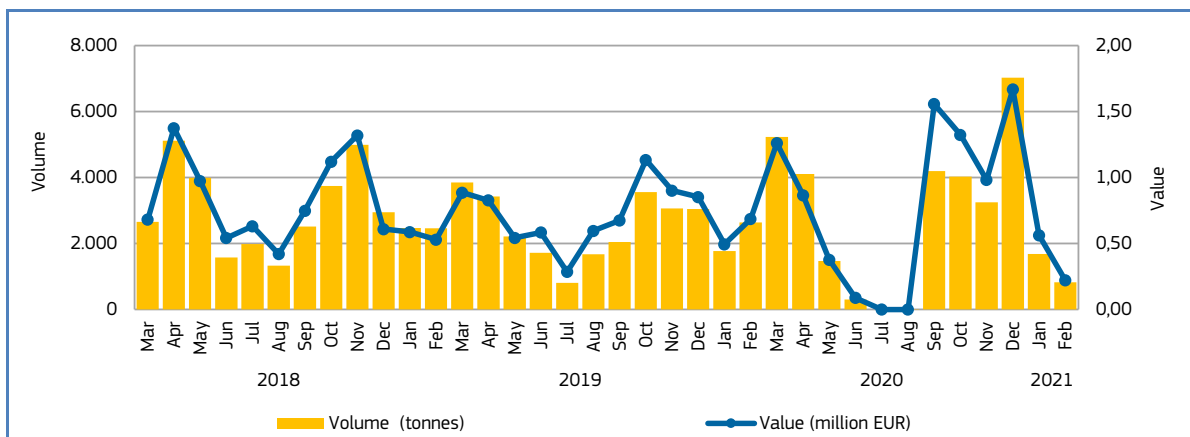


Figure 24. **ATLANTIC HERRING: FIRST SALES IN POLAND, MARCH 2018 - FEBRUARY 2021**

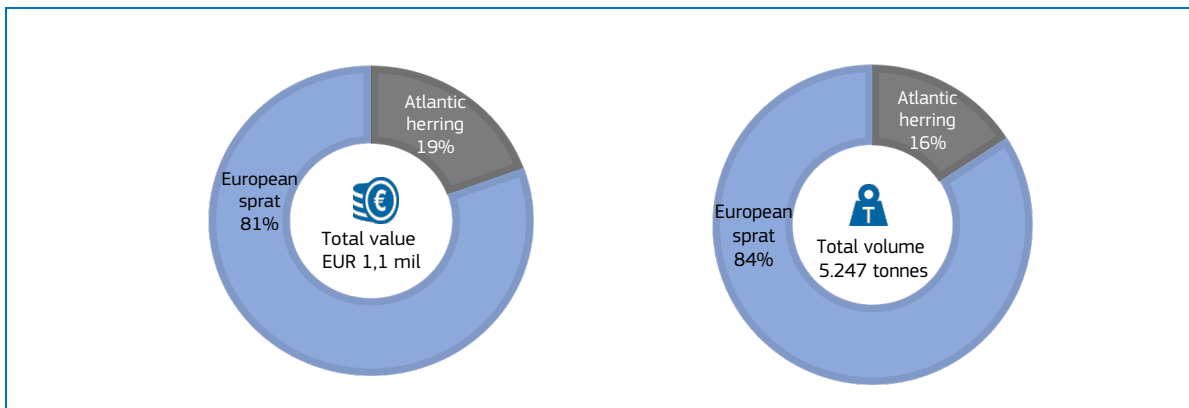


Over the past 36 months in **Poland**, first sales fluctuated throughout each year depending on various factors including fisheries' seasonality, authorities' measures, and weather conditions. The highest first-sales volume of common Atlantic herring occurred in December 2020 when 7.028 tonnes were sold. However, the lowest first-sales volume was recorded in August 2020 and no sales occurred in July 2020 due to EU restrictions<sup>20</sup>.

<sup>19</sup> [https://www.fishsource.org/fishery\\_page/4771](https://www.fishsource.org/fishery_page/4771)

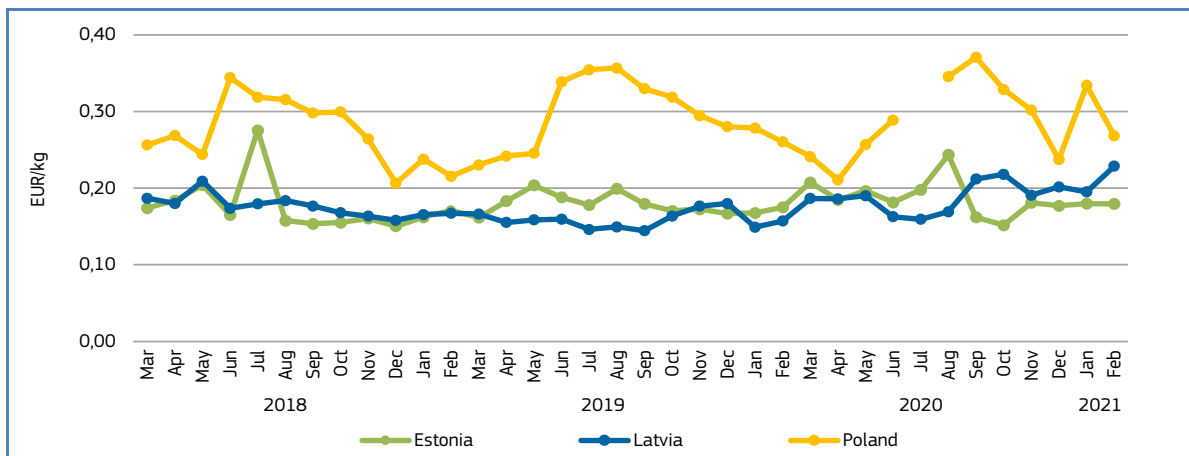
<sup>20</sup> Council Regulation (EU) 2019/1838 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32019R1248%20>

Figure 25. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN POLAND IN VALUE AND VOLUME, FEBRUARY 2021**



## Price trend

Figure 26. **ATLANTIC HERRING: FIRST-SALES PRICES IN SELECTED COUNTRIES, MARCH 2018 - FEBRUARY 2021**



Over the 36-month observation period (March 2018 to February 2021), the weighted average first-sales price of Atlantic herring in **Poland** was 0,28 EUR/kg, 54% higher than in **Latvia** (0,18 EUR/kg), and 53% greater than that of **Estonia** (0,18 EUR/kg).

In **Estonia** in February 2021, the average first-sales price of Atlantic herring (0,18 EUR/kg) slightly increased by 3% compared with February 2020, and 5% compared with February 2019. Over the past 36 months, average price ranged from 0,15 EUR/kg for 2.101 tonnes in December 2018, to 0,28 EUR/kg for 0,8 tonnes in July 2018. The latter high price was closely linked with low supply.

In **Latvia** in February 2021, the average first-sales price of Atlantic herring (0,23 EUR/kg) increased by 46% compared to the same month in 2020 and 37% when compared to February 2019. During the observed period, the lowest average price (0,14 EUR/kg for 915 tonnes) was seen in September 2019, while the highest average price was recorded in February 2021 at 0,23 EUR/kg, for 3.011 tonnes.

In **Poland** in February 2021, the average first-sales price of Atlantic herring (0,27 EUR/kg) increased by 3% compared to February 2020 and by 25% relative to February 2019. During the observed period, the lowest average price of 0,21 EUR/kg for 2.950 tonnes was seen in December 2018, while the highest average price was recorded in September 2020, at 0,37 EUR/kg for 4.200 tonnes.



## 1.7. Focus on Atlantic horse mackerel



The Atlantic horse mackerel (*Trachurus trachurus*), also known as the European horse mackerel or common scad, is a species of jack mackerel in the family Carangidae. The common name, horse mackerel, comes from the old Dutch word “Horsmakreel”. This means a mackerel that spawns on a ‘hors’, which is a shallow area in the sea or a bank<sup>21</sup>. The species prefers more temperate waters and can be found off the Atlantic coasts from Senegal up to Norway, and in the Mediterranean, but rarely in the Black Sea. The species spreads from the coast to more than 300 metres and prefers the deepest areas of the continental shelf<sup>22</sup>. This species attains a maximum fork length of 60 cm (most commonly around 30 cm) and a weight of 1,5 kilograms<sup>23</sup>. It feeds on small fish and crustaceans. There are two main populations, with the west stock spawning in the eastern Atlantic and the north stock spawning in the North Sea. All have pelagic eggs and spawning generally occurs during the summer<sup>24</sup>, with peaks in May and June in the North Sea<sup>25</sup>.

Atlantic horse mackerel is an important species in commercial fisheries where it is targeted by purse seiners, longlines, traps and coastal trawlers<sup>26</sup>. In purse seine fisheries it is caught together with other small pelagic species such as sardines and anchovies at night, when the fish are attracted by lamplight. It is fished all year round, but especially during the summer months<sup>27</sup>. Belgium, France, Germany, Ireland, Netherlands, Norway, Portugal, Spain, and Scotland are the main European fishing nations for Atlantic horse mackerel<sup>28</sup>.

In the EU, management measures include fishing effort restrictions such as mesh size for towed gear (at least 55 mm for South Western waters and 32 mm for the Baltic Sea) and a minimum conservation reference size of 15 cm. No minimum conservation reference size applies to horse mackerel caught in waters adjacent to the Azores and under the sovereignty or jurisdiction of Portugal<sup>29</sup>.

Most catches are used for human consumption. The species is utilised fresh, frozen, dried and salted, smoked, and canned, and can be fried, broiled and baked.

### Selected countries

Table 19. **COMPARISON OF ATLANTIC HORSE MACKEREL FIRST-SALES PRICES, MAIN PLACES OF SALE AND CONTRIBUTION TO OVERALL SALES OF SMALL PELAGICS IN SELECTED COUNTRIES**

Atlantic horse mackerel		Changes in Atlantic horse mackerel first sales Jan-Feb 2021 (%)		Contribution of Atlantic horse mackerel to total “small pelagics” first sales in February 2021 (%)	Principal places of sales in Jan-Feb 2021 in terms of first-sales value
		Compared to Jan-Feb 2020	Compared to Jan-Feb 2019		
Netherlands	Value	-19%	-50%	61%	Scheveningen, IJmuiden/Velsen, Vlissingen.
	Volume	-15%	-47%	56%	
Portugal	Value	+5%	+17%	76%	Nazaré, Aveiro, Peniche.
	Volume	-34%	-36%	64%	
Spain	Value	-27%	-17%	21%	A Coruña, Vigo, Santa Eugenia Ribeira.
	Volume	-44%	-30%	25%	

<sup>21</sup> <https://www.nioz.nl/en/expertise/wadden-delta-research-centre/news-media/wadden-sea-species/fish-series/horse-mackerel>

<sup>22</sup> <http://www.fao.org/3/Y2668B/y2668b06.htm>

<sup>23</sup> [http://species-identification.org/species.php?species\\_group=fnam&id=1794](http://species-identification.org/species.php?species_group=fnam&id=1794)

<sup>24</sup> <http://www.fao.org/fishery/species/2306/en>

<sup>25</sup> <https://www.ices.dk/about-ICES/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20ofactsheet-horse-mackerel.pdf>

<sup>26</sup> <http://www.fao.org/fishery/species/2306/en>

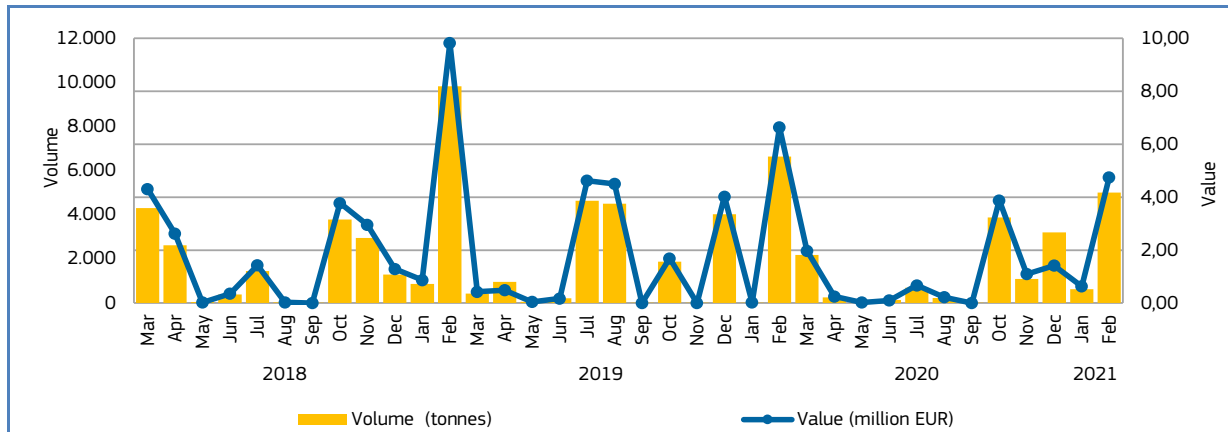
<sup>27</sup> <http://www.abcomunicazioni.it/content/progetti/sicilianfishontheroad/en/il-pescato-siciliano/il-pesce-azzurro/suro.html>

<sup>28</sup> ICES WGIDE 2019 Horse Mackerel in the Northeast Atlantic

<sup>29</sup> Regulation (EU) 2019/1241 <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A02019R1241-20210101>



Figure 27. ATLANTIC HORSE MACKEREL: FIRST SALES IN THE NETHERLANDS, MARCH 2018 - FEBRUARY 2021



In the Netherlands, over the observed 36-month period, the highest first sales of Atlantic horse mackerel occurred in February 2021, 2020, and 2019. The lowest sales were observed in September 2018. In general, first sales fluctuate regularly, and there were low sales recorded during the spring spawning season (mainly May-June) off the Netherlands coast<sup>30</sup>.

Figure 28. FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN THE NETHERLANDS IN VALUE AND VOLUME, FEBRUARY 2021

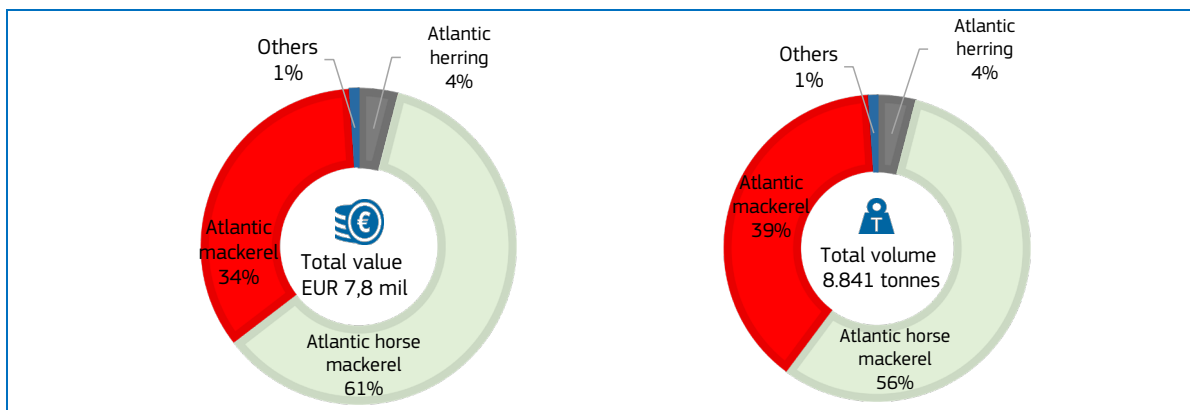
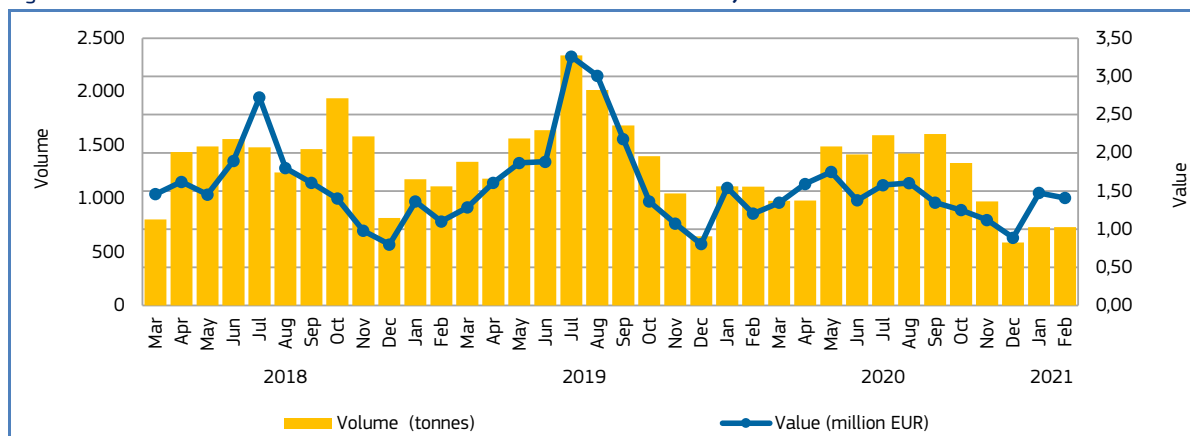


Figure 29. ATLANTIC HORSE MACKEREL: FIRST SALES IN PORTUGAL, MARCH 2018 - FEBRUARY 2021



<sup>30</sup> <https://www.ices.dk/about-ICES/projects/EU-RFP/EU%20Repository/ICES%20FishMap/ICES%20FishMap%20species%20factsheet-horsemackerel.pdf>

In **Portugal** over the past 36 months, there were “high seasons” with months with unusually high first-sales volumes when roughly 2.000 tonnes were sold, one in July and August 2019 and another in October 2018. In general, supply is lower during colder periods (December-February) when weather conditions are not favourable for fishing activities. Atlantic horse mackerel is the main target species in the Portuguese bottom trawl demersal fish fleet, which accounts for more than 50% of the Portuguese annual catches<sup>31</sup>.

Figure 30. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, FEBRUARY 2021**

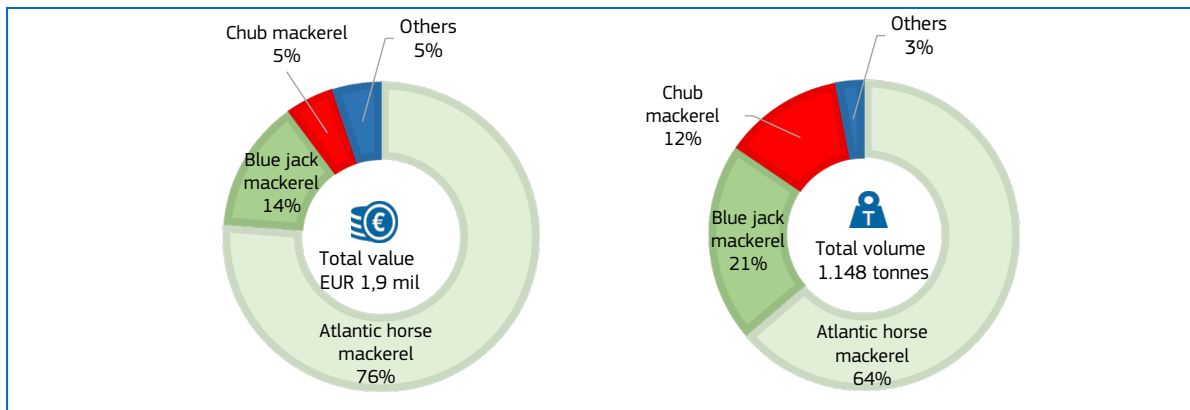
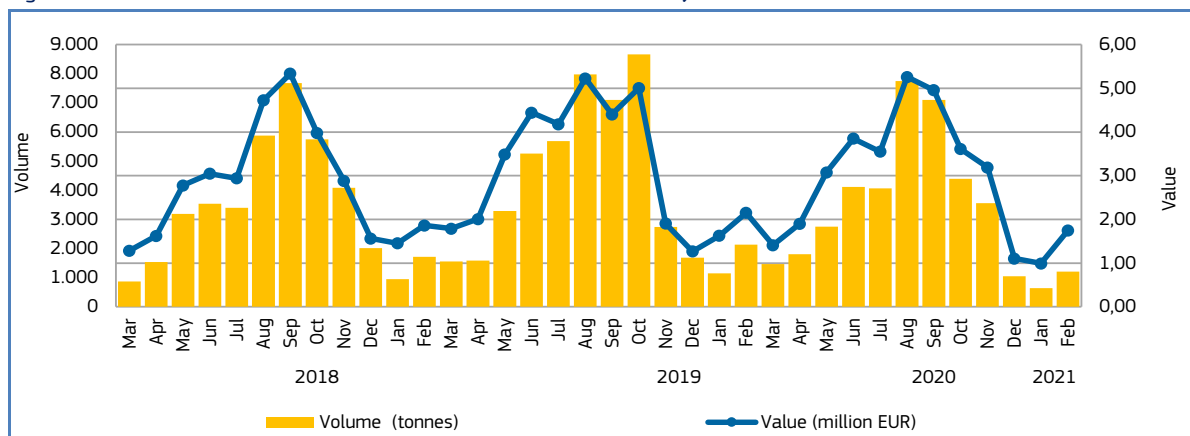


Figure 31. **ATLANTIC HORSE MACKEREL: FIRST SALES IN SPAIN, MARCH 2018 - FEBRUARY 2021**



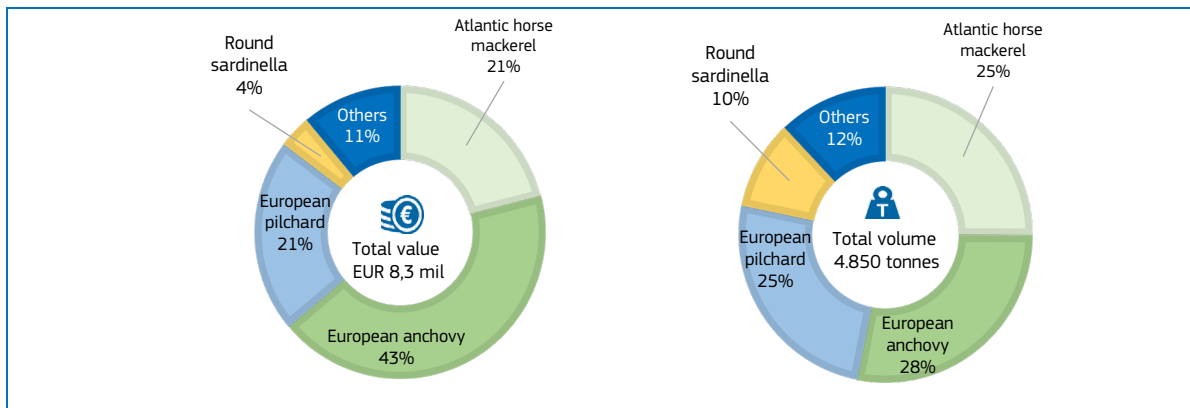
Among surveyed countries, **Spain** has the highest first-sales value and volume of Atlantic horse mackerel. Over the past 36 months, the highest first sales were registered in October 2019, when 8.664 tonnes were sold. The main fishing season occurs in August-September. Most of the catches by Spanish fleets are from purse-seine vessels (70% of total)<sup>32</sup>.

<sup>31</sup> Stock Annex: Southern Horse Mackerel 2017 [http://www.ices.dk/sites/pub/Publication%20Reports/Stock%20Annexes/2017/hom.27.9a\\_SA.pdf](http://www.ices.dk/sites/pub/Publication%20Reports/Stock%20Annexes/2017/hom.27.9a_SA.pdf)

<sup>32</sup> Stock Annex: Southern Horse Mackerel 2017 [http://www.ices.dk/sites/pub/Publication%20Reports/Stock%20Annexes/2017/hom.27.9a\\_SA.pdf](http://www.ices.dk/sites/pub/Publication%20Reports/Stock%20Annexes/2017/hom.27.9a_SA.pdf)

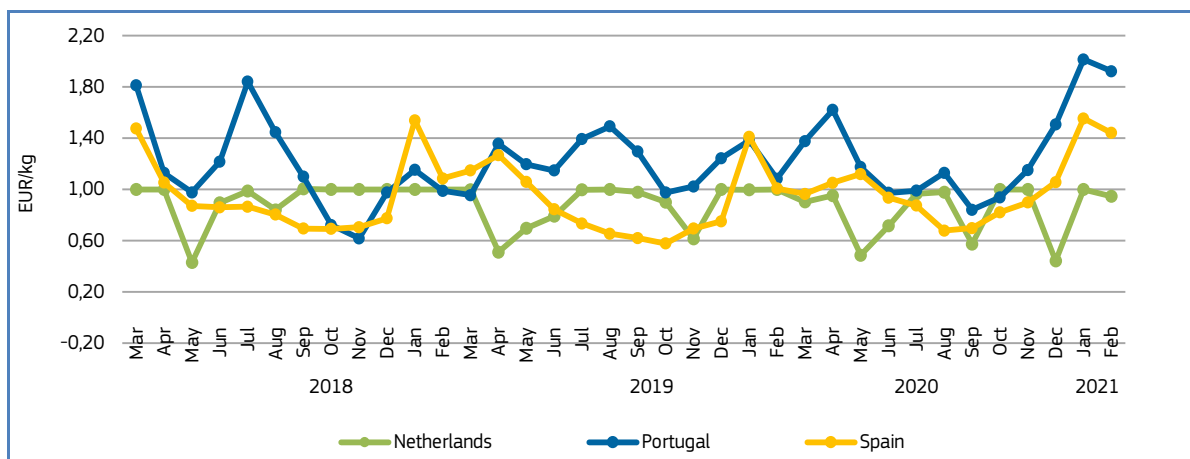


Figure 32. **FIRST SALES: COMPOSITION OF “SMALL PELAGICS” (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, FEBRUARY 2021**



## Price trend

Figure 33. **ATLANTIC HORSE MACKEREL: FIRST-SALES PRICES IN SELECTED COUNTRIES, MARCH 2018 - FEBRUARY 2021**



Over the 36-month observation period (March 2018–February 2021), the weighted average first-sales price of Atlantic horse mackerel in **Portugal** was 1,19 EUR/kg, 46% higher than that of **Spain** (0,82 EUR/kg), and 25% greater than that of **the Netherlands** (0,95 EUR/kg).

In **the Netherlands**, in February 2021, the average first-sales price of Atlantic horse mackerel (0,95 EUR/kg) decreased by 5% compared to February 2020 and 2019. The lowest average price was registered in May 2018 at 0,43 EUR/kg for 51 tonnes, while the highest average price of 1,00 EUR/kg was registered for several months. This was the maximum price due to internal sales and internal procedures within the company that owns the catching vessels.

In **Portugal**, in February 2021, the average first-sales price of Atlantic horse mackerel was 1,92 EUR/kg, 77% and 95% higher than in February 2020 and 2019, respectively. The lowest price in the past 36 months was registered in November 2018, at 0,62 EUR/kg for 1.583 tonnes. The highest price (2,01 EUR/kg for 733 tonnes) was observed in January 2021.

In **Spain**, in February 2021, the average first-sales price of Atlantic horse mackerel (1,44 EUR/kg) increased by 43% compared to February 2020 and by 33% compared to February 2019. The lowest average price was registered in October 2019 at 2,14 EUR/kg for 83 tonnes. The highest average price of 6,74 EUR/kg for 68 tonnes was registered in April 2018.

## 2. Extra-EU imports

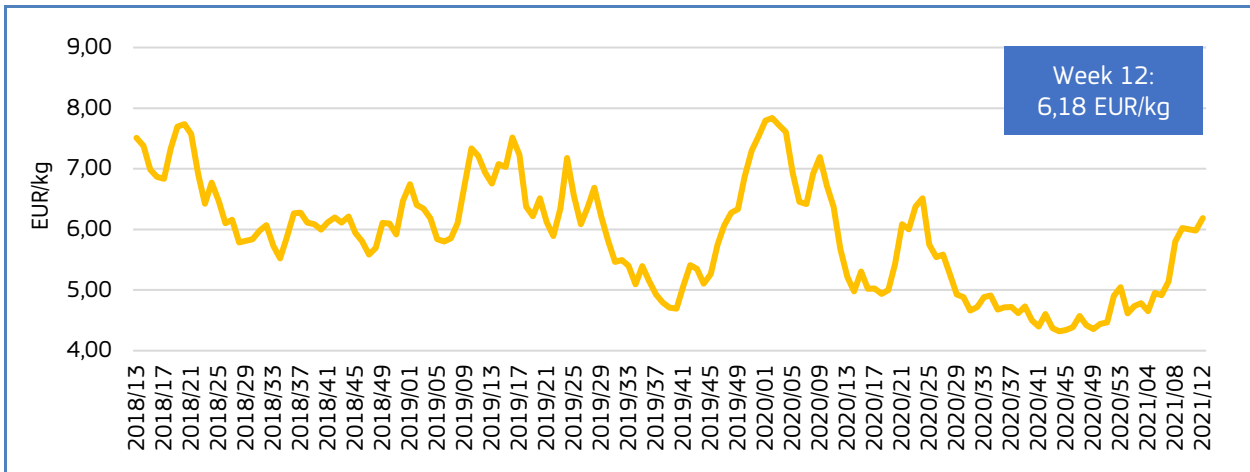
The weekly extra-EU import prices (weighted average values per week, in EUR per kg) for nine different species are examined every month. The three most relevant species in terms of value and volume remain consistent: fresh whole Atlantic salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (*Penaeus* spp.) from Ecuador. The other six species change each month; three are chosen from the commodity group of the month, and three are randomly selected. The commodity group this month is "small pelagics", and the featured species are fresh or chilled herring from Norway, frozen sardines from Morocco, and frozen fillets of mackerel from Iceland. The three randomly selected species this month are frozen redfish from Iceland, prepared or preserved skipjack (whole or in pieces) from Ecuador, and prepared or preserved tuna (whole or in pieces) from Mauritius.

Table 20. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST RELEVANT FISHERIES AND AQUACULTURE PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 12/2021	Preceding 4-week average	Week 12/2020	Notes
<b>Fresh whole Atlantic salmon imported from Norway</b> ( <i>Salmo salar</i> , CN code 04021440)	<b>Price (EUR/kg)</b>	6,18	5,95 (+4%)	5,68 (+9%)	In the observed period from 2018 to 2021, prices tend to range between 6-7,00 EUR/kg. Upward trend since the beginning of the year, in contrast with a downward trend over the past three years.
	<b>Volume (tonnes)</b>	13.622	11.490 (+19%)	11.524 (+18%)	Most of the weekly volumes range from 11.000 to 12.000 tonnes. Downward trend since the beginning of the year, in contrast with the upward trend since week 13 of 2018.
<b>Frozen Alaska pollock fillets imported from China</b> ( <i>Theragra chalcogramma</i> , CN code 04047500)	<b>Price (EUR/kg)</b>	2,53	2,48 (+2%)	3,00 (-15%)	In the observed past three years, most prices are greater than 2,50 EUR/kg, with four prices over 3,00 EUR/kg. Upward trend over the past three years.
	<b>Volume (tonnes)</b>	2.098	2.878 (-27%)	3.646 (-42%)	Fluctuations in supply from 370 to 7.300 tonnes. About 46% of volumes are between 2.000 and 3.000 tonnes. Downward trend over the past three years.
<b>Frozen tropical shrimp imported from Ecuador</b> (genus <i>Penaeus</i> , CN code 04061792)	<b>Price (EUR/kg)</b>	5,11	4,76 (+7%)	5,80 (-12%)	In the past three years, most prices range between 5,50 and 6,00 EUR/kg. Downward trend since week 1 of 2021.
	<b>Volume (tonnes)</b>	1.771	3.093 (-43%)	2.296 (-23%)	Volumes fluctuate from 700 to 4.000 tonnes/week, with most ranging between 1.000 to 2.000 tonnes. Upward trend since week 1 of 2021.

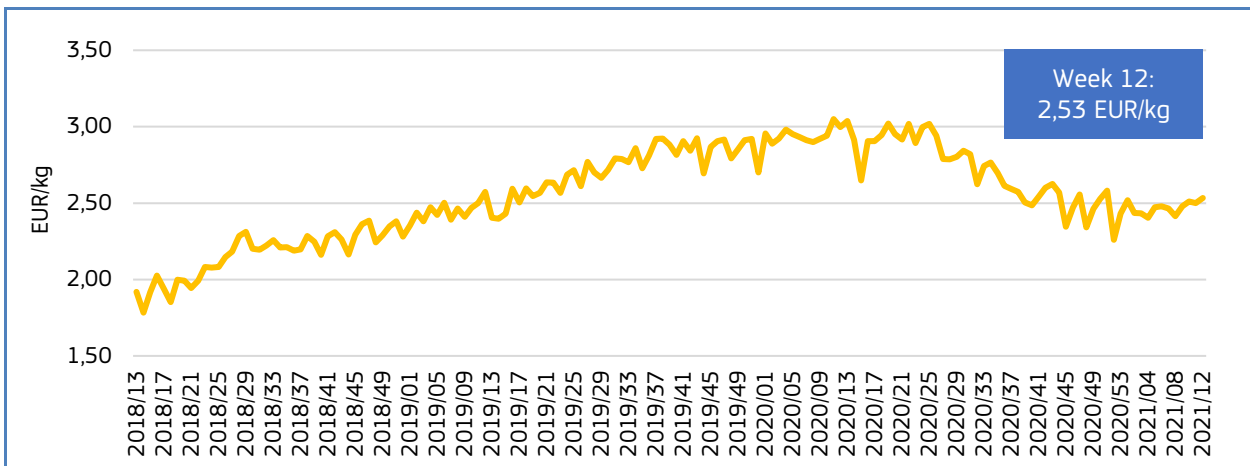
Source: European Commission (updated 20.04.2021).

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



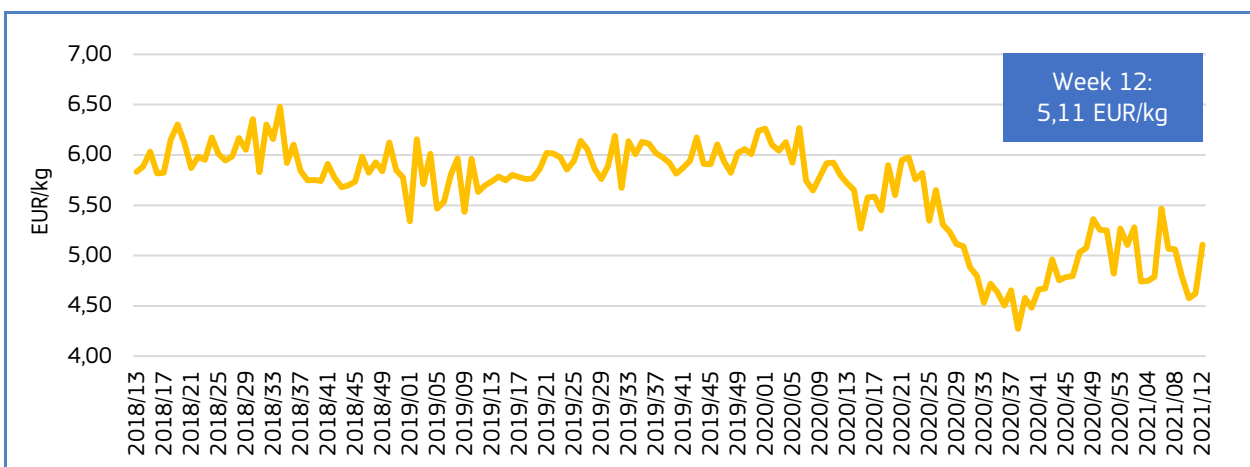
Source: European Commission (updated 20.04.2021).

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



Source: European Commission (updated 20.04.2021).

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



Source: European Commission (updated 20.04.2021).



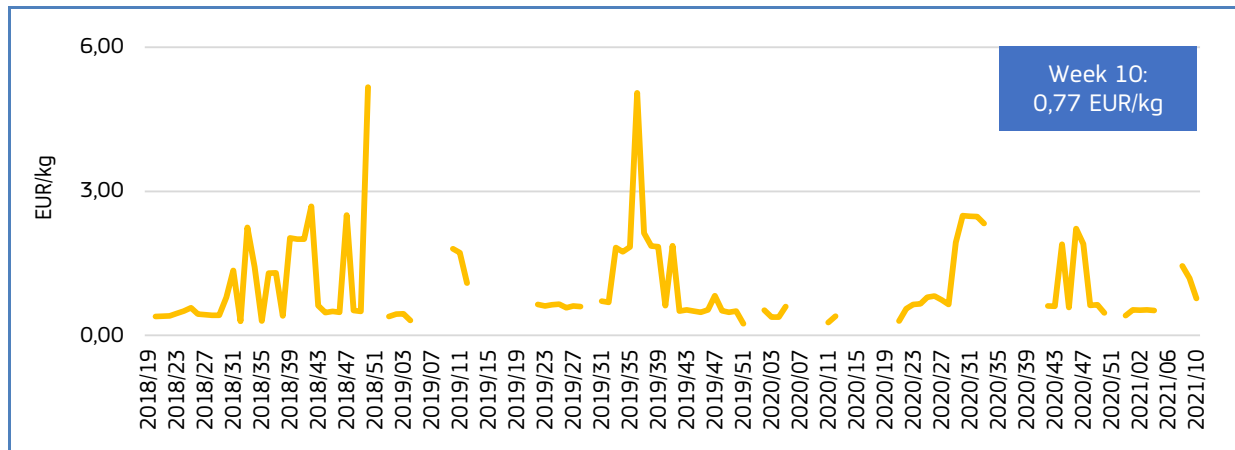
Table 21. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 5/2021	Preceding 4-week average	Week 12/2020	Notes
<b>Fresh or chilled herring from Norway</b> ( <i>Clupea harengus, clupea pallasii</i> , CN code 03024100)	<b>Price (EUR/kg)</b>	0,77*	1,32** (-42%)	n/a	Data are limited. Fluctuations in price over the past three years, but an overall stable trend.
	<b>Volume (tonnes)</b>	0,075*	2,5** (-97%)	n/a	Data are limited. High fluctuations in supply during the past three years. Downward trend from week 20 of 2018 to week 10 of 2021.
<b>Frozen sardines from Morocco</b> ( <i>Sardina pilchardus</i> , CN code 03035310)	<b>Price (EUR/kg)</b>	0,79	0,76 (+3%)	0,90 (-12%)	Downward trend from 2018 to 2021. On average, price is 0,78 EUR/kg.
	<b>Volume (tonnes)</b>	561	349 (+61%)	222 (+152%)	High fluctuations in supply during the observed period of three years -from 54 to 4.080 tonnes. Upward trend from 2018 to 2021.
<b>Frozen fillets of mackerel from Iceland</b> ( <i>Scomber scombrus, Scomber japonicus</i> , CN code 03048949)	<b>Price (EUR/kg)</b>	2,51	2,60 (-3%)	2,99 (-16%)	Slight upward trend over the past 52 weeks. On average, price is 2,40 EUR/kg. Price spikes correlate with drop in supply.
	<b>Volume (tonnes)</b>	113	159 (-29%)	90 (+25%)	High fluctuations in supply during the analysed period of three year - from 0,032 to 1.028 tonnes. Upward trend over the past 52 weeks.

Source: European Commission (updated 20.04.2021).

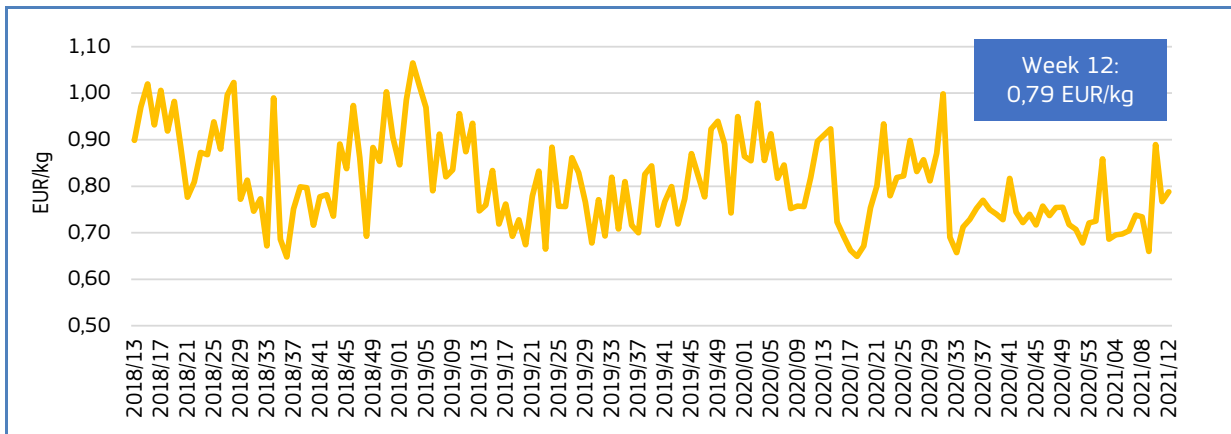
\* Data refers to week 10 of 2021 (the most recent available); \*\*data refers to weeks 8 and 9 of 2021.

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



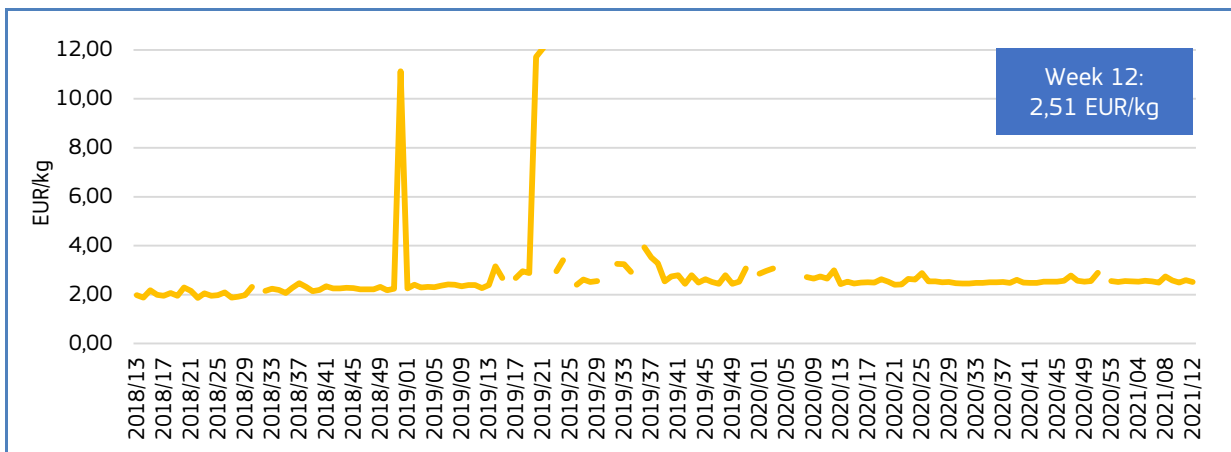
Source: European Commission (updated 20.04.2021).

Figure 38. **IMPORT PRICE OF FROZEN SARDINES FROM MOROCCO, 2018 - 2021**



Source: European Commission (updated 20.04.2021).

Figure 39. **IMPORT PRICE OF FROZEN FILLETS OF MACKEREL FROM ICELAND, 2018 - 2021**



Source: European Commission (updated 20.04.2021).

Between 2018 and 2021, price of fresh or chilled herring from Norway remained stable overall, despite fluctuations from 0,24 to 22,65 EUR/kg (week 18 of 2019). Volume of supply ranged from 0,008 to 4.442 tonnes.

Since week 1 of 2021, price of frozen sardines from Morocco showed a downward trend, while volume had an opposite trend. Over the past three years, price fluctuated between 0,65 and 1,07 EUR/kg.

From 2018 to 2021, the price of frozen fillets of mackerel from Iceland fluctuated from 1,86 to 12,07 EUR/kg. Since the beginning of 2021 price exhibited a slight upward trend, while volume decreased.

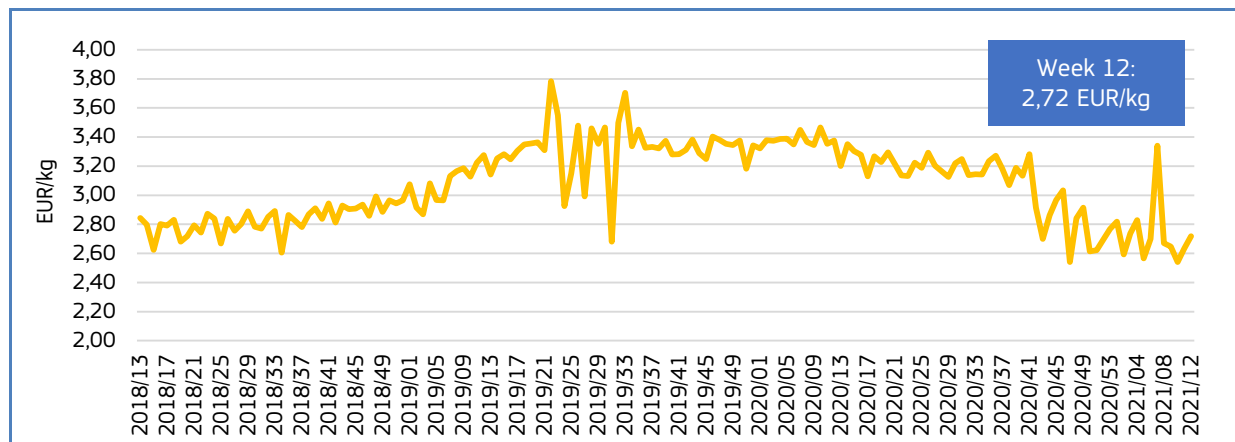
Table 22. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF EU IMPORTS OF THREE OTHER FISHERIES AND AQUACULTURE PRODUCTS RELEVANT TO THE EU MARKET**

Extra-EU Imports		Week 12/2021	Preceding 4-week average	Week 12/2020	Notes
<b>Frozen redfish from Iceland</b> ( <i>Sebastes marinus</i> , CN code 03038931)	<b>Price (EUR/kg)</b>	2,72	2,62 (+4%)	3,38 (-20%)	Upward trend from 2018 to 2021, with an average price of 3,05 EUR/kg. Price drop does not correlate with increase of supply.
	<b>Volume (tonnes)</b>	64	125 (-49%)	87 (-27%)	High fluctuations in supply from 2018 to 2021, varying between 0,162 and 345 tonnes. Overall downward trend.
<b>Prepared or preserved skipjack, whole or in pieces, from Ecuador</b> (CN code 16041428)	<b>Price (EUR/kg)</b>	3,29	3,41 (-4%)	3,94 (-17%)	Downward trend from 2018 to 2021. On average price is 3,82 EUR/kg.
	<b>Volume (tonnes)</b>	776	712 (+9%)	1.188 (-35%)	Downward trend from 2018 to 2021, with fluctuations in supply from 244 to 1.545 tonnes.
<b>Prepared or preserved tuna, whole or in pieces, from Mauritius</b> (CN code 16041448)	<b>Price (EUR/kg)</b>	2,09*	n/a	n/a	Data are limited. Downward trend over the past three years. On average price is 4,45 EUR/kg.
	<b>Volume (tonnes)</b>	16*	n/a	n/a	Data are limited. Volume ranged between 0,606 and 647 tonnes from 2018 to 2020, with an overall downward trend.

Source: European Commission (updated 20.04.2021).

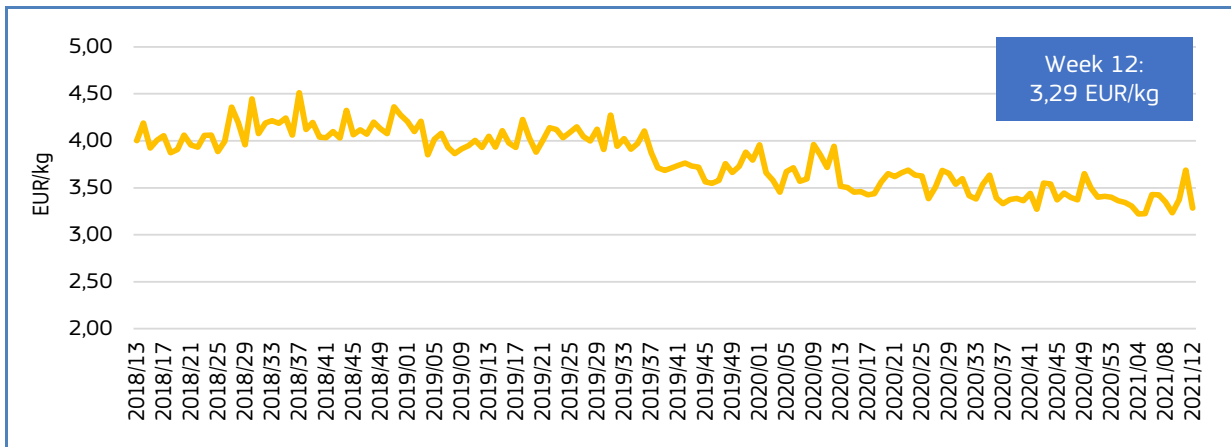
\* Data refers to week 11 of 2021 (the most recent available).

Figure 40. **IMPORT PRICE OF FROZEN REDFISH FROM ICELAND, 2018 - 2021**



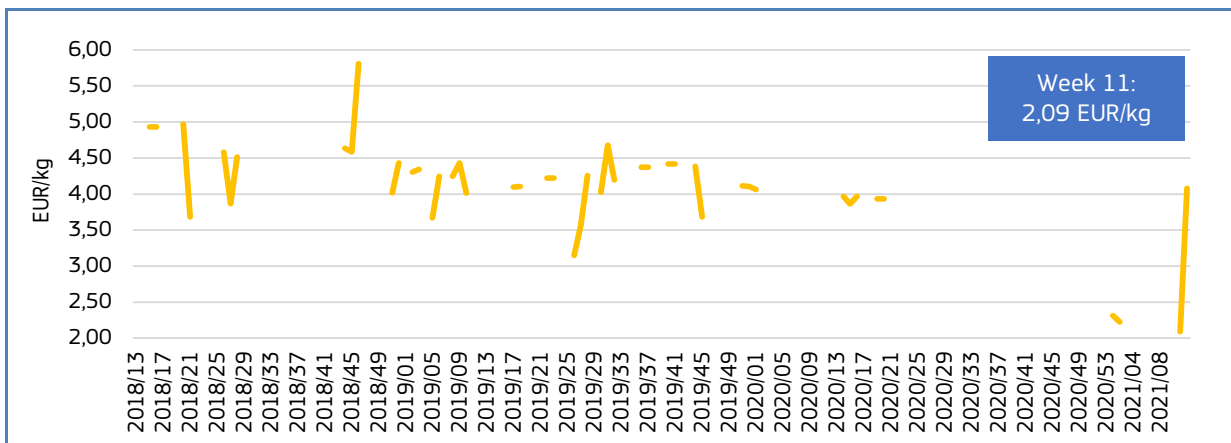
Source: European Commission (updated 20.04.2021).

Figure 41. **IMPORT PRICE OF PREPARED OR PRESERVED SKIPJACK FROM ECUADOR, 2018 - 2021**



Source: European Commission (updated 20.04.2021).

Figure 42. **IMPORT PRICE OF PREPARED OR PRESERVED TUNA FROM MAURITIUS, 2018 - 2021**



Source: European Commission (updated 20.04.2021).

Since the first week of January 2021, prices of frozen redfish from Iceland have exhibited a slight downward trend, while volume remained relatively stable.

During the same period, price of prepared or preserved skipjack from Ecuador exhibited an upward trend, while supply trended downwards. Over the past three years, price ranged from 3,22 EUR/kg to 4,51 EUR/kg.

Since the beginning of the year, price of prepared or preserved tuna from Mauritius exhibited a downward trend, while volume had an opposite trend. Over the past three years, price fluctuated between 2,09 EUR/kg and 6,89 EUR/kg.

## 3. Consumption

### 3.1. HOUSEHOLD CONSUMPTION IN THE EU

In February 2021, compared with February 2020, household consumption of fresh fisheries and aquaculture products increased in both volume and value in most of the Member States analysed, with Ireland seeing the highest increases. Salmon (+67% in both volume and value), and cod (+71% in volume and +72% in value) were the main species responsible for such increase in Ireland.

Salmon was also the main species responsible for increased volume of consumption in both Germany and Italy (+24% and +66%, respectively). In Germany, Mussel *Mytilus* spp. (+114%) contributed to the increase. In Portugal, European seabass and gilthead seabream were the species most consumed (+35% and +71%, respectively), whereas in Denmark the most consumed species were fresh flounder and salmon (+24% and +15%, respectively).

Table 23. FEBRUARY OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)

Country	Per capita consumption 2018* (live weight equivalent, LWE) kg/capita/year	February 2019		February 2020		January 2021		February 2021		Change from February 2020 to February 2021	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	39,83	952	15,85	1.019	17,81	1.195	18,59	1.194	21,28	17%	19%
France	33,52	16.707	192,24	16.675	206,62	17.164	215,37	17.681	217,74	6%	5%
Germany	14,50	5.403	77,49	5.796	92,62	7.015	97,36	7.617	107,10	31%	16%
Hungary	6,12	332	2,06	482	3,05	373	2,37	573	2,86	19%	6%
Ireland	23,13	1.069	15,22	960	13,55	1.423	22,60	1.545	22,89	61%	69%
Italy	31,02	24.752	261,35	22.978	246,42	26.954	295,59	27.150	291,04	18%	18%
Netherlands	20,90	2.278	36,82	2.518	40,19	2.816	45,61	2.656	44,07	6%	10%
Poland	13,02	3.714	22,72	3.905	25,80	3.855	26,71	4.454	29,45	14%	14%
Portugal	60,92	5.472	34,85	5.842	40,08	6.429	44,11	6.719	48,36	15%	21%
Spain	46,01	47.992	371,00	47.722	388,85	48.500	435,02	52.307	454,94	10%	17%
Sweden	26,61	614	7,75	859	11,94	930	11,96	914	11,79	6%	1%

Source: EUMOFA, based on Europanel (updated 18.04.2021).

\*Data on per capita consumption of all fish and seafood products for all EU Member States can be found at: [https://www.eumofa.eu/documents/20178/415635/EN\\_The+EU+fish+market\\_2020.pdf/](https://www.eumofa.eu/documents/20178/415635/EN_The+EU+fish+market_2020.pdf/)

Over the past three years, the average household consumption of fresh fisheries and aquaculture products in February in volume has been below the annual average in most of the Member States analysed. Only in Denmark, Germany, and Ireland, was the average volume for February above the yearly average household consumption. However, in terms of value, the February average household consumption was above the annual average in the majority of the Member States (except Hungary, Italy, the Netherlands, Spain, and Sweden).

The most recent weekly consumption data (up to **week 19 of 2021**) are available on the EUMOFA website and can be accessed [here](#).

## 3.2. Fresh monk

**Habitat:** predatory demersal species, living partially buried in sand, from 20 to 1.000 m.<sup>33</sup>

**Catch area:** Eastern Atlantic: south-western Barents Sea to Strait of Gibraltar including the Mediterranean and Black Sea.<sup>34</sup>

**Catching countries in the EU:** France, Spain, Ireland, Denmark.<sup>35</sup>

**Production method:** Caught.

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

**Presentation:** Whole, headed and gutted, filleted.

**Preservation:** Fresh, frozen.



### 3.2.1. Overview of household consumption in France and Spain

France and Spain are among the EU Member States with the highest per capita apparent consumption<sup>36</sup> of fisheries and aquaculture products. In France in 2018, this was estimated to be 33,52 kg, an increase of 1% compared to the previous year and 38% higher than the EU average (24,36 kg LWE). This was 73% less than Malta<sup>37</sup>, the Member State with the highest per capita apparent consumption in 2018 (85,95 kg LWE).

In Spain, per capita apparent consumption of fisheries and aquaculture products was 46,01 kg, down 1% from 2017; this was 37% higher than in France and 89% higher than the EU average.

See more on per capita apparent consumption in the EU in Table 22.

Over the past three years (March 2018 – February 2021), total household consumption of fresh monk in France (11.664 tonnes) was 65% lower than in Spain (33.580 tonnes). At the same time, French consumers spent 51% more per kilogram of fresh monk than Spanish consumers (17,69 EUR/kg and 11,74 EUR/kg on average, respectively).

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

**First Sales:** Belgium 2/2017, 8/2016, 4/2015, 2/2014; Denmark 6/2018, 2/2017; France 2/2017, 1/2015, March 2013; Italy 6/2018; Portugal 6/2018; the UK 2/2017, 5/2016, July 2013.

**Extra-EU Imports:** Fresh: Norway 6/2018, 8/2019, 2/2020; Frozen: Namibia 8/2019, 3/2020.

**Topic of the month:** Monk in the EU market 10/2016; Monk in France March 2013.

**Consumption:** France 3/2019, 1/2017; Spain 3/2019, 1/2017.

<sup>33</sup> <http://www.fishbase.org/Summary/SpeciesSummary.php?ID=716&AT=monkfish>

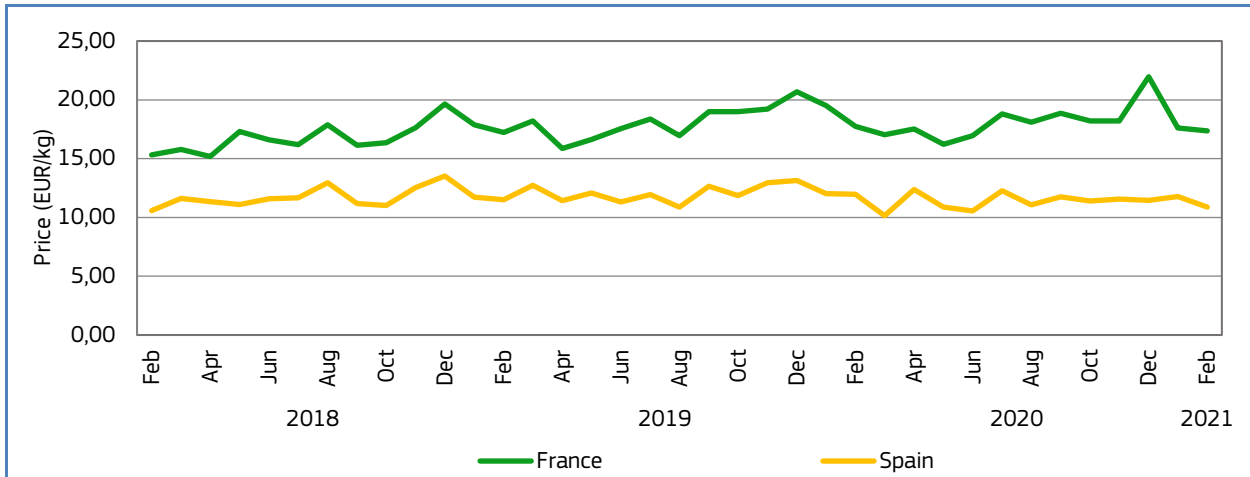
<sup>34</sup> Ibidem.

<sup>35</sup> <https://www.eumofa.eu/documents/20178/258139/Monthly+Highlights+-+N.10-2016.pdf>

<sup>36</sup> "Apparent consumption" is calculated by using the supply balance sheet that provides an estimate of the supply of fisheries and aquaculture products available for human consumption at EU level. The calculation of the supply balance sheet is based on the equation: *Apparent consumption* = [(total catches – industrial catches) + aquaculture + imports] – exports. Catches targeted for fishmeal (industrial catches) are excluded. Non-food use products are also excluded from imports and exports. It is worth underlining that the methodologies for estimating apparent consumption at EU and Member State levels are different, the first based on data and estimates as described in the Methodological background, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes.

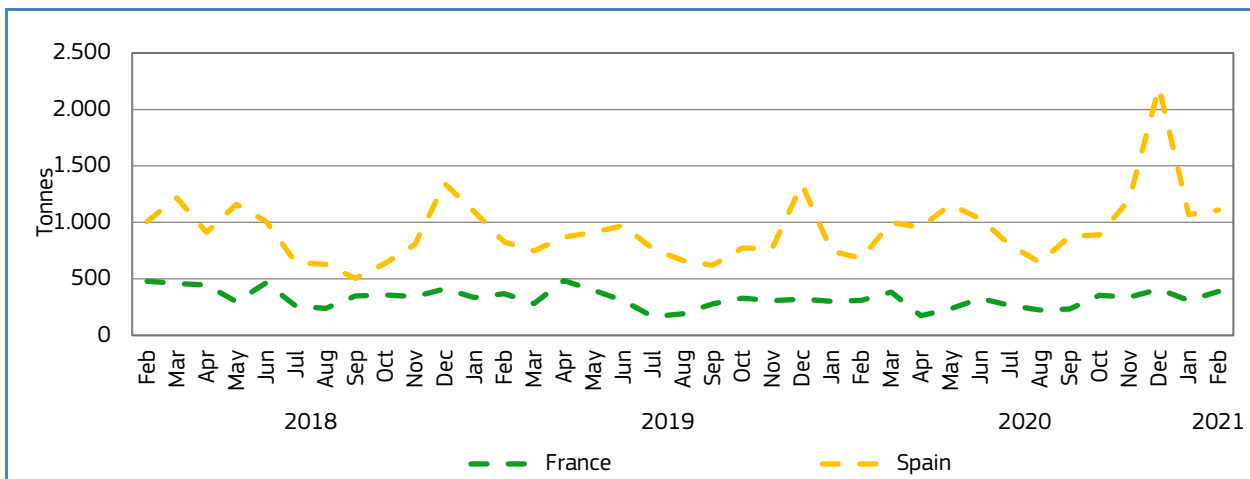
<sup>37</sup> The high per capita apparent consumption in Malta could be due to higher consumption of fisheries and aquaculture products during the tourist season.

Figure 43. PRICES OF FRESH MONK PURCHASED BY FRENCH AND SPANISH HOUSEHOLDS



Source: EUMOFA, based on Europanel (updated 18.04.2021).

Figure 44. HOUSEHOLD PURCHASES OF FRESH MONK IN FRANCE AND SPAIN



Source: EUMOFA, based on Europanel (updated 18.04.2021).

### 3.2.2. Trends in household consumption of fresh monk in France

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

**Yearly average price:** 16,85 EUR/kg (2018), 17,92 EUR/kg (2019), 18,38 EUR/kg (2020).

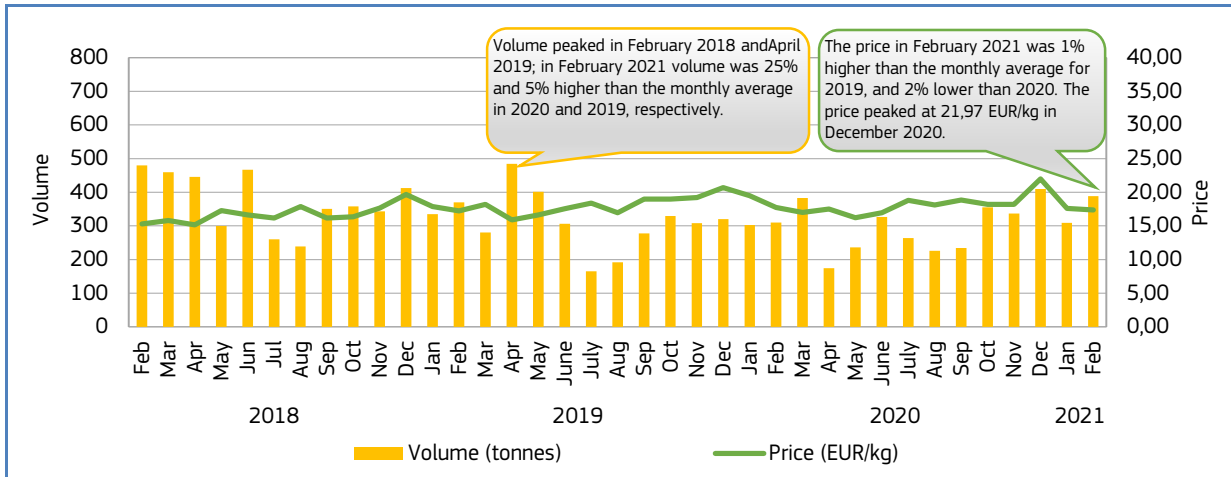
**Yearly total consumption:** 4.462 tonnes (2018), 3.771 tonnes (2019), 3.559 tonnes (2020).

**Short-term trend (January to February 2021):** slight decrease in price (-1%), increase in volume (+25%).

**Average price:** 17,47 EUR/kg.

**Average monthly consumption:** 349 tonnes.

Figure 45. **RETAIL PRICE AND VOLUME OF FRESH MONK PURCHASED BY HOUSEHOLDS IN FRANCE, FEBRUARY 2018 – FEBRUARY 2021**



Source: EUMOFA, based on Europanel (updated 18.04.2021).

### 3.2.3. Trends in household consumption of fresh monk in Spain

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

**Yearly average price:** 11,88 EUR/kg (2018), 12,05 EUR/kg (2019), 11,41 EUR/kg (2020).

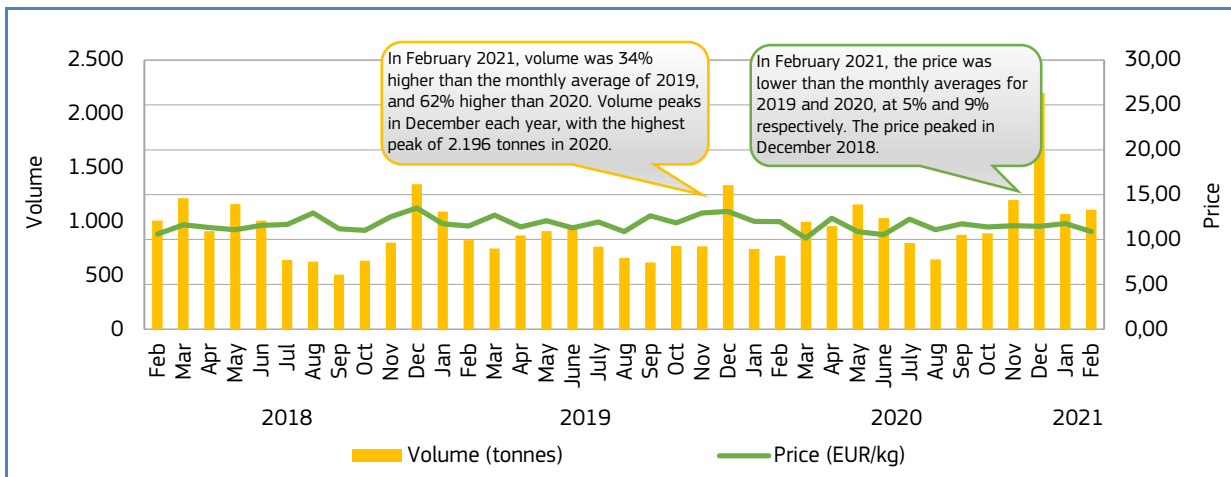
**Yearly total consumption:** 10.799 tonnes (2018), 10.351 tonnes (2019), 12.185 tonnes (2020).

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

**Average price:** 11,32 EUR/kg.

**Average monthly consumption:** 1.090 tonnes.

Figure 46. **RETAIL PRICE AND VOLUME OF FRESH MONK PURCHASED BY HOUSEHOLDS IN SPAIN, FEBRUARY 2018 – FEBRUARY 2021**



Source: EUMOFA, based on Europanel (updated 18.04.2021).



## 4. Case study – Fisheries and catch in Greenland

### 4.1 Introduction

Greenland is the world's largest island, and is situated in the North Atlantic Ocean. Its land area totals 2.166.086 square kilometres, with a coastline of 44.047 kilometres. The island's fishing zone is around 186.552 square kilometres in size. Greenland is in the polar zone, as two thirds of the country lies within the Arctic Circle; almost 80% of its land area is covered by ice and glaciers. Within the ice-free area, only a small part is arable. It has a population of 56.000 people, 18.000 of whom live in the capital - Nuuk. Greenland is part of the Kingdom of Denmark but has its own autonomous government which is responsible for most domestic affairs<sup>38</sup>. Greenland, together with Denmark, became a member of the EU in 1973, but Greenland then left the EU in 1985 after a referendum held in 1982<sup>39</sup>.

In Greenland, economic activity is dominated by a few large sectors. Fishing, sealing, whaling and hunting are the largest, but Greenland also has a growing tourism industry as well as some mining. Fisheries that catch shrimps, halibut, cod, and certain other species are regulated by quotas set by the government. About one third of the revenue generated by the private sector is within the fishing and fishing-related industry and trade. In 2018, 4.415 people were employed in fishery related activities<sup>40</sup>.

In 2019, exports of goods and services from Greenland were valued at 1.033 million EUR and imports were valued at 1.36 million EUR<sup>41</sup>. Fish products accounted for more than 90% of exports.

Currently, there is no aquaculture production in Greenland. One major government-owned seafood company, Royal Greenland, has experimented with mariculture cages for Atlantic cod near Maniitsoq. However, national statistics do not differentiate capture fisheries from these activities<sup>42</sup>.



Source: The World Factbook

### 4.2 Fisheries

Greenland has bi- and trilateral fisheries agreements with the Faroe Islands, Norway, Russia, and Iceland, as well as a general fisheries agreement with the EU. Greenland's government has authority over its fisheries, and the Greenland Fisheries License Control (GFLK) appoints observers on fishing vessels, primarily on shrimp trawlers<sup>43</sup>. The fishing fleet for

<sup>38</sup> <https://www.norden.org/en/information/facts-about-greenland>

<sup>39</sup> <https://stat.gl/publ/da/GF/2020/pdf/Gr%C3%B8nland%20i%20tal%202020.pdf>

<sup>40</sup> Ibidem

<sup>41</sup> <https://www.nordicstatistics.org/the-business-sector/>

<sup>42</sup> <http://www.fao.org/figis/pdf/fishery/facp/GRL/en?title=FAO%20Fisheries%20%26amp%3B%20Aquaculture%20-%20Country%20Profile>

<sup>43</sup> <https://stat.gl/publ/da/GF/2020/pdf/Gr%C3%B8nland%20i%20tal%202020.pdf>

Northern prawn is modern and has efficient onboard processing capabilities and limited bycatch. 25% of all catches in Greenland are landed in towns and settlements by law to support the local labour markets. The remaining 75% of catches are processed on board<sup>44</sup>.

Fishing in Greenland can be grouped into two types: offshore and coastal. Coastal fishing supplies the land industry, while offshore fishing primarily consists of factory trawlers with production on board. The fishery sector in Greenland is mainly dominated by two companies: Royal Greenland, the largest company in Greenland and owned by the government, and the privately owned Polar Seafood<sup>45</sup>.

In 2020, fisheries from the trawler and purse seine fleet (offshore fleet) amounted to 133.289 tonnes valued at 330 million EUR. This was a 4% increase in volume and a 6% increase in value from 2019. Catches of Northern prawn accounted for 45% of total catch volume and 63% of value. Greenland halibut, mackerel, and Atlantic cod were the second, third, and fourth main species caught. Together, these four species accounted for 88% of volume and 97% of value.

Table 24. **CATCH OF FISH AND CRUSTACEANS IN GREENLAND BY THE OFFSHORE FLEET**  
(volume in tonnes, value in million EUR)

Species	2016		2017		2018		2019		2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Northern prawn	37.845	124	44.270	142	41.159	126	47.881	188	59.418	209
Greenland halibut	7.511	19	9.381	25	9.052	26	10.167	39	13.536	48
Mackerel	34.650	35	45.781	49	63.465	60	30.241	36	26.538	33
Atlantic cod	15.316	16	17.448	19	17.479	21	18.185	35	17.594	29
Atlantic herring	20.100	21	12.205	11	2.799	3	3.190	3	3.201	3
Redfish	5.371	7	4.510	6	3.141	4	2.807	3	2.445	3
Blue Whiting	12.717	3	20.471	5	23.333	6	12.350	3	7.664	2
Other	9.939	7	30.520	11	15.305	9	3.280	5	2.893	4
<b>Total</b>	<b>143.449</b>	<b>233</b>	<b>184.586</b>	<b>267</b>	<b>175.733</b>	<b>256</b>	<b>128.101</b>	<b>312</b>	<b>133.289</b>	<b>330</b>

Source: StatBank Greenland.

In 2020, landings from the coastal fleet amounted to 117.387 tonnes valued at 173 million EUR. This was a 3% decrease in volume and a 10% decrease in value from 2019. Catches of Greenland halibut accounted for 26% of volume and 44% of value. Greenland halibut, Northern prawn, and Atlantic cod were the three main species, together accounting for 89% of volume and 92% of value.

<sup>44</sup> <http://www.fao.org/figis/pdf/fishery/facp/GRL/en?title=FAO%20Fisheries%20%26amp%3B%20Aquaculture%20-%20Country%20Profile>

<sup>45</sup> <https://stat.gl/publ/da/GF/2020/pdf/Gr%C3%B8nland%20i%20tal%202020.pdf>

Table 25. **CATCH OF FISH AND CRUSTACEANS IN GREENLAND BY THE COASTAL FLEET**  
(volume in tonnes, value in million EUR)

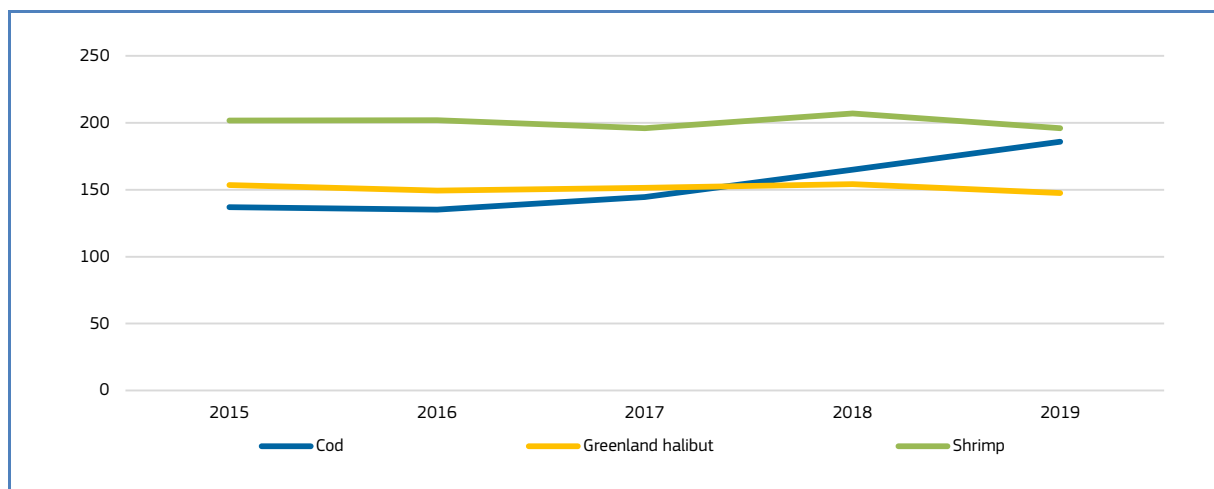
Species	2016		2017		2018		2019		2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Greenland halibut	34.599	85	28.073	69	32.007	80	33.222	85	30.268	77
Northern prawn	45.263	53	45.410	53	48.495	60	51.299	69	54.369	66
Atlantic cod	40.258	26	36.076	25	27.397	21	24.145	23	19.788	15
Snow crab	1.950	5	2.210	6	2.646	9	2.696	9	2.512	8
Lumpfish	4.985	2,1	7.384	4	6.726	5	7.383	6	8.842	6
Other species	1.069	0,6	734	0,4	468	0,4	575	0,4	550	0,3
Capelin	345	0,1	394	0,2	266	0,1	788	0,4	617	0,3
Other	381	0,2	438	0,3	455	0,3	424	0,3	442	0,3
<b>Total</b>	<b>128.849</b>	<b>173</b>	<b>120.720</b>	<b>158</b>	<b>118.460</b>	<b>177</b>	<b>120.532</b>	<b>192</b>	<b>117.387</b>	<b>173</b>

Source: StatBank Greenland.

### Price index of main fish species in Greenland

From 2015 to 2019, the price index of cod in Greenland increased by 36%. On the other hand, the average price of Greenland halibut decreased by 4% during the same period, and that of coldwater shrimp by 3%.

Figure 47. **INDEX OF AVERAGE FIRST SALE PRICES IN GREENLAND-MAIN SPECIES (2010=100)**



Source: StatBank Greenland

### 4.3 Catch and hunting

The hunting of seals in the Northwest Atlantic is based on sustainable management principles, closely monitored by international organisations such as the International Council for the Exploration of the Sea (ICES) and the North Atlantic Marine Mammal Commission (NAMMCO). Seal species in the area are not classified as endangered species under the Convention on International Trade in Endangered Species (CITES) nor under the International Union for Conservation of

Nature (IUCN)<sup>46</sup>. Hunting is regulated through fixed seasons and licenses. A general hunting license is required for anyone wishing to hunt seals.

There are six different species of seal in Greenlandic waters. Five of them have been hunted for centuries, but today the catch is focused on the harp seal, ringed seal, and hooded seal, all of which have great importance to Inuit hunters<sup>47</sup>. As a rule, the skin is sold, while the meat is eaten or used as dog food in sled dog districts. About half of all purchased sealskin is processed by the country's only tannery, Great Greenland; this is a government-owned tannery located in Qaqortoq in South Greenland. The tannery operates several trading stations, making it possible for hunters in small communities to sell their sealskins<sup>48</sup>. Seals are hunted primarily for their meat and skin, but the production of handicrafts, clothes, and traditional artifacts are important by-products of the hunt. Since 2009, import of sealskins was banned in the EU. Even though it has an exemption for Inuit hunting, this has had great impact on the global markets for sealskins and the exports of sealskins from Greenland. The economy of seal hunting is therefore struggling, and the tannery, as well as the hunters, are given subsidies from the authorities<sup>49</sup>.

From 2015 to 2019, the total number of seals hunted decreased by 48% to 64.000. In more detail, the number of harp seals hunted decreased by 52% to 29.882 and the number of ringed seals hunted decreased by 48% to 32.000. The hunting of hooded seal is negligible. The reason behind the decrease in hunted seals is a combination of difficult market conditions due to the import ban of sealskins, and changing climate conditions (less ice) which makes it difficult to maintain traditional ways of life involving dogsledding. Many Inuit have therefore reduced this activity. The need for seal meat to feed the dogs, which have been their traditional source of nutrition, is therefore reduced. In 2019, 28.208 seal skins were sold, which accounted for 44% of the seals hunted that year.

Several whale species are regulated through hunting quotas. Greenland hunts mainly four species: common minke whale, fin whale, humpback whale and bowhead whale. The catch limits are set by numbers of animals for each species. There is a high demand for meat from large whales in modern Greenland, and when fresh meat from a large whale is brought ashore, the hunters have no problem selling their catch. In East Greenland, the hunt focuses on the minke whale. Here the catch is shared between the settlements, and only limited sales occur<sup>50</sup>. There are currently no exports of any whale products from Greenland, and the meat is only consumed in Greenland.<sup>51</sup>

Several kinds of seabirds, such as guillemot and eider, are hunted for the local market. From 2015 to 2019, the total number of birds hunted decreased by 70% to 36.717. The main reason for the strong decline was the fall in catches of guillemots and eider. Hunting of these seabirds has decreased in line with decreasing populations of these and other seabirds in the North Atlantic.

Table 26. **CATCH OF MAMMALS AND BIRDS IN GREENLAND – Seals and birds in numbers, whales in tones.**

Species	2015	2016	2017	2018	2019
Seals	123.738	107.981	92.236	98.682	64.080
Whales	3.008	3.488	3.662	4.302	3.718
Birds	121.043	111.672	102.914	81.358	36.717

Source: StatBank Greenland.

<sup>46</sup> <https://www.ft.dk/samling/20141/almdel/GRU/bilag/31/1512564.pdf>

<sup>47</sup> *Ibidem*

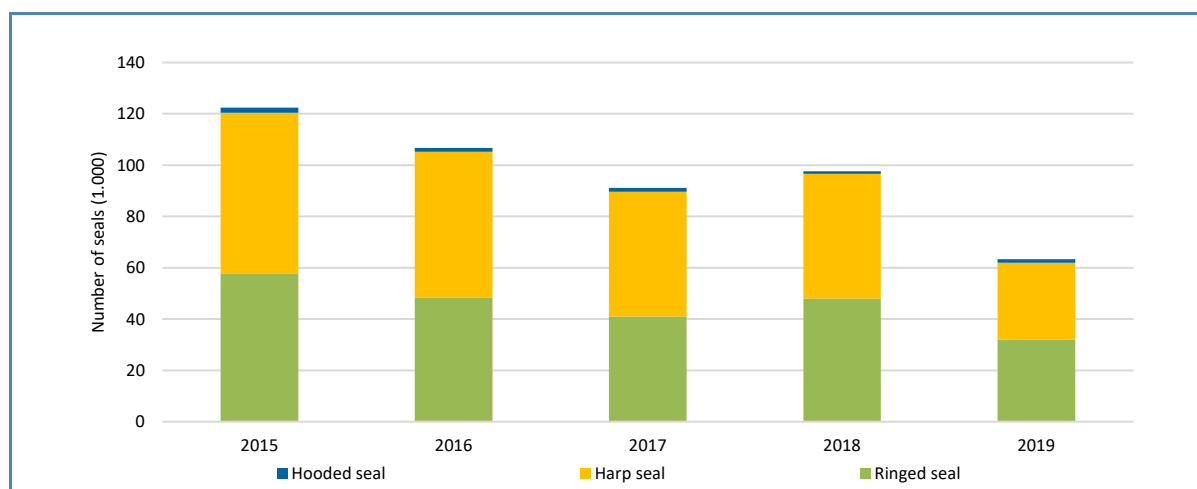
<sup>48</sup> <https://nammco.no/wp-content/uploads/2020/05/addendum-to-whitepaper-on-sealing-in-greenland-march2015-eng.pdf>

<sup>49</sup> <https://nammco.no/wp-content/uploads/2020/05/addendum-to-whitepaper-on-sealing-in-greenland-march2015-eng.pdf>

<sup>50</sup> <https://iwc.int/greenland>

<sup>51</sup> <https://stat.gl/publ/da/GF/2020/pdf/Gr%C3%B8nland%20i%20tal%202020.pdf>

Figure 48. **NUMBER OF SEALS HUNTED IN GREENLAND - BY SPECIES**



Source: StatBank Greenland

## 4.4 Trade

### Total exports from Greenland

In 2018, seafood exports from Greenland reached nearly 242.000 tonnes valued at 702 million EUR. This was a 6% increase in terms of volume and a 15% increase in terms of value from 2017. The most important species in terms of value were Greenland halibut and shrimps. Together, halibut and shrimps accounted for 68% of export value and 34% of volume.

Table 27. **EXPORT OF SEAFOOD FROM GREENLAND (volume in tonnes, value in million EURO)**

Species	2016		2017		2018	
	Volume	Value	Volume	Value	Volume	Value
Greenland halibut	24.845	114	24.194	122	28.512	167
Shrimp, coldwater	34.812	144	39.811	174	36.622	162
Shrimp, miscellaneous	15.692	109	14.372	107	17.955	151
Cod	23.568	63	23.499	64	20.546	65
Mackerel	33.763	30	46.750	48	63.766	58
Other marine fish	15.129	54	39.050	41	41.015	41
Other flatfish	5.032	18	8	0	1.769	16
Other	37.812	35	40.728	55	31.739	42
<b>Total</b>	<b>190.653</b>	<b>567</b>	<b>228.412</b>	<b>610</b>	<b>241.924</b>	<b>702</b>

Source: StatBank Greenland.

### EU imports from Greenland

The largest destination market for fishery products from Greenland is the EU. In 2020, EU imports from Greenland amounted to 153.166 tonnes valued at 624 million EUR. This was a 6% growth in volume and a 2% decrease in value compared to 2019. Imports mainly consisted of shrimps, Greenland halibut, and cod, which together accounted for 77% of volume and 86% of value.

Most products imported by the EU from Greenland are frozen. In 2020, 117.243 tonnes were frozen products valued at 459 million EUR. This was a 6% growth in volume from 2019, while value increased by about 1%. Prepared/preserved products amounted to 20.089 tonnes valued at 145 million EUR. This was a 4% growth in volume and a 10% decrease in value compared to 2019.

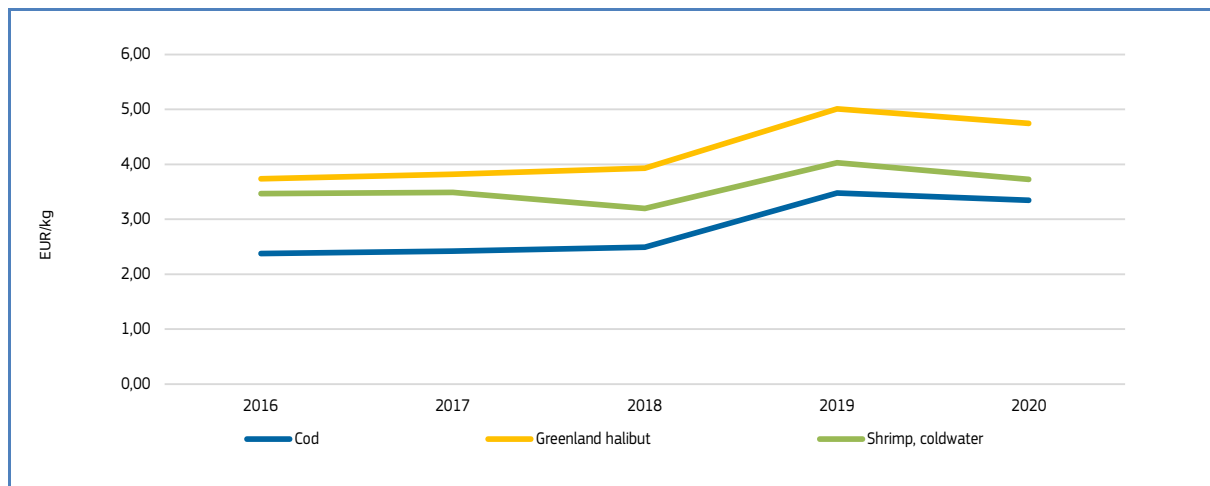
Table 28. **EU IMPORT OF MAIN COMMERCIAL SPECIES FROM GREENLAND (volume in tonnes, value in million EUR)**

Main Commercial Species	2017		2018		2019		2020	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Shrimp, coldwater	38.478	134	40.439	129	39.794	160	50.786	189
Halibut, Greenland	27.567	105	29.681	117	33.738	169	31.746	151
Shrimp, miscellaneous	16.782	102	18.035	113	19.084	158	20.004	144
Cod	25.318	61	20.205	50	18.265	64	15.370	51
Crab	1.394	11	1.388	12	1.728	22	1.541	22
Other flatfish	1.429	10	2.478	17	2.495	23	2.166	20
Mackerel	20.341	24	17.081	23	12.728	18	12.955	20
Other	22.111	27	24.953	24	16.030	25	18.597	27
<b>Total</b>	<b>153.420</b>	<b>475</b>	<b>154.260</b>	<b>485</b>	<b>143.862</b>	<b>639</b>	<b>153.166</b>	<b>624</b>

Due to rounding there might be small variations between the totals and the sum of data.  
Source: EUMOFA elaboration of EUROSTAT-COMEXT data

From 2019 to 2020, there were decreases in average import price for the three species most imported to the EU. The import price of coldwater shrimps decreased by 8% to 3,72 EUR/kg, that of Greenland halibut by 5% to 4,75 EUR/kg, and that of cod by 4% to 3,34 EUR/kg.

Figure 49. **EU IMPORT PRICE OF MAIN SPECIES FROM GREENLAND**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data

## 4.5 Processing

The fish processing industry in Greenland is supplied with unprocessed fish from landings carried out by Greenlandic fishing vessels in Greenlandic waters. The sector is broken into onboard and land-based processing facilities. All inshore vessels are required to land 100% of fish unprocessed, whereas offshore vessels are required to land only 25% of fish unprocessed. This legislation is designed to support local labour markets.

There are several small and a few major landing sites along Greenland's coast. The largest landings by volume are in the port of Ilulissat, followed by Aasiaat, Nuuk and Sisimiut, all of which are on the West coast of Greenland<sup>52</sup>.

## 4.6 The impact of changing climate conditions in Greenland

Most Greenlanders (76%) eat wild food that they hunt, fish, or gather. Nearly one-quarter of the population went out on the sea ice in 2020, and many live within sight of a glacier. The Greenlandic Inuit have long relied on nature for their livelihoods. This makes them and their way of living vulnerable to the effects of climate change. About 3 in 4 (76%) residents in Greenland say that they have personally experienced the effects of climate change<sup>53</sup>. Climate change has made it increasingly difficult for Greenlanders to perform traditional cultural practices, such as dogsledding. Dogsled teams use the sea ice to travel and hunt, but since the sea ice is melting and the winter season has become shorter, this activity has become more difficult to maintain.

As a result of this reduced opportunity for hunting, some hunters are getting rid of their dog teams as they have become too expensive to feed and maintain. With the loss of dog teams comes the loss of the traditional Greenlandic culture and lifestyle.

On the other hand, many Greenlanders see climate change as bringing new opportunities, given that most of Greenland's export income is from fish. As seas warm, an increasing number of southern fish species are finding their way into Greenland's oceans, creating new opportunities for fishing. Fishermen report that cod stocks are getting bigger and bigger, and that while coldwater shrimp is moving further north, new fish species – such as mackerel, herring, cod and Atlantic bluefin tuna – are entering the country's waters. Warming temperatures also mean that fishers can extend their seasons due to larger ice-free areas, allowing them to catch more fish<sup>54</sup>.

## 4.7 EU- Greenland fishery partnership relations

The Greenland-EU FPA/Protocol is an agreement which permits EU vessels to fish in Greenlandic waters for cod, pelagic and demersal redfish, Greenland halibut, shrimp, grenadier, and capelin. Small amounts of bycatch (grenadier and other species) are permitted. The species are caught within the limits of national quotas and scientific advice.

The agreement is unique amongst the EU's fisheries agreements in that it is the only one in northern waters for which financial compensation is paid for access. Other agreements are based on the transfer or exchange of quotas. The agreement with Greenland is a part of the Union's Sustainable Fisheries Partnership Agreements (SFPAs). The agreement was concluded for the period 2007-2012 and is renewed automatically thereafter for 6 years. Vessels for six Member States (Germany, Denmark, Estonia, Latvia, Lithuania, and Spain) can fish in Greenlandic waters according to this agreement.

The agreement was renewed a few weeks ago and the financial contribution from the EU to Greenland is EUR 13.168.978 per year for access to the Greenlandic fishing zone. This also includes a financial reserve of EUR 1.700.000 for additional species. EUR 2.931.000 is also provided per year for the support and implementation of Greenlandic fisheries policy<sup>55</sup>.

<sup>52</sup> <http://www.fao.org/fishery/facp/GRL/en#CountrySector-ProductionSector>

<sup>53</sup> GREENLANDIC PERSPECTIVES on Climate Change 2018-2019. Author: Kelton Minor

<sup>54</sup> <https://visitgreenland.com/about-greenland/the-guide-to-climate-change-in-greenland/>

<sup>55</sup> <https://op.europa.eu/en/publication-detail/-/publication/8e479fc2-e32e-11e9-9c4e-01aa75ed71a1>

## 5. Case study – Canned sardine and sardine-like products in the EU

Canned sardine products are among the most consumed preserved fish products in the EU. These products can include several different species other than common sardine (*Sardina pilchardus*), which are still marketed as 'sardines' under specific conditions. This is the case of canned sprat or sardinella when sold in markets where the species are not well known. In 2019, EU countries produced 73.669 tonnes of canned sardine, sprat and sardinella (all species combined). Most sardines are imported from Morocco, either canned or frozen to be canned, and sold in the EU. On the other hand, the canned sprat industry mostly relies on EU production, especially landings from the countries surrounding the Baltic Sea. However, in recent years, relatively small - but increasing - volumes of canned sardinella species have been imported, especially from Norway and the Philippines.

### 5.1. Context

In the EU, marketing standards for fishery and aquaculture products are set out in the CMO regulation<sup>56</sup> (and in the three specific regulations for fresh and chilled fishery products<sup>57</sup> preserved tuna and bonito<sup>58</sup> and preserved sardines and sardine-like products<sup>59</sup>). Among other provisions, the Regulation for preserved sardine and sardine-like products<sup>60</sup> defines the conditions for the use of the 'sardine' denomination:

- 'preserved sardines' means products prepared from fish of the species *Sardina pilchardus*;
- 'preserved sardine-like products' means products marketed and presented in the same way as preserved sardines and prepared from the species added to the regulation since 2003. These species include:

- *Sardinops melanosticus*, *S. neopilchardus*, *S. ocellatus*, *S. sagax*, and *S. caeryleus*;
- *Sardinella aurita*, *S. brasiliensis*, *S. maderensis*, *S. longiceps*, and; *S. gibbosa*;
- *Clupea harengus*;
- *Sprattus sprattus*;
- *Hyperlophus vittatus*;
- *Nematalosa vlaminghi*;
- *Etrumeus teres*;
- *Ethmidium maculatum*;
- *Engraulis anchoita*, *E. mordax*, *E. ringens*;
- *Opisthonema oglinum*.

Preserved sardine-type products may be marketed in the EU under a trade description consisting of the word 'sardines' joined together with the scientific name of the species and the geographic area where the species was caught.

In FAO Codex Alimentarius<sup>61</sup>, provisions on canned sardines specifies that the name of the product shall be:

- "Sardines" (to be reserved exclusively for *Sardina pilchardus*); or

<sup>56</sup> Regulation (EU) No 1379/2013 of the European Parliament and of the Council of 11 December 2013 on the common organisation of the markets in fishery and aquaculture products

<sup>57</sup> Council Regulation (EC) No 2406/96 of 26 November 1996 laying down common marketing standards for certain fishery products

<sup>58</sup> Council Regulation (EEC) No 1536/92 of 9 June 1992 laying down common marketing standards for preserved tuna and bonito

<sup>59</sup> Council Regulation (EEC) No 2136/89 of 21 June 1989 laying down common marketing standards for preserved sardines

<sup>60</sup> <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32003R1181&from=EN>

<sup>61</sup> <http://www.fao.org/3/Y2461F/y2461f0d.htm>



- "X sardines" where "X" is the name of a country, a geographic area, the species, or the common name of the species, or any combination of these elements in accordance with the law and custom of the country in which the product is sold, and in a clear manner not to mislead the consumer.

For instance, in the French market, canned sprat products are mostly marketed under the denomination '*petites sardines*' (together with the scientific name and catch area) as most French consumers do not know this species. In Poland, although canned sprat is a traditional and well-appreciated product in the domestic market, it can also be found sold as 'brisling sardines' when in oil or tomato sauce<sup>62</sup>. Moreover, canned sardinella can be found also under this denomination (e.g. canned sardinella imported from Tunisia and sold in the French market as '*petites sardines*'). However, at the EU level it is not clear whether this provision of the regulation is widely used or if it is just marginal and used as a way of diversification/segmentation for canned sardine products, in markets where canned sardine is popular (mostly around the Mediterranean). This case study aims to provide an overview of the data available at EU level for these three species: sardine, sprat and sardinella.

## 5.2. EU production

### LANDINGS IN THE EU

In 2018, landings of sardine in the EU amounted to 181.322 tonnes. The main countries for sardine landings were Croatia (26%), Spain (17%), Italy (15%) and France (14%). Other important countries were the Netherlands (11%), Greece (7%), Portugal (5%) and the UK (5%). Especially in Southern European countries, a significant share of sardine landings is aimed to supply the fresh fish market in summer. The rest is frozen on land and stored for further processing (namely canning).

Table 29. **LANDINGS OF COMMON SARDINE IN THE EU (volume in 1.000 tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Croatia	-	-	-	-	53	57	51	54	48	46
Spain	77	79	102	51	44	45	34	33	26	26
Italy	16	16	14	20	23	26	29	29	23	26
France	18	15	23	20	26	25	20	24	25	26
Netherlands	5	8	1	9	2	2	17	36	29	19
Greece	10	7	6	5	7	8	8	11	13	12
Portugal	61	63	56	32	28	16	14	14	15	10
United Kingdom	2	2	3	4	4	3	4	8	7	8
Others	3	4	1	0	0	1	1	2	1	0
<b>Totals</b>	<b>192</b>	<b>193</b>	<b>207</b>	<b>141</b>	<b>188</b>	<b>184</b>	<b>178</b>	<b>211</b>	<b>187</b>	<b>173</b>

Source: EUMOFA based on EUROSTAT.

In the same year, landings of sprat in the EU amounted to 433.617 tonnes, more than half of which were destined for industrial purposes, namely the production of fishmeal and fish oil. This was specifically the case in Denmark, which accounted for 62% of EU total landings of sprat. Other main producing countries were Poland (13%), Latvia (9%), Estonia (6%) and Sweden (4%).

<sup>62</sup> Source: [https://www.eumofa.eu/documents/20178/355514/PTAT\\_Canned+sprat.pdf](https://www.eumofa.eu/documents/20178/355514/PTAT_Canned+sprat.pdf)

Table 30. **LANDINGS OF SPRAT IN THE EU (volume in 1.000 tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Denmark	337	300	252	172	168	245	385	320	241	268
Poland	32	33	33	45	48	48	44	47	50	56
Latvia	44	41	31	34	37	32	32	27	35	39
Estonia	47	53	38	32	34	32	28	24	26	28
Sweden	103	97	58	43	33	24	18	21	22	19
Finland	8	7	7	4	5	6	5	8	16	10
Others	15	19	20	25	17	14	22	15	20	13
<b>Totals</b>	<b>601</b>	<b>568</b>	<b>459</b>	<b>380</b>	<b>360</b>	<b>415</b>	<b>556</b>	<b>477</b>	<b>429</b>	<b>447</b>

Source: EUMOFA based on EUROSTAT.

For sardinella species<sup>63</sup>, landings in the EU were much lower (fluctuating between 5.000 and 15.000 tonnes) and corresponded almost exclusively to round sardinella (*Sardinella aurita*). Spain accounts for the majority of sardinella landings (51% of landings in EU in 2018).

Table 31. **LANDINGS OF SARDINELLA SPECIES IN THE EU (volume in tonnes)**

Country	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Spain	62.494	71.909	41.528	5.349	4.880	3.714	4.108	2.811	5.738	4.150
Netherlands	13.621	1.458	8.855	3.959	1.614	838	517	783	172	1.446
Italy	645	987	504	672	380	344	389	746	1.584	1.214
Greece	1.721	1.465	1.279	1.298	1.316	1.094	1.220	1.010	1.009	1.155
Others	2.973	743	3.724	201	329	10	33	100	130	141
<b>Totals</b>	<b>81.455</b>	<b>76.563</b>	<b>55.889</b>	<b>11.479</b>	<b>8.518</b>	<b>6.001</b>	<b>6.267</b>	<b>5.449</b>	<b>8.634</b>	<b>8.106</b>

Source: EUMOFA based on EUROSTAT.

## PROCESSING

In Eurostat-Prodcom data, canned products of sardines, sprat and sardinella are aggregated together in one single category<sup>64</sup>. In 2019, EU production of canned sardine, sprat and sardinella amounted to 73.669 tonnes, a 30% decrease compared to ten years before. The main producers were Poland (22%), Spain (20%), Latvia (17%), Portugal (13%), France (12%) and Croatia (9%). Spain, Portugal, Croatia and France mostly produce canned sardine whereas Poland and Latvia are focused on canned sprat. Among major producing countries, Poland was the only one that experienced a significant increase in production over the last decade (+36% between 2010 and 2019). Over the same period, production was stable in Croatia and decreased in all other major producing countries.

<sup>63</sup> Including round sardinella, *Maderian sardinella* and *sardinellas nei*.

<sup>64</sup> 10202530 - Prepared or preserved sardines, sardinella, brisling and sprats, whole or in pieces (excluding minced products and prepared meals and dishes)

Table 32. **EU PRODUCTION OF CANNED SARDINE, SPRAT AND SARDINELLA (volume in 1.000 tonnes)**

Country	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Poland	12	12	13	13	12	13	14	16	18	17
Spain	18	19	17	15	16	16	14	16	14	15
Latvia	34	40	47	53	48	28	16	17	17	13
Portugal	18	20	18	14	12	12	12	10	9	9
France	10	10	12	8	8	8	9	9	10	9
Croatia	7	8	7	5	6	5	5	5	5	7
Estonia	4	4	6	6	6	5	3	3	3	2
Italy	2	2	2	2	2	2	1	2	2	2
Others	1	1	0	1	0	1	2	2	1	1
<b>Total</b>	<b>105</b>	<b>115</b>	<b>122</b>	<b>117</b>	<b>112</b>	<b>91</b>	<b>78</b>	<b>80</b>	<b>78</b>	<b>74</b>

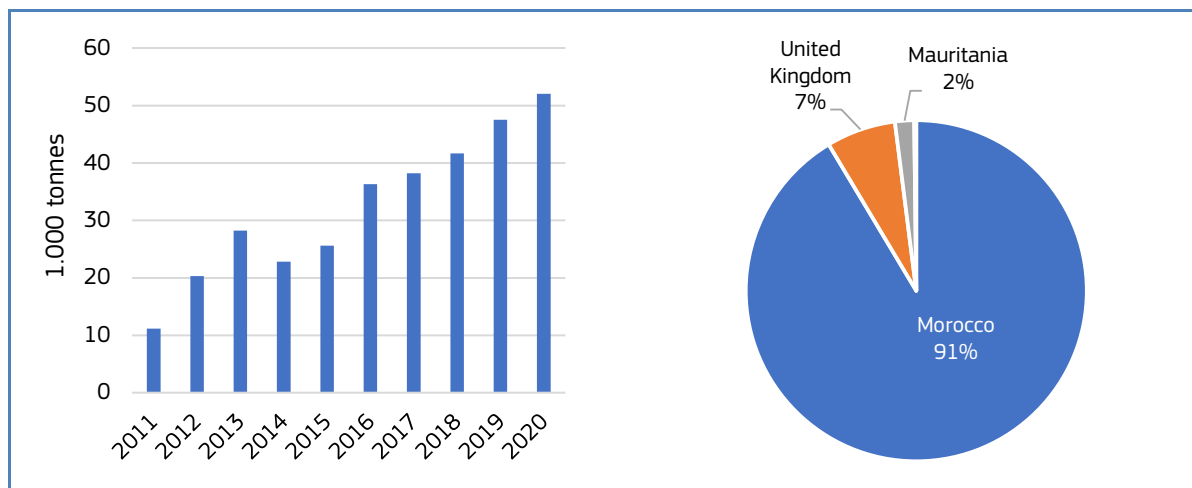
Source: EUROSTAT-PRODCOM. For France, data for 2010 and 2011 are not available so estimated volumes are provided.

### 5.3. EU imports of sardine products (*Sardina pilchardus*)<sup>65</sup>

#### EU IMPORTS OF FROZEN SARDINE

In 2020, EU imports of **frozen sardine**<sup>66</sup>, mostly destined for the canning industry, amounted to 52.037 tonnes. This was a 9% increase compared to 2019 and a 367% increase from 2011. Most of the imported volume originated from Morocco (91% of total extra-EU imports volume in 2020). The main importing country was by far Spain, accounting for 52% of total extra-EU import volume in 2020, being a hub for fishery products imported from Morocco. Other major importers were Malta<sup>67</sup> (18%), Portugal (12%), Croatia (10%) and France (5%).

Figure 50. **EXTRA-EU IMPORTS OF FROZEN SARDINES IN 2020 AND MAIN ORIGINS, IN VOLUME**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data. Sum of percentages may not equal 100% due to rounding.

<sup>65</sup> The whole analysis is at EU-27 level so the UK is removed from reporting countries, and included as a partner country for all years.

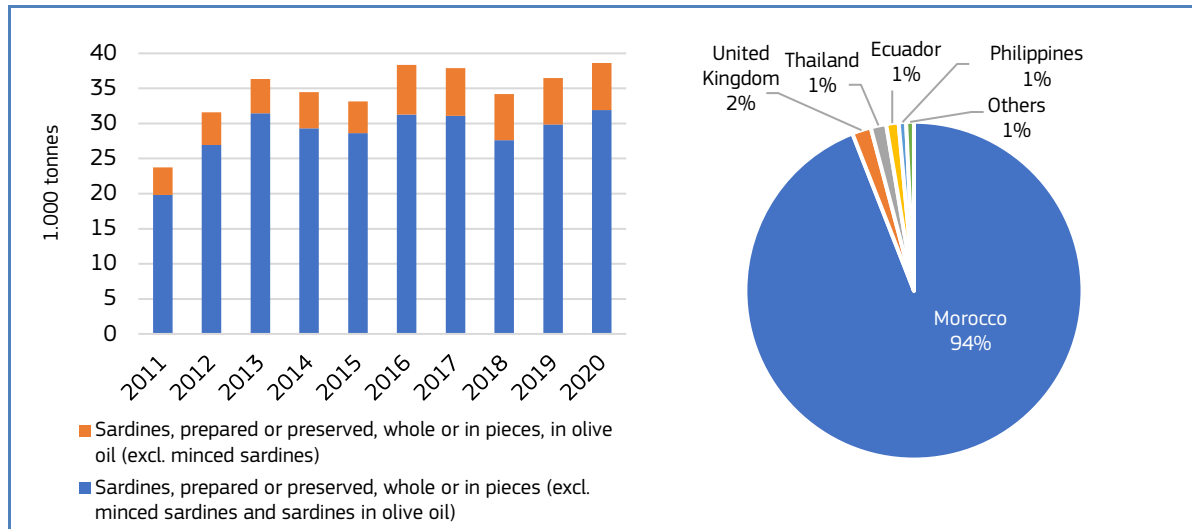
<sup>66</sup> CN8 code: 03035310 Frozen sardines "Sardina pilchardus"

<sup>67</sup> Most Maltese imports are likely to be used as fish feed for bluefin tuna fattening activities.

## EU IMPORTS OF CANNED SARDINE

In 2020, EU imports of **canned sardine** amounted to 38.621 tonnes (17% in olive oil<sup>68</sup> and 83% in other preserved sardine products<sup>69</sup>). This was a 6% increase compared to 2019 and a 63% increase from 2011. Most of the imported volume originated from Morocco (94% of total extra-EU imports volume in 2020). The main importing countries were France and the Netherlands<sup>70</sup>, accounting for 26% and 22%, respectively, of total extra-EU import volume in 2020. Other major importers were Germany (18%), Spain (12%), the Czech Republic (6%) and Italy (5%).

Figure 51. **EXTRA-EU IMPORTS OF CANNED SARDINE IN 2020 AND MAIN ORIGINS, IN VOLUME**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data. Sum of percentages may not equal 100% due to rounding.

## 5.4. EU imports of sardine-type products<sup>71</sup>

### EU IMPORTS OF FROZEN SARDINE-TYPE PRODUCTS

In 2020, EU imports of **frozen sprat**<sup>72</sup> amounted to 2.207 tonnes. This was a 18% decrease compared to 2019 and a 33% decrease compared to 2011. Most of the imported volume originated from Norway (55%), Morocco (25%) and the UK (17%). The main importing countries were Poland and Malta<sup>73</sup>, accounting for 54% and 25%, respectively, of total extra-EU import volume in 2020. Other major importers were the Netherlands (7%), Sweden and Latvia (4% each). Interannual variations are significant for extra-EU imports of frozen sprat. Except for Malta, frozen sprat imports seem mostly used as raw material for sprat canners to complement the supply from EU landings.

<sup>68</sup> CN8 code: 16041311 Sardines, prepared or preserved, whole or in pieces, in olive oil (excl. minced sardines).

<sup>69</sup> CN8 code: 16041319 Sardines, prepared or preserved, whole or in pieces (excl. minced sardines and sardines in olive oil).

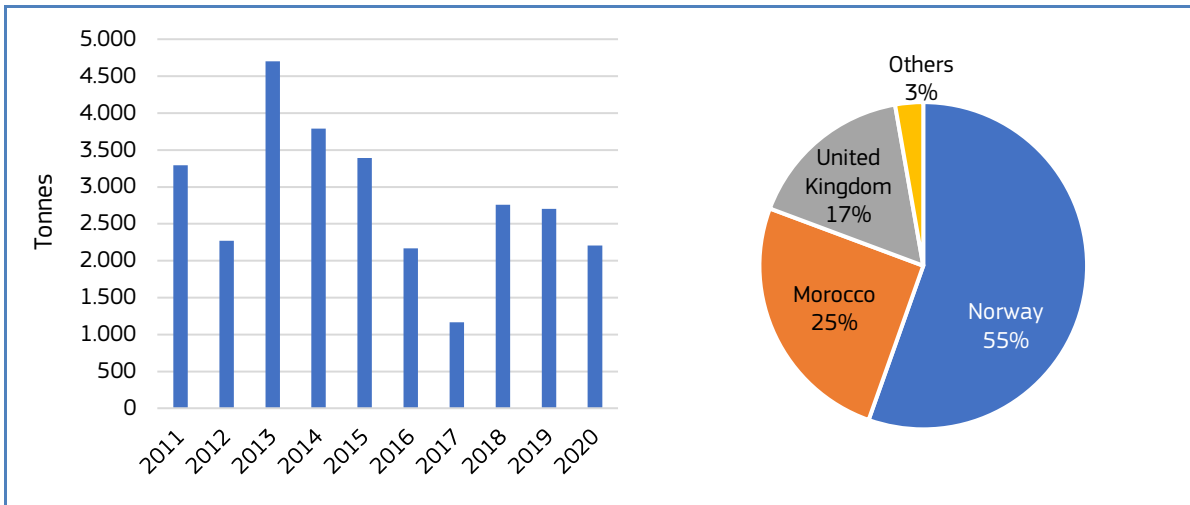
<sup>70</sup> The Netherlands is one of the main entry point for extra-EU imports of FAPs in EU so it is likely that most of these imports are destined for re-export in other EU markets.

<sup>71</sup> the whole analysis is at EU-27 level so UK is removed from reporting countries, and included as partner country for all years.

<sup>72</sup> CN8 code: 03035390 Frozen brisling or sprats "Sprattus sprattus"

<sup>73</sup> Most of Maltese imports are likely to be used as fish feed for bluefin tuna fattening activities.

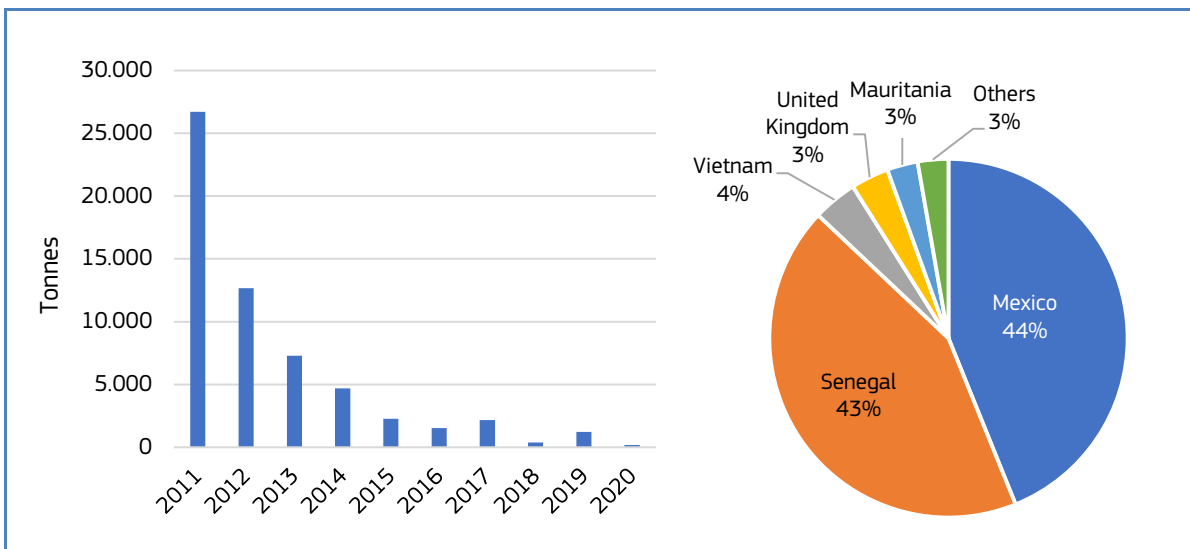
Figure 52. **EXTRA-EU IMPORTS OF FROZEN SPRAT IN 2020 AND MAIN ORIGINS, IN VOLUME**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data. Sum of percentages may not equal 100% due to rounding.

In 2020, EU imports of **frozen ‘other sardines’** (*Sardinops* spp. and *sardinella* spp.)<sup>74</sup> amounted to 175 tonnes. This was a -86% decrease against 2019 and a -99% decrease against 2011. This huge drop was mostly due to the strong decrease of imports from Morocco from 6,570 tonnes in 2011 to 0,5 tonnes in 2020. Most of the imported volume originated from Mexico (44% of total extra-EU imports volume in 2020) and Senegal (43%). The main importing countries were Poland and France, accounting for 28% and 20%, respectively, of total extra-EU import volume in 2020. Other major importers were Latvia (14%), Italy (14%), and Belgium (11%).

Figure 53. **EXTRA-EU IMPORTS OF FROZEN SARDINOPS SPP. AND SARDINELLA SPP. IN 2020 AND MAIN ORIGINS, IN VOLUME**



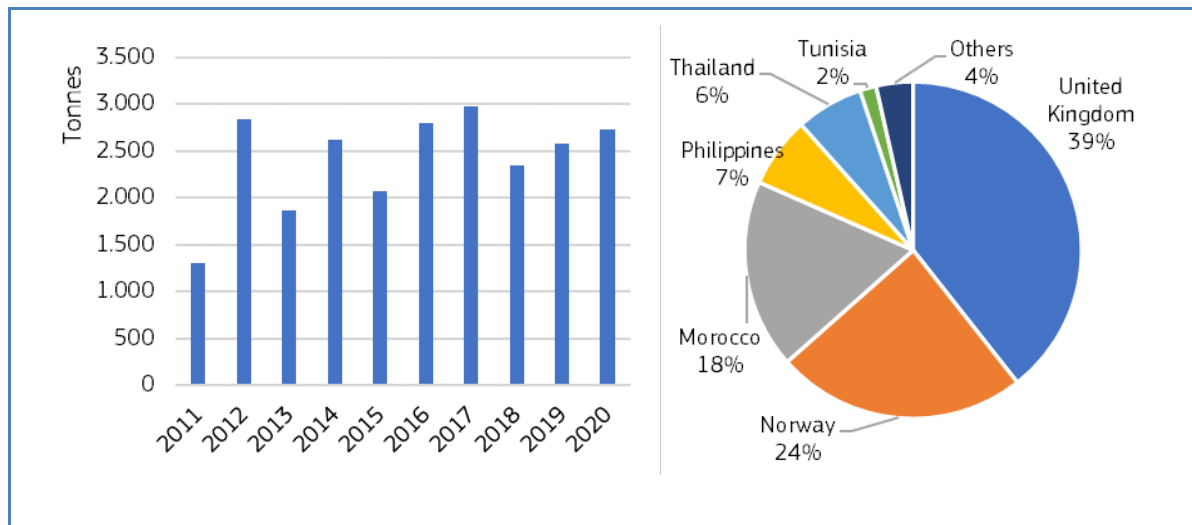
Source: EUMOFA elaboration of EUROSTAT-COMEXT data. Sum of percentages may not equal 100% due to rounding.

<sup>74</sup> CN8 code: 03035330 Frozen sardines "Sardinops spp." and sardinella "Sardinella spp."

## EU IMPORTS OF CANNED SARDINE-TYPE PRODUCTS

In 2020, EU imports of **canned sardinella, brisling or sprat**<sup>75</sup> amounted to 2.736 tonnes. This was a 6% increase against 2019 and a 110% increase against 2011. Most of the imported volume originated from the UK (39% of total extra-EU imports volume in 2020), Norway (24%) and Morocco (18%). Imports from the Philippines have experienced a significant increase in recent years: 186 tonnes in 2020 compared to 53 tonnes in 2019 and no reported flows before 2016. On the other hand imports from Thailand have strongly decreased, from 586 tonnes in 2011, to 177 tonnes in 2020. The main importing countries were Ireland, Sweden and Spain, accounting for 30%, 28% and 21%, respectively - of total extra-EU import volume in 2020.

Figure 54. **EXTRA-EU IMPORTS OF CANNED SARDINELLA, BRISLING OR SPRAT IN 2020 AND MAIN ORIGINS, IN VOLUME**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data. Sum of percentages may not equal 100% due to rounding.

<sup>75</sup> CN8 code:16041390 Prepared or preserved sardinella, brisling or sprats, whole or in pieces (excl. minced)

## 6. Global highlights

**EU / Greenland / SFPA:** On 22 April 2021, the EU and Greenland signed a new sustainable fisheries partnership agreement (SFPA) and protocol that will strengthen their cooperation in the fisheries field for the next four years, with the possibility of a two-year extension. This agreement will allow the EU fleet to continue fishing in Greenlandic waters for a duration of four to six years while continuing to contribute to the development of the fisheries sector in Greenland<sup>76</sup>.



**EU / Aquaculture / Sustainability:** The EU-funded project HOLOFARM explores the possibilities for farming sea cucumbers in Europe. Through controlled production, HOLOFARM wants to improve sustainable sourcing options for markets around the world and relieve pressure on natural stocks. HOLOFARM aims to make aquaculture producers more resilient to challenges like climate change, disease, and invasive species<sup>77</sup>.

**EU / Aquaculture:** The European Commission has published a new action plan to accelerate the development of the organic aquaculture sector. The plan will boost the production and consumption of organic products, as set out in the EU's Farm to Fork and Biodiversity Strategies<sup>78</sup>.

**Croatia / Fisheries / Safety:** Croatia is the 15th country to become a Contracting State to the 2012 Cape Town Agreement on fishing vessel safety, showing increasing support for the regulations designed to safeguard fishing vessels and their crews. In Croatia, this agreement is going to be a useful tool in tackling illegal, unreported and unregulated (IUU) fishing and reducing pollution from fishing vessels, including marine debris<sup>79</sup>.

**UK / Funds / COVID-19:** In April, the Marine Management Organisation (MMO) opened applications for the Fisheries and Seafood Scheme, which will support the fishing and seafood sector in England. It will provide £6.1 million over the next 12 months to support England's seafood sector, coastal communities, and marine environment. The fund will focus on projects that help businesses adapt to life outside the EU's Common Fisheries Policy and recover from the impacts of COVID-19. It will also fund a wide range of projects, from providing professional advice to local businesses and encouraging local sales, to making fishing gear more selective of size and species, to making working conditions safer<sup>80</sup>.

**Aquaculture / Supply:** There was a significant divergence in production growth rates of farmed European seabass versus farmed gilthead seabream in 2020. Total production of gilthead seabream is expected to increase by around 2% while seabass harvest is expected to fall by about 10%, for a total drop in production of both species of around 4%. This decline is partially a consequence of the heavy losses experienced by Spanish aquaculture producers due to Storm Gloria earlier in 2020, but also reflects a sharp reduction in juvenile seabass stocking in Greece and Turkey in 2019<sup>81</sup>.

**World / Canned tuna / Trade:** Consumption of inexpensive and shelve-stable canned tuna increased worldwide in 2020 and generated brisk international trade. Demand for frozen raw materials also increased from the large production bases in Asia and Europe to meet growing demand. The non-canned tuna market, however, remained suppressed along with restricted catering trade due to the COVID-19 crisis<sup>82</sup>.

**SSCF / Mediterranean / FLAGS:** The World Wide Fund for Nature (WWF) and Blue Seeds have launched an innovative scheme supporting small-scale coastal fishers (SSCF) that want to implement measures to reduce the environmental impact of fisheries. In line with this initiative, all coastal fishers in Mediterranean European countries wishing to submit a project under the scope of EMFF could ask for technical support and co-financing to better design their submission. The deadline for submitting the first round of applications is 15 May. A second call is foreseen for June 2021<sup>83</sup>.

<sup>76</sup> [https://ec.europa.eu/oceans-and-fisheries/news/eu-and-greenland-sign-new-sustainable-fisheries-partnership-agreement-2021-04-22\\_en](https://ec.europa.eu/oceans-and-fisheries/news/eu-and-greenland-sign-new-sustainable-fisheries-partnership-agreement-2021-04-22_en)

<sup>77</sup> [https://ec.europa.eu/oceans-and-fisheries/news/new-sustainable-food-oceans-eu-funds-holofarm-sea-cucumber-farming-2021-03-26\\_en](https://ec.europa.eu/oceans-and-fisheries/news/new-sustainable-food-oceans-eu-funds-holofarm-sea-cucumber-farming-2021-03-26_en)

<sup>78</sup> [https://ec.europa.eu/oceans-and-fisheries/news/coast-guard-cooperation-3-eu-agencies-strengthen-cooperation-support-member-states-2021-03-19\\_en](https://ec.europa.eu/oceans-and-fisheries/news/coast-guard-cooperation-3-eu-agencies-strengthen-cooperation-support-member-states-2021-03-19_en)

<sup>79</sup> <https://www.imo.org/en/MediaCentre/Pages/WhatsNew-1584.aspx>

<sup>80</sup> <https://www.gov.uk/government/news/61-million-fisheries-and-seafood-scheme-opens-for-applications>

<sup>81</sup> <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1263874/>

<sup>82</sup> <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/1207658/>

<sup>83</sup> [https://webgate.ec.europa.eu/fpfis/cms/farnet2/new-funds-small-scale-fisheries-projects\\_en](https://webgate.ec.europa.eu/fpfis/cms/farnet2/new-funds-small-scale-fisheries-projects_en)

## 7. Macroeconomic Context

### 7.1. Marine fuel

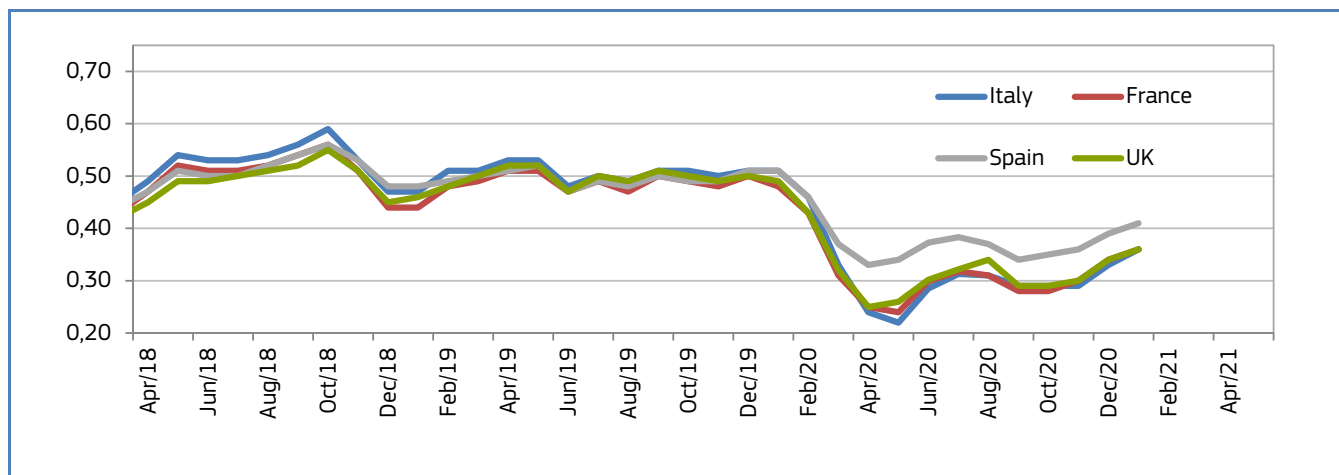
Average prices for marine fuel in **April 2021** ranged between 0,39 and 0,47 EUR/litre in ports in **France, Italy, Spain,** and the **UK**. Prices decreased by an average of about 2,3% compared with the previous month, although they increased by an average of 58,9% compared with the same month in 2020.

Table 33. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

Member State	Apr 2021	Change from Mar 2021	Change from Apr 2020
France <i>(ports of Lorient and Boulogne)</i>	0,41	-2%	64%
Italy <i>(ports of Ancona and Livorno)</i>	0,39	-5%	63%
Spain <i>(ports of A Coruña and Vigo)</i>	0,47	-2%	42%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,43	0%	72%

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)**

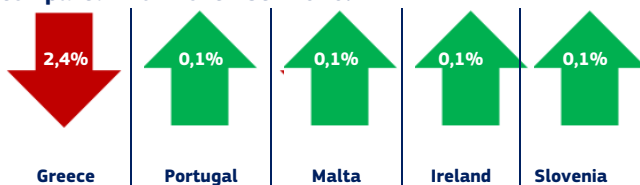


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

### 7.2. Consumer prices

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

**Inflation: lowest rates in February 2021, compared with November 2020.**



**Inflation: highest rates in February 2021, compared with November 2020.**

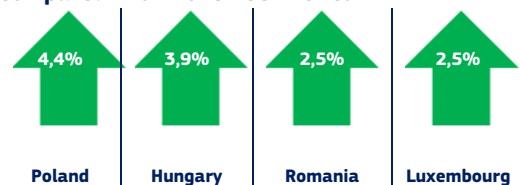




Table 34. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

	Mar 2019	Mar 2020	Feb 2021	Mar 2021	Change from Feb 2021		Change from Mar 2020	
<b>Food and non-alcoholic beverages</b>	106,13	109,44	110,01	110,15	↑	0,1%	↑	0,6%
<b>Fish and seafood</b>	110,12	113,22	113,54	113,26	↓	0,2%	↑	0,0%

Source: Eurostat.

### 7.3. Exchange rates

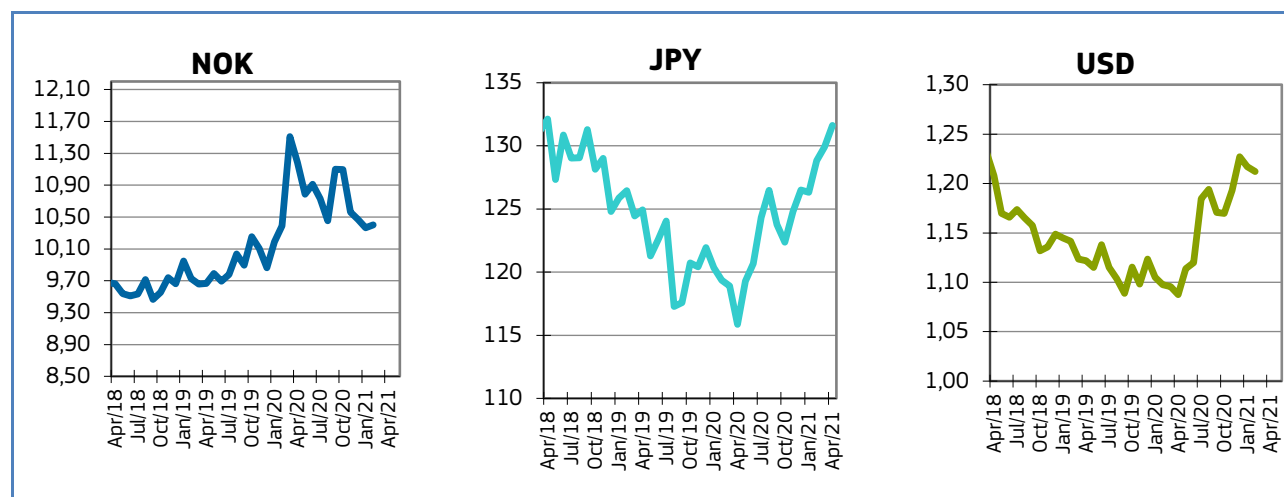
Table 35. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Apr 2019	Apr 2020	Mar 2021	Apr 2021
NOK	9,6678	11,1840	9,9955	9,9533
JPY	124,93	115,87	129,91	131,62
USD	1,1218	1,0876	1,1725	1,2082

Source: European Central Bank.

In April 2021, the euro depreciated against the Norwegian krone (0,4%), remained stable against the US dollar (0,0%), and appreciated against the Japanese yen (1,3%), relative to the previous month. For the past six months, the euro has fluctuated around 1,21 against the US dollar. Compared with April 2020, the euro has appreciated 13,6% against the Japanese yen, 11,1% against the US dollar, and depreciated 11,0% against the Norwegian krone.

Figure 56. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

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

**First sales:** EUR-Lex, DG Mare – European Commission, FAO, ICES, Eur-LEX, Directorate of Fisheries of Norway, Royal Netherlands Institute for Sea Research, Marine Species Identification Portal, fishsource.org., abcomunicazioni.it

**Consumption:** EUROPANEL, FAO, fishbase.org.

**Case studies:** The Nordic Council and the Nordic Council of Ministers., Statistics Greenland, Nordic Statistics, FAO, IWC, StatBank Greenland, The Government of Greenland Ministry of Fisheries, Hunting and Agriculture, VisitGreenland.com, European Commission

**Global highlights:** DG Mare - European Commission, FAO (Globefish), Gov.UK.

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

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

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

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

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

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

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

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