



COMMERCIAL AND RECREATIONAL FISHERIES FOR WILD SEABASS IN THE ATLANTIC

Economic and market study



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Main findings

Identification of fishing fleets most dependent on Atlantic seabass

At fleet segment level, the economic dependency on seabass (value of seabass in total landing value > 10%) is solely composed of small-scale fleet segments (vessels under 12 m) using mostly hooks and to a lesser extent also nets, passive gears and even beam trawls. These dependent fleet segments account for 35% of seabass catches in the Atlantic. Only one fleet segment has a dependency over 50% (Dutch vessels under 10 m using passive gears). After this, the most dependent fleet segments are French vessels under 12 m using hooks (longline and/or handline) with a level of dependency between 34% and 47%.

Profitability of these fleet segments

In 2016, except one small fleet segment in the UK (17 vessels of 10-12 m long using hooks), all these selected fleet segments had positive performance indicators (GVA and EBIDTA), being an indicator of the economic sustainability of the activity for the fleet segments that are most dependent on seabass. For the most dependent fleet segments (dependency over 30%), economic performance increased for French vessels using hooks under 10 m. However, economic performance indicators have decreased for French and Dutch vessels under 10 m using polyvalent passive gear only. For less dependent fleet segments, evolution of economic performance has been very heterogeneous depending on countries and gear used.

Size and weight of EU seabass fisheries by stock

In seaboard corresponding to **Northern stock**¹, the UK and France are the main places in terms of first sale value with 5,3 and 3,7 million euros, respectively, in 2018. This corresponds to **1% and 2%** of total first sale value in these seaboard, respectively for the UK and France.

In seaboard corresponding to **Southern stock**², France is by far the main place in terms of seabass first sale value with 26,5 million euros in 2018, corresponding to **7%** of total first sale value in this seaboard. Spain³ is the other first sale places with 6,9 million euros of seabass sold in auctions in 2018. This corresponds to 1% of total first sale value in these seaboard in Spain.

For **recreational fisheries**, the main country in terms of removals (catches – discards) and economic weight is France. However, no breakdown is available at stock level. The table below provides orders of magnitude of recreational kept catches (removals) and economic weight by country (Source: EUMOFA estimates).

¹ North Sea, Channel and Celtic Sea.

² Bay of Biscay and Iberian Coast

³ Includes seabass catches in the Southern stock but also in the Iberian stocks (areas 8 c and 9 a, also exploited by Portugal) not concerned by the management measures.

	Recreational removals (tonnes)	Related expenditure (million EUR)	Share in total sea angling sector economic weight
FR	Between 1.638 and 3.744	100	20%
UK	Between 230 and 440	188-282	20-30%
IE	unknown	52	31%
NL	138	16	unknown
BE	60	unknown	unknown

Note: These figures are provided by several study led at national levels at different dates, some of them before the implementation of management measures: FR 2017 for removals and 2011 for economic weight (both stocks combined), UK 2012, IE 2015, NL 2010, BE 2013.

First sales

In 2018, in seaboards corresponding to Northern stock, the main first sale places in value (annual first sale above EUR 1 million) were Ijmuiden/Velsen in the Netherlands (54 tonnes), Plymouth (39 tonnes) and Weymouth in the UK (38 tonnes). In seaboards corresponding to Southern stock, the main place of sale in value were French ports of the Bay of Biscay: Les Sables-d'Olonne (537 tonnes), La Cotinière (192 tonnes), and La Turballe (157 tonnes).

It should be noted that seabass fishery, especially in France, is very seasonal with peaks in winter between December and March (the spawning period when seabass aggregates and is targeted by trawlers), with lower volumes recorded in summer between April and September. As a result, first sale prices experience strong fluctuations throughout the year (from 20,00 EUR/kg in summer to 10,00 EUR/kg in winter).

Trade and market information

Most seabass trade flows are of farmed seabass. Wild-caught seabass only accounts for a very minor share in annual import and export flows for all selected countries. However, there are few exceptions to this general observation:

- The UK exports more than half of its wild-caught production to supply the French market, where demand and prices are significantly higher;
- France exports wild-caught seabass to Italy and Spain, volumes being uncertain as possibly mixed with farmed seabass (export volumes estimated at respectively 200 and 90 tonnes).

In France, by far the main producer and consumption market for wild-caught seabass, the supply chain for wild seabass includes fish auctions, wholesalers and retailer/fishmonger or foodservice sector. Although wild seabass is marketed as whole and fresh fish, a significant market segmentation exists according to three main criteria: production methods (farmed/wild-caught), size category, fishing gear used (with higher price for fish caught with hooks and lines).

0. Context and objectives

0.1. Context

European seabass (*Dicentrarchus labrax*) is one of the most valuable fish species caught in Europe. It is a key species for Ireland, France, the UK, Belgium and the Netherlands. France and the UK account for most catches of the stock and important recreational fishing activities take place in both countries, while Ireland catches of this species are only for recreational purposes. Seabass is not only politically sensitive at EU level but also at national level between different fishing gears, fleets, commercial and recreational fishing.

Table 1: Seabass landing estimates in 2018 in the Atlantic (in tonnes)

Stocks	Divisions 4.b–c, 7.a, and 7.d–h ⁴ (Northern stock)		Divisions 8.a–b ⁵ (Southern stock)	
	Countries	Commercial landings	Recreational removals ⁶	Commercial landings
BE	18	156	-	720
FR	297		2.204	
NL	165		-	
ES	0		84	
UK	431		-	
IE	-		-	
Total	912	156	2.288	720

Source: ICES (2018)

There are four stocks of seabass, according to the International Council for the Exploration of the Sea (ICES). The two main stocks are the “Northern” and “Southern” stocks, divided by the 48th parallel in the North-East Atlantic: a line between the North Sea, the Channel, Irish and Celtic Seas on the one hand and the Bay of Biscay on the other hand. A third stock is located in the West of Scotland and West of Ireland and a fourth stock is located around the Iberian Peninsula: they are both of smaller sizes than the two main stocks.

The **Northern stock** was managed at national level until 2015 when emergency measures had to be taken at EU level to restore the state of the declining stock. Since 2015, the EU has adopted a range of measures both for commercial and recreational fishing, including monthly catch limits, daily bag limits and closed seasons.

The **Southern stock** is managed by France for commercial fisheries, with catch limits, and by the EU for recreational fisheries, with daily bag limits.

⁴ Central and southern North Sea, Irish Sea, English Channel, Bristol Channel, and Celtic Sea. Link: <http://www.ices.dk/sites/pub/Publication%20Reports/Advice/2019/2019/bss.27.4bc7ad-h.pdf>

⁵ Northern and central Bay of Biscay. Link:

<http://www.ices.dk/sites/pub/Publication%20Reports/Advice/2019/2019/bss.27.8ab.pdf>

⁶ Estimated

⁷ Recreational removals = recreational catches – released recreational catches = kept fish.

The management measures are set every year based on scientific advice. They differ between the Northern stock and the Southern stock where commercial and recreational fisheries have higher allowances. Seabass catches are not subject to the landing obligation.

0.2. Objectives

The aim of the study is to provide a better understanding of the specificities of the seabass fishery and in particular its market dimension (per Member State and segments of the fleets, for commercial and for recreational fisheries).

The study is based on processing and analysis of different data sources (ICES, STECF, EUROSTAT, national sources). **This analysis was undertaken in 2019** using the most relevant and recent available data:

- DCF data on economic performance of EU fishing fleet (2016).
- EUROSTAT data on EU landings (2017).
- EUROSTAT trade data (2017).
- EUMOFA first sale data (2018).
- Other market datasets (2018-2019).

1. Economic dependency and performance of fleet segments targeting Atlantic seabass

In this section the STECF economic dataset⁸ has been used to calculate the level of dependency of EU fishing fleet on seabass and to assess their levels of profitability. Data on revenue and costs (latest year available 2016) have been analysed to build profitability indicators over the selected fleet segments (the most dependent to the seabass species). See the fleet segment nomenclature in annex.

1.1. Fishing fleets dependent on seabass

Three levels of dependency (value of seabass landings/value of total landings) have been considered in order to identify which fleet segments/countries were the most concerned by seabass market. We split the concerned fleet segments in three groups: 10-20% dependency, 20-30% dependency and above 30% dependency.

We observe that in general the economic dependency on seabass concerns only small-scale fleet segments (vessels under 12 m) using mostly hooks and to a lesser extent also nets, passive gears and even beam trawls. Only one fleet segment has a dependency over 50% (Dutch vessels under 10 m using passive gears). After this, the most dependent fleet segments are French vessels under 12 m using hooks (longline and/or handline) with level of dependency between 34% and 47%.

⁸ 2018 – EU Fleet Economic Performance. The data included is the result of the DCF data call 2018 to support the analysis carried out during the STECF Expert Working Group on 'Annual Economic Report on the EU Fishing Fleet'. Link: <https://stecf.jrc.ec.europa.eu/dd/fleet>

Table 2: EU fishing fleet segments dependent on seabass (volume in kg, value in euros)

Groups	MS	Fleet segment	Volume seabass	Value seabass	Volume total	Value total	% Volume	% value
Group 1 – Between 10 - 20%	ES ⁹	ESP A27 HOK1012 °	44.268	626.720	2.154.014	4.781.345	2%	13%
	FR	FRA A27 DFN0010	156.131	2.159.350	3.659.840	19.694.418	4%	11%
	UK	GBR A27 DFN0010	183.270	1.958.738	4.204.230	12.148.210	4%	16%
	UK	GBR A27 HOK1012 °	12.607	165.452	355.039	1.582.109	4%	10%
	UK	GBR A27 PGP0010 °	18.869	207.289	603.356	1.835.741	3%	11%
	NL	NLD A27 PG1012 °	6.232	131.809	127.384	934.064	5%	14%
Group 2 – Between 20 - 30%	FR	FRA A27 MGO0010 °	38.716	662.384	343.397	2.977.417	11%	22%
	UK	GBR A27 HOK0010	176.031	2.200.342	2.742.539	9.197.504	6%	24%
	NL	NLD A27 TBB0010 °	5.179	82.400	101.136	416.363	5%	20%
Group 3 – Above 30%	FR	FRA A27 HOK0010	556.231	10.580.406	3.364.062	22.484.349	17%	47%
	FR	FRA A27 HOK1012	233.844	4.154.018	2.429.225	12.091.869	10%	34%
	FR	FRA A27 PGP0010	35.700	593.016	4.740.330	1.711.949	1%	35%
	NL	NLD A27 PG0010 °	106.044	1.538.818	310.761	2.440.509	34%	63%

Source: STECF, 2016 data (HOK: vessels using hooks, DFN: Drift and/or fixed netters, PGP: vessels using polyvalent passive gear only, MGO: vessels using other active gears, TBB: Beam trawlers).

⁹ Includes seabass catches in the Southern stock but also in the Iberian stocks (areas 8 c and 9 a, also exploited by Portugal) not concerned by the management measures.

However, it is important to highlight that the fleet segments the most dependent on seabass account only for 32% of total seabass EU landing volume (2016). In terms of landed volume, other major fleet segments are French netters accounting for 23% of total seabass volume and French demersal trawlers (or demersal seiners) accounting for 18% of the volume and 15% of the value of EU total landings of seabass.

Table 3: Breakdown of landings volume (in kg) and value (in euros) by main gear type and country (2016)

MS	Gear type	Volume seabass	Value seabass	Volume total	Value total	% seabass in Volume	% seabass in Value	% total volume of seabass
FR	DFN	879.038	9.544.774	45.064.414	179.373.608	2%	5%	23%
FR	HOK	790.076	14.734.424	5.793.287	34.576.218	14%	43%	21%
FR	DTS	674.863	8.123.385	121.833.101	399.217.410	1%	2%	18%
ES ¹⁰	PMP	206.225	2.943.771	16.052.878	63.322.562	1%	5%	5%
UK	HOK	188.638	2.365.794	3.097.577	10.779.612	6%	22%	5%
UK	DFN	185.484	1.988.521	7.026.354	16.943.853	3%	12%	5%
FR	TM	169.321	1.908.424	18.247.349	34.011.470	1%	6%	4%
NL	PG	112.276	1.670.627	438.145	3.374.573	26%	50%	3%
ES	DTS	88.933	837.472	101.278.674	231.349.825	0%	0%	2%

Source: STECF, 2016 data (HOK: vessels using hooks, DFN: Drift and/or fixed netters, PMP: Vessels using active and passive gears, DTS: Demersal trawlers and/or demersal seiners, TM: Pelagic trawlers, PG: Vessels using passive gears only for vessels < 12m).

¹⁰ Includes seabass catches in the Southern stock but also in the Iberian stocks (areas 8 c and 9 a, also exploited by Portugal) not concerned by the management measures.

1.2. Profitability of the selected fleet segments

The most recent available data (2016) on revenue and costs (STECF Economic data) are processed to build profitability indicators (Incomes, GVA, EBIDTA) for the selected fleet segments. Below the STECF definitions for the selected economic performance indicators:

- **Incomes** = Income from landings + income from fishing rights + other income + direct subsidies
- **Gross Value Added (GVA)** = Income from landings + other income – energy costs – repair costs – other variable costs – non variable costs.
- **EBITDA**: Earnings before interest, taxes, depreciation, and amortization = GVA – Wages and salaries of crew.

The first observation is that in 2016, except one small fleet segment in the UK (HOK1012, 17 vessels), all these selected fleet segments had positive performance indicators (GVA and EBIDTA), being an indicator of the economic sustainability of the activity for the fleet segments the most dependent on seabass.

However, profitability should be observed over time series to understand trends occurring for each fleet segment. Over the 2008-2016 period, for the most dependent fleet segments (group 3), the table 3 shows that economic performance increased for French vessels using hooks under 10 m. However, economic performance indicators have decreased for French and Dutch vessels under 10 m using polyvalent passive gear only. For less dependent fleet segments, evolution of economic performance has been very heterogeneous depending on countries and gear used. Overall, among the selected fleet segments, the hooks segment across all MS has experienced income increase over the period on average by 47%.

Table 4: Economic performance indicators for the selected fleet segments in 2016

Groups	MS	Fleet segment	Dependency on seabass	GVA (1000 euros)	EBITDA (1000 euros)	Number of vessels
Group 1 - Between 10 - 20%	ES ¹¹	ESP A27 HOK1012 °	13%	6.296	2.960	64
	FR	FRA A27 DFN0010	11%	15.395	4.830	274
	UK	GBR A27 DFN0010	16%	10.323	6.545	632
	UK	GBR A27 HOK1012 °	10%	-477	-35	17
	UK	GBR A27 PGP0010 °	11%	1.034	520	91
	NL	NLD A27 PG1012 °	14%	239	222	19
Group 2 - Between 20 - 30%	FR	FRA A27 MGO0010 °	22%	6.867	2.192	164
	UK	GBR A27 HOK0010	24%	5.128	3.146	541
	NL	NLD A27 TBB0010 °	20%	492	172	5
Group 3 - Above 30%	FR	FRA A27 HOK0010	47%	16.748	6.144	239
	FR	FRA A27 HOK1012	34%	7.927	2.339	49
	FR	FRA A27 PGP0010	35%	3.508	1.093	70
	NL	NLD A27 PG0010 °	63%	2.104	1.951	162

Source: STECF, 2016 data (HOK: vessels using hooks, DFN: Drift and/or fixed netters, PGP: vessels using polyvalent passive gear only, MGO: vessels using other active gears, TBB: Beam trawlers).

¹¹ Includes seabass catches in the Southern stock but also in the Iberian stocks (areas 8 c and 9 a, also exploited by Portugal) not concerned by the management measures.

2. Size and weight of EU seabass fisheries

2.1. Commercial fisheries

European seabass is mostly caught in the North Sea, the English Channel and the Bay of Biscay by EU fleets using trawls, seines, nets and hooks and line. To a lesser extent, it is also caught in the Mediterranean.

In 2017, EU catches of seabass in North-East Atlantic reached 4.175 tonnes. France was by far the main fishing country with catches of 2.577 tonnes, followed by Portugal (573 tonnes)¹²; the UK (438 tonnes); Spain (432 tonnes); the Netherlands (132 tonnes) and Belgium (22 tonnes). The landing value of North-East Atlantic seabass fisheries can be estimated at **EUR 55 million for 4.175 tonnes in 2017. It means that seabass caught in the Atlantic accounts for less than 1% of EU landing value of all species**, ranking circa 40th of the most valuable species in EU. Finally, there may also be illegal and unreported landings due to lucrative markets for seabass, but evidence that such activities are occurring is either missing or anecdotal.

In total, including Mediterranean landings (based on catch data)¹³, **seabass landings in the EU reached 4.924 tonnes for a value of EUR 65 million**. By comparison, farmed seabass production has reached more than 79.000 tonnes in 2017 for an estimated value of EUR 490 million. France was by far the main landing place (2.768 tonnes) followed by Spain (602 tonnes), Portugal (434 tonnes) and the UK (426 tonnes). The differences between catches and landings are due to landings abroad, especially UK and NL in FR and PT in ES. Over the last decade, the value of EU landings has decreased by 30% following the strong decrease in volume (-38%). In 2016, the EU apparent consumption for seabass was estimated at almost 97.000 tonnes (live weight equivalent)¹⁴, therefore partly relying on imports from third countries (specifically Turkey).

Table 5: Value of landings of European seabass in the EU (million euros)

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
FR	67,2	31,9	31,6	56,8	54,1	57,2	52,2	45,0	38,2	38,9
ES¹⁵	7,1	7,5	8,4	9,4	7,7	8,5	6,6	7,1	7,5	7,6
PT	3,4	3,3	3,6	3,4	3,0	3,7	4,7	3,8	4,8	5,1
UK	5,6	5,0	5,8	6,5	7,1	6,8	9,1	7,5	5,9	4,8
IT	3,5	3,4	3,3	3,2	3,6	2,6	2,9	5,0	5,9	4,3
NL	2,7	3,0	2,9	2,9	2,0	2,0	1,2	2,7	2,1	1,8
EL	2,8	1,6	2,1	1,8	1,5	1,5	1,4	1,2	2,0	1,4
BE	0,5	0,5	0,7	1,0	1,2	1,2	1,1	1,2	1,2	0,9
Other MS	0,1	0,1	0,1	0,1	0,1	0,2	0,1	0,2	0,1	0,2
Total	92,9	56,2	58,5	85,1	80,2	83,6	79,6	73,7	67,8	64,9

Source: EUMOFA based on Eurostat

¹² Only on stock 8c and 9a

¹³ According to Eurostat, 95% of French catches of seabass occur in the North-East Atlantic. This share is 72% for Spain.

¹⁴ <http://www.eumofa.eu/documents/20178/121372/PTAT+Case+Study+-+Seabass+in+the+EU.pdf>

¹⁵ Includes seabass catches in the Southern stock but also in the Iberian stocks (areas 8 c and 9 a, also exploited by Portugal) not concerned by the management measures.

By analysing **first-sale data** (sales recorded in fish auctions and sales notes), it is possible to provide a breakdown of seabass first sale value between seaboards, corresponding to the two stocks assessed by ICES.

In seaboards corresponding to **Northern stock**¹⁶, the UK and France are the main places in terms of first sale value with 5,3 and 3,7 million euros, respectively, in 2018. This corresponds to **1% and 2%** of total first sale value in these seaboards, respectively for the UK and France.

Over the last decade, whereas seabass first sale value has increased in UK fish auctions (+14%, lower volumes being compensated by a +56% increase of prices reaching 11,32 EUR/kg in 2018), it has strongly decreased in French auctions (-77%, despite a +89% increase of prices reaching 15,90 EUR/kg in 2018). This followed the strong decrease of landings due to the decrease of the stock in Channel and the implementation of the related management measures.

Table 6: First sale value of European seabass in seaboards corresponding to Northern stock (million euros)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
UK	4,6	5,7	6,3	6,9	5,8	8,6	7,1	5,7	5,5	5,3
FR	16,4	16,8	14,6	14,8	13,5	11,2	10,8	6,8	5,4	3,7
NL	N.A.	2,8	0,7	0,4	1,8	1,4	1,3	1,1	1,0	1,2
BE¹⁷	0,4	0,5	0,4	0,4	0,4	0,4	0,4	0,2	0,2	0,1
Total	N.A.	25,9	22,0	22,6	21,5	21,6	19,5	13,8	12,1	10,4

Source: EUMOFA

In seaboards corresponding to **Southern stock**¹⁸, France is by far the leader in terms of seabass first sale value with 26,5 million euros in 2018, corresponding to **7%** of total first sale value in this seaboard. Spain¹⁹ is the other country where first sales occur with 6,9 million euros of seabass sold in auctions in 2018. This corresponds to 1% of total first sale value in these seaboards in Spain.

Over the 2009-2018 period, seabass first sale value has increased by 20% in France (a +34% price increase, to reach 13,23 EUR/kg in 2018, compensating the -10% decrease in volume).

Table 7: First sale value of European seabass in seaboards corresponding to Southern stock (million euros)

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
FR	22,1	22,6	26,8	26,6	29,9	31,9	27,8	26,3	26,8	26,5
ES²⁰	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	6,8	9,8	5,5	6,9
Total	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	34,6	36,1	32,3	33,4

Source: EUMOFA

¹⁶ North Sea, Channel and Celtic Sea.

¹⁷ Incomplete data: only three main auctions are available.

¹⁸ Bay of Biscay and Iberian Coast

¹⁹ Includes seabass catches in the Southern stock but also in the Iberian stocks (areas 8 a, 8 b and 9 a, also exploited by Portugal) not concerned by the management measures.

²⁰ Includes seabass catches in the Southern stock but also in the Iberian stocks (areas 8 a, 8 b and 9 a, also exploited by Portugal) not concerned by the management measures.

2.2. Recreational fisheries

According to a European Parliament study²¹, the total economic impact of marine recreational fishing amounts to EUR 10,5 billion, supporting almost 100.000 jobs. However, this value should not be compared with commercial fisheries landing value. The comparison could be calculated by including all economic benefits created by commercial fisheries (at least expenditures).

On the Atlantic coasts, in the areas where it is present (from Portugal to Denmark), seabass is one of the species most targeted by recreational fisheries. All types of fishing techniques are involved (from the shore/on boat, rod and line/longline/fixed nets/spearfishing).

As there is no reporting obligation, it very difficult to estimate the volume of seabass caught each year by recreational fishing. However, some figures are estimated, and a “value” of the fishery is estimated mostly based on average expenditure by seabass fishers (tackle, trip, accommodation, etc.). To this value, the value of indirect benefits can be added.

For the seabass management advice on seabass stocks, ICES estimated the volume of recreational catches kept (called “removals”). In 2018, they were estimated at almost 1.000 tonnes at EU level:

- 156 tonnes in divisions 4.b–c, 7.a, and 7.d–h (central and southern North Sea, Irish Sea, English Channel, Bristol Channel, and Celtic Sea), meaning -91% since 2010²².
- 720 tonnes in divisions 8.a–b (northern and central Bay of Biscay), meaning -50% since 2010²³;

According to the European Anglers Alliance, European seabass is one of the most important and valuable species to recreational angling and its dependent businesses. The EEA estimates that 2 million sea anglers regularly or occasionally target seabass in EU waters. The EAA conservatively estimates the socio-economic value of recreational bass angling to be an average of 100 euros per bass angler per year, equal to a total of EUR **200 million**²⁴. This calculation is likely to be underestimated when analyzing several studies led at national level in the countries in which recreational seabass fishing is mostly concerned.

Table 8: Estimates of seabass catches in recreational fisheries

	Recreational removals (tonnes)	Related expenditure (million EUR)	Share in total sea angling sector economic weight
FR	Between 1.638 and 3.744	100	20%
UK	Between 230 and 440	188-282	20-30%
IE	unknown	52	31%
NL	138	16	unknown
BE	60	unknown	unknown

Source: EUMOFA estimates. Note: these figures are provided by several study led at national levels at different dates, some of them before the implementation of management measures: FR 2017 for removals and 2011 for economic weight (both stocks combined), UK 2012, IE 2015, NL 2010, BE 2013.

²¹ [www.europarl.europa.eu/RegData/etudes/STUD/2017/601996/IPOL_STU\(2017\)601996_EN.pdf](http://www.europarl.europa.eu/RegData/etudes/STUD/2017/601996/IPOL_STU(2017)601996_EN.pdf)

²² <http://www.ices.dk/sites/pub/Publication%20Reports/Advice/2019/2019/bss.27.4bc7ad-h.pdf>

²³ <http://www.ices.dk/sites/pub/Publication%20Reports/Advice/2019/2019/bss.27.8ab.pdf>

²⁴ <https://www.eaa-europe.org/topics/sea-bass/>

France: Over the 2009-2011 period, an Ifremer study²⁵ assessed the characteristics and catches of the French European seabass recreational fishery along the Atlantic coast, targeting the Northern and Southern stock of seabass. The number of people fishing seabass was estimated at 370.000, representing 2 million fishing trips. They estimated that the annual total recreational seabass catches were 3.173 tonnes (4 million fish) of which **2.345 tonnes were kept** (2 million fish, with an average weight of 1,2 kg). The fishing gear used were rod with lure (40%), rod with bait (23%), handline (21%), fixed net (8%), longline (4%) and speargun (4%). So recreational landings were estimated to represent between 20 and 30% of the total fishing catches on the Atlantic coasts of France. However, these figures have been calculated before the implementation of bag-limits, so they are likely not to be representative of catch volumes in recent years. In terms of value, as seabass was considered as the main species targeted for at least 20% of total recreative fishers and that total yearly expenditure was estimated at circa EUR 500 million, recreative fishing of seabass might represent about EUR 100 million of direct expenditure.

In 2018, a new study²⁶ has been released by FranceAgriMer on marine recreational fishery in France for the year 2017. Seabass was considered as the second most targeted species (after mackerel, shellfish gathering put aside) with 27% of respondents quoting seabass in their top-3 species caught during the year. Total seabass recreational catches in 2017 were estimated to be between 2,1 and 4,8 million fish, with the average at **3,4 million fish**. No major differences have been reported among seaboards (Atlantic and Channel). Taking an average weight at 1,2 kg/fish (average weight of kept seabass according to the Ifremer study), 2017 catches amounted to between **2.520 tonnes and 5.760 tonnes**, which is way above ICES estimations (between 500 and 1.000 tonnes for FR). One of the main reasons explaining this mismatch could be that the estimation of catches in this study takes into account fish which was caught and released because too small or because the bag limit is already reached. However, considering the management measures implemented in the meantime, it is likely that the share of released seabass has significantly increased in recent years. In addition, notably due to the rising awareness on the conservation of seabass stocks, many anglers are now practicing and promoting the no-kill (catch and release). According to the FranceAgriMer study, recreational fishers fishing seabass released 35% of their catch. **Therefore, the annual volume of kept seabass would be between 1.638 and 3.744 tonnes**. So, it could also be that ICES underestimates recreational seabass removals or that the total number of fish caught is overestimated in the FranceAgriMer study.

United Kingdom: A 2012 study on recreational sea angling in England²⁷ estimated the number of sea anglers to be 884.000 in 2012. These anglers make a significant contribution to the economy, as in 2012, sea anglers resident in England spent £1,23 billion on the sport, equivalent to £831million direct spend (i.e. EUR 936 million) once imports and taxes had been excluded. 10% of respondents declared catching seabass, however it is likely that a larger share of them target seabass so the contribution of seabass to the total expenditure in UK should be above 10%, likely between 20 and 30% as in Ireland²⁸. When adding catches occurred from the shore, on boat and on charter boats,

²⁵ <https://archimer.ifremer.fr/doc/00285/39592/38084.pdf>

²⁶ Étude sur l'évaluation de l'activité de pêche de loisirs en France métropolitaine (dont la Corse), décembre 2018.

²⁷ Armstrong, M., Brown, A., Hargreaves, J., Hyder, K., Pilgrim-Morrison, S., Munday, M., et al. 2013. Sea Angling 2012 – a survey of recreational sea angling activity and economic value in England. Defra report.

²⁸ As an example, in the study carried out by Nautilus Consultants for the South West of England called The Motivation, Demographics and Views of South West Recreational Sea Anglers, almost 50% of anglers selected bass as their most favoured species but when catches were analysed only 10% were bass. Source:

the assessed total volume of seabass caught by sea anglers was between 330 and 690 tonnes of which **between 230 and 440 tonnes were kept**.

Ireland: In 1990, the Republic of Ireland introduced measures to close commercial fishing for seabass to conserve dwindling stocks and promote recreational angling. The measures prohibit Irish registered commercial fishing vessels having seabass on board or using nets in their capture. No data are available concerning recreational seabass catches in Ireland in total weight.

According to the study “The Economic Contribution of Bass and Sea Angling in Ireland (2015)”, recreational fisheries of seabass in IE could be estimated as follows:

- Total expenditure by Irish anglers in Ireland on seabass fishing: EUR 43 million.
- Contribution of Irish Bass Recreational Fishery to Irish Economy (Non-Irish Anglers): EUR 9 million.
- Total Contribution of Irish Bass Recreational Fishery to Irish Economy: **EUR 52 million**²⁹ which is almost **31%** of direct spending on all sea angling activities in Ireland (EUR 169 million).

The Netherlands: In 2010, recreational bass angling in the Netherlands was estimated to have a calculated socio-economic value of **EUR 16 million** on a yearly basis for removals estimated at **138 tonnes**³⁰.

Belgium: A recreational fishing survey was conducted in 2013 in Belgium by the Belgian Fisheries Institute, using a questionnaire approach, in order to meet DCF requirements. The estimated retained catch of sea bass was **60 tonnes** (no additional details are available).

No data relative to recreational fishing for seabass is available for Spain.

http://resources.anglingresearch.org.uk/sites/resources.anglingresearch.org.uk/files/The_Motivation_Demographics_&Views_of_SW_Recreational_Sea_Anglers.pdf

²⁹ https://www.eaa-europe.org/files/basseaeconomiccontribution2015_7910.pdf

³⁰ Source: Assessment of recreational fisheries for seabass - Request for Services - Sea bass. Commitment No.686192. Paper for STECF.

3. The market for wild seabass – from first sale to consumption

3.1. First-sales: main places of sale

This section analyses first sale data by seaboard corresponding to the two stocks defined by ICES. However, it is likely that several French vessels operating in the Western part of Brittany may go fishing seabass in the Southern stock and land/sell in auctions corresponding to the Northern stock and vice-versa.

In 2018, in seaboards corresponding to **Northern stock**, the leading places of first sale value (annual first sale above EUR 1 million) were Ijmuiden/Velsen in the Netherlands (54 tonnes); Plymouth in UK (39 tonnes) and Weymouth (38 tonnes). The first place of sale in France for the Northern stock was Boulogne-sur-mer (24 tonnes). Overall, first sale prices were higher in French ports than in ports in the UK or in the Netherlands. See details below in table 8.

Table 9: Northern stock main places of first sale (2018)

LOCATION	VOLUME (KG)	VALUE (EUR)	PRICE (EUR/KG)
NL – Ijmuiden/Velsen	54.130	661.325	12,22
UK – Plymouth	38.693	525.154	13,57
UK – Weymouth	37.934	491.269	12,95
UK – Brixham	33.825	438.344	12,96
NL – Scheveningen	33.517	345.884	10,32
UK – Eastbourne	28.081	331.895	11,82
UK – Mevagissey	24.939	265.648	10,65
FR – Boulogne-sur-Mer	24.581	348.834	14,19
UK – Burry Port	23.504	262.275	11,16
UK – Newlyn	21.821	241.977	11,09
FR – Roscoff	21.688	328.947	15,17
FR – Cherbourg	20.222	327.993	16,22

Source: EUMOFA

In 2018, in seaboards corresponding to **Southern stock**, the main places of sale in value were French ports of the Bay of Biscay: Les Sables-d'Olonne (537 tonnes), La Cotinière (192 tonnes), and La Turballe (157 tonnes). They correspond to ports where important landings of seabass caught with trawls/seines occur, especially during the spawning season (January-April). The first place of sale in Spain was Sant Eugenia Ribeira (100 tonnes). See details below in table 9.

Table 10: Southern stock mains place of first sale (2018)

LOCATION	VOLUME (KG)	VALUE (EUR)	PRICE (EUR/KG)
FR – Les Sables-d’Olonne	537.710	6.685.406	12,43
FR – La Cotinière (Saint-Pierre-d’Oléron)	192.285	2.632.980	13,69
FR – La Turballe	157.507	1.826.989	11,60
FR – Arcachon	154.286	1.418.237	9,19
FR – Noirmoutier-en-l’île	127.948	1.921.642	15,02
FR – Royan	113.403	1.623.877	14,32
FR – Guilvinec	103.509	1.799.338	17,38
ES – Santa Eugenia Ribeira	100.379	1.499.212	14,94
FR – St Jean-de-Luz	97.734	947.041	9,69
FR – Saint-Gilles-Croix-de-Vie	93.107	1.267.316	13,61
FR – Lorient	87.294	1.210.760	13,87

Source: EUMOFA

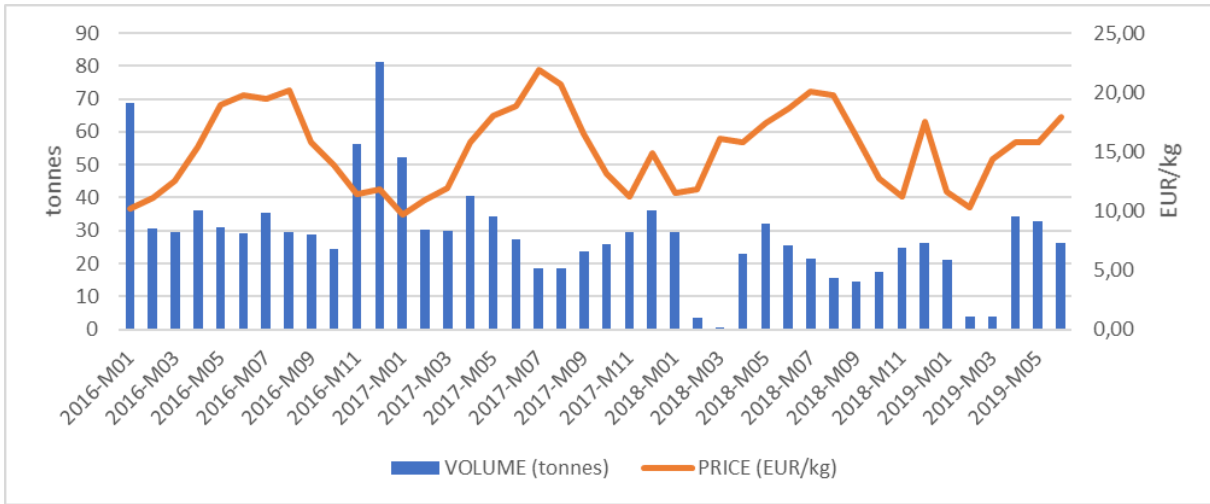
It should be noted that seabass fishery, especially in France, is very seasonal with peaks in winter **between December and March** (spawning period when seabass aggregates and is targeted by trawlers) and lower volumes recorded in summer between April and September. As a result, first sale prices experience strong fluctuations throughout the year (from 20,00 EUR/kg in summer to 10,00 EUR/kg in winter).

Figures 1, 2 and 3 below illustrate this seasonality for Northern and Southern stock, respectively.

On figures 1, 2 and 3, this seasonality is very well visible for both stocks with lower prices from September to April despite a slight increase in December corresponding to the high demand for Christmas season. For the Northern stock (figures 1 and 2), first sale volume was close to zero in February-March 2018 and 2019, likely to be due to the implementation of fishing closure management measure. This resulted in higher prices compared to the same period in 2017.

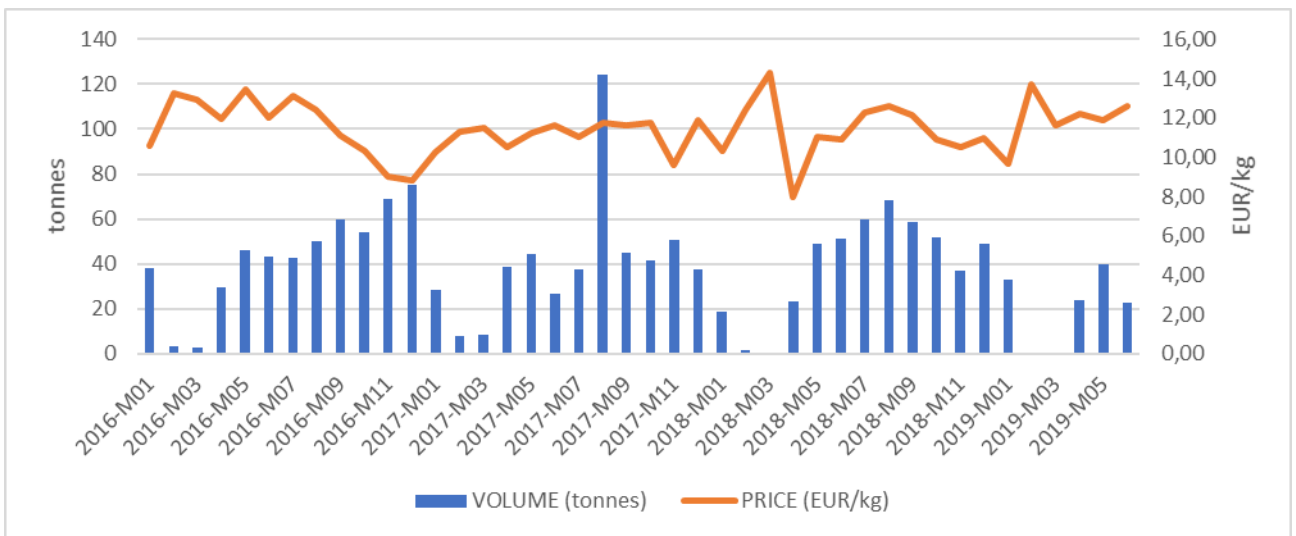
For Southern seabass (figure 3), high tonnages of seabass caught and sold in Jan-Feb-March in France lead to significantly lower prices (10,00 EUR/kg) on the market – a trend that is confirmed over the years and corresponding to high landings of trawlers during the seabass spawning aggregating period.

Figure 1: Seabass monthly first sales in French auction in seaboard corresponding to the Northern stock (volume in tonnes and price in EUR/kg)



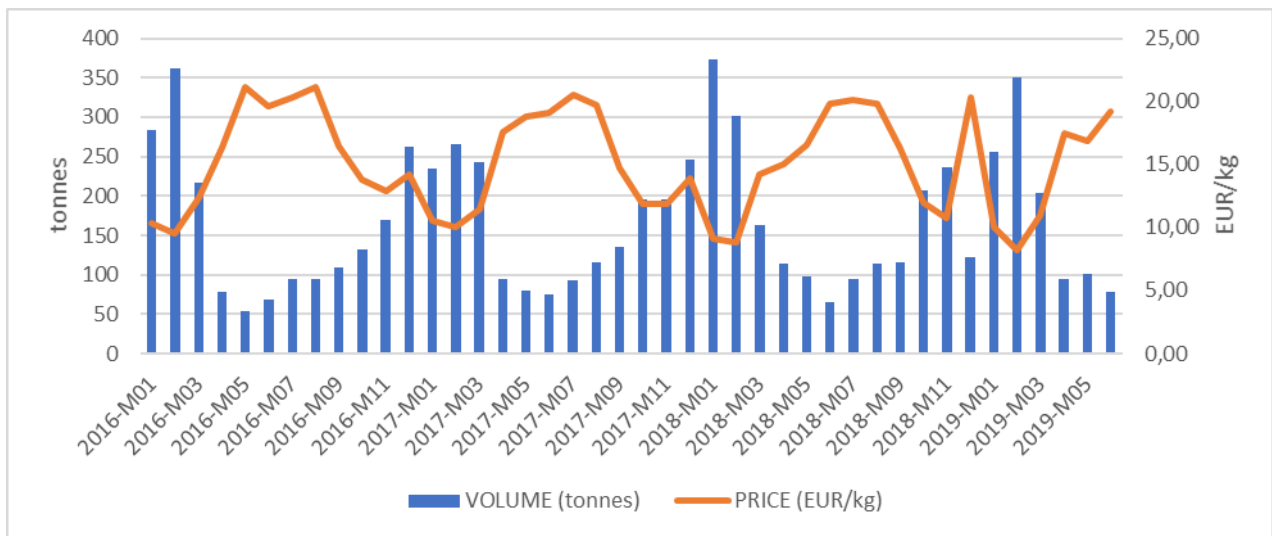
Source: EUMOFA

Figure 2: Seabass monthly first sales in English auctions (volume in tonnes and price in EUR/kg)



Source: EUMOFA

Figure 3: Seabass monthly first sales in French auctions in seaboard corresponding to the Southern stock (volume in tonnes and price in EUR/kg)



Source: EUMOFA

3.2. Trade

Seabass trade flows are significant for many EU countries, corresponding for the majority to fish from aquaculture production. Unfortunately, trade data (COMEXT) does not allow to provide the breakdown between wild-caught and farmed seabass, the two available custom codes including only fresh European seabass (CN 03 02 84 10) and frozen European seabass (CN 03 03 84 10). Seabass is mostly traded fresh as whole fish. The table below summarizes the production (fisheries and aquaculture) and trade flows for the year 2017.

Table 11: Production and trade flows in volume terms of countries involved in Atlantic seabass fisheries (in tonnes)

	Landings (net weight)	Aquaculture production (live weight)	Imports (net weight)	Exports (net weight)
France	2.768	1.413	6.491	1.037
Spain	602	17.656	9.264	6.244
United Kingdom	426	0	7.738	226
Netherlands	139	0	8.165	9.719
Belgium	61	0	1.365	708

Source: EUMOFA

However, most of these trade flows concern farmed seabass especially from the two major producers and suppliers of the EU market, namely Greece (EL) and Turkey (TR). In order to isolate and estimate wild-caught seabass trade flows, it is necessary to see which are the main trade partners of each selected country in order to estimate the shares of farmed and wild-caught seabass in import flows.

Examining **unit price** (export/import price in EUR/kg) can also give a good indication of the production method, wild seabass being traded a significantly higher prices (between 10,00 and 30,00 EUR/kg) than farmed seabass (between 5,00 and 10,00 EUR/kg) in average.

In the table below, we can see that wild-caught seabass only accounts for a very minor share in annual import and export flows for all selected countries. However, there are few exceptions to this general observation:

- The UK exports more than half of its wild-caught production to supply the French market, where demand and prices are significantly higher;
- France exports wild-caught seabass to Italy and Spain, volumes being uncertain as possibly mixed with farmed seabass (export volumes estimated at respectively 200 and 90 tonnes).

Table 12: Assessment of the share of wild-caught seabass in trade flows for the selected EU countries in 2017 (in volume terms)

	Main suppliers	Comments	Main countries of destination	Comments	% wild-caught seabass in imports	% wild-caught seabass in exports
France	EL (48%), NL (15%), ES (13%), IT (8%), TR (7%), UK (4%)	At the exception of imports from UK, it is likely that wild-caught seabass is very negligible in imports flows	IT (22%), CH (15%) DE (15%), UK (12%), BE (10%)	French seabass aquaculture is traditionally very export-oriented especially to CH and DE. On the other hand, export price to IT and ES correspond to wild-caught seabass (almost 17,00 EUR/kg)	5% mostly from UK	Between 20 and 30% mostly to high-end channels in IT and ES
Spain	EL (44%), TR (26%), IT (17%)	Farmed seabass almost exclusively, considering the main origins but minor quantities of wild seabass from UK and FR	PT (47%), FR (17%), IT 512%), US (10%)	Considering the Spanish production, it is likely that most of exports concern farmed fish	Below 5%	Below 5%
United Kingdom	NL (57%), TR (19%), EL (17%)	Farmed seabass almost exclusively considering the main origins	FR (84%)	Most of wild seabass is exported to FR, the main market for this product, with high demand and higher prices.	Below 5%	Above 90%
Netherlands	TR (66%), EL (14%), BE (11%)	Farmed seabass almost exclusively considering the main origins	UK (39%), DE (22%), FR (18%), IT (7%)	Considering the importance of trade flows, as for other fish product, NL is a hub re-exporting to other EU countries most of its imports, mostly farmed seabass	Below 5%	Below 5%
Belgium	TR (44%), NL (29%), FR (10%)	Mostly farmed seabass considering the main origins	NL (97%)	Considering the landed volume, it is likely that seabass exports include mostly re-export of imported farmed seabass to NL	Below 10%	Below 5%, small quantities to FR

Source: EUMOFA

3.3. Supply chain, market and prices

Wild seabass is a high-end product, of most interest to fishmongers and restaurants. At retail stage, its price can exceed 30,00 EUR/kg while the farmed seabass generally remains below the 10,00 EUR/kg mark³¹.

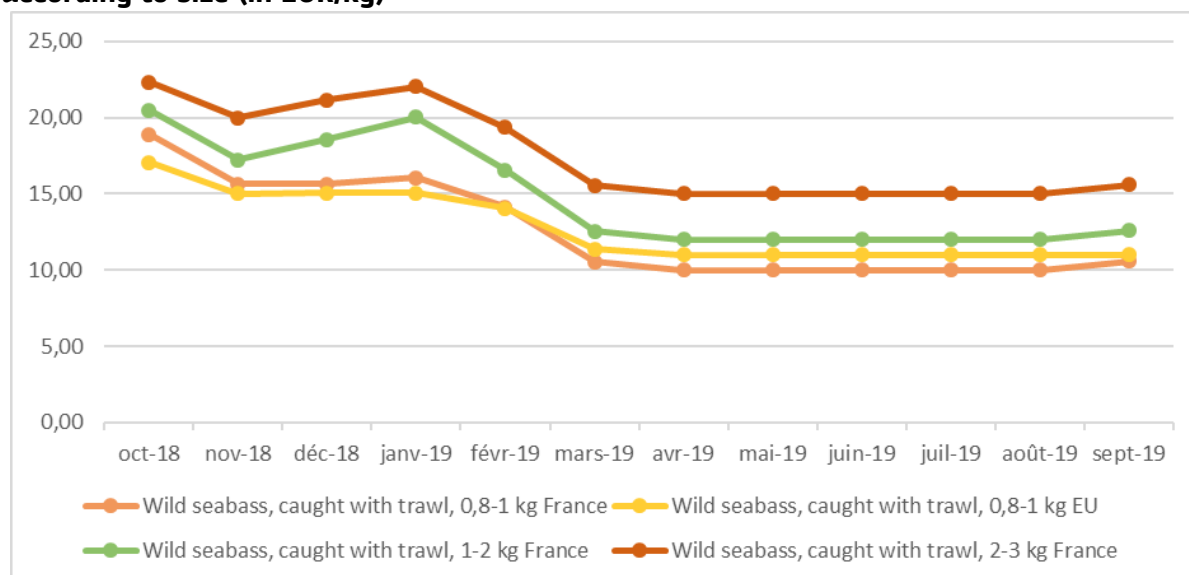
In **France**, by far the main producer and consumption market for wild-caught seabass, the supply chain for wild seabass includes fish auctions, wholesalers and the retailer/fishmonger and foodservice sectors. Some direct selling (from fisherman to consumer) also occurs on the coast. No processing phase is involved as this fish is sold as a fresh whole fish and does not need value-adding process.

However, a significant market segmentation exists according to three main criteria:

- The **production technique** (farmed/wild-caught): wild-caught seabass is **at least 50% more expensive** than farmed seabass;
- The **size of the fish**: 4 main commercial sizes exist: 0,8-1 kg, 1-2 kg, 2-3 kg and +3kg. Bigger fish are **more expensive**;
- The **fishing gear used**: the quality of the wild-caught fish depends on the fishing gear used. Therefore, this criterion has a great influence on prices. **Seabass caught with trawl is the cheapest whereas seabass caught with hooks and lines is the most expensive**. French fishermen using hooks have even created a specific label to differentiate their product on the market in order to preserve their price premium, threatened by high winter supplies landed by trawlers and by increasing aquaculture supplies³².

As for aquaculture, the origin can also be a segmentation factor but to a lesser extent. This price segmentation in the French market is illustrated in the figures 3, 4 and 5 below at wholesale and retail stages.

Figure 4: Seabass caught with trawl: monthly wholesale prices in the French market according to size (in EUR/kg)

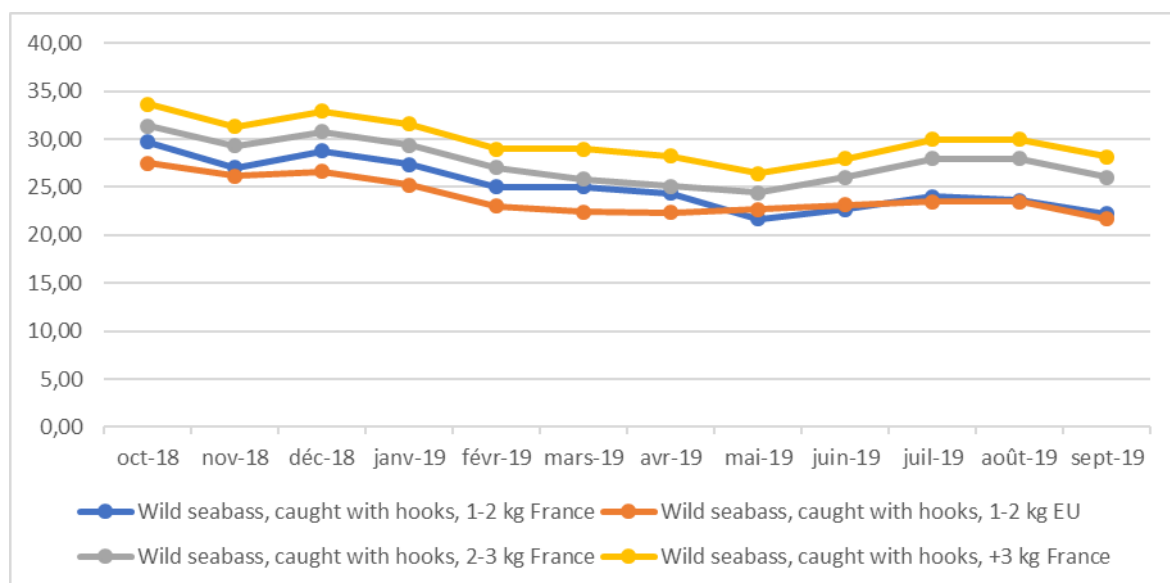


Source: RNM.FranceAgriMer.fr

³¹ <http://www.eumofa.eu/documents/20178/121372/PTAT+Case+Study+-+Seabass+in+the+EU.pdf>

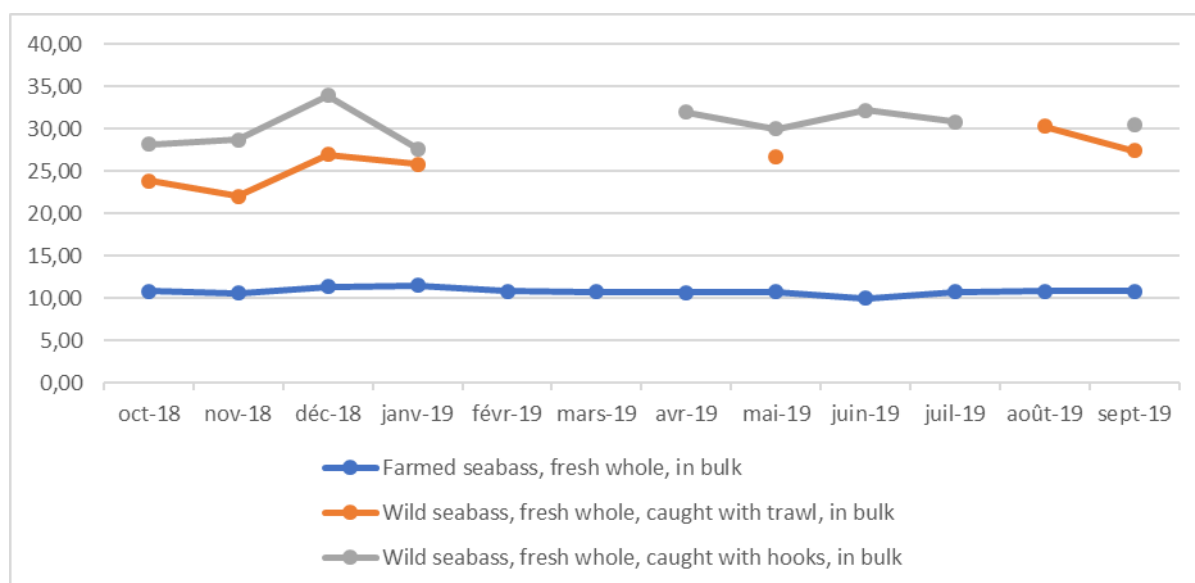
³² <http://pointe-de-bretagne.fr/>

Figure 5: Seabass caught with hooks: monthly wholesale prices in the French market according to size (in EUR/kg)



Source: RNM.FranceAgriMer.fr

Figure 6: Seabass monthly retail prices in the French market according to production methods (in EUR/kg)



Source: RNM.FranceAgriMer.fr

4. Annex

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JRC fleet segment nomenclature³³

FISHING_TECHNIQUE

DFN	=	Drift and/or fixed netters
DRB	=	Dredgers
DTS	=	Demersal trawlers and/or demersal seiners
FPO	=	Vessels using pots and/or traps
HOK	=	Vessels using hooks
MGO	=	Vessel using other active gears
MGP	=	Vessels using polyvalent active gears only
PG	=	Vessels using passive gears only for vessels < 12m
PGO	=	Vessels using other passive gears
PGP	=	Vessels using polyvalent passive gears only
PMP	=	Vessels using active and passive gears
PS	=	Purse seiners
TM	=	Pelagic trawlers
TBB	=	Beam trawlers

VESSEL_LENGTH classes

VL0006	=	Vessel less than 6 meters in length. *For Supra region 2 only.
VL0010	=	Vessel between 0 meters and 10 meters in length. **For Supra region 1 and 3 only.
VL0612	=	Vessel between 6 meters and 12 meters in length. *For Supra region 2 only.
VL1012	=	Vessel between 10 meters and 12 meters in length. **For Supra region 1 and 3 only.
VL1218	=	Vessel between 12 meters and 18 meters in length. All regions.
VL1824	=	Vessel between 18 meters and 24 meters in length. All regions.
VL2440	=	Vessel between 24 meters and 40 meters in length. All regions.
VL40XX	=	Vessel greater than 40 meters in length. All regions.

³³ <https://datacollection.jrc.ec.europa.eu/wordef/fleet-segment-dcf>

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