

# Monthly Highlights

No. 9 / 2024

E U M O F A

European Market Observatory for  
Fisheries and Aquaculture Products

Over the 36-month observation period (September 2021 – August 2024), the weighted average first-sales price of European lobster in France was 26,18 EUR/kg, 14% more than in Denmark (22,88 EUR/kg) and 42% more than in Ireland (18,42 EUR/kg).

Between weeks 38/2021 to 37/2024 the price of live lobsters from the United States ranged between 14,37 EUR/kg (week 23/2024) and 38,14 EUR/kg (week 13/2024) with 51% of weekly prices between 15,00 EUR/kg and 20,00 EUR/kg.

In 2024, the average monthly household consumption of fresh pangasius was 146 tonnes in the Netherlands, where households paid on average 13,36 EUR per kg.

In 2022, Australia had a capture volume of 165.059 tonnes, a 3% increase from 2021. Over the past 30 years, fisheries in Australia have declined by 34%.

In 2022, EU-27 catches of haddock reached 17.748 tonnes. The main EU producers were Ireland, France and Denmark, together accounting for 82% of EU catches.

The EU Council set 2025 fishing limits for the Baltic, allowing increased catches for three herring stocks while restricting eastern and western cod to by-catch only. Although the Council decision largely followed the Commission's 2024 proposal, the Commission is concerned that some elements may not aid stock recovery or comply with the Baltic multiannual plan.



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Find all data, information, and more at:

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

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## 1. First sales in Europe

During **January–August 2024**, 18 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups. 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>1</sup>.

### 1.1. January–August 2024 compared to the same period in 2023

**Increases in value and volume:** Bulgaria and Greece recorded an increase in both first-sales value and volume due mainly to sprat and clam in Bulgaria, and anchovy and sardine in Greece.

**Decreases in value and volume:** Belgium, Cyprus, Denmark, France, Germany, Italy, Portugal, Spain, Sweden, Norway and the UK all recorded decreases in first-sales value and volume. Sweden stood out with the most significant drops due to lower first sales of sprat, herring and coldwater shrimp.

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

Country	January – August 2022		January – August 2023		January – August 2024		Change from January – August 2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	8.991	57,15	9.690	59,72	7.627	46,38	-21%	-22%
Bulgaria	1.753	1,12	2.199	1,02	2.580	1,50	17%	46%
Cyprus	539	2,28	547	2,43	475	2,20	-13%	-10%
Denmark	483.353	313,29	551.349	350,49	538.514	339,09	-2%	-3%
Estonia	39.333	10,63	43.843	15,30	40.726	20,39	-7%	33%
Finland	39.436	9,44	42.641	12,34	34.647	13,12	-19%	6%
France	189.247	497,59	170.738	470,43	167.016	449,97	-2%	-4%
Germany	19.464	56,09	22.275	38,19	20.701	37,80	-7%	-1%
Greece	6.849	18,56	8.623	23,99	19.972	57,67	132%	140%
Ireland	152.584	220,66	147.706	185,72	148.815	177,94	1%	-4%
Italy	53.483	249,40	47.225	217,20	37.841	173,99	-20%	-20%
Latvia	24.911	5,33	26.817	7,29	24.368	8,64	-9%	18%
Lithuania	753	0,49	280	0,59	289	0,39	3%	-34%
Netherlands	52.710	119,35	44.527	89,80	15.122	98,19	-66%	9%
Poland	52.548	12,90	47.137	17,65	39.202	20,44	-17%	16%
Portugal	76.060	208,75	78.854	203,32	70.159	186,47	-11%	-8%
Spain	312.414	1.078,10	302.570	995,87	289.604	973,07	-4%	-2%
Sweden	105.789	61,98	79.946	51,13	36.383	37,11	-54%	-27%
Norway	2.009.862	2.294,85	2.077.690	2.109,71	1.912.984	1.969,74	-8%	-7%
United Kingdom	57.307	211,93	60.916	218,79	46.321	162,63	-24%	-26%

*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. Data for Denmark are subject to confidentiality measures, so they do not fully correspond to total first sales in the country.

<sup>1</sup> First sales data updated on 17. 10. 2024

## 1.2. August 2024 compared to August 2023

**Increases in value and volume:** First sales increased in Greece, Lithuania, the Netherlands and Sweden. In relative terms the highest increase was observed in Greece, due mainly to sardine and anchovy.

**Decreases in value and volume:** First sales decreased in Belgium, Denmark, Estonia, Finland, France, Germany, Italy, Poland Portugal, Spain, Norway and the UK. Estonia and Germany experienced the most significant falls in relative terms in volume and value. The decrease was mainly due to falls in first sales of herring in Estonia, and of shrimp *Crangon* spp. and eel in Germany.

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

Country	August 2022		August 2023		August 2024		Change from August 2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.272	8,7	898	6,0	763	5,0	-15%	-18%
Bulgaria	152	0,2	342	0,159	224	0,210	-35%	32%
Cyprus	234	0,7	101	0,4	96	0,4	-6%	5%
Denmark	73.144	63,2	68.479	69,1	62.412	56,9	-9%	-18%
Estonia	775	0,6	917	0,8	188	0,4	-80%	-42%
Finland	412	0,1	558	0,1	301	0,1	-46%	-42%
France	23.929	67,8	19.965	57,6	18.224	56,5	-9%	-2%
Germany	1.434	7,3	1.190	6,6	606	3,2	-49%	-52%
Greece	936	2,2	778	2,2	2.700	7,7	247%	250%
Ireland	4.566	16,8	3.903	12,9	3.775	13,6	-3%	6%
Italy	6.417	30,5	5.714	25,2	4.102	17,0	-28%	-33%
Latvia	2.515	0,5	1.711	0,3	1.182	0,3	-31%	2%
Lithuania	5	0,008	3	0,007	4	0,011	41%	59%
Netherlands	2.951	17,9	1.630	10,0	3.261	17,6	100%	76%
Poland	3	0,0	707	0,762	626	0,7	-12%	-8%
Portugal	17.782	34,0	14.370	30,2	13.930	28,5	-3%	-5%
Spain	41.975	157,8	41.847	136,8	35.709	122,5	-15%	-10%
Sweden	11.021	13,0	2.789	5,8	6.928	8,9	148%	55%
Norway	267.318	311,9	223.903	251,0	177.024	239,1	-21%	-5%
United Kingdom	9.898	40,4	10.362	36,5	6.954	23,8	-33%	-35%

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. Data for Denmark are subject to confidentiality measures, so they do not fully correspond to total first sales in the country.

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

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

Overview | 1. First sales in Europe | 2. Extra-EU imports | 3. Consumption

| 4. Fisheries and Aquaculture in Australia | 5. Haddock in the EU | 6. Global highlights |  
7. Macroeconomic context

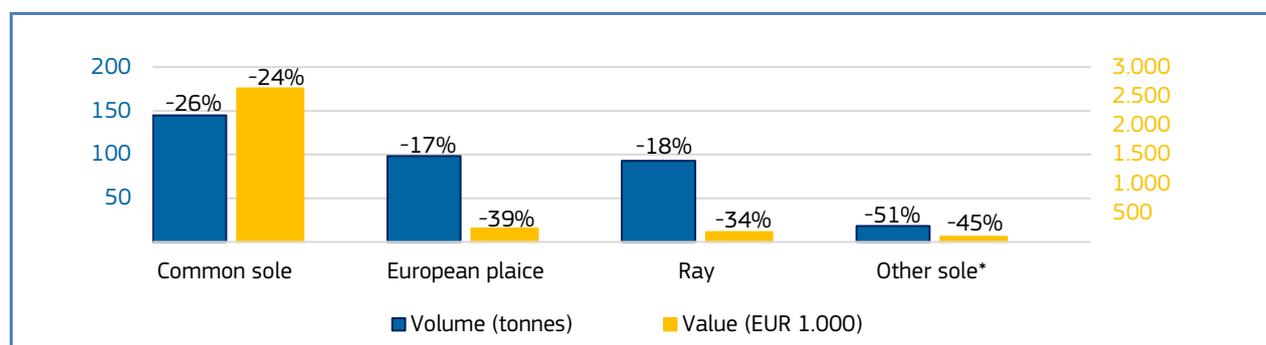
### 1.3. First sales in selected countries

First-sales data analysed in this section are extracted from EUMOFA.<sup>2</sup>

Table 3. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 46,4 million, -22%	7.627 tonnes, -21%	Common sole, squid, European plaice, ray.
<b>Aug 2024 vs Aug 2023</b>	EUR 5,0 million, -18%	763 tonnes, -15%	Common sole, European plaice, ray, other sole*.

Figure 1. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, AUGUST 2024



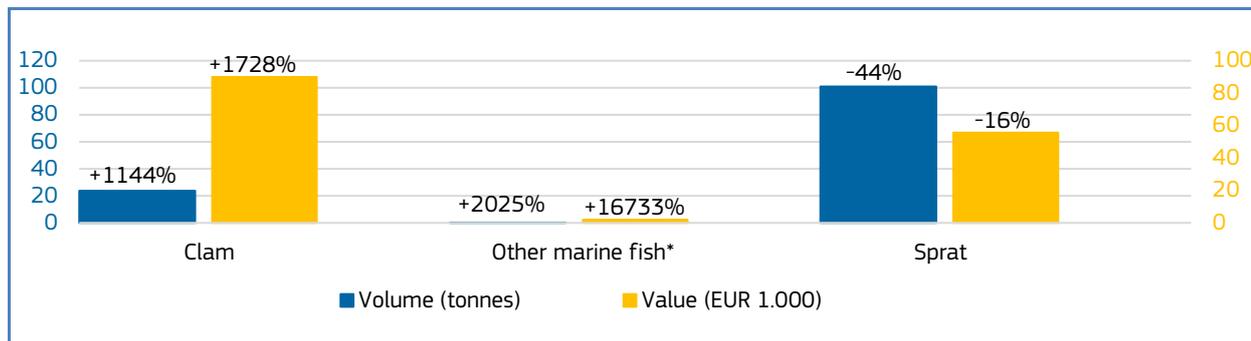
Percentages show change from the previous year. \*EUMOFA aggregation for species (see Metadata 2, Annex 3: <https://eumofa.eu/supply-balance-and-other-methodologies>).

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

 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 1,5 million, +46%	2.580 tonnes, +17%	Sprat, clam, other molluscs and aquatic invertebrates*.	In August 2024, there was a substantial increase in first sales of <b>clam</b> compared to August 2023. In Bulgaria clam fishing in August only occurs in coastal areas of the Black Sea carried out by small-scale fisheries. The species is not covered by TAC, so catches are not regulated. In August 2024 a 47% price increase was observed. However, it is noticeable that in August 2023, sales of catches of clam were 15% of those landed in Bulgaria, while in August 2024 they were 60%. This may be an inaccuracy in recording sales data for August 2023. Moreover, an approximate 206% increase in landed catches was observed when comparing August 2024 with August 2023. Weather conditions in August 2023 caused a reduction in fishing effort.
<b>Aug 2024 vs Aug 2023</b>	EUR 0,2 million, +32%	224 tonnes, -35%	<b>Value:</b> clam, other marine fish*. <b>Volume:</b> sprat, other molluscs and aquatic invertebrates*, red mullet.	

<sup>2</sup> First-sales data updated on 17. 10. 2024.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, AUGUST 2024**

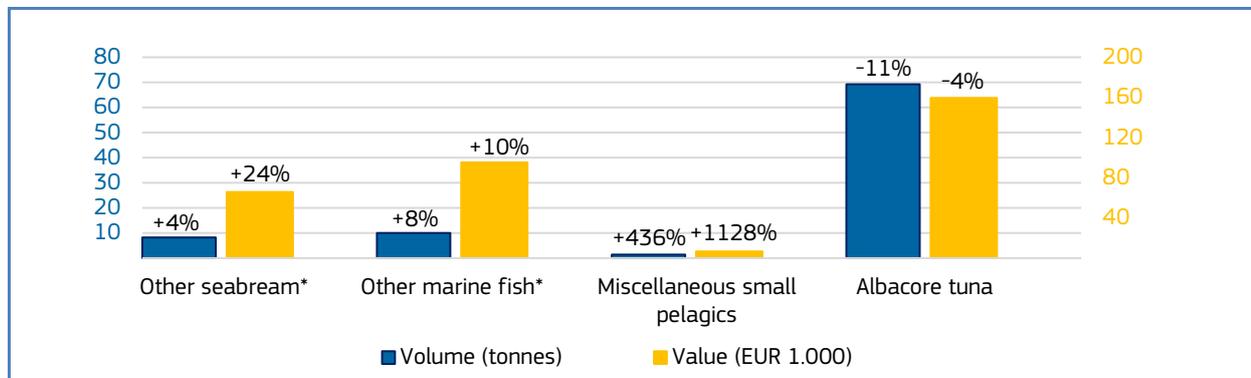


Percentages show change from the previous year. \*EUMOFA aggregation for species.

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Aug 2024 vs Jan-Aug 2023	EUR 2,2 million, -10%	475 tonnes, -13%	Albacore tuna, picarel, swordfish, red mullet	<p>In August 2024, there was a significant increase in first sales of <b>miscellaneous shrimps</b> compared to August 2023. This is probably due to artisanal fisheries using set nets, which in August 2024 saw improved use of specialized nets that were more effective in catching shrimp, particularly <i>Marsupenaeus japonicus</i>.</p> <p>In August 2024, there was a sharp increase in first sales of <b>miscellaneous small pelagic fish</b> compared to August 2023. It is important to note that small pelagic fish like anchovy and sardine are not found in Cypriot waters. The only species in the area that can be classified as small pelagic is most likely <i>Sardinella aurita</i>, which due to its biological characteristics can show significant fluctuations in population. The artisanal fishery using set nets may have been influenced by the higher abundance of <i>S. aurita</i> in August 2024, contributing to the observed increase.</p>
Aug 2024 vs Aug 2023	EUR 0,4 million, +5%	96 tonnes, -6%	<p><b>Value:</b> other seabream*, other marine fish*, miscellaneous small pelagics, shrimp miscellaneous.</p> <p><b>Volume:</b> albacore tuna, other horse mackerel, red mullet.</p>	

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, AUGUST 2024**

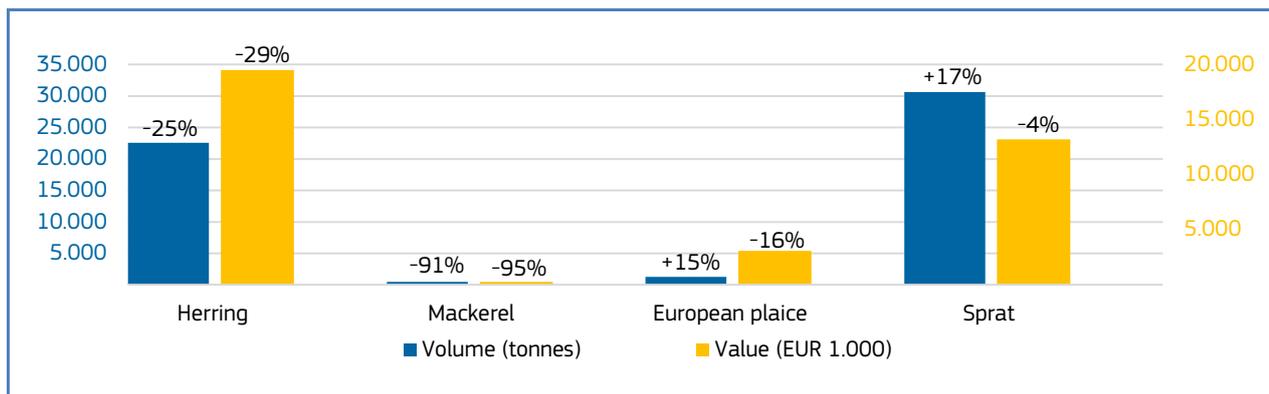


Percentages show change from the previous year. \*EUMOFA aggregation for species.

Table 6. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK

 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2024 vs Jan-Aug 2023	EUR 339,1 million, -3%	538.514 tonnes, -2%	Other groundfish*, European plaice, clam, coldwater shrimp.
Aug 2024 vs Aug 2023	EUR 56,9 million, -18%	64.412 tonnes, -9%	Herring, mackerel, European plaice, sprat.

Figure 4. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, AUGUST 2024

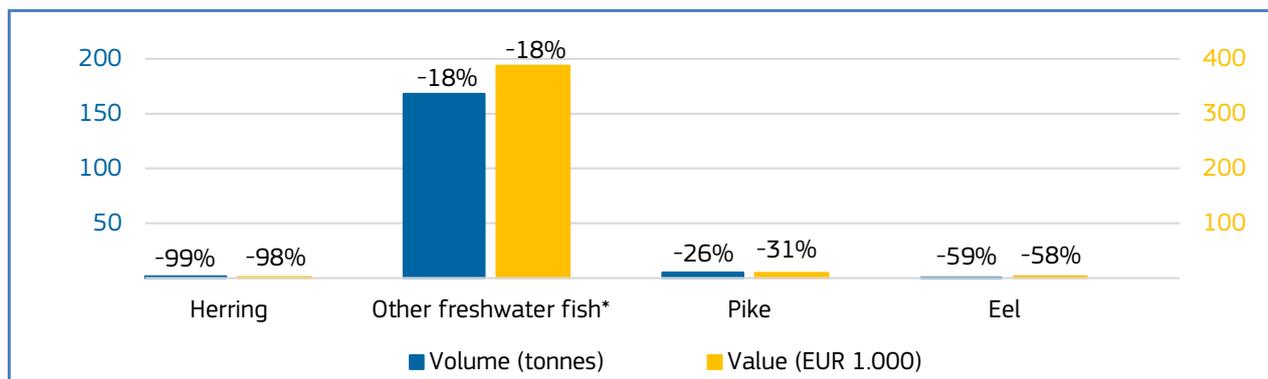


Percentages show change from the previous year. \*EUMOFA aggregation for species.

Table 7. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA

 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Aug 2024 vs Jan-Aug 2023	EUR 20,4 million, +33%	40.726 tonnes, -7%	<b>Value:</b> sprat, herring, other freshwater fish*. <b>Volume:</b> herring, seaweed and other algae*, other marine fish*.	In August 2024, there was a decrease in first sales of <b>herring</b> compared to August 2023. Herring sales in August 2024 amounted to only 24% of total landings by the Estonian fleet. It is noticeable that all catches are from the small-scale Estonian fleet. Since catch quantities are from the small-scale segment, some quantities might be sold without declaration on first sales, as is legally permitted. There was no particular market demand in August 2024, so suppliers shifted their activities to the autumn. No activities were observed from the large fleet segment of Estonia, and there were no landings of herring from other countries, as is usual in that period.
Aug 2024 vs Aug 2023	EUR 0,4 million, -42%	188 tonnes, -80%	Herring, other freshwater fish, pike, eel.	

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, AUGUST 2024**

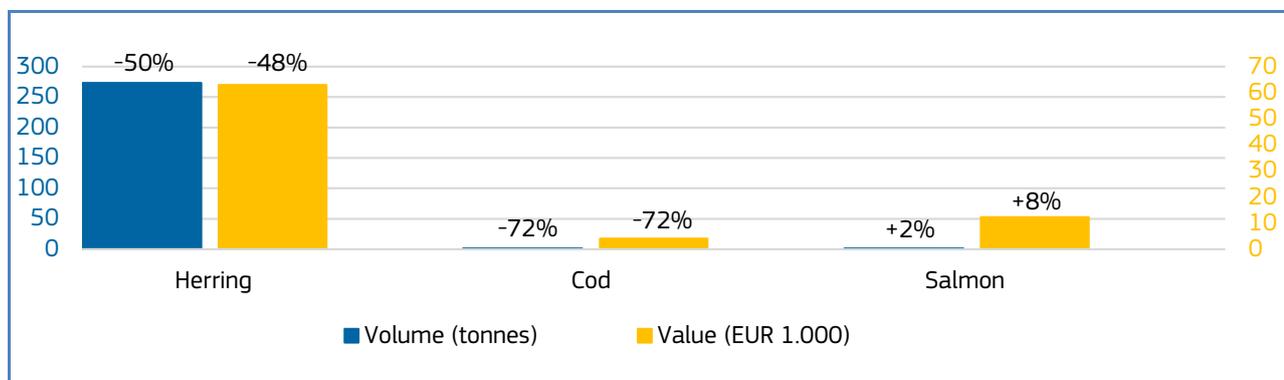


Percentages show change from the previous year. \*EUMOFA aggregation for species.

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2024 vs Jan-Aug 2023	EUR 13,1 million, +6%	34.6475 tonnes, -19%	Herring, sprat.
Aug 2024 vs Aug 2023	EUR 0,09 million, -42%	301 tonnes, -46%	Herring, cod.

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND, AUGUST 2024**

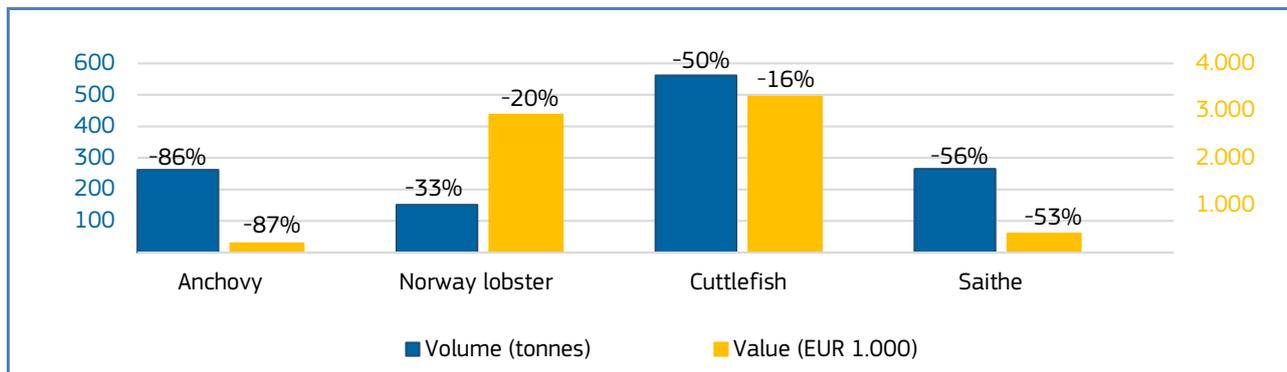


Percentages show change from the previous year

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2024 vs Jan-Aug 2023	EUR 450,0 million, -4%	167.016 tonnes, -2%	Other molluscs and aquatic invertebrates*, squid, octopus, seaweed and other algae, anchovy, blue whiting.
Aug 2024 vs Aug 2023	EUR 56,5 million, -2%	18.224 tonnes, -9%	Anchovy, Norwegian lobster, cuttlefish, saithe, sardine.

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, AUGUST 2024**

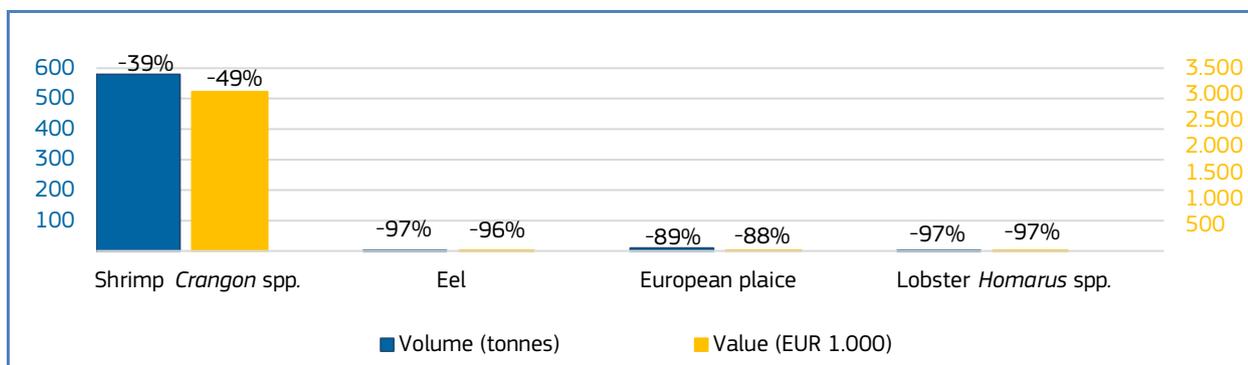


Percentages show change from the previous year. \*EUMOFA aggregation for species.

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 37,8 million, -1%	20.701 tonnes, -7%	Greenland halibut, cod, mackerel, European plaice.	<p>In August 2024, there was a strong decrease in first sales of <b>European plaice</b> compared to August 2023. In a context of very good stock status<sup>3</sup>, part of this 'decrease' can be explained by data reporting issues, with only domestic landings generally being included. The sole fleet with heavy beam trawler that always had plaice as bycatch has reduced its activities, due mainly to fuel prices.</p> <p>In August 2024, there was a decrease in first sales of <b>eel</b> compared to August 2023. This can be partly explained by the fact that the German production of eel during the first 7 months of 2024 strongly exceeded that of the first 7 months of 2023. The decrease observed in August 2024 compared to August 2023 can thus be seen as a 'technical' / 'seasonal' adjustment.</p>
<b>Aug 2024 vs Aug 2023</b>	EUR 3,2 million, -52%	606 tonnes, -49%	Shrimp <i>Crangon</i> spp., eel, European plaice, lobster <i>Homarus</i> spp..	

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY, AUGUST 2024**



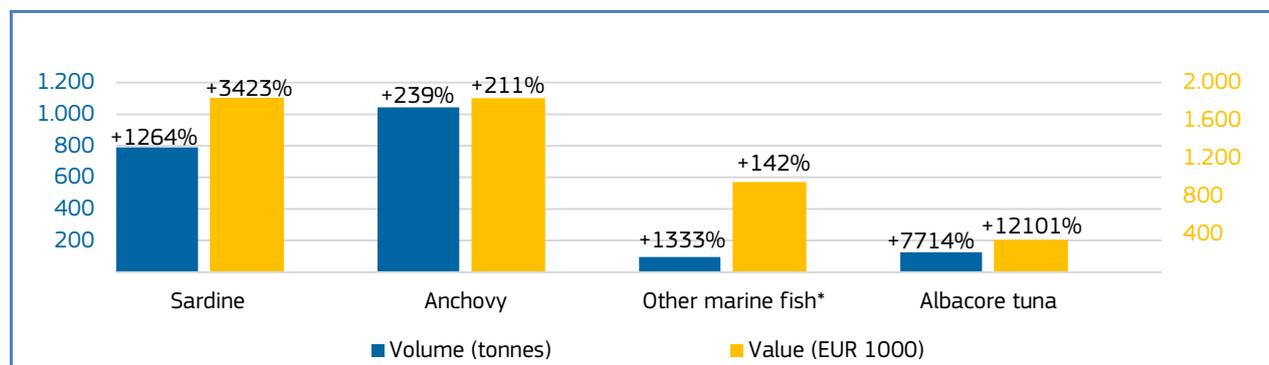
Percentages show change from the previous year.

<sup>3</sup> ICES Advice 2024 – ple.27.420 – <https://doi.org/10.17895/ices.advice.25019441>

Table 11. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE

 Greece	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Aug 2024 vs Jan-Aug 2023	EUR 57,7 million, +140%	19.972 tonnes, +132%	Anchovy, sardine, other marine fish*, hake.	<p>The significant increase in first sales of both <b>sardine</b> and <b>anchovy</b> in August 2024, compared to the same period in 2023, can be attributed to several factors. Sardine and anchovy are known for exhibiting large year-to-year fluctuations in population and landings. These fluctuations can be driven by a variety of environmental, biological and human-induced factors, making sardine stocks highly variable from one year to the next. The remarkable increase in value and volume of sardine and anchovy in August 2024 is probably due to more abundant small pelagic stocks in the Aegean Sea, driven by favourable environmental conditions and natural population dynamics.</p> <p>In August 2024, there was a substantial increase in first sales of <b>other marine fish</b> compared to August 2023. In August, the trawl fishery is traditionally closed due to regulatory measures aimed at protecting fish stocks. With the absence of trawl fishing, artisanal fleets using alternative methods such as set nets and longlines become the primary active fishing operations during this period. The significant increase in both value and volume in 2024 may be due to an increase in artisanal fishing activity which could have intensified to meet market demand. Artisanal fishers typically target a variety of species classified as "other marine fish".</p> <p>In August 2024, there was a sharp increase in first sales of <b>albacore tuna</b> compared to August 2023, which can be largely attributed to a shift in fishing activity by Greek longliners, probably driven by the management of albacore stocks under a recommendation of the International Commission for the Conservation of Atlantic Tuna<sup>4</sup>, which established a Total Allowable Catch of 2.500 tonnes for albacore tuna in the Mediterranean for 2022, 2023, and 2024. This could be due to more favourable market prices or increased stock availability within Greek fishing grounds, prompting longliners to maximize their quota for this species during that period.</p>
Aug 2024 vs Aug 2023	EUR 7,7 million, +250%	2.700 tonnes, +247%	Sardine, anchovy, other marine fish*, albacore tuna.	

Figure 9. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE, AUGUST 2024



<sup>4</sup> ICCAT RECOMMENDATION 22-05: AMENDING THE RECOMMENDATION 21-06 TO ESTABLISH A REBUILDING PLAN FOR MEDITERRANEAN ALBACORE <https://www.iccat.int/Documents/Recs/compendiopdf-e/2022-05-e.pdf>

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

 Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 177,9 million, -4%	148.815 tonnes, +1%	<b>Value:</b> Mackerel, crab, monk, other molluscs and aquatic invertebrates*. <b>Volume:</b> blue whiting, herring, sardine.
<b>Aug 2024 vs Aug 2023</b>	EUR 13,6 million, +6%	3.775 tonnes, -3%	<b>Value:</b> albacore tuna, Norway lobster, hake <b>Volume:</b> crab, other molluscs and aquatic invertebrates*, whiting.

Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND, AUGUST 2024**

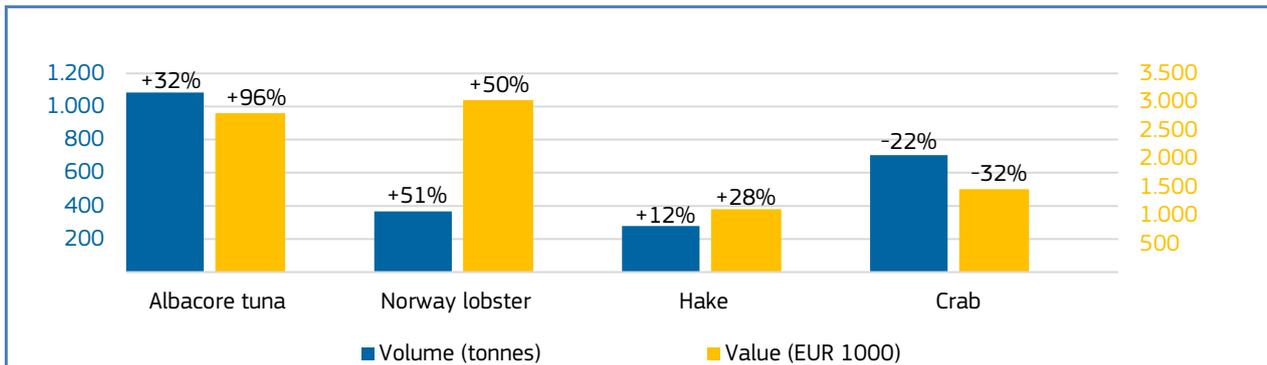
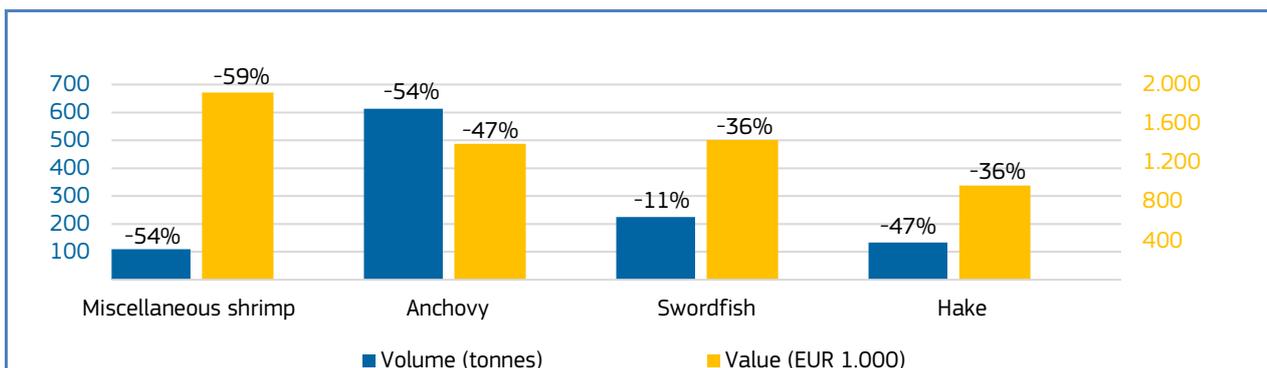


Table 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY**

 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 174,0 million, -20%	37.841 tonnes, -20%	Miscellaneous shrimps*, hake, deep-water rose shrimps, anchovy.
<b>Aug 2024 vs Aug 2023</b>	EUR 17,0 million, -33%	4.102 tonnes, -28%	Miscellaneous shrimps*, anchovy, swordfish, hake.

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, AUGUST 2024**

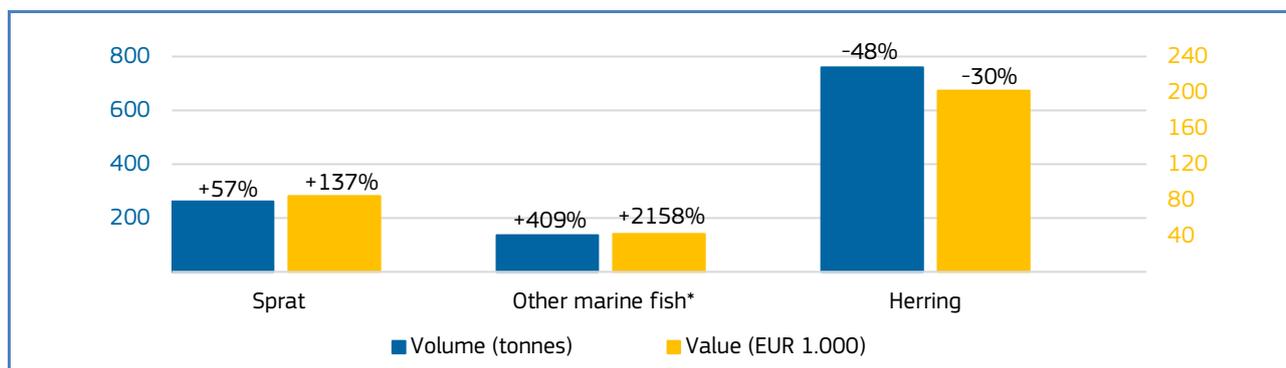


Percentages show change from the previous year.

Table 14. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA

 Latvia	First-sales value / trend %	First-sales volume/ trend %	Main contributing species	Note
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 8,6 million, +18%	24.368 tonnes, -9%	<b>Value:</b> sprat, other freshwater fish*, herring. <b>Volume:</b> sprat, herring, smelt.	<p>In August 2024, there was an increase in first sales of <b>sprat</b> compared to August 2023. Sprat sales in August 2024 made up 42% of total Latvian fleet landings of that species. Sales of sprat in August 2023 were only 23% of total Latvian fleet landings. When comparing the landings of the Latvian fleet in August 2024 with August 2023, it was observed that landings in August 2024 were 15% lower, while sales in Latvia were 57% higher. Due to additional market demand of sprat and insufficient supply to satisfy it in August 2024, there was a 51% price increase when comparing August 2024 with August 2023.</p> <p>In August 2024, there was a substantial increase in first sales of <b>other marine fish</b> compared to August 2023. The main species behind the increase is three-spined stickleback, the consumption of which is growing in Latvia. The rise in market demand for this species has led the supplier to focus more on its provision. It is not covered by restrictions for total available catches. In August 2024, 31% of total Latvian fleet landings consisted of this species, while in August 2023 it made up only 7% of total fleet landings. When comparing August 2024 landings with August 2023, it was observed that landings in August 2024 were 407% higher. It is noticeable that prices of other marine fish increased by 344% when comparing August 2024 with August 2023. However, the price in August 2023 was rather too low compared with the average price of other marine fish in 2023. Weather conditions, fishing capacity and resources enabled an increase in fishing effort to increase supply to the market in August 2024.</p>
<b>Aug 2024 vs Aug 2023</b>	0,3 million, +2%	1.182 tonnes, -31%	<b>Value:</b> sprat, other marine fish*, European flounder. <b>Volume:</b> herring, smelt, cod.	

Figure 12. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, AUGUST 2024

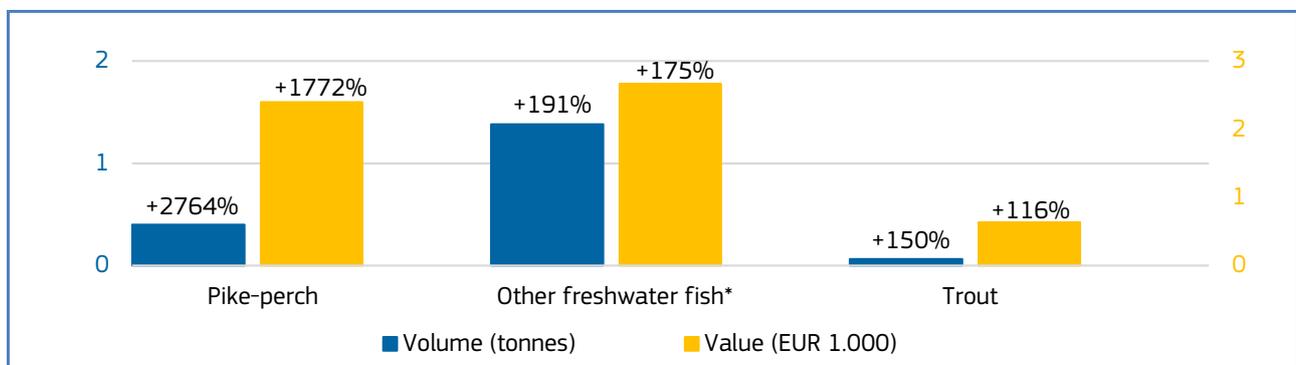


Percentages show change from the previous year. \*EUMOFA aggregation for species

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

 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species	Note
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 0,4 million, -34%	289 tonnes, +3%	<b>Value:</b> smelt, herring, other salmonids*. <b>Volume:</b> other freshwater fish*, other groundfish*, miscellaneous small pelagics.	<p>In August 2024, there was a sharp increase in first sales of <b>pike-perch</b> compared to August 2023. In Lithuania the fishery of pike-perch only occurs in coastal areas of the Baltic Sea and spreads by seasonal periods. The pike-perch stocks flow from the Lagoon Bay to the Baltic Sea and stay in the coastal areas. Water temperature and wind direction in the fishing season are determining factors for fishing those species. Weather conditions, fishing capacity and resources enabled an increase in fishing effort so as to increase supply to the market in August 2024. It is noticeable that due to small quantities of those species supplied to the market, the slight differences show significant discrepancies in percentage. An increase in supply to the market led to a 35% price decrease when comparing August 2024 with August 2023.</p> <p>In August 2024, there was a remarkable increase in first sales of <b>other freshwater fish</b> compared to August 2023. In Lithuania freshwater fishery only occurs in coastal areas of the Baltic Sea and spreads by seasonal periods. The main species sold are vimba bream and European perch, and are very popular for local use. The freshwater stocks flow from the Lagoon Bay to the Baltic Sea and stay in the coastal areas. Water temperature and wind direction in the fishing period are the determining factors for fishing these species. The increases in value and volume were mostly affected by catches of these two species. Weather conditions, a slight increase in fishing effort, fishing capacity and resources enabled an increase in fishing and thus increased supply to the market in August 2023. It is noticeable that due to the small quantities of those species supplied to the market, slight differences show significant discrepancies in percentages. An increase of supply to the market led to a 5% decrease in price when comparing August 2024 with August 2023.</p>
<b>Aug 2024 vs Aug 2023</b>	EUR 0,01 million, +59%	4 tonnes, +41%	Pike-perch, other freshwater fish*, trout.	

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, AUGUST 2024**

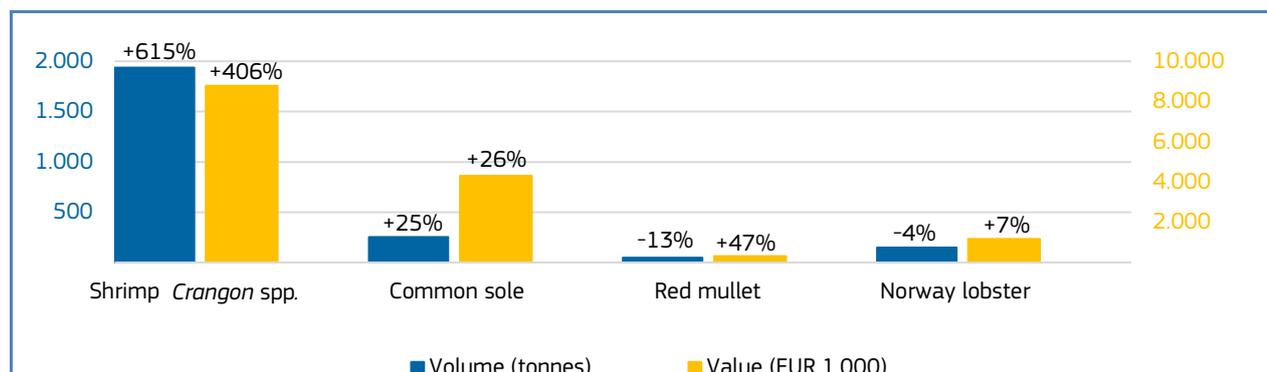


Percentages show change from the previous year.

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

 the Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 98,2 million, +9%	15.122 tonnes, -66%	<b>Value:</b> shrimp <i>Crangon</i> spp., squid, cod, mackerel <b>Volume:</b> European plaice, gurnard, Norway lobster.	In August 2024, there was a huge increase in first sales of <b>shrimp <i>Crangon</i> spp.</b> compared to August 2023. The Dutch production of shrimp <i>Crangon</i> or brown shrimp increased from around 271 tonnes in August 2023 to around 1.940 tonnes (+1,670 tonnes or +615%), while the increase in value is a bit lower due to a decrease in unit ex-vessel price (-30%). The production recorded in August 2023 appears to be the exception compared to production in August 2022, 2021, and 2020 of 1.234 tonnes, 1.755 tonnes and 1.272 tonnes respectively. In a context where the North Sea “brown” shrimp stock ( <i>Crangon crangon</i> ) appears to be trending above lower reference limits or proxies, and showing a tendency to recover quickly from periods of lower abundance <sup>5</sup> , such an evolution is mostly due to external factors in August 2023, such as weather and energy costs.
<b>Aug 2024 vs Aug 2023</b>	EUR 17,6 million, +76%	3.261 tonnes, +100%	Shrimp <i>Crangon</i> spp, common sole, red mullet, Norway lobster.	

Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, AUGUST 2024**



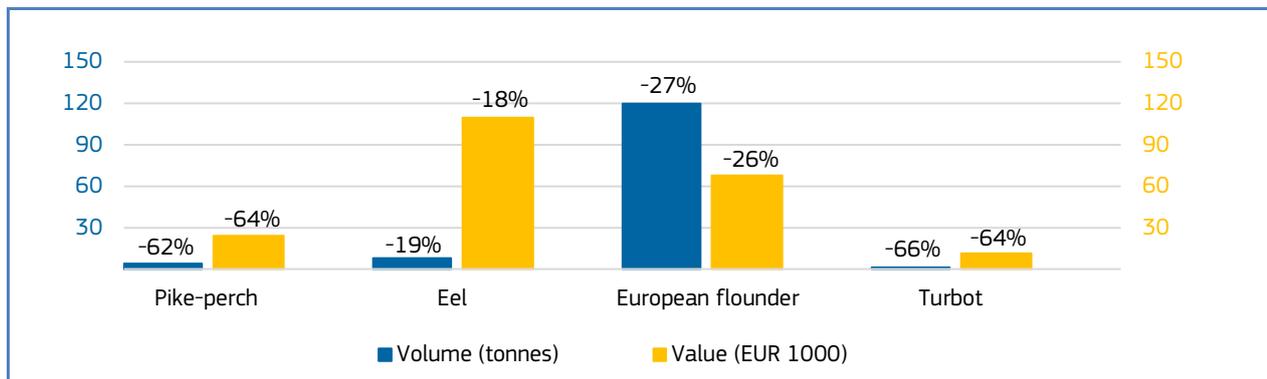
Percentages show change from the previous year.

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

 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 20,4 million, +16%	39.202 tonnes, -17%	<b>Value:</b> sprat, other freshwater fish*, pike-perch, eel. <b>Volume:</b> sprat, herring, European flounder, European plaice.
<b>Aug 2024 vs Aug 2023</b>	EUR 0,7 million, -8%	626 tonnes, -12%	Pike-perch, eel, European flounder, turbot.

<sup>5</sup> [https://www.fishsource.org/stock\\_page/1207](https://www.fishsource.org/stock_page/1207)

Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, AUGUST 2024**

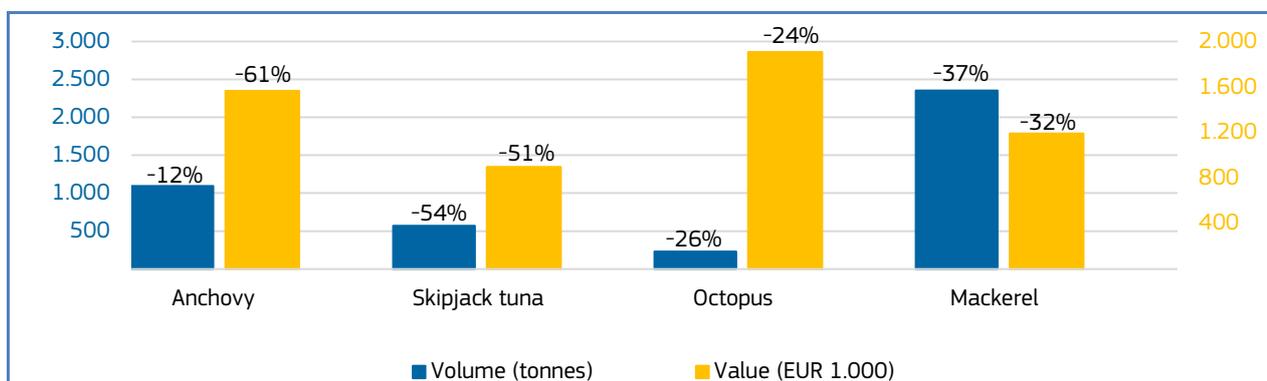


Percentages show change from the previous year. \*EUMOFA aggregation for species.

Table 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL**

 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 186,5 million, -8%	70.159 tonnes, -11%	Octopus, anchovy, mackerel, horse mackerel.
<b>Aug 2024 vs Aug 2023</b>	EUR 28,5 million, -5%	13.930 tonnes, -3%	Anchovy, skipjack tuna, octopus, mackerel.

Figure 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, AUGUST 2024**

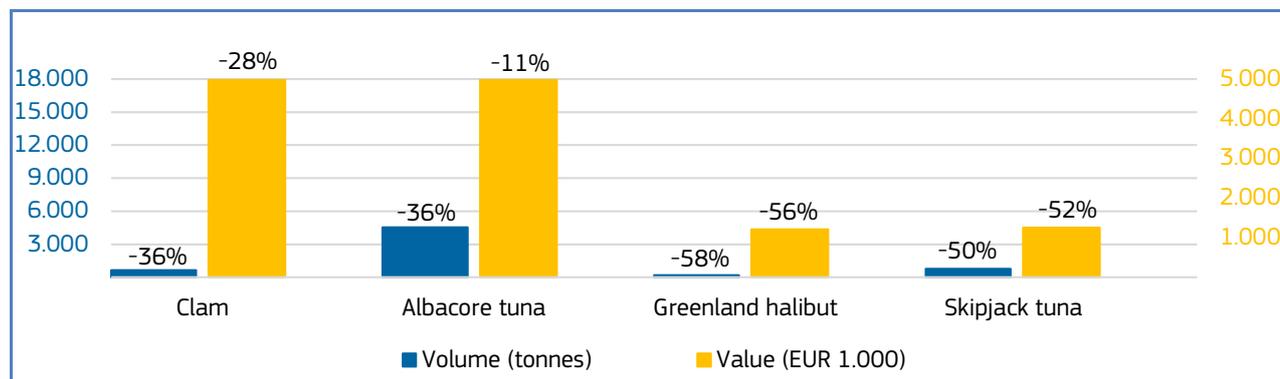


Percentages show change from the previous year.

Table 19. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN**

 Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 973,1 million, -2%	289.604 tonnes, -4%	Clam, swordfish, Greenland halibut, hake.
<b>Aug 2024 vs Aug 2023</b>	EUR 122,5 million, -10%	35.709 tonnes, -15%	Clam, albacore tuna, Greenland halibut, skipjack tuna.

Figure 17. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, AUGUST 2024**

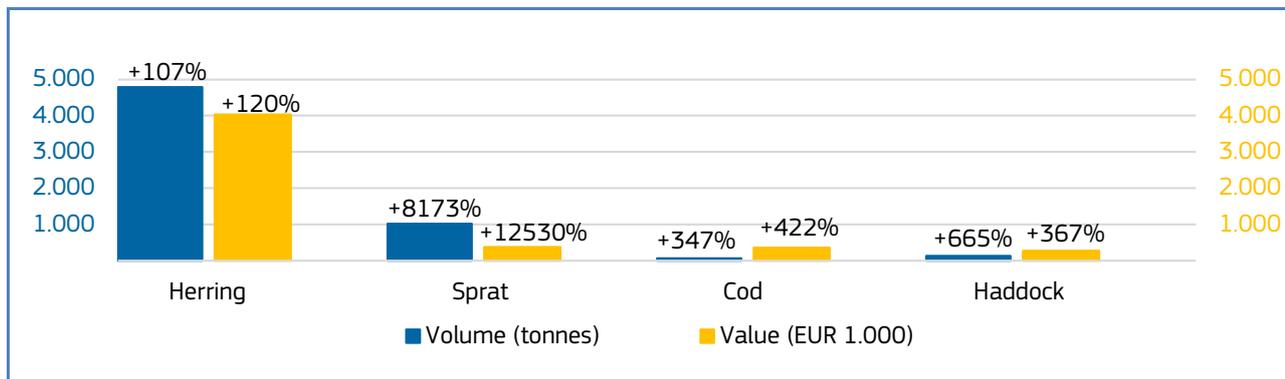


Percentages show change from the previous year. \*EUMOFA aggregation for species.

Table 20. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN**

 Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
<b>Jan-Aug 2024 vs Jan-Aug 2023</b>	EUR 37,1 million, -27%	36.383 tonnes, -54%	Sprat, herring, coldwater shrimp, Norway lobster.	<p>In August 2024, there were increases in first sales of <b>herring and sprat</b> compared to August 2023. One of the reasons for increasing sales might be due to an increase in market demand, making the price from foreign suppliers attractive. When comparing <b>herring</b> catches of the Swedish fleet in August 2024 with August 2023, it was observed that catches in August 2024 were 17% lower, while sales in August 2024 were 120% higher. Insufficient supply in August 2024 caused a 7% price increase when comparing August 2024 with August 2023. However, there was a 75% price increase when comparing the average price of 2024 with 2023. Comparing sales of <b>sprat</b> in August 2022, 2023 and 2024, it looks like the highest increase in volume was in August 2024 but quite similar to August 2022. The price in August 2024 was quite high, which might indicate that market demand was not satisfied. Sprat catches by the Swedish fleet were 85% higher in August 2024 compared with August 2023.</p> <p>In August 2024, there was a slight increase in first sales of <b>cod</b> compared to August 2023. It was observed that in August 2024, sales volumes of cod were 79% of all cod catches of the Swedish fleet, while in August 2023 sales volume were 19% of all cod caught by the Swedish fleet. The sales volume was 40% of landings in Sweden by the Swedish fleet in August 2024, while in August 2023 it was 71% of landings in Sweden by the Swedish fleet. One of the reasons for increased sales might be due to an increase in market demand. The price in August 2024 was 17% higher when compared with August 2023, and by around 17% compared with the average price in 2024. This might indicate that market demand was not satisfied. Catches of cod were 9% higher in August 2024 compared with August 2023.</p> <p>In August 2024, there was an increase in first sales of <b>haddock</b> compared to August 2023. It was observed that in August 2024, sales quantities of haddock were 50% of all haddock catches of the Swedish fleet, while in August 2023 sales volumes were 29% of all haddock caught by the Swedish fleet. The increase in value was due to greater supply to the market.</p>
<b>Aug 2024 vs Aug 2023</b>	EUR 8,9 million, +55%	6.928 tonnes, +148%	Herring, sprat, cod, haddock.	

Figure 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, AUGUST 2024**

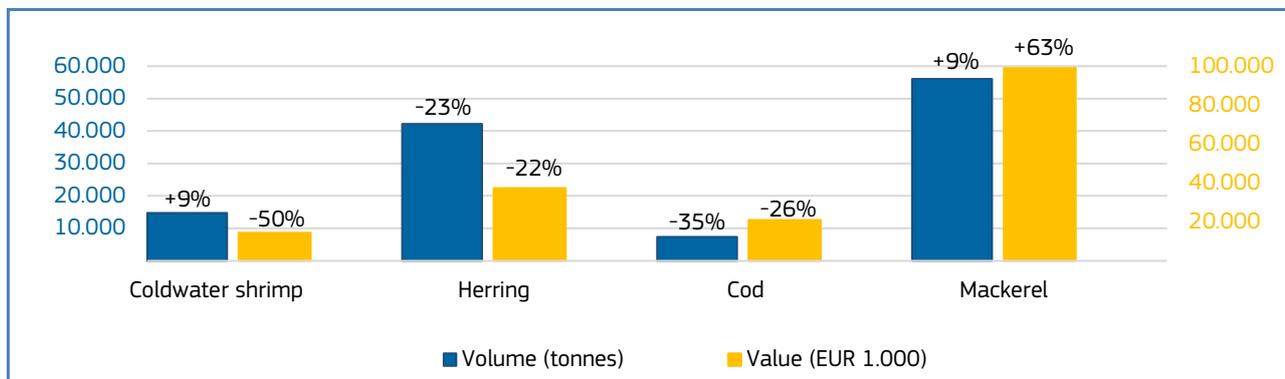


Percentages show change from the previous year.

Table 21. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY**

 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2024 vs Jan-Aug 2023	EUR 1.969,7 million, -7%	1,9 million tonnes, -8%	Cod, saithe, herring, other groundfish*.
Aug 2024 vs Aug 2023	EUR 239,1 million -5%	177.024 tonnes, -21%	Coldwater shrimp, herring, cod, mackerel.

Figure 19. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, AUGUST 2024**

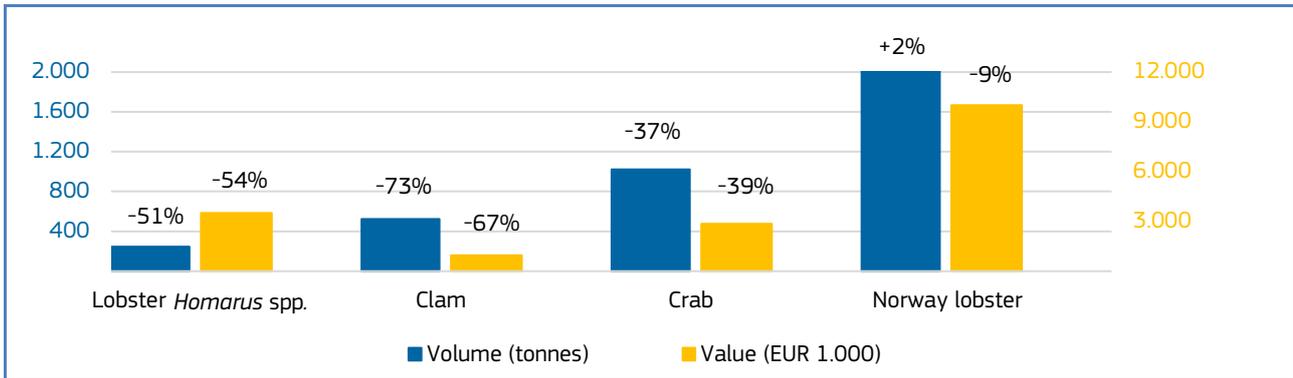


Percentages show change from the previous year.

Table 22. **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
Jan-Aug 2024 vs Jan-Aug 2023	EUR 162,6 million, -26%	46.321 tonnes, -24%	Lobster <i>Homarus</i> spp., other molluscs and aquatic invertebrates*, crab, scallop.
Aug 2024 vs Aug 2023	EUR 23,8 million, -35%	6.954 tonnes, -33%	Lobster <i>Homarus</i> spp., clam, crab, Norway lobster.

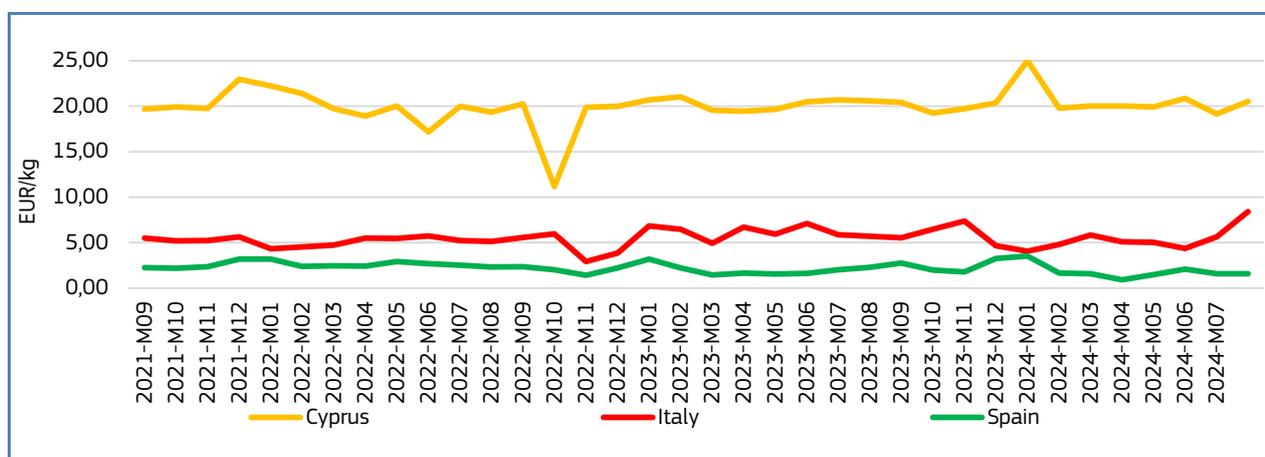
Figure 20. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, AUGUST 2024**



Percentages show change from the previous year.

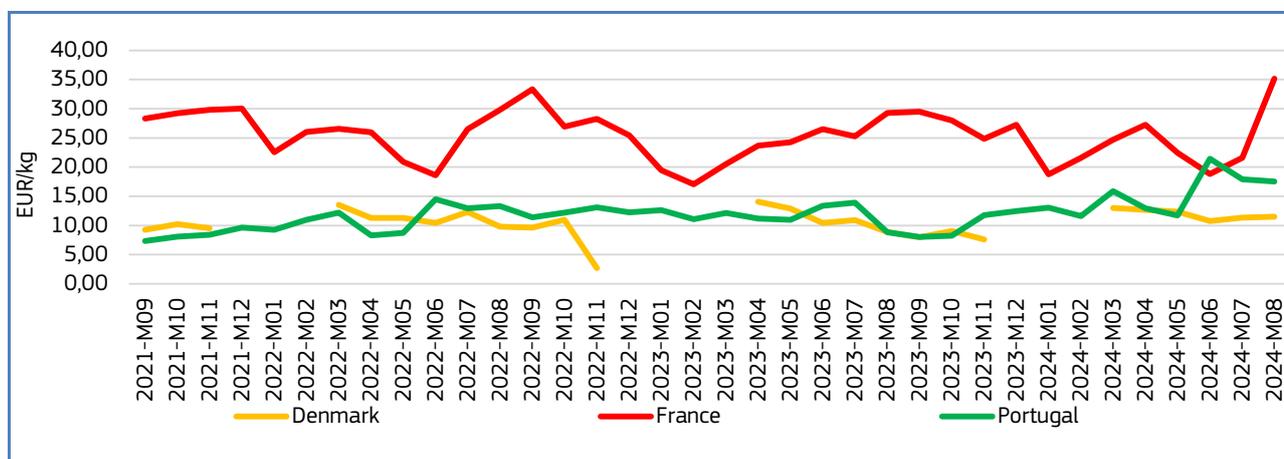
### 1.4. Comparison of first sales prices of selected species in selected countries<sup>6</sup>

Figure 21. **FIRST SALES PRICES OF BLACK SEABREAM IN CYPRUS, ITALY AND SPAIN**



EU first sales of **black seabream** occur in several countries including **Cyprus, Italy and Spain**. In August 2024, the average first-sales prices of black seabream were 20,52 EUR/kg in Cyprus (up by 7% from the previous month and same price as the previous year), 8,41 EUR/kg in Italy (up by 49% from July 2024 and by 47% from August 2023), and 1,57 EUR/kg in Spain (down by 1% from the previous month and by 31% from the previous year). In August 2024, supply relative to the previous year increased in Spain (+89%), while it decreased in Cyprus (-11%) and Italy (-54%). In the countries analysed, volume seems to peak in similar periods: between March and April in Italy; in March in Cyprus; between February and April in Spain. Prices followed an increasing trend in Italy while they decreased in Spain. In Cyprus the maximum price of 25,00 EUR/kg was recorded in January 2024, in Spain falls in price seem to occur between October-November and February-April.

Figure 22. **FIRST SALES PRICES OF COMMON PRAWN IN DENMARK, FRANCE AND PORTUGAL**

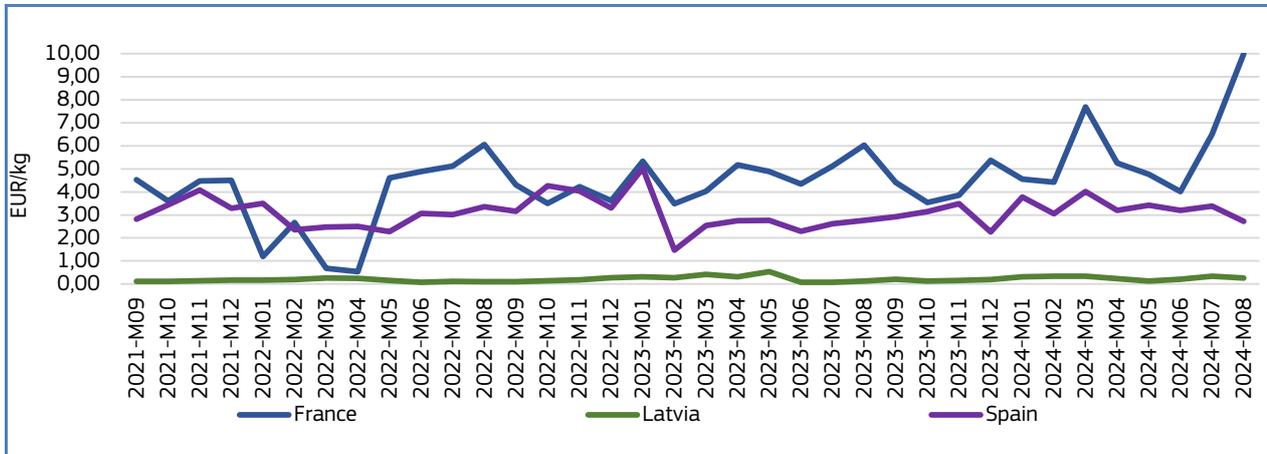


EU first sales of **common prawn** occur in **Denmark, France and Portugal** as well as several other Member States. In August 2024, the average first-sales prices of common prawn were: 11,51 EUR/kg in Denmark (up by 1% from previous month and by 30% from August 2023), 35,13 EUR/kg in France (up by 63% from July 2024 and by 20% from August 2023), and 17,55 EUR/kg in Portugal (down by 2% from the previous month and by 99% from the previous year). In August 2024, supply increased in France (+80%), while it decreased in Denmark (-20%) and Portugal (-64%), relative to the previous year. Supply is seasonal and seems to peak in June in Denmark, in December in France, and in January–February in Portugal. Between months 09/2021 and 08/2024, prices have been fluctuating and increasing in the three markets analysed. In Denmark highest spikes in price seem to occur in

<sup>6</sup> First sales data updated on 21. 10. 2024.

March–April, while in Portugal between June and July. The highest price of 35,13 EUR/kg was recorded in France in August 2024.

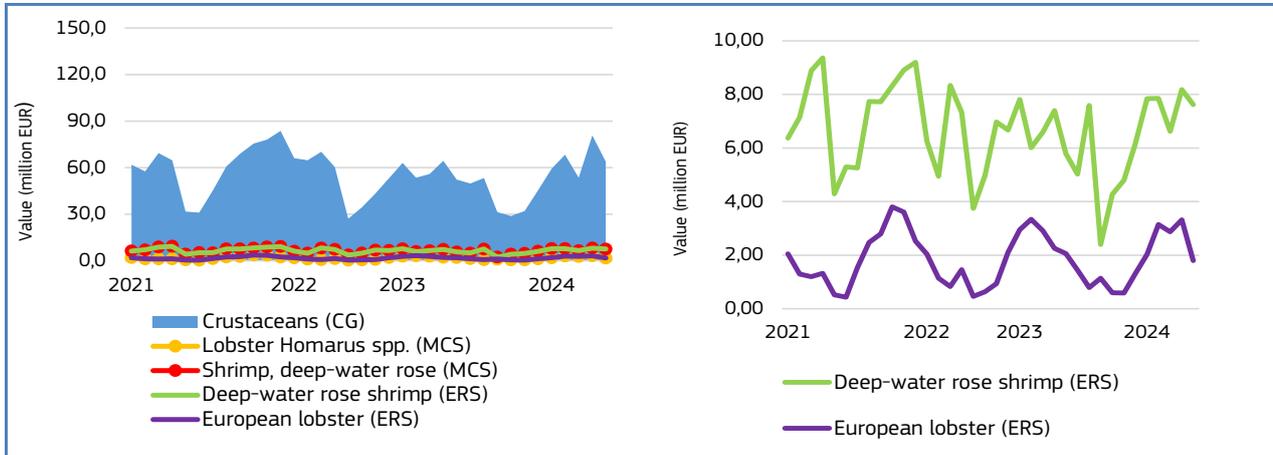
Figure 23. **FIRST SALES PRICES OF SMELT IN FRANCE, LATVIA AND SPAIN**



EU first sales of **smelt** occur in several Member States as well as **France, Latvia** and **Spain**. In August 2024, the average first-sales prices of smelt were 9,99 EUR/kg in France (up by 54% from the previous month and by 66% from the previous year), 0,26 EUR/kg in Latvia (down by 23% from the previous month and up by 111% from August 2023), and 2,73 EUR/kg in Spain (down by 19% from July 2024 and by 1% from the previous year). In August 2024, supply decreased in France (-81%), and Latvia (-67%), while it increased in Spain (+20%), relative to the previous year. In the countries analysed, volume seems to peak in similar periods: September and October in France; February in Spain; July and between November and January in Latvia. Between months 09/2021 to 08/2024, prices fluctuated and increased in France and Latvia. In Latvia seasonal falls in price seem to occur between May and June following supply, while in Spain falls in price occur between December and February. The highest price of 9,99 EUR/kg was recorded in August 2024 in France.

## 1.5. Commodity group of the month: Crustaceans<sup>7</sup>

Figure 24. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES<sup>8</sup>, SEPTEMBER 2021 – AUGUST 2024**



In August 2024, first sales of the “**Crustaceans**” commodity group (CG<sup>9</sup>) were 2<sup>nd</sup> highest in value and 5<sup>th</sup> highest in volume out of the 10 CGs in the countries monitored by EUMOFA.<sup>10</sup> In the reporting countries covered by the EUMOFA database, first sales of this group of species in August 2024 totalled EUR 63,9 million and 7.844 tonnes, representing an increase of 19% in value and 5% in volume compared to August 2023. In the past 36 months, the highest first-sales value of crustaceans was registered in August 2022 at about EUR 83,7 million.

The crustaceans commodity group includes 11 main commercial species (MCS): crab, lobster *Homarus* spp., Norway lobster, rock lobster and sea crawfish, shrimp *Crangon* spp., coldwater shrimp, deep-water rose shrimp, warmwater shrimp, other miscellaneous shrimps, squillid, and the grouping “other crustaceans”.<sup>11</sup>

At the Electronic Recording and Reporting System (ERS) level deep-water rose shrimp (12%) and European lobster (3%) together accounted for 15% of the total first-sales value for “crustaceans” recorded in August 2024.

<sup>7</sup> First sales data updated on 21. 10. 2024.

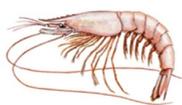
<sup>8</sup> Norway, the Faroe Islands and the UK excluded from the analyses.

<sup>9</sup> Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

<sup>10</sup> More data on commodity groups can be found in Table 1.2 of the Annex.

<sup>11</sup> EUMOFA aggregation for species (Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>)

### 1.6. Focus on deep-water rose shrimp



Deep-water rose shrimp (*Parapenaeus longirostris*) is a crustacean that belongs to the Pandalidae family. It is common in sandy-muddy bottoms at depths of 70–400 m. This species has a wide geographic distribution: it is found in the Mediterranean Sea and the Atlantic Ocean, from northern Spain to southern Angola<sup>12</sup>. The species feeds on small fish, cephalopods and crustaceans. It reaches maturity after one year and can live for up to 3–4 years. It can grow up to 16 cm (males) and 19 cm (females) in total length.

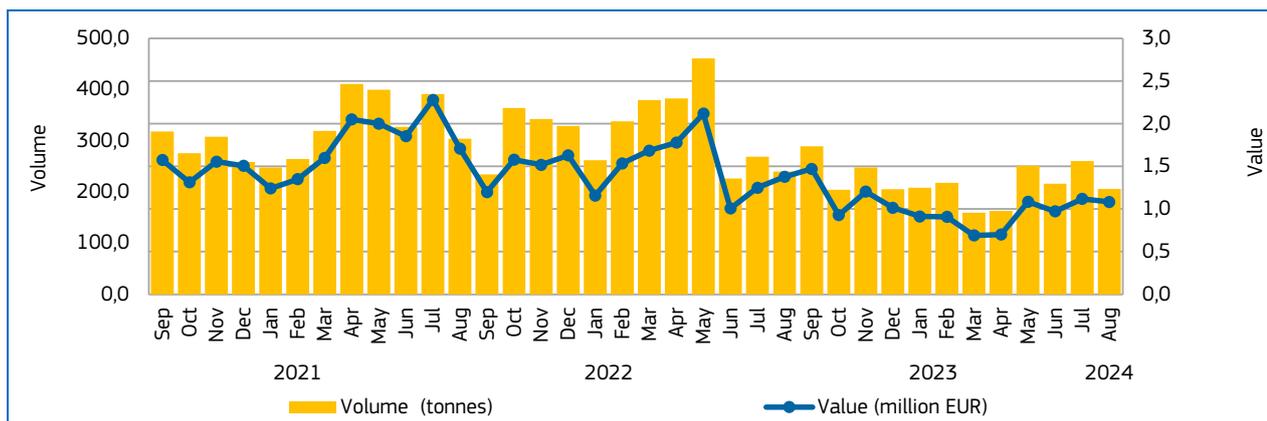
The deep-water rose shrimp fishery takes place in many areas in the Mediterranean Sea, but most comes from the Strait of Sicily<sup>13</sup>. It is mainly exploited by bottom trawlers that operate throughout the year on the outer continental shelf and upper slope of the south-central Mediterranean<sup>14</sup>. The minimum landing size for the species is 22 mm (carapace length).<sup>15</sup> Deep-water rose shrimp has a high nutritional value and protein content and is highly prized on the market.

#### Selected countries

Table 23. COMPARISON OF DEEP-WATER ROSE SHRIMP FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF “CRUSTACEANS” IN SELECTED COUNTRIES

Deep-water rose shrimp		Changes in Deep-water rose shrimp first sales Jan-Aug 2024 (%)		Contribution of Deep-water rose shrimp to total “Crustaceans” first sales in August 2024 (%)	Principal places of sale in August 2024 in terms of first-sales value
		Compared to Jan-Aug 2023	Compared to Jan-Aug 2022		
Italy	Value	-37%	-47%	25%	Porto Santo Stefano, Mazara del Vallo, Brindisi.
	Volume	-34%	-37%	49%	
Portugal	Value	-3%	-13%	33%	Vila Real de Santo António, Olhão, Peniche.
	Volume	-38%	-39%	32%	
Spain	Value	+19%	+6%	27%	Huelva, Isla Cristina, Ayamonte.
	Volume	+2%	-4%	41%	

Figure 25. DEEP-WATER ROSE SHRIMP: FIRST SALES IN ITALY, SEPTEMBER 2021 – AUGUST 2024



Over the past 36 months in **Italy**, the highest first-sales of deep-water rose shrimp in value were in June 2022 when approximately 391 tonnes were sold for EUR 2,3 million. The highest volume was recorded in May 2023 at 461 tonnes.

<sup>12</sup> <http://www.fao.org/fishery/species/2598/en>

<sup>13</sup> EUROFISH Magazine 2/2016, [https://issuu.com/eurofish/docs/eurofish\\_magazine\\_2\\_2016/42](https://issuu.com/eurofish/docs/eurofish_magazine_2_2016/42)

<sup>14</sup> [https://gfcmsitestorage.blob.core.windows.net/documents/SAC/SAF/DemersalSpecies/2014/DPS\\_GSA\\_12-16\\_2014\\_ITA\\_MLT\\_TUN.pdf](https://gfcmsitestorage.blob.core.windows.net/documents/SAC/SAF/DemersalSpecies/2014/DPS_GSA_12-16_2014_ITA_MLT_TUN.pdf)

<sup>15</sup> COUNCIL REGULATION (EC) No 850/98 <http://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:01998R0850-20150601&qid=1463153613173&from=EN>

Figure 26. **FIRST SALES: COMPOSITION OF “CRUSTACEANS” (ERS LEVEL) IN ITALY IN VALUE AND VOLUME, AUGUST 2024**

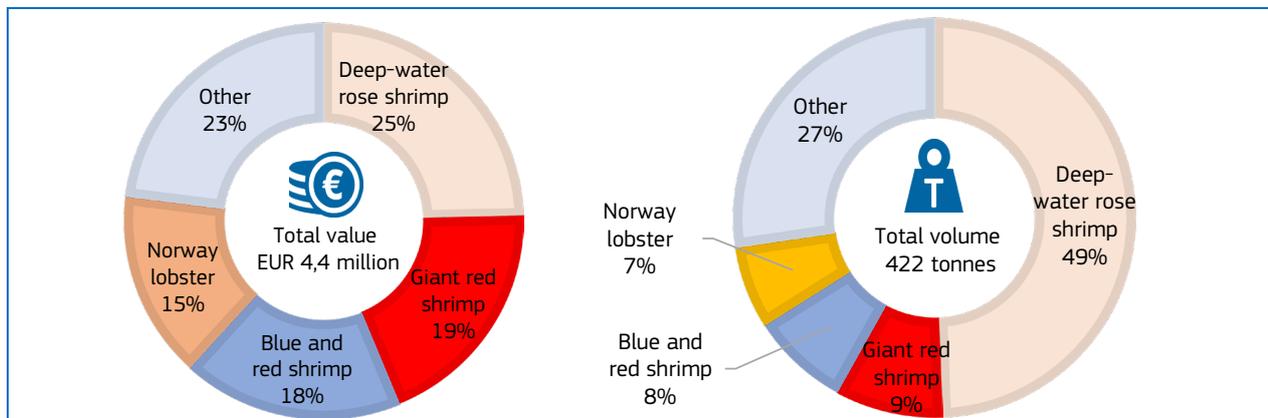
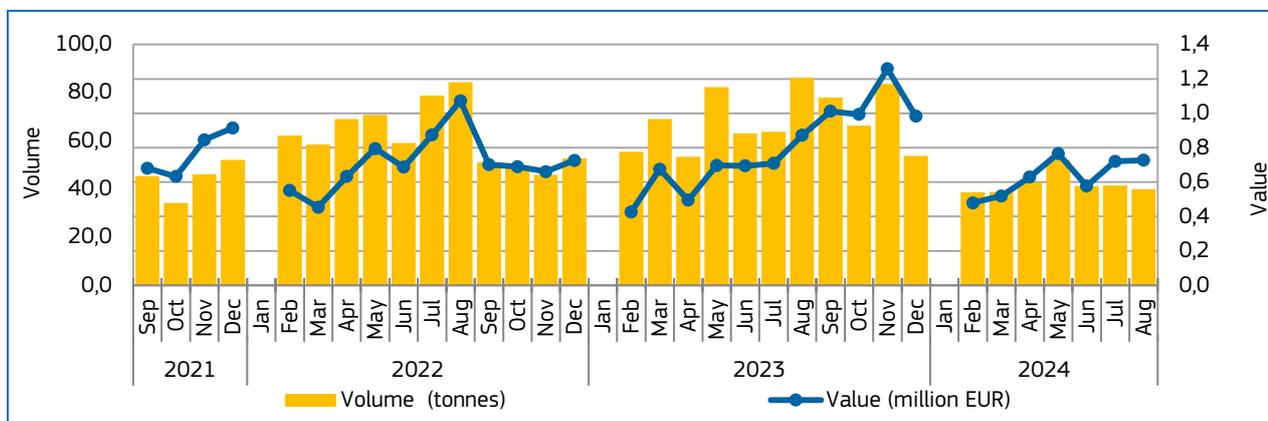


Figure 27. **DEEP-WATER ROSE SHRIMP: FIRST SALES IN PORTUGAL, SEPTEMBER 2021 – AUGUST 2024**



Over the past 36 months in **Portugal**, the highest first-sales value of deep-water rose shrimp was in November 2023 when approximately 84 tonnes were sold for EUR 1,3 million. A peak in first-sales volume was observed in August 2023 (86 tonnes).

Figure 28. **FIRST SALES: COMPOSITION OF “CRUSTACEANS” (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, AUGUST 2024**

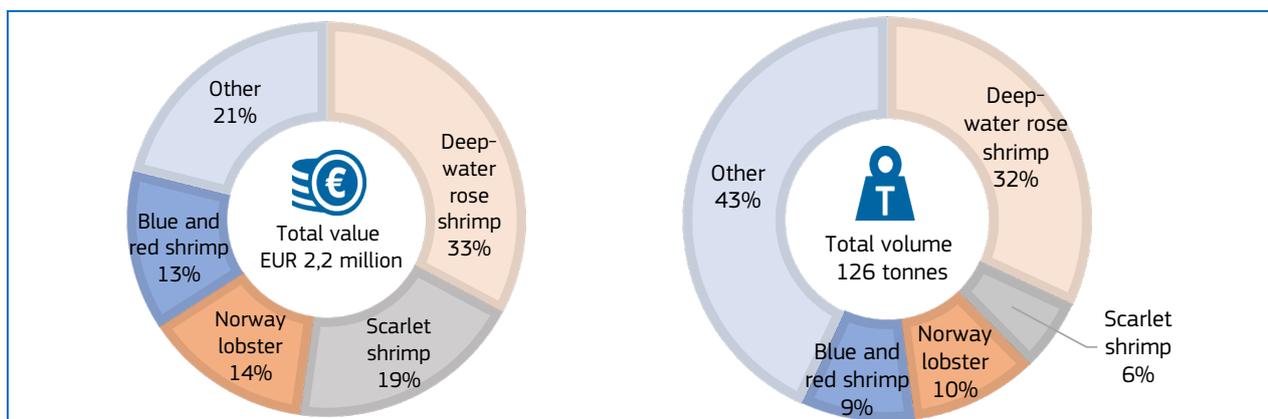
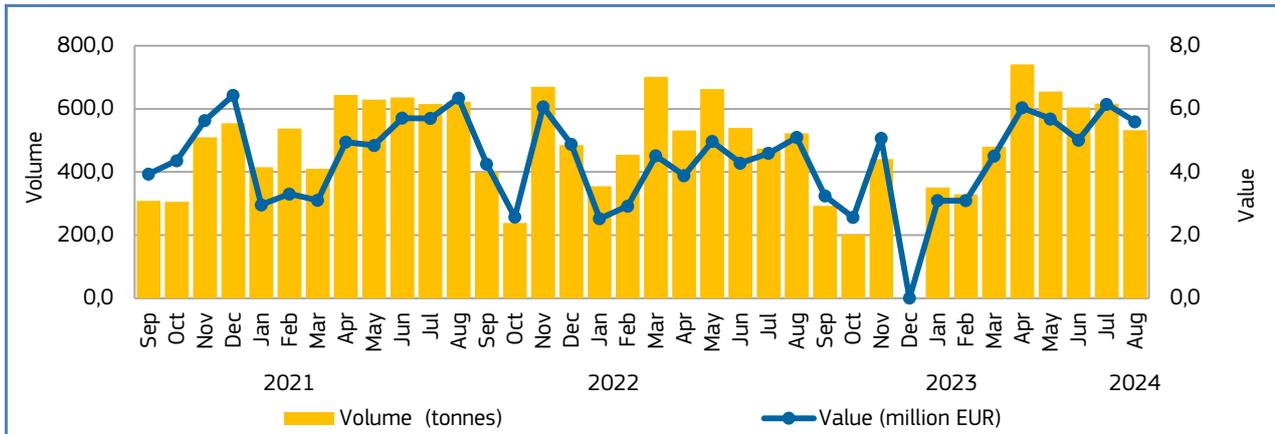
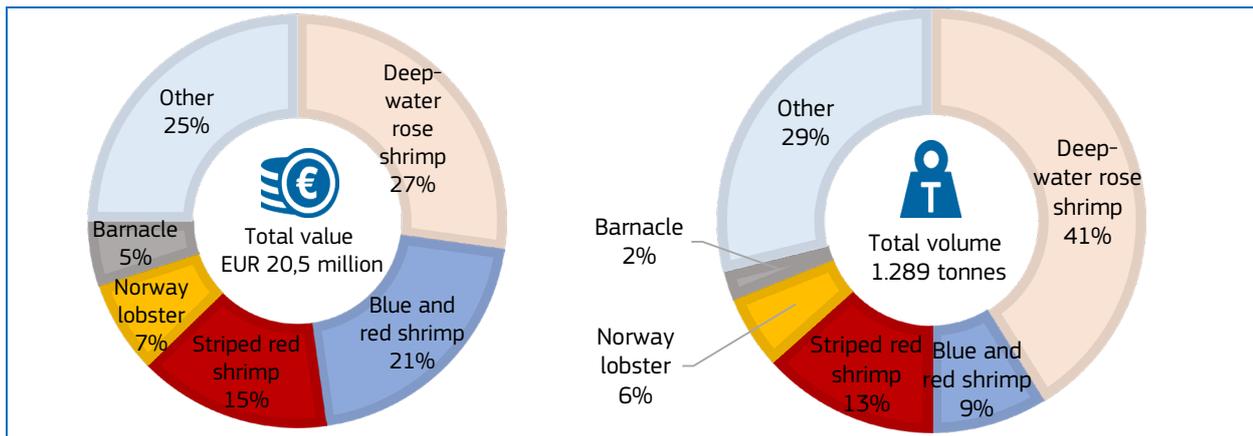


Figure 29. **DEEP-WATER ROSE SHRIMP: FIRST SALES IN SPAIN, SEPTEMBER 2021 – AUGUST 2024**



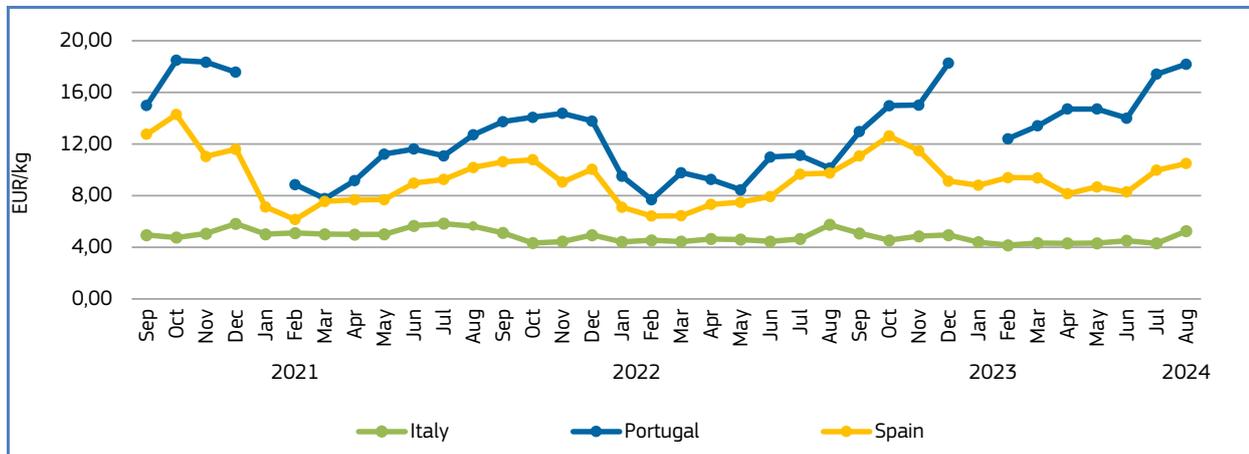
In **Spain**, over the 36-month observation period from September 2021 to August 2024, the highest first-sales value of deep-water rose shrimp was registered in December 2021 when 554 tonnes were sold for EUR 6,4 million. First-sales volume reached its highest in April 2024 when 741 tonnes were sold.

Figure 30. **FIRST SALES: COMPOSITION OF “CRUSTACEANS” (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, AUGUST 2024**



## Price trend

Figure 31. **DEEP-WATER ROSE SHRIMP: FIRST-SALES PRICES IN SELECTED COUNTRIES, SEPTEMBER 2021 – AUGUST 2024**



Over the 36-month observation period (September 2021 to August 2024), the weighted average first-sales price of deep-water rose shrimp in **Portugal** was 12,65 EUR/kg, 160% higher than in **Italy** (4,86 EUR/kg) and 40% higher compared to **Spain** (9,04 EUR/kg).

In **Italy** in August 2024, the average first-sales price of deep-water rose shrimp (5,26 EUR/kg) decreased by 9% compared to August 2023 and by 7% compared to the same month in 2022. Over the past 36 months, the average price ranged from 4,16 EUR/kg in February 2024 to 5,83 EUR/kg in July 2022.

In **Portugal** in August 2024, the average first-sales price of deep-water rose shrimp (18,19 EUR/kg) increased by 80% compared to August 2023 and by 43% compared to the same month in 2022. Over the past 36 months, the average price ranged from 7,69 EUR/kg for 56 tonnes in February 2023 to 18,49 EUR/kg for about 34 tonnes in October 2021.

In **Spain** in August 2024, the average first-sales price of deep-water rose shrimp (10,50 EUR/kg) increased by 8% compared to August 2023 and by 3% compared to 2022. During the period observed, the average price ranged from 6,15 EUR/kg for 537 tonnes in February 2022 to 14,29 EUR/kg for 305 tonnes in October 2021.

EUMOFA also covered **deep-water rose shrimp** in the following *Monthly Highlights*:

**First sales:** MH 4 2020 (Italy, Portugal, Spain), MH 5 2018 (Italy, Portugal, Spain), MH 1 2017 (Italy).

### 1.7. Focus on European lobster



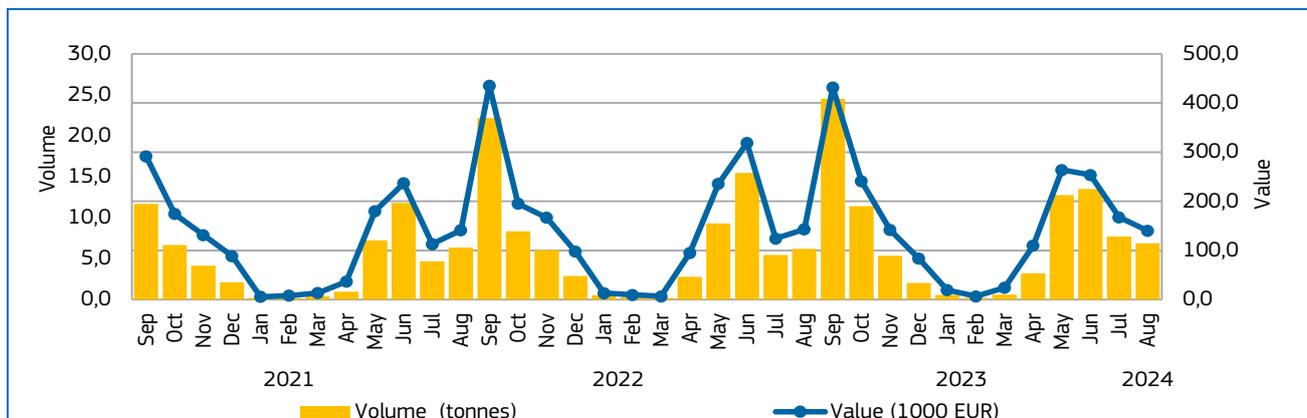
European lobster or common lobster (*Homarus gammarus*) is a species of clawed lobster found in the eastern Atlantic Ocean, Mediterranean Sea and parts of the Black Sea. It is one of the most valued seafoods in the world and has a global market. It can grow up to 1 m in length and can live from 20 to 50 years. Adults live on the continental shelf at depths up to 150 m, although not normally deeper than 50 m. Spawning occurs in the summer, and eggs are carried by the females for up to a year before hatching into planktonic larvae.<sup>16</sup> The species is widely caught using lobster pots, and to a lesser extent as bycatch by bottom trawlers, mostly around the British Isles. The main fishing countries in the EU are France, Ireland, the Netherlands and Denmark. In the EU, European lobster is managed by a minimum landing size (MLS) of 87 mm carapace length (at 4 and 8 years old)<sup>17</sup>. As well as MLS, most management measures are implemented at regional level: fishing licenses, fishing closures, fishing areas and limits on the number of pots set out vessels.<sup>18</sup> European lobster is traded live, frozen (raw or cooked, whole or tail) and, to a lesser extent, processed (soup, bisque).

#### Selected countries

Table 24. COMPARISON OF EUROPEAN LOBSTER FIRST-SALES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "CRUSTACEANS" IN SELECTED COUNTRIES

European lobster		Changes in European lobster first sales Jan-Aug 2024 (%)		Contribution of European lobster to total "Crustaceans" first sales in August 2024 (%)	Principal places of sale in August 2024 in terms of first-sales value
		Compared to Jan-Aug 2023	Compared to Jan-Aug 2022		
Denmark	Value	+4%	+34%	2%	NA
	Volume	+13%	+43%	1%	
France	Value	+9%	-8%	12%	Brest, Lorient, Roscoff
	Volume	+5%	-9%	5%	
Ireland	Value	-6%	-18%	11%	Kilmore Quay, Castletown Bearhaven, Galway.
	Volume	-3%	-9%	3%	

Figure 32. EUROPEAN LOBSTER: FIRST SALES IN DENMARK, SEPTEMBER 2021 – AUGUST 2024



<sup>16</sup> <http://www.bim.ie/media/bim/content/downloads/BIM,Lobster,Handling,and,Quality,Guide.pdf>

<sup>17</sup> REGULATION (EU) 2019/1241 [https://eur-lex.europa.eu/eli/reg/2019/1241/art\\_2/oj](https://eur-lex.europa.eu/eli/reg/2019/1241/art_2/oj)

<sup>18</sup> [http://www.pdm-seafoodmag.com/guide/crustaceans/details/product/Homard\\_europ%C3%A9en.html](http://www.pdm-seafoodmag.com/guide/crustaceans/details/product/Homard_europ%C3%A9en.html)

In **Denmark** over the 36-month period observed, the highest first-sales value was registered in September 2022 when about 22 tonnes of European lobster were sold for EUR 0,4 million. The highest first-sales volume was reported in September 2023 when 25 tonnes were sold for EUR 0,4 million.

Figure 33. **FIRST SALES: COMPOSITION OF “CRUSTACEANS” (ERS LEVEL) IN DENMARK IN VALUE AND VOLUME, AUGUST 2024**

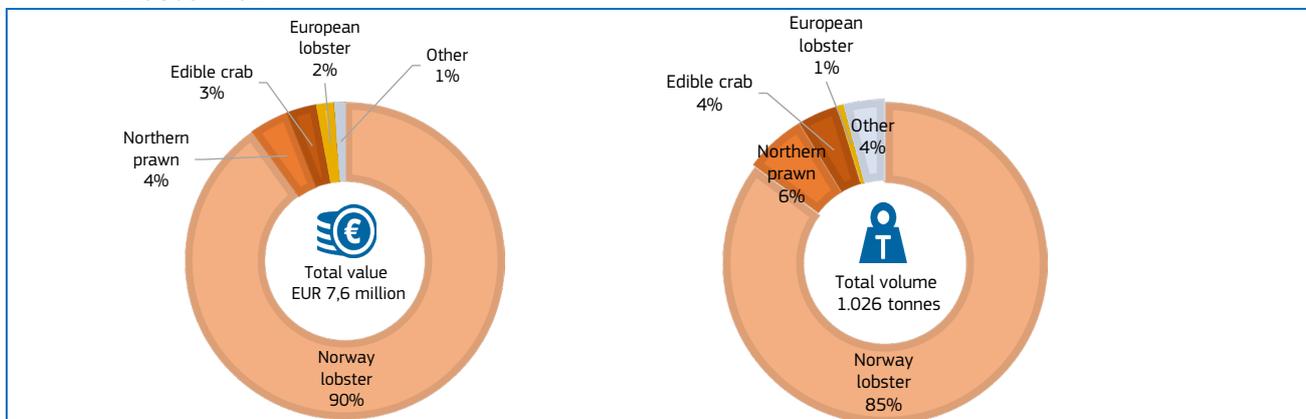
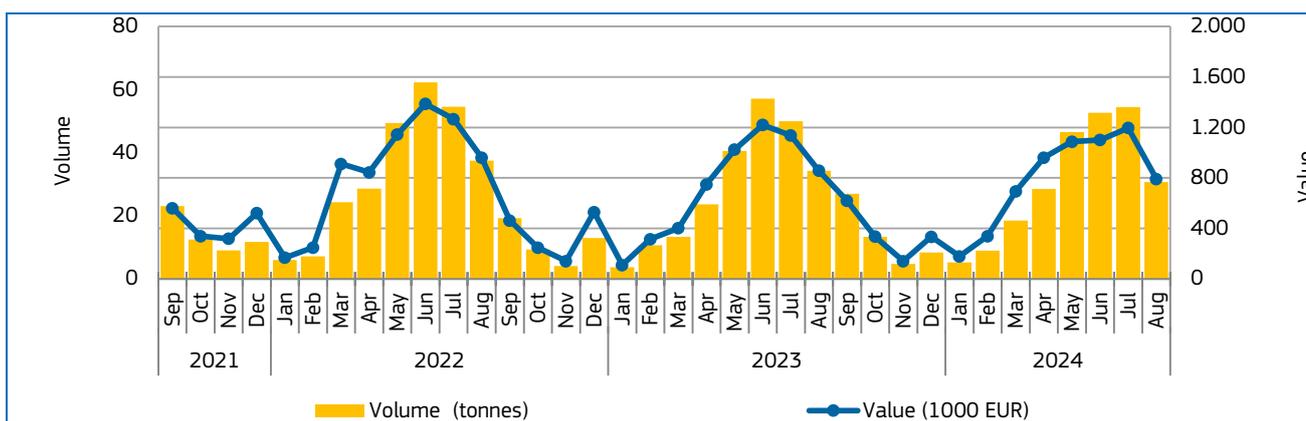


Figure 34. **EUROPEAN LOBSTER: FIRST SALES IN FRANCE, SEPTEMBER 2021 – AUGUST 2024**



In **France** over the 36-month period observed, the highest first-sales in both value and volume were registered in June 2022 when approximately 62 tonnes were sold for EUR 1,4 million.

Figure 35. **FIRST SALES: COMPOSITION OF “CRUSTACEANS” (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, AUGUST 2024**

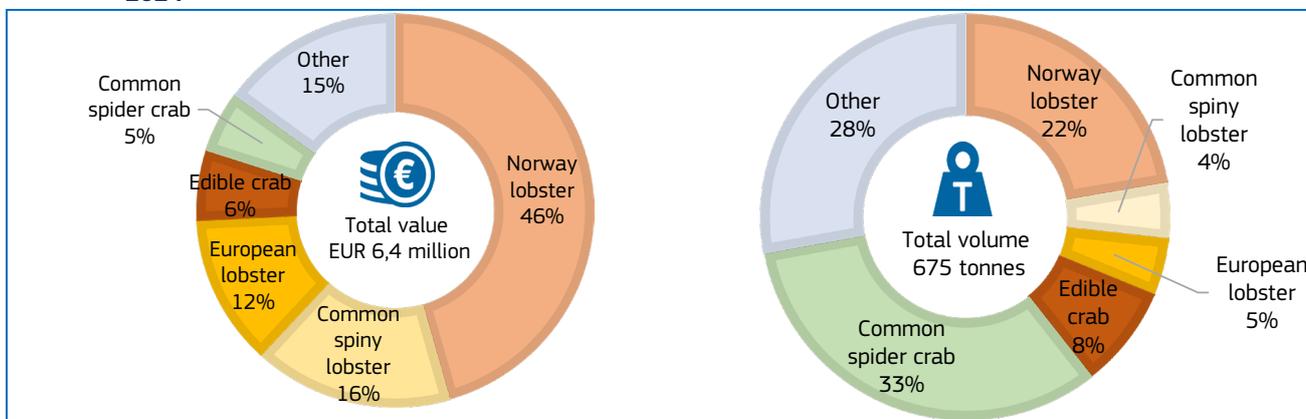
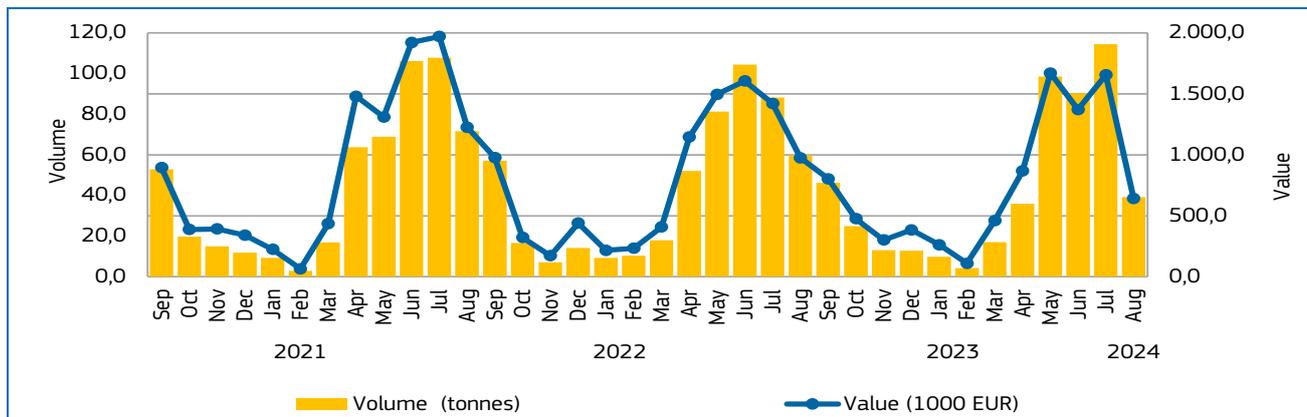
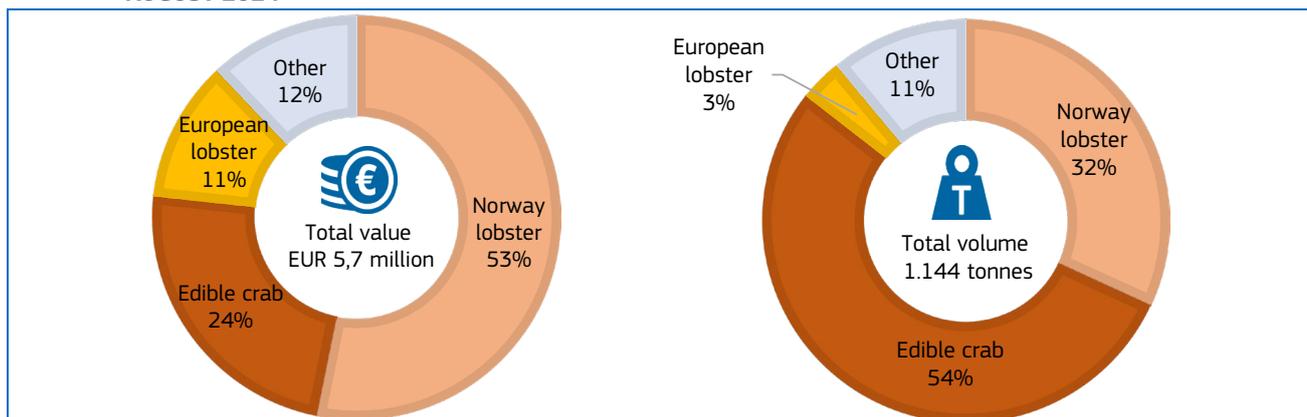


Figure 36. EUROPEAN LOBSTER: FIRST SALES IN IRELAND, SEPTEMBER 2021 – AUGUST 2024



In Ireland, the lobster fishery is one of the most traditional fisheries among Irish coastal communities and mainstay of many small-scale fishers around the Irish coast.<sup>19</sup> From September 2021 to August 2024, the highest first-sales value was registered in July 2022 when about 108 tonnes were sold for EUR 2 million. First-sales volume was the highest in July 2024 with 114 tonnes sold for 1,7 million.

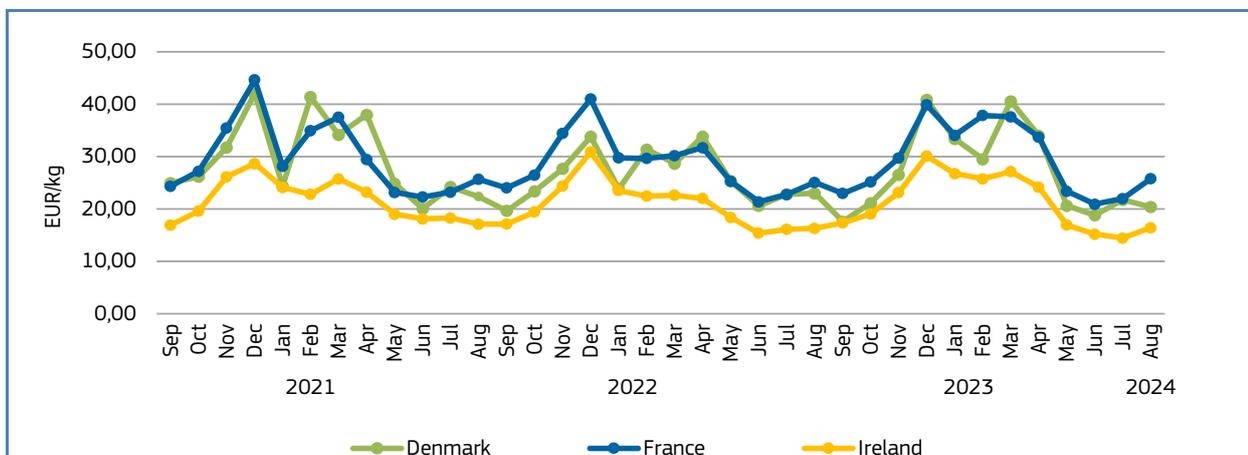
Figure 37. FIRST SALES: COMPOSITION OF “CRUSTACEANS” (ERS LEVEL) IN IRELAND IN VALUE AND VOLUME, AUGUST 2024



<sup>19</sup> [https://www.tcd.ie/tceh/projects/foodsmartdublin/recipes/April\\_LoCra/HistoryEcology\\_lob.php](https://www.tcd.ie/tceh/projects/foodsmartdublin/recipes/April_LoCra/HistoryEcology_lob.php)

## Price trend

Figure 38. EUROPEAN LOBSTER: FIRST-SALES PRICES IN SELECTED COUNTRIES, SEPTEMBER 2021 – AUGUST 2024



Over the 36-month observation period (September 2021 – August 2024), the weighted average first-sales price of European lobster in **France** was 26,18 EUR/kg, 14% more than in **Denmark** (22,88 EUR/kg) and 42% more than in **Ireland** (18,42 EUR/kg).

In **Denmark** in August 2024, the average first-sales price of European lobster (24,33 EUR/kg) decreased by 11% compared to August 2023 and by 9% compared to August 2022. In the 36-month period observed, the lowest average price of 17,61 EUR/kg for 25 tonnes was registered in September 2023, while the highest price of 42,04 EUR/kg for about 2 tonnes was recorded in December 2021.

In **France** in August 2024, the average first-sales price of European lobster (25,78 EUR/kg) increased by 3% compared to August 2023 and about 1% over the same month of 2022. During the period observed, the highest average price of 44,65 EUR/kg was reached in December 2021 when 12 tonnes were sold, while the price bottomed out in June 2024 (20,93 EUR/kg) when 53 tonnes were sold.

In **Ireland** in August 2024, the average first-sales price of European lobster (16,41 EUR/kg) increased by only 1% compared to August 2023 and went down by 4% from August 2022. In the 36-month period observed, the lowest average price of 14,46 EUR/kg for 114 tonnes was registered in July 2024, while the highest price of 30,90 EUR/kg for about 14 tonnes was recorded in December 2022.

EUMOFA also covered **European lobster** in the following Monthly Highlights:

**First sales:** MH 10 2019 (Denmark, France, the UK), MH 10 2015 (the UK), MH 6 2014 (the UK).

## 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 or chilled Atlantic and Danube 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 for this month is "Crustaceans"<sup>20</sup>.

Data analysed in the section "Extra-EU imports" are extracted from EUMOFA, as collected from the European Commission.<sup>21</sup>

Table 25. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST RELEVANT FISHERIES AND AQUACULTURE PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 37/2024	Preceding 4-week average	Week 37/2023	Notes
Atlantic and Danube salmon, excluding liver and roes, fresh imported from Norway ( <i>Salmo salar</i> , <i>Hucho hucho</i> CN code 03021400)	Price (EUR/kg)	6,19	6,23 (-1%)	6,58 (-6%)	From weeks 38/2021 to 37/2024 prices fluctuated, ranging between 5,15 EUR/kg (week 38/2021) and 11,28 EUR/kg (week 16/2022) showing an increasing trend. Prices showed strong seasonality following supply and the highest peaks occurred between weeks 10 and 16, while the highest falls seemed to occur between weeks 33 and 37.
	Volume (tonnes)	19.791	17.840 (+11%)	17.895 (+11%)	Volumes fluctuated between 1.309 tonnes (week 52/2023) and 19.791 tonnes (week 37/2024). Supply is seasonal, with highest peaks occurring most often in weeks 33/39 and 49.
Frozen Alaska pollock fillets imported from China ( <i>Theragra chalcogramma</i> , CN code 03047500)	Price (EUR/kg)	2,47	2,43 (+2%)	3,21 (-23%)	Between weeks 38/2021 to 37/2024 prices fluctuated ranging between 1,84 EUR/kg (week 48/2022) and 4,03 EUR/kg (week 41/2022) and following a decreasing trend since week 24/2023.
	Volume (tonnes)	809	1.365 (-41%)	1.666 (-51%)	In the period analysed, weekly volumes ranged between 147 tonnes (week 25/2022) to 13.785 tonnes (week 50/2023). Highest peaks in supply seemed to occur in the last weeks of the year between weeks 46 and 50.
Frozen tropical shrimp imported from Ecuador (genus <i>Penaeus</i> , CN code 03061792)	Price (EUR/kg)	5,10	5,10 (0%)	5,27 (-3%)	From weeks 38/2021 to 37/2024 prices fluctuated between 4,83 EUR/kg (week 07/2024) and 7,19 EUR/kg (week 41/2022) following a decreasing trend. Highest falls in prices occurred between weeks 1 and 8, 26 and 35.
	Volume (tonnes)	3.590	4.071 (-12%)	3.079 (+17%)	In the period analysed volumes showed high fluctuations ranging between 482 tonnes (week 25/2022) and 5.055 tonnes (week 24/2024). Highest peaks in supply seemed to occur most often between weeks 15/27, 30/33 and 45/46.

<sup>20</sup> The featured species of the commodity group of the month are frozen lobsters, whole, even smoked or cooked by steaming or by boiling in water from Canada, live lobsters from United States and crab, prepared or preserved from Viet Nam. The three randomly selected species this month are fresh or chilled coalfish from Norway, smoked trout incl. fillets (excl. offal) from Turkey and fresh or chilled Cape hake and deepwater hake from Namibia.

<sup>21</sup> Last update: 15. 10. 2024.

Figure 39. **IMPORT PRICE OF ATLANTIC AND DANUBE SALMON FROM NORWAY, 2021 - 2024**

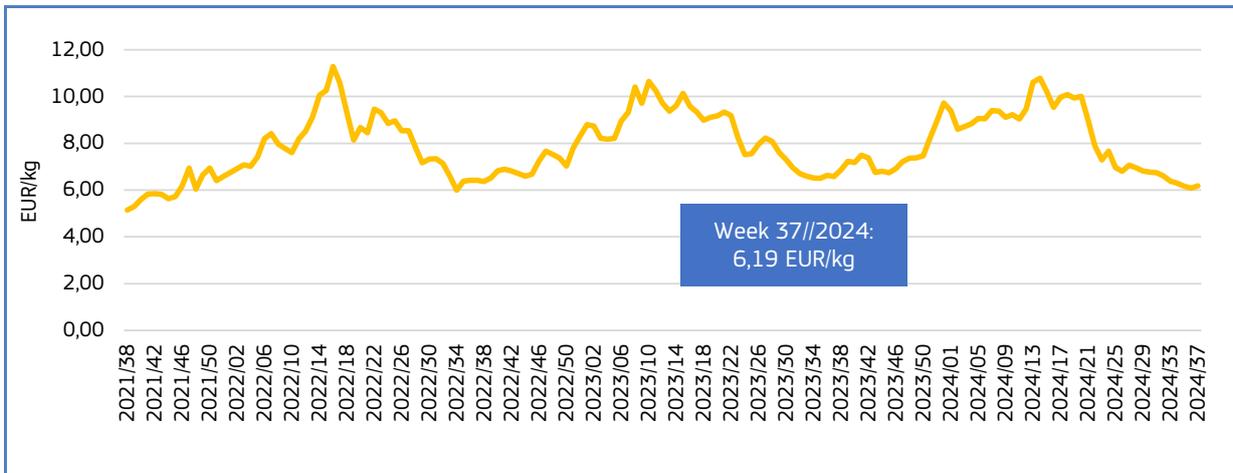


Figure 40. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2021 - 2024**

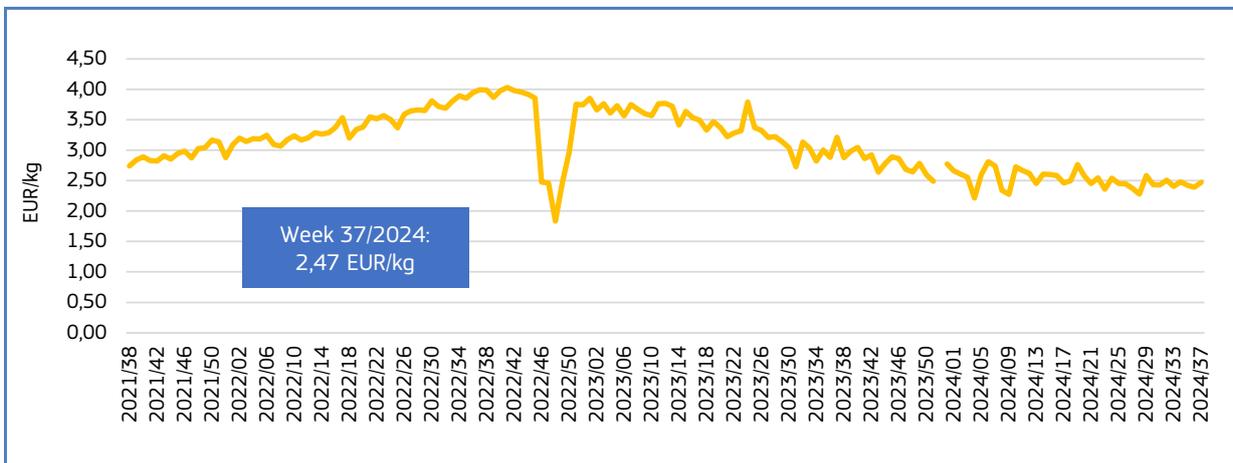
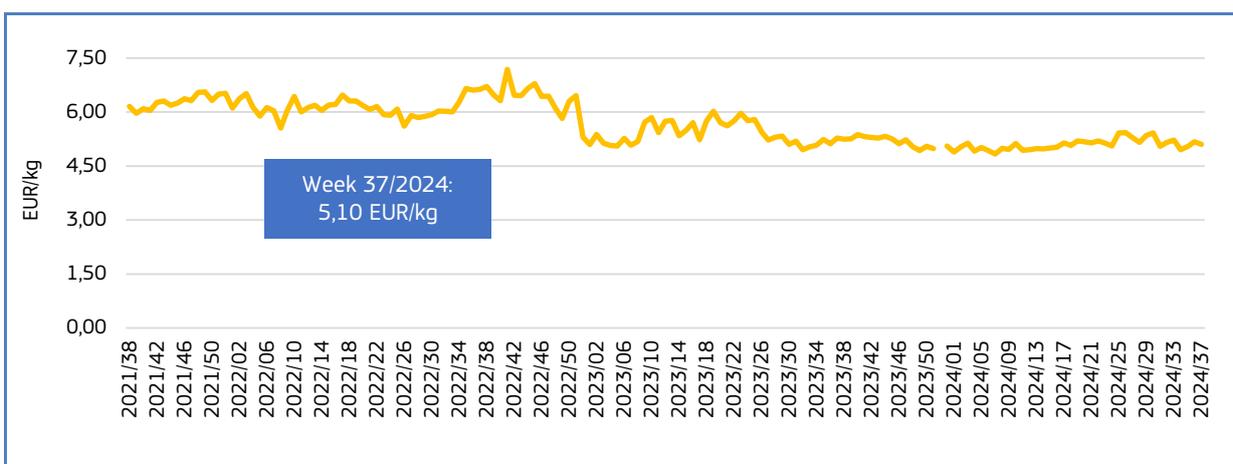


Figure 41. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2021 - 2024**



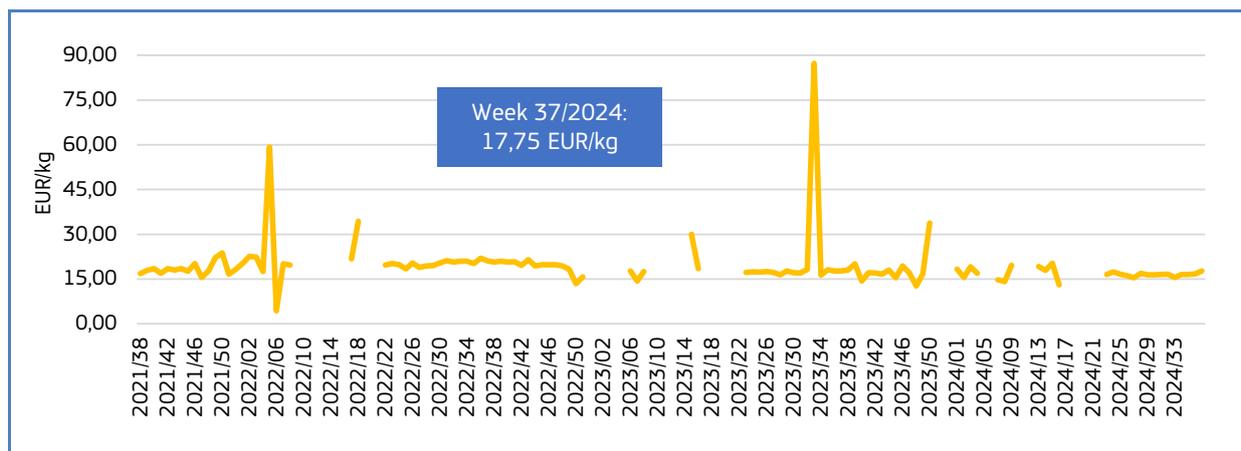
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Table 26. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 37/2024	Preceding 4-week average	Week 37/2023	Notes
Frozen lobsters, whole, even smoked or cooked by steaming or by boiling in water from <b>Canada</b> ("Homarus spp.", CN code 03061210)	<b>Price (EUR/kg)</b>	17,75	16,35 (+9%)	17,70 (0%)	Between weeks 38/2021 to 37/2024 prices fluctuated, ranging between 3,00 EUR/kg (week 11/2022) and 87,27 EUR/kg (week 33/2023). 67% of the weekly prices were between 15,00 EUR/kg and 20,00 EUR/kg. Volumes showed strong fluctuation ranging from 18 kilos (week 10/2023) to 456 tonnes (week 32/2022). 68% of the weekly supply was below 100 tonnes. Supply is seasonal with highest peaks appearing to occur most often in summer between weeks 24 and 32.
	<b>Volume (tonnes)</b>	75	128 (-41%)	85 (-12%)	
Live lobsters from <b>United States</b> ("Homarus spp.", CN code 03063210)	<b>Price (EUR/kg)</b>	19,81	19,80 (0%)	18,34 (+9%)	Between weeks 38/2021 to 37/2024 prices fluctuated following supply showing strong seasonality ranging between 14,37 EUR/kg (week 23/2024) and 38,14 EUR/kg (week 13/2024). 51% of weekly prices were between 15,00 EUR/kg and 20,00 EUR/kg, with highest peaks in prices occurring between weeks 11 and 15. In the period analysed supply fluctuated seasonally with the highest peaks occurring most often in week 50. Volume ranged from 2 tonnes (week 25/2022) to 268 tonnes (week 50/2023). 63% of the weekly supply was less than 50 tonnes.
	<b>Volume (tonnes)</b>	80	67 (+20%)	64 (+25%)	
Crab, prepared or preserved (excl. smoked) from <b>Viet Nam</b> (CN code 16051000) <sup>22</sup>	<b>Price (EUR/kg)</b>	7,73	8,90 (-13%)	6,55 (+18%)	Between weeks 38/2021 to 37/2024 prices fluctuated, ranging between 4,67 EUR/kg (week 09/2023) and 38,56 EUR/kg (week 12/2022). 54% of the weekly prices were between 8,00 EUR/kg and 12,00 EUR/kg. High fluctuations in supply between 2 kilos (week 45/2021) and 67 tonnes (week 45/2022). 87% of the weekly supply was below 30 tonnes.
	<b>Volume (tonnes)</b>	2	13 (-84%)	15 (-86%)	

Figure 42. **IMPORT PRICE OF FROZEN LOBSTER FROM CANADA, 2021 - 2024**



<sup>22</sup> The analysis is based on the available data, covering 54% of the total 157-week period under consideration.

Figure 43. **IMPORT PRICE OF LIVE LOBSTERS FROM UNITED STATES, 2021 - 2024**

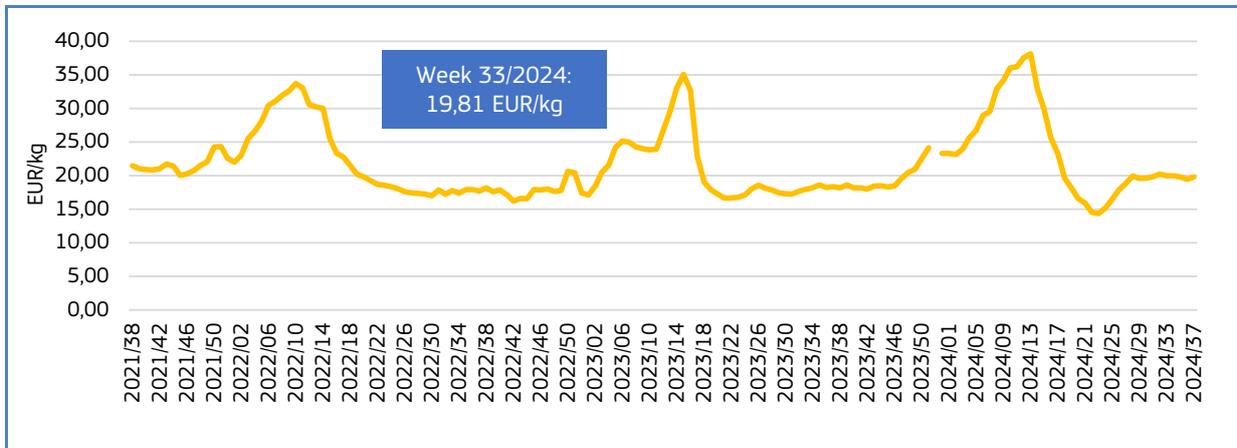
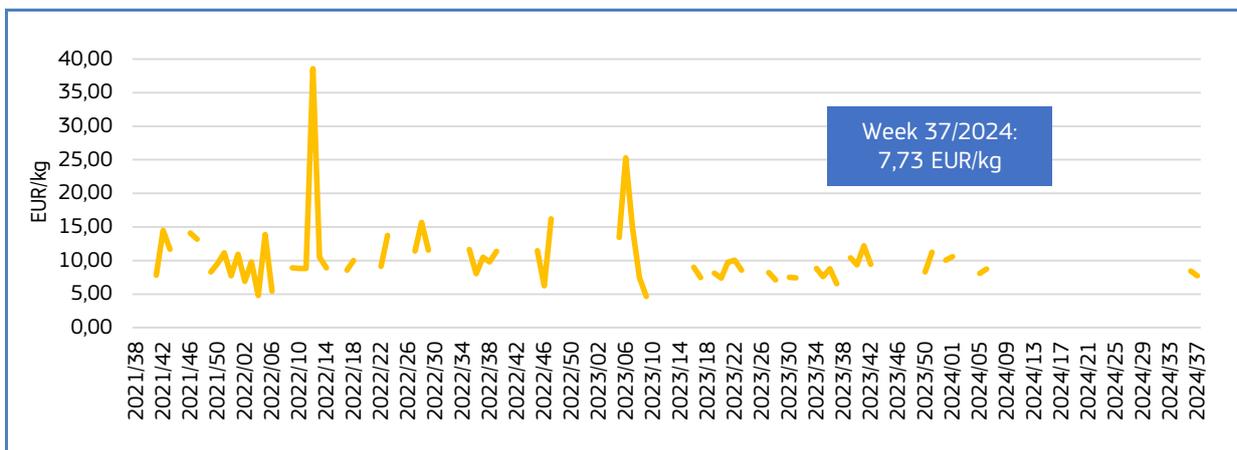


Figure 44. **IMPORT PRICE OF CRAB, PREPARED OR PRESERVED, FROM VIET NAM, 2021 - 2024**



Between weeks 01/2024 and 37/2024, the price of frozen **lobster** from **Canada** showed some fluctuations and a decreasing trend. The price ranged between 13,05 EUR/kg and 20,28 EUR/kg, and volume fluctuated between 606 kilos and 265 tonnes.

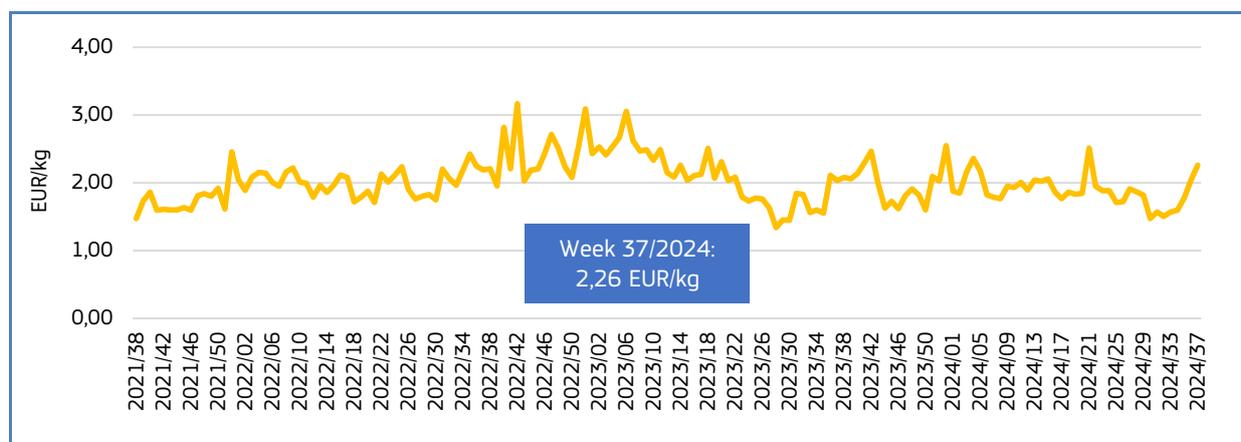
Between weeks 01/2024 and 37/2024, the price of live **lobster** from **United States** decreased ranging between 14,37 EUR/kg and 38,14 EUR/kg. Supply fluctuated between 19 tonnes and 80 tonnes.

In 2024, the price of prepared or preserved **crab** from **Vietnam** ranged between 7,22 EUR/kg and 10,58 EUR/kg, and volume fluctuated between 800 kilos and 38 tonnes.

Table 27. **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 37/2024	Preceding 4-week average	Week 37/2023	Notes
Fresh or chilled <b>coalfish</b> from <b>Norway</b> ("Pollachius virens", CN code 03025300)	<b>Price (EUR/kg)</b>	2,26	1,75 (+29%)	2,03 (+11%)	Between weeks 38/2021 to 37/2024 prices fluctuated following an increasing trend. They reached the maximum price of 3,17 EUR/kg (week 42/2022), decreased to the minimum price of 1,34 EUR/kg (week 28/2023), then increased again. 48% of the weekly prices were between 1,50 EUR/kg and 2,00 EUR/kg.
	<b>Volume (tonnes)</b>	328	495 (-34%)	387 (-15%)	Supply fluctuated strongly ranging between 12 tonnes (week 52/2023) and 971 tonnes (week 01/2023). The highest peaks seemed to occur most often between weeks 1/5, 48/53. 54% of the weekly supply was less than 400 tonnes.
Smoked <b>trout</b> incl. fillets (excl. offal) from <b>Turkey</b> ("Salmo trutta, Oncorhynchus mykiss, Oncorhynchus clarki, Oncorhynchus aguabonita, Oncorhynchus gilae, Oncorhynchus apache and Oncorhynchus chrysogaster", CN code 03054300)	<b>Price (EUR/kg)</b>	11,62	11,32 (+3%)	11,84 (-2%)	In the period analysed prices fluctuated following an increasing trend, increasing from the minimum price of 7,12 EUR/kg (week 02/2022) to the maximum price of 12,59 EUR/kg (week 41/2023) to then fluctuate again. 30% of the weekly prices were between 8,00 EUR/kg and 11,00 EUR/kg.
	<b>Volume (tonnes)</b>	59	49 (+21%)	48 (+23%)	Volumes ranged between 2 (week 34/2022) and 134 tonnes (week 11/2023). No clear seasonality is detected. 37% of the weekly supply was below 60 tonnes.
Fresh or chilled <b>Cape hake</b> "shallow-water hake" and deepwater hake "deepwater Cape hake" from <b>Namibia</b> ("Merluccius capensis, Merluccius paradoxus " CN code 03025411)	<b>Price (EUR/kg)</b>	5,92	5,88 (+1%)	6,47 (-9%)	Between weeks 38/2021 to 37/2024 prices fluctuated ranging between 5,48 EUR/kg (week 14/2022) and 7,11 EUR/kg (week 09/2022). 77% of the weekly prices were between 6,00 EUR/kg and 7,00 EUR/kg.
	<b>Volume (tonnes)</b>	28	24 (+16%)	48 (-42%)	Volumes showed strong fluctuations ranging from 3 tonnes (week 34/2022) to 106 tonnes (week 49/2022). The highest peaks in supply were recorded in weeks 1/3 and 49/51. 44% of the weekly supply was below 40 tonnes.

Figure 45. **IMPORT PRICE OF FRESH OR CHILLED COALFISH FROM NORWAY, 2021 - 2024**



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Figure 46. **IMPORT PRICE OF SMOKED TROUT FROM TURKEY, 2021 - 2024**

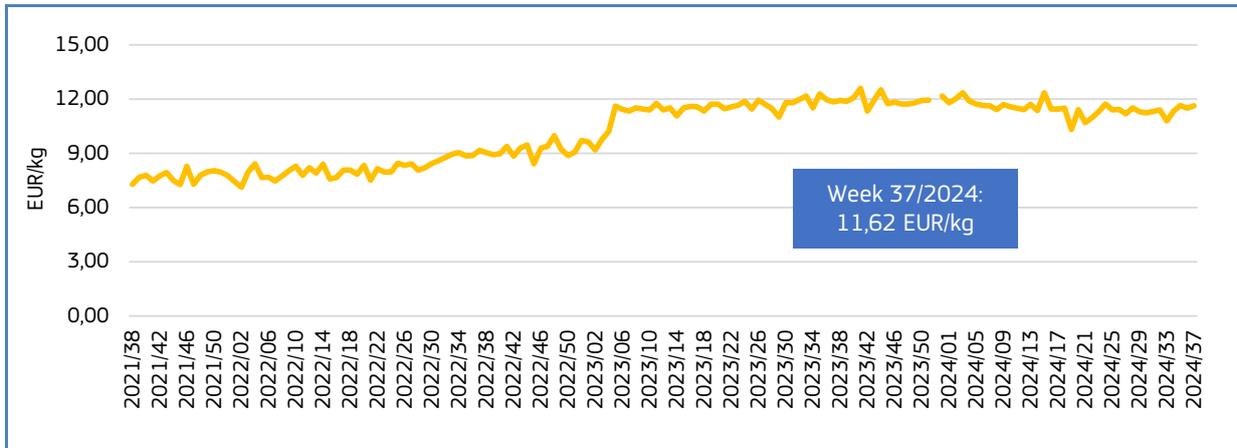
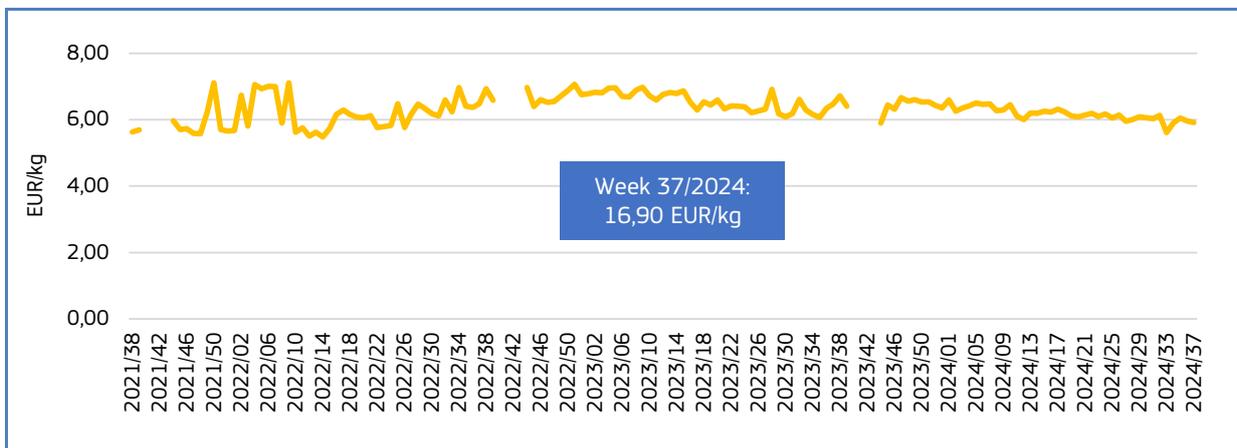


Figure 47. **IMPORT PRICE OF FRESH OR CHILLED CAPE HAKE FROM NAMIBIA, 2021 - 2024**



Between weeks 01/2024 and 37/2024, the price of fresh or chilled **coalfish** from **Norway** showed an increasing trend. The price ranged between 1,47 EUR/kg and 2,51 EUR/kg, and volume fluctuated ranging between 164 tonnes and 949 tonnes.

Between weeks 01/2024 and 37/2024, the price smoked **trout** from **Turkey** fluctuated and decreased. The price ranged between 10,31 EUR/kg to 12,35 EUR/kg. Supply fluctuated between 22 tonnes and 85 tonnes.

In 2024, the price of fresh or chilled **cape hake** from **Namibia** decreased ranging between 5,61 EUR/kg and 6,60 EUR/kg, and volume fluctuated between 6 tonnes and 93 tonnes.

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## 3. Consumption

### 3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel<sup>23</sup>.

In August 2024 compared with August 2023, household consumption in volume and value of fresh fisheries and aquaculture products fell in France, Ireland, and Sweden, while an increase was observed in Denmark, Germany, Hungary, Poland and Spain. The highest increase in absolute terms was observed in Hungary and Denmark. In Denmark it was mainly due to dab (188% in volume and 168% in value), flounder (79% in volume and 70% in value) and cod (66% in volume and 71% in value). The highest decrease in volume was reported in Sweden due to lower consumption of flounder (70% in volume and 76% in value) and pike-perch (69% in volume and 30% in value), while a decrease in value in the Netherlands was mainly due to shrimp *Crangon* spp (36% in volume and 28% in value) and mackerel (19% in volume and 18% in value).

Table 28. **AUGUST OVERVIEW OF THE HOUSEHOLD CONSUMPTION OF FRESH FISHERY AND AQUACULTURE PRODUCTS IN THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita apparent consumption 2021* (live weight equivalent, LWE) kg/capita/year	August 2022		August 2023		May 2024		August 2024		Change from August 2023 to August 2024	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	20,00-25,00	1.007	18,27	957	18,73	998	19,31	1.111	21,04	16%	12%
France	32,18	15.367	190,13	16.036	193,74	15.287	196,38	15.675	189,01	2%	2%
Germany	12,51	4.264	73,52	3.684	69,89	3.834	71,04	4.080	73,06	11%	5%
Hungary	6,55	312	2,09	162	1,45	270	2,16	244	2,14	50%	48%
Ireland	14,56	834	13,78	820	14,99	826	14,78	811	14,48	1%	3%
Italy	30,15	18.547	214,10	16.958	197,61	17.244	211,07	16.536	205,25	2%	4%
Netherlands	21,08	2.728	46,54	2.622	45,41	2.441	44,47	2.619	43,58	0%	4%
Poland	14,26	2.474	19,06	2.508	26,48	2.413	28,00	2.695	30,33	7%	15%
Portugal	56,52	5.343	39,06	5.380	39,51	4.897	39,10	5.380	43,31	0%	10%
Spain	42,98	38.207	347,40	36.620	350,18	38.955	391,67	36.975	372,61	1%	6%
Sweden	22,71	683	11,35	882	13,30	596	9,36	832	13,16	6%	1%

\* EUMOFA estimates. The supply balance is built on the basis of the equation catches + aquaculture production + imports – exports = apparent consumption and is calculated in live weight equivalent. The methodologies for estimating apparent consumption at EU and Member State levels are different, the former based on data and estimates, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes. Where EUMOFA estimations of per capita apparent consumption continued to show high annual volatility even with these adjustments, national contact points were contacted to confirm these estimates or to provide their own figures. For the Netherlands and Poland, sources are the Dutch Fish Marketing Board and Institute of Agricultural and Food Economics - National Research Institute, respectively. The estimate for Denmark was provided by the University of Copenhagen.

Over the past three years, the average household consumption of fresh fisheries and aquaculture products in August has been below the annual average in both volume and value in most reporting countries except for Denmark, Portugal and Sweden, where volume increased by 5%, 7% and 21% and value by 4%, 5% and 27%, respectively.

<sup>23</sup> Last update: 14. 10. 2024.

The most recent monthly consumption data (up to **August 2024**) are available on the EUMOFA website and can be accessed **here**.

## 3.2. Pangasius

**Habitat:** Is a freshwater species found mainly in Asia that migrates upstream to spawn and is introduced into river basins and ponds for aquaculture<sup>24</sup>.

**Producing countries:** Bangladesh, Cambodia, China, Laos, Malaysia, Thailand, Vietnam<sup>25</sup>.

**Production method:** Aquaculture.

**Main consumers in the EU:** Germany, the Netherlands, Spain.

**Presentation:** Whole, fillets.

**Preservation:** Frozen.

### 3.2.1. Overview of household consumption in the Netherlands

Based on EUMOFA estimates, in 2021 per capita apparent consumption of fishery and aquaculture products in the Netherlands was 21,08 kg LWE, below the EU average of 23,71 kg LWE. Despite an 8% increase from 2020, the consumption of fishery and aquaculture products was still 11% lower than the EU average, 63% lower than the consumption of Portugal which has the highest value in the EU, and 222% higher than that of Hungary with the lowest fish consumption in the EU.

In 2024, the average monthly household consumption of fresh Pangasius was 146 tonnes in the Netherlands, where households paid on average 13,36 EUR per kg of the species. This was 3% lower in volume and 2% lower in price than in the same period the previous year, and 3% lower in volume and 7% higher in price than the three-year average. Total consumption of Pangasius in the Netherlands was 1.170 tonnes in 2024, while total consumption was 5.430 tonnes over the last three years.

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

**Consumption: MH 9 2021** (NL).

**Extra-EU imports: MH 1 2024** Vietnam; **MH 8 2023** Vietnam; **MH 5 2022** Vietnam; **MH 7 2021** Vietnam; **MH 1 2021** Vietnam; **MH 7 2020** Vietnam; **MH 7 2019** Vietnam; **MH 7 2018** Vietnam.

**Topic of the month: Pangasius imports in the EU MH 4 2014.**

<sup>24</sup> <https://www.fishbase.de/summary/pangasianodon-hypophthalmus.html>

<sup>25</sup> EUMOFA MH 9 2021, <https://eumofa.eu/documents/20124/56563/MH9+2021+EN.pdf/ec42d37a-681b-68de-1a26-c601e3b39405?t=1637771505396>

Figure 48. **PRICES OF PANGASIUS PURCHASED BY DUCTH HOUSEHOLDS**

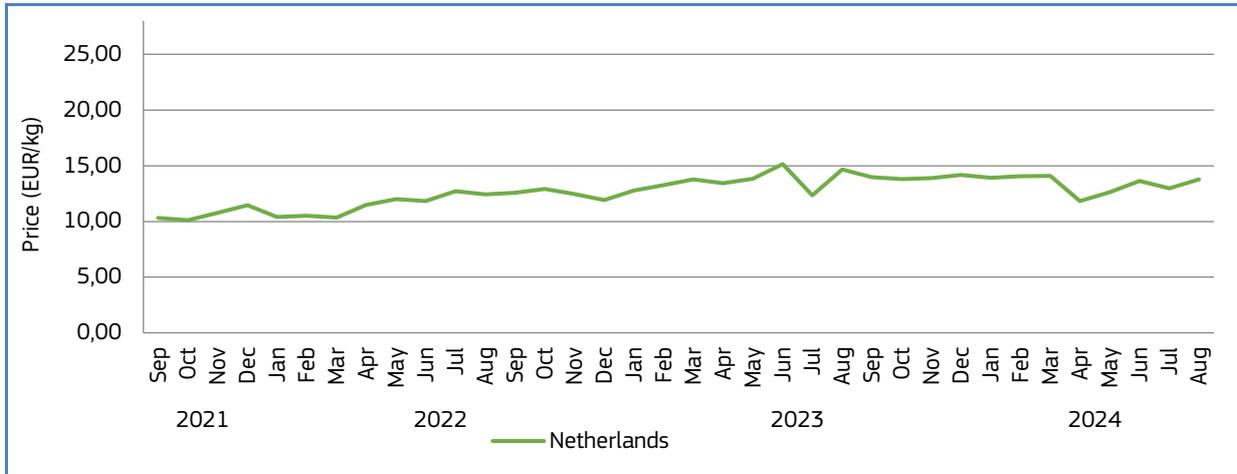
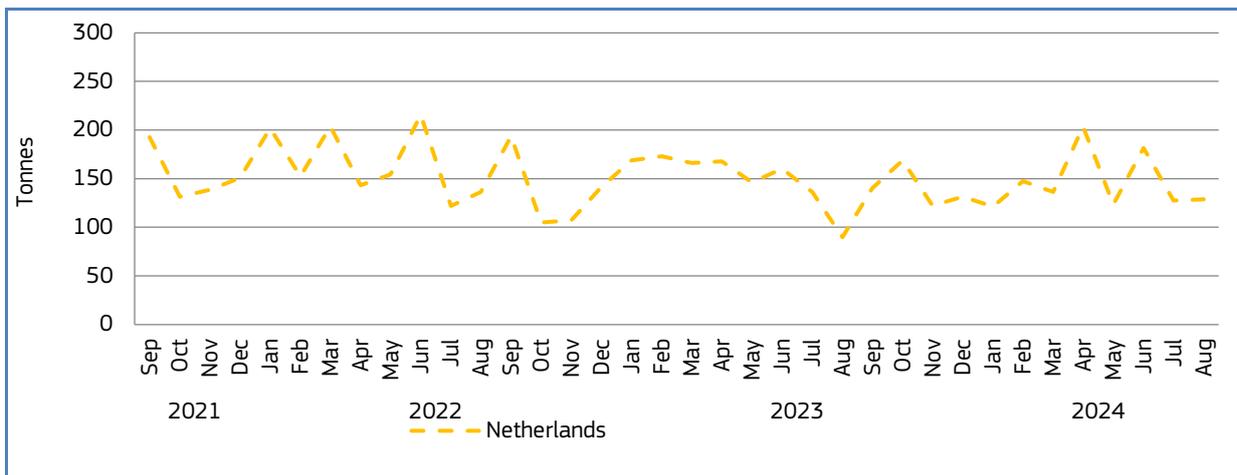


Figure 49. **HOUSEHOLD PURCHASES OF PANGASIUS IN THE NETHERLANDS**



### 3.2.2. Household consumption trends in the Netherlands

**Long-term trend (September 2021 to August 2024):** Downward trend in volume and a slight upward trend in price.

**Yearly average price:** 10,61 EUR/kg (2021), 11,80 EUR/kg (2022), 13,76 EUR/kg (2023).

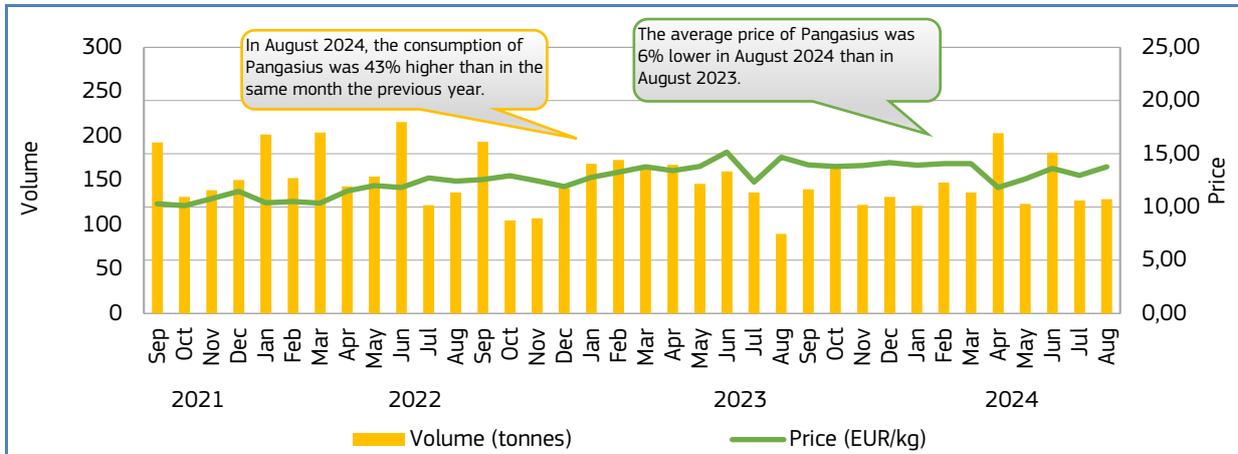
**Yearly consumption:** 2.037 tonnes (2021), 1.877 tonnes (2022), 1.771 tonnes (2023).

**Short-term trend (January-August 2024):** Fluctuating volumes and a slight downward trend in price.

**Price:** 13,36 EUR/kg.

**Consumption:** 1.170 tonnes.

Figure 50. **RETAIL PRICE AND VOLUME OF PANGASIOUS PURCHASED BY HOUSEHOLDS IN THE NETHERLANDS, SEPTEMBER 2021 – AUGUST 2024**



In August 2024, the consumption of Pangasius was 43% higher than in the same month the previous year.

The average price of Pangasius was 6% lower in August 2024 than in August 2023.

## 4. Case study: Fisheries and Aquaculture in Australia

Australia is a federal state of Oceania and the sixth largest country in the world by area. Australia is situated in the southern hemisphere, with the majority of its population residing in coastal cities such as Sydney, Melbourne and Brisbane. The country has a coast to the Indian Ocean to the west and to the Pacific Ocean to the east. The nearest neighbouring countries are Papua New Guinea, Indonesia and East Timor in the north.

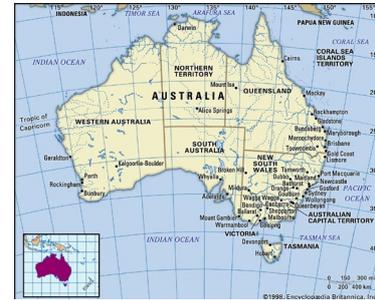
### 4.1. Fisheries and aquaculture in the Australia

With its significant coastline, fisheries and aquaculture are important industries in Australia which has the third largest fishing zone with 8,148,250 square km<sup>26</sup>.

Fisheries management in Australia is shared between the Australian Government and state and territory governments. The Australian Government, through the Australian Fisheries Management Authority (AFMA), is responsible for managing fisheries in Commonwealth waters which extend from three to 200 nautical miles offshore. AFMA manages these fisheries to ensure sustainability and the long-term viability of fish stocks, focusing on key commercial species<sup>27</sup>.

State and territory governments are responsible for managing fisheries within their own jurisdictions, typically from the coastline to three nautical miles offshore. These governments regulate fishing activities, monitor fish stocks, and enforce fishing laws within their waters. They also manage recreational fishing activities. Both levels of government cooperate through the Fisheries Management Act 1991 and the Offshore Constitutional Settlement, which establishes the framework for managing shared fish stocks and cross-jurisdictional fisheries.

Aquaculture is practiced across Australia, spanning from the tropical northern regions to the temperate southern areas. The industry is predominantly located in regional parts of the country and plays a crucial role in fostering regional development, contributing positively to the local economies<sup>28</sup>. The regulation of aquaculture lies with the various states and territory governments. However, the Australian Government also plays a key role in the management of the industry as it has important functions related to biosecurity management, aquatic animal health, environment oversight, food safety, research and market access. Furthermore, aquaculture operations, particularly those involving public waters or discharges into them, must adhere to strict environmental regulations which are continuously monitored by state authorities. Similarly, stringent food safety standards apply to both aquaculture and wild-caught seafood.



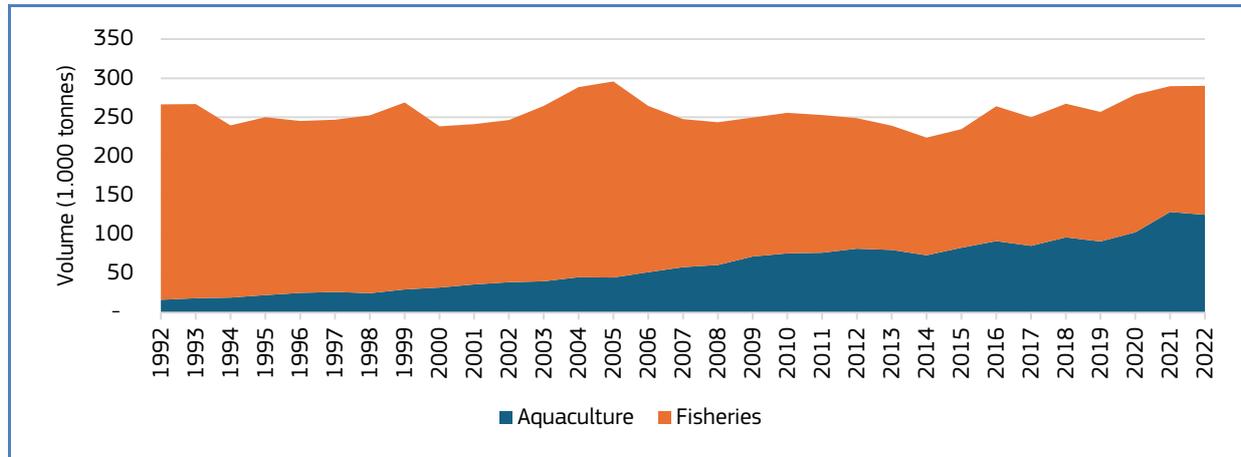
Source: Britannica

<sup>26</sup> Department of Agriculture, Fisheries and Forestry. Domestic fisheries. <https://www.agriculture.gov.au/agriculture-land/fisheries/domestic>

<sup>27</sup> Australian Fisheries Management Authority. <https://www.afma.gov.au/>

<sup>28</sup> Australian Government. Department of Agriculture, Fisheries and Forestry. Aquaculture in Australia. <https://www.agriculture.gov.au/agriculture-land/fisheries/aquaculture/aquaculture-industry-in-australia>

Figure 51. **TOTAL PRODUCTION OF FISHERY AND AQUACULTURE IN AUSTRALIA**



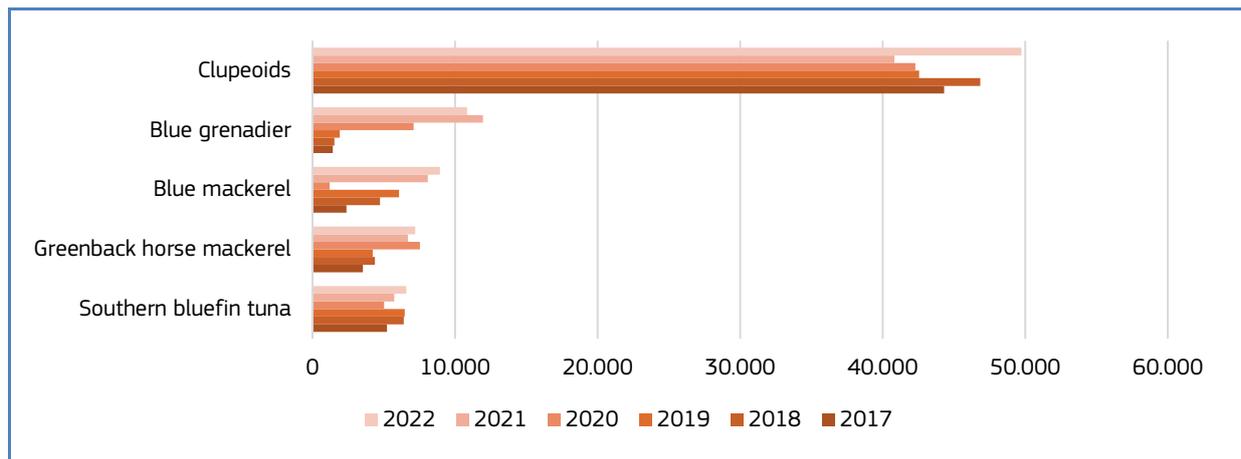
Source: FAO.

In 2022, Australia had a capture volume of 165.059 tonnes, a 3% increase from 2021. Over the past 30 years, fisheries in Australia have declined by 34%. In 2022, the total volume of aquaculture products reached 125.231 tonnes. As opposed to fisheries, this industry has also seen noticeable growth over the past 30 years. In 1992, farmed volume was at 16.422 tonnes.

### Fisheries production

The five largest captured species in Australia are clupeoids (*Clupeoidei*), Blue grenadier (*Macruronus novaezelandiae*), Blue mackerel (*Scomber australasicus*), Greenback horse mackerel (*Trachurus declivis*) and Southern bluefin tuna (*Thunnus maccoyii*). In 2022, the catch volume of clupeoids reached 49.730 tonnes, a 22% increase from the volume in 2021. The catch volume of blue grenadier declined by 9% from 2021, reaching a volume of 10.852 tonnes in 2022. Catches of blue mackerel, greenback horse mackerel and Southern bluefin tuna all increased from 2021 to 2022. The catch volume of blue mackerel reached 8.929 tonnes (+10%), Greenback horse mackerel reached 7.204 tonnes (+8%), and Southern bluefin tuna reached 6.577 tonnes (+15%) in 2022.

Figure 52. **TOP FIVE CAPTURED SPECIES IN AUSTRALIA BY VOLUME**



Source: FAO.

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## Aquaculture production

In Australia, the five largest species groups in 2022 were Atlantic salmon (*Salmo salar*), Penaeus shrimps nei (*Penaeus spp*), Southern bluefin tuna (*Thunnus maccoyii*), flat and cupped oysters nei (*Ostreidae*), and barramundi (*Lates calcarifer*). Between 2017 and 2022, Australia's top five farmed species showed varying trends in terms of volume. Atlantic salmon and flat and cupped oysters saw consistent growth, with Atlantic salmon production rising sharply from 52.580 to 81.045 tonnes, and oysters nearly doubling in production. Penaeus shrimps also showed significant growth, particularly between 2020 and 2022, reaching 9.450 tonnes. In contrast, barramundi production fluctuated, peaking in 2021 but declining again in 2022 to 4.198 tonnes. Southern bluefin tuna remained relatively stable over the period, with only minor fluctuations around 8.000 tonnes. Overall, the trends suggest strong growth for most species, with barramundi being more volatile.

In Australia, most farming of Atlantic salmon takes place in Tasmania in marine based grow-out operations<sup>29</sup>. Salmon aquaculture in Tasmania includes land-based freshwater hatcheries, marine grow-out facilities, and advanced harvesting operations, with integrated processing and distribution capabilities.

The shrimp species currently farmed in Australia are the black tiger shrimp (*P. monodon*) and the banana prawn (*Fenneropenaeus merguensis*)<sup>30</sup>. Approximately 95% of the shrimp farms in Australia are located in Queensland, with the remaining 5% in New South Wales (NSW)<sup>31</sup>. Some of the largest farms operate year-round, while others produce a single crop each year. A large share of the shrimp produced in Australia ends up in the domestic market. Harvested prawns are processed immediately, with most farms equipped with their own facilities for grading, cooking, packaging and freezing.

In Australia, farming of Southern bluefin tuna is based on "ranching", which consists of taking wild-caught tunas and transferring them to sea pens, where they are raised until they have reached a certain size<sup>32</sup>. Ranching started because of over-exploitation of wild stocks. Japan is the industry's largest market. China is also a growing market, as well as some other countries in South-East Asia. Some of the production also goes to domestic consumption in Australia<sup>33</sup>.

Oyster farming in Australia is one of its oldest aquaculture industries, and already started over 120 years ago<sup>34</sup>. The oyster farming industry takes place in several areas in Australia such as New South Wales, South Australia and Tasmania, with these being some of the largest oyster-producing regions in the country.

The farming of barramundi in Australia started back in the mid 1980's<sup>35</sup>. Today, barramundi is farmed in all mainland states in Australia, as well as in the Northern Territory. The farming takes place in various types of production systems. While most of the volume comes from fresh or saltwater outdoor pond operations and sea cages, some of the production also comes from indoor recirculating water tank systems.

<sup>29</sup> Department of Natural Resources and Environment Tasmania. Salmon farming. <https://nre.tas.gov.au/aquaculture/aquaculture-species-in-tasmania/salmon-farming>

<sup>30</sup> Australian Prawn Farmers Association. *Facts about Australian Farmed Prawns*. <https://apfa.com.au/education-resources/#prawnfarming>

<sup>31</sup> Australian Prawn Farmers Association. *Australian Prawn Farming*. <https://apfa.com.au/education-resources/#prawnfarming>

<sup>32</sup> Australian Southern Bluefin Tuna Industry. Our history. <https://asbtia.org/our-industry-about-sbt/our-history/>

<sup>33</sup> Australian Southern Bluefin Tuna Industry Association. <https://asbtia.org/our-product/preparation-handling/>

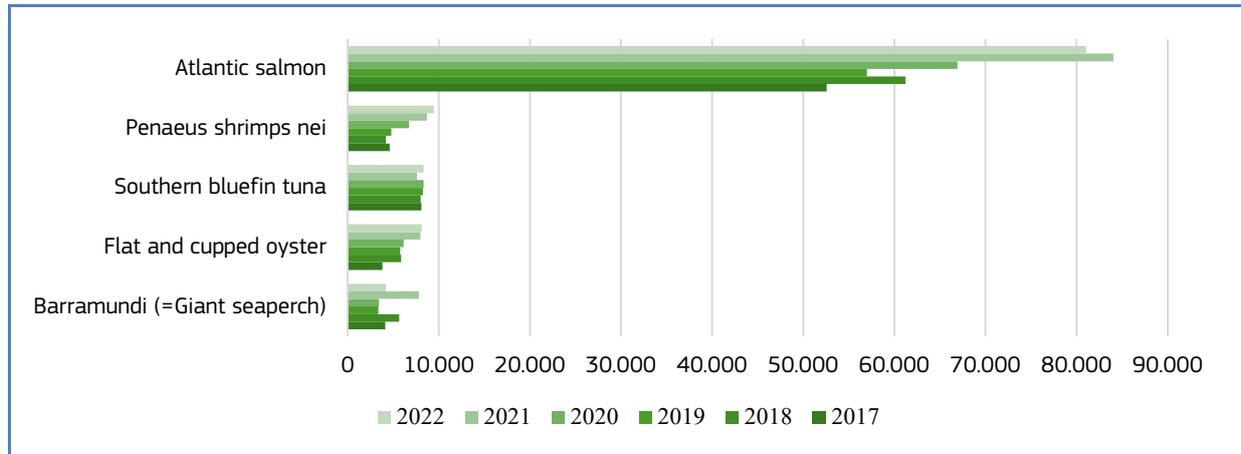
<sup>34</sup> Maquire, G. B., Nell, J. A., (2019). History, Status and Future of Oyster Culture in Australia. [https://worldoyster.org/wp/wp-content/uploads/2019/04/news\\_19-1e.pdf](https://worldoyster.org/wp/wp-content/uploads/2019/04/news_19-1e.pdf)

<sup>35</sup> Australian Barramundi Farmers Association. About the Industry. <https://abfa.org.au/industry/>

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Figure 53. **TOP FIVE AQUACULTURE SPECIES IN AUSTRALIA BY VOLUME (tonnes)**



Source: FAO.

## 4.2. International trade

### Export of fishery and aquaculture products from Australia

In 2023, Australia exported 140.365 tonnes of fishery and aquaculture products to a value of EUR 882 million. Compared to 2022, this was a decline of 31%. The main reason for this decline is the fall in exports of products not destined for human consumption (more specifically, fish or marine mammal solubles). In 2023, South Korea was the largest export market for fishery and aquaculture products from Australia with a volume of 32.521 tonnes to a value of EUR 18,8 million. Exports to South Korea saw a noticeable decrease from 2022 to 2023, down 56% in terms of volume. The second and third largest export markets were China and New Zealand with 20.433 tonnes and 16.393 tonnes, respectively. The export value to China and New Zealand reached EUR 238 million and EUR 19,7 million. The reason for the high export value to China is a large share of the salmon exports from Australia to China (65%). Other high-value species such as abalone and toothfish are also exported to the Chinese market.

In 2023, the largest species groups exported from Australia were the grouping “other non-food use” (i.e., products not destined for human consumption other than fishmeal and fish oil), salmon<sup>36</sup>, bluefin tuna<sup>37</sup>, rock lobster and sea crawfish.

Table 29. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM AUSTRALIA BY TRADE PARTNER (volume in tonnes, value in 1.000 EUR)**

Trade partner	2019		2020		2021		2022		2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
South Korea	82.446	27.064	117.643	29.699	113.788	32.958	81.034	39.616	32.521	18.768
China	23.851	595.120	24.914	377.965	19.024	189.612	18.502	216.877	20.433	238.822
New Zealand	36.614	47.441	52.653	58.925	60.269	40.337	32.936	25.191	16.393	19.747
United Kingdom	152	1.464	31	517	280	1.909	133	1.467	15.055	1.242
Japan	17.300	136.340	18.153	109.510	15.311	103.094	13.958	120.298	12.871	112.154

<sup>36</sup> The salmon species exported from Australia in the MCS category “salmon”: *Salmo salar*, *Hucho Hucho*, *Oncorhynchus gorbuscha*, *Oncorhynchus keta*, *Oncorhynchus tshawytscha*, *Oncorhynchus kisutch*, *Oncorhynchus masou* and *Oncorhynchus rhodurus*

<sup>37</sup> MCS: Bluefin tuna includes the following species: *Thunnus thynnus*, *Thunnus orientalis*, *Thunnus maccoyii*.

Fiji	20.330	6.153	14.387	4.282	16.066	4.814	13.364	614	5.651	2.681
Hong Kong	3.190	89.034	3.699	79.570	6.488	183.966	3.963	126.094	4.965	163.303
Vietnam	4.311	18.788	6.181	33.699	5.182	56.199	4.133	46.742	4.892	94.642
USA	2.102	31.923	4.416	47.831	3.929	62.523	3.450	72.024	4.316	50.875
Indonesia	3.246	10.225	2.196	8.183	4.379	28.007	2.985	35.511	2.703	25.674
Other	85.584	96.473	60.383	113.001	103.218	157.614	29.985	188.143	20.565	154.049
<b>Total</b>	<b>279.125</b>	<b>1.060.026</b>	<b>304.657</b>	<b>863.182</b>	<b>347.936</b>	<b>861.034</b>	<b>204.445</b>	<b>872.577</b>	<b>140.365</b>	<b>881.956</b>

Source: Trade Data Monitor.

## Import of fishery and aquaculture products to Australia

In 2023, Australia imported fishery and aquaculture products to a volume of 365.474 tonnes and a value of EUR 1,69 billion. Imports of fishery and aquaculture products to Australia have seen some fluctuations since 2019, but the overall import volume has declined by 3,1%. However, in terms of value, there has been an increase of 12,5% during the same period. This is partly driven by higher prices on several of the fishery and aquaculture products imported to Australia, which partially reflects the impact of inflation during that period. China was the largest supplier to Australia with 61.560 tonnes in 2023, a decline of 4,7% from 2022. In terms of import value from China, this reached EUR 226 million, also down from 2022 by 18,4%. The second and third largest suppliers to the Australian market in 2023 were Thailand and the EU with 53.052 tonnes and 45.958 tonnes, respectively.

In terms of main commercial species, the main species supplied by China to Australia in 2023 were cephalopods such as squid and cuttlefish, marine fish such as herring, anchovy, sardine, sardinella, brisling and sprat, other non-food use (fish or marine mammal solubles), shrimp (miscellaneous), scallops and seaweed and other algae. From Thailand, the largest import volumes came from main commercial species such as tuna, shrimp and salmon.

Table 30. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO AUSTRALIA BY TRADE PARTNER**  
(volume in tonnes, value in 1.000 EUR)

Trade partner	2019		2020		2021		2022		2023	
	Volume	Value								
China	45.864	213.950	46.988	189.561	60.424	198.165	64.628	277.445	61.560	226.363
Thailand	64.154	291.883	62.273	270.573	54.440	237.426	69.208	347.264	53.052	269.024
EU	23.926	116.623	41.868	128.195	36.647	126.339	46.850	163.917	45.958	184.908
Vietnam	37.943	192.479	36.943	192.834	40.933	231.853	53.755	370.258	43.657	292.638
New Zealand	28.012	127.802	24.210	116.516	26.506	135.642	24.931	146.975	23.479	138.073
United States	17.499	57.453	24.701	65.086	20.140	56.081	21.199	72.148	17.754	65.784
Indonesia	13.349	60.824	17.412	61.600	19.439	79.882	20.391	99.660	17.446	81.009
Malaysia	14.209	56.213	12.148	38.967	13.663	44.012	16.040	58.118	12.987	44.714
Peru	15.253	28.956	22.396	39.204	20.108	41.769	16.528	47.166	9.750	26.870
India	2.684	5.723	3.818	6.223	3.565	6.838	4.189	12.889	8.236	27.669
Other	114.453	350.594	108.372	305.078	88.827	286.523	91.231	360.346	71.596	333.049
<b>Total</b>	<b>377.346</b>	<b>1.502.500</b>	<b>401.130</b>	<b>1.413.838</b>	<b>384.692</b>	<b>1.444.530</b>	<b>428.950</b>	<b>1.956.187</b>	<b>365.474</b>	<b>1.690.101</b>

Source: Trade Data Monitor.

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### 4.3. Trade flows with the EU

The EU has trade agreements in place with Australia, but both sides are now negotiating an update to this trade agreement. Negotiations were launched in 2018. On May 22 2018, the Council of the European Union adopted a decision to initiate negotiations for a Free Trade Agreement (FTA) with Australia. So far, trade and economic relations between the EU and Australia have been governed by the 2008 EU-Australia Partnership Framework. This framework aims to ease trade in industrial goods by reducing technical barriers, as well as enhancing trade in services and investment between the two regions.

In 2023, Australia was the EU's 21st largest trading partner for goods, while the EU ranked as Australia's third largest, following China and Japan but ahead of the United States. Total goods traded between the two amounted to EUR 52,1 billion, with the EU holding a surplus of EUR 24,8 billion. In addition, trade in services reached EUR 34,3 billion in 2022, contributing an EU surplus of EUR 16,5 billion<sup>38</sup>.

Australia has been a Member of the World Trade Organization (WTO) since its founding in 1995. The tariffs on Australian fishery products imported into the EU vary by species and product type. As of 2022, the EU-27 applies tariffs between 2 - 25% on seafood products from Australia<sup>39</sup>. Australia has relatively low tariffs on imported seafood, ranging from 0-5%. On average, there is a 2,8% estimated tariff on prepared or preserved fish, and no tariffs for crustaceans<sup>40</sup>.

#### EU export of fishery and aquaculture products to Australia

From 2019 to 2023, the export volume and value of fishery and aquaculture products from the EU to Australia saw an increase in both volume and value. The total export volume rose from 18.907 tonnes in 2019 to 35.224 tonnes in 2023, while the corresponding export value increased from EUR 113 million to EUR 170 million.

In 2023, the largest main commercial species group was "other non-food use" products with a volume of 10.767 tonnes. In the period between 2019 and 2023, export volume and value of other non-food use saw fluctuations. 99.5% of the other non-food use consisted of seaweeds and other algae (fresh, chilled, frozen or dried, whether or not ground, unfit for human consumption.) Herring expanded in value and volume between 2019 and 2023, with herring increasing from 1.580 tonnes in 2019 at a value of EUR 3,77 million to a volume of 6.260 tonnes and a value of EUR 7 million in 2023. Salmon remains a high-value export, with relatively stable volumes around 5.000-6.000 tonnes but substantial growth in value, reaching EUR 95,3 million in 2023 from EUR 65,9 million in 2019. There were no reported exports of fishmeal from the EU to Australia in 2019 or 2020, and only small volumes supplied in 2021 and 2022. Exports of fishmeal showed a spike in 2023 of 5.203 tonnes to a value of EUR 9 million. Exports of fish oil increased from 30 tonnes in 2019 to nearly 3.000 tonnes in 2023, and value increased from EUR 346.000 to EUR 13 million.

For other non-food use, almost all of the volume exported in 2023 came from Ireland (99,6%). The largest EU exporters of herring were Finland, Germany and Poland with 5.483 tonnes, 294 tonnes and 243 tonnes, respectively. The largest suppliers of salmon in 2023 were Denmark and Poland with 3.242 tonnes and 2.365 tonnes. Denmark was also the largest exporter in the EU of fishmeal and fish oil with 5.203 tonnes and 1.527 tonnes. Belgium and Germany were the second and third largest exporters of fish oil with 1.023 tonnes and 348 tonnes.

Table 31. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM THE EU TO AUSTRALIA BY MAIN COMMERCIAL SPECIES (volume in tonnes, value in 1.000 EUR)**

MCS	2019		2020		2021		2022		2023	
	Volume	Value								
Other non-food use	7.916	7.225	15.703	7.311	11.235	4.347	15.075	6.768	10.767	4.690

<sup>38</sup> European Commission. *Australia*. [https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/australia\\_en](https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/australia_en)

<sup>39</sup> Seafood Industry Australia. [https://seafoodindustryaustralia.com.au/wp-content/uploads/2023/01/European-Union\\_Market-opportunities-and-impediments-for-Australian-seafood.pdf](https://seafoodindustryaustralia.com.au/wp-content/uploads/2023/01/European-Union_Market-opportunities-and-impediments-for-Australian-seafood.pdf)

<sup>40</sup> International Trade Centre (ITC Trademap) 2022. ITC Trade Map.

Herring	1.580	3.770	3.116	4.940	4.361	5.545	6.588	8.258	6.260	7.026
Salmon	4.929	65.908	4.982	65.154	4.319	54.437	5.495	83.229	5.856	95.349
Fishmeal					14	228	4	58	5.203	9.105
Fishoil	30	346	434	1.548	138	871	216	1.798	2.941	13.105
Other	4.452	35.468	5.168	37.032	4.131	32.509	4.754	39.589	4.197	40.721
<b>Total</b>	<b>18.907</b>	<b>112.716</b>	<b>29.404</b>	<b>115.986</b>	<b>24.198</b>	<b>97.937</b>	<b>32.131</b>	<b>139.701</b>	<b>35.224</b>	<b>169.997</b>

Source: EUMOFA elaboration of Eurostat-Comext data.

## EU imports from Australia

The overall EU import volume from Australia decreased from 1.033 tonnes in 2019 to 965 tonnes in 2023, while the total value reached EUR 16 million in 2023, down from EUR 18,1 million in 2019. From 2019 to 2023, the volume and value of fishery and aquaculture products imported by the EU from Australia showed varying trends across product categories. Other marine fish<sup>41</sup> consistently account for the largest volume among imports, fluctuating between 737 tonnes in 2019 and 536 tonnes in 2023. Imports of warmwater shrimp<sup>42</sup> have seen growth in volume from 86 tonnes in 2019 to 137 tonnes in 2023, with a rise in value from EUR 1 million to EUR 1,7 million over the same period.

Imports of rock lobster and sea crawfish<sup>43</sup>, the third-largest group by volume, showed a peak in 2021 at 98 tonnes and EUR 3,05 million, followed by a decline to 56 tonnes and EUR 1,5 million in 2023. Imports of caviar, livers, and roes<sup>44</sup> also increased, with the volume growing from 44 tonnes in 2019 to 56 tonnes in 2023. Molluscs and aquatic invertebrates displayed a decrease in both volume and value over time, with volume declining from 70 tonnes in 2019 to 19 tonnes in 2023 and value from EUR 3,6 million in 2019 to EUR 1,5 million in 2023. For other marine fish, the Netherlands, Italy and Germany were the three largest importers in the EU in 2023 with a volume of 239 tonnes, 189 tonnes and 49 tonnes, respectively. For rock lobster and sea crawfish, Italy and Spain imported most with 17 tonnes each in 2023. Spain and France were the two largest markets for warmwater shrimp from Australia with 76 and 61 tonnes, both up from 2022. Caviar, livers and roe mainly entered into Italy and Greece, with the import volume to these two countries reaching 36 tonnes and 17 tonnes in 2023. Lastly, the Netherlands and Germany were the two largest markets for molluscs and aquatic invertebrates with 11 and 5 tonnes, respectively.

Table 32. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO THE EU FROM AUSTRALIA BY MAIN COMMERCIAL SPECIES (volume in tonnes, value in 1.000 EUR)**

MCS	2019		2020		2021		2022		2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Other marine fish	737	11.425	415	5.323	764	9.703	502	7.691	536	7.852
Shrimp, warmwater	86	1.036	36	396	120	1.439	84	1.233	137	1.688
Rock lobster and sea crawfish	2	106	4	123	98	3.052	85	2.725	56	1.496
Caviar, livers and roes	44	927	4	93	122	2.493	38	1.130	56	1.619

<sup>41</sup> Other marine fish (product description): "Fish, prepared or preserved (excl. fish whole or in pieces, preparations of surimi and salmonidae, anchovies, sardines, bonito, mackerel of the species *Scomber scombrus* and of the species *Scomber japonicus* and fish of the species *Orcynopsis unicolor*, tu, Fresh or chilled fillets of fish, Fresh or chilled fish, Frozen fish fillets, Frozen fish, Frozen meat of saltwater fish, Frozen raw fish fillets, coated with batter or breadcrumbs, whether or not pre-fried in oil (excl. salmonidae, herrings, sardines, sardinella, brisling or sprats, tunas, skipjack and Atlantic bonito, bonito "sarda spp.", mackerel, anchovies, fish of spe, Prepared or preserved sardines, bonito, mackerel of species *Scomber scombrus* and *japonicus* and fish of species *Orcynopsis unicolor* (excl. whole or in pieces)"

<sup>42</sup> Warmwater shrimp (product description): Frozen shrimps of the genus "Penaeus", even smoked, whether in shell or not, incl. shrimps in shell, cooked by steaming or by boiling in water.

<sup>43</sup> Rock lobster and sea crawfish (product description): Various preservations of *Palinurus* spp., *Panulirus* spp. and *Jasus* spp, lobster (prepared or preserved)

<sup>44</sup> Caviar substitutes prepared from fish eggs, Fish livers, roes and milt, dried, smoked, salted or in brine, Frozen fish livers, roes and milt (excl. hard and soft roes for the manufacture of deoxyribonucleic acid or protamine sulphate)

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Molluscs and aquatic invertebrates, other	70	3.569	76	4.123	72	4.132	33	1.837	19	1.457
Other	94	1.039	63	922	388	2.302	125	1.895	161	1.869
<b>Total</b>	<b>1.033</b>	<b>18.103</b>	<b>598</b>	<b>10.981</b>	<b>1.565</b>	<b>23.122</b>	<b>866</b>	<b>16.511</b>	<b>965</b>	<b>15.981</b>

Source: EUMOFA elaboration of Eurostat-Comext data.

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## 5. Case study: Haddock in the EU

Haddock is a white fish found in the Northeast Atlantic, affordable and popular among EU consumers. In 2022, the EU accounted for 6% of the world catch, with 17.748 tonnes (live weight equivalent), following an increasing trend observed since 2021. Ireland, France and Denmark are the main players in the EU in terms of haddock catches, together accounting for 82% of total EU catches in 2022. The EU production is complemented by extra-EU imports, mostly from Norway, and to a lesser extent from Russia and Iceland.

### 5.1. Biology, exploitation and management

Haddock (*Melanogrammus aeglefinus*) is a white fish, member of the Gadidae family. Adults are mostly found at 80-200 m over rock, sand, gravel or shells, usually at temperatures between 4° and 10°C. Haddock mainly feeds on small bottom-living organisms including crustaceans, molluscs, echinoderms, worms and fishes (sand lance, capelin, silver hake, American eel, herring and Argentine). It is a batch spawner undertaking extensive migrations in the Barents Sea and Iceland<sup>45</sup>. Haddock is mostly found in the Northeast Atlantic, from the Bay of Biscay to Spitzbergen, in the Barents Sea to Novaya Zemlya, around Iceland, and rarely present off southern Greenland. In the Northwest Atlantic it inhabits Cape May, New Jersey to the Strait of Belle Isle.



Haddock is caught by nets, hooks and lines, traps, seines and trawls<sup>46</sup>. Minimum conservation reference sizes are 30 cm in the North Sea, 30 cm in the whole area of North and Southwestern waters as well as in the Northeast Atlantic Fisheries Commission (NEAFC) area, and 27 cm in Skagerrak and Kattegat<sup>47</sup>. However, adult individuals can reach up to 60 cm in length and 4 kg in weight while its common length is 35 cm. The species is subject to TAC and quotas. The total allowable catch (TAC) is made up of separate quotas in different FAO subareas where the EU participate: the Irish Sea, Rockall, the North Sea, West of Scotland, the Skagerrak, the southern Celtic seas, the English Channel, and the Northeast Arctic.

For human consumption haddock is sold fresh, chilled as fillets, frozen, smoked and canned, but is also utilised for fish meal and animal feeds. It can be consumed steamed, fried, broiled, boiled, microwaved and baked<sup>48</sup>. Haddock is well appreciated in Europe, particularly for traditional meals and fast-food (fish and chips).

### 5. 2. Production

#### Global production

In 2022, global production of haddock (*Melanogrammus aeglefinus*) reached 309.345 tonnes LWE. It was mostly caught in the Northern Atlantic. Norway, Russia and Iceland accounted together for three quarters of global catches, with 30%, 27% and 18% respectively of production. The UK was also a major haddock producer, with 11% of total catches. EU-27 accounted for 6% of global catches.

Over the last decade (2013-2022), global production of haddock fluctuated between 288.751 tonnes LWE and 341.824 tonnes LWE, around an average of 317.261 tonnes, with no clear trend. Over the decade, most of the major producers

<sup>45</sup> <https://www.fishbase.se/summary/melanogrammus-aeglefinus.html>

<sup>46</sup> [https://fish-commercial-names.ec.europa.eu/fish-names/species/melanogrammus-aeglefinus\\_fr#ecl-accordion-header-prod-gears](https://fish-commercial-names.ec.europa.eu/fish-names/species/melanogrammus-aeglefinus_fr#ecl-accordion-header-prod-gears)

<sup>47</sup> Regulation (EU) 2019/1241: <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R1241&rid=4>

<sup>48</sup> <https://www.fishbase.se/summary/melanogrammus-aeglefinus.html>

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experienced decreases in haddock catches: -9% for Norway, -14% for Russia, -16% for the UK and 8% for EU27. The only major producer experiencing an increase in catches was Iceland (+24%). Minor producing countries have significantly progressed over the decade, such as the USA (+168%) and Faroe Islands (+113%).

Table 33. **WORLD CATCHES OF HADDOCK (volume in tonnes LWE)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Norway	101.240	94.210	96.987	110.321	115.449	95.368	95.487	91.292	102.980	91.659
Russia	95.674	79.225	92.005	115.711	106.867	90.486	76.370	89.163	98.316	82.526
Iceland	46.003	36.364	40.922	38.730	36.246	48.663	58.009	54.536	56.550	57.186
UK	39.742	36.334	33.280	34.001	34.382	35.595	33.624	28.864	25.242	33.222
EU-27	19.286	15.819	13.998	13.569	13.256	11.879	12.715	12.583	16.368	17.748
Others	17.311	26.800	30.814	29.492	32.685	34.201	40.634	37.800	29.855	27.004
<b>Total</b>	<b>309.256</b>	<b>288.751</b>	<b>308.006</b>	<b>341.824</b>	<b>338.886</b>	<b>316.193</b>	<b>316.840</b>	<b>314.238</b>	<b>329.271</b>	<b>309.345</b>

Source: FAO.

## EU production

In 2022, EU-27 catches of haddock reached 17.748 tonnes. These catches occurred in the Northeast Atlantic (99,9% v. 95% for global catches), and in the Northwest Atlantic (< 1% v. 5% for global). The main EU producers were Ireland, France and Denmark, together accounting for 82% of EU catches (31%, 26% and 25% respectively). Over the 2013-2022 period, the EU catches experienced an 8% decrease. However, trends have been very different among main producing countries, with increases reported in Ireland and Denmark (+35% and +64% respectively) and decreases in France and Germany (-51% and -16% respectively).

Table 34. **EU CATCHES OF HADDOCK (volume in tonnes live weight)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Ireland	4.069	3.394	3.126	3.772	3.933	3.605	4.462	4.528	5.686	5.491
France	9.448	6.935	6.228	5.267	5.339	4.947	4.998	4.163	4.706	4.644
Denmark	2.741	2.843	2.505	2.218	2.066	1.662	1.495	2.142	3.774	4.489
Germany	1.269	1.145	833	851	801	771	553	664	865	1.069
Netherlands	198	125	65	202	138	131	302	285	399	772
Sweden	331	373	339	248	295	242	204	173	271	458
Belgium	259	206	172	147	146	122	128	151	306	434
Spain	250	235	324	226	142	199	436	260	278	352
Others	637	505	327	512	368	190	125	201	39	39
<b>Total</b>	<b>19.202</b>	<b>15.761</b>	<b>13.919</b>	<b>13.443</b>	<b>13.228</b>	<b>11.869</b>	<b>12.703</b>	<b>12.567</b>	<b>16.324</b>	<b>17.748</b>

Source: FAO.

In 2022, landings of haddock in the EU27 amounted to 15.794 tonnes (net weight) for a value of EUR 30,3 million, almost exclusively consisting of fresh whole/gutted haddock. These landings mostly occurred in Ireland (36%), Denmark (32%) and France (20%), accounting for 88% of EU landing volume. Over the 2013-2022 period, EU-27 landings experienced a 36% decrease over 2013-2018 followed by a 56% increase over 2018-2022.

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Table 35. **LANDINGS OF HADDOCK IN THE EU (volume in tonnes net weight)<sup>49</sup>**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Ireland	3.641	3.138	3.353	4.163	3.207	3.543	4.591	4.834	5.768	5.693
Denmark	3.534	3.631	3.204	2.819	2.928	2.190	1.866	2.844	4.192	5.012
France	7.519	5.413	4.873	4.110	4.231	3.778	3.853	3.224	3.571	3.157
Netherlands	9	19	53	132	124	113	273	261	420	1.184
Spain	401	235	233	203	137	143	223	231	168	247
Sweden	310	287	142	80	70	80	58	46	73	226
Belgium	184	157	138	101	126	88	93	93	176	214
Others	315	184	258	99	188	170	210	105	195	61
<b>Total</b>	<b>15.912</b>	<b>13.063</b>	<b>12.255</b>	<b>11.707</b>	<b>11.012</b>	<b>10.105</b>	<b>11.167</b>	<b>11.638</b>	<b>14.564</b>	<b>15.794</b>

Source: EUROSTAT.

### 5. 3. First sales in the EU

In 2023, reported first sales of haddock in EU countries<sup>50</sup> to EUMOFA amounted to a volume of 14.710 tonnes and a value of EUR 28 million<sup>51</sup>. The main countries in terms of first sales volume and value were Denmark (46% of total volume and 37% of value), followed by Ireland (29% of total volume and 37% of total value) and France (17% of total volume and 25% of total value). Most first sales are whole gutted fish (77% of EU first sale value), far ahead of other types of presentation. In most cases, fish is preserved as fresh in 99% of volumes, otherwise frozen. In 2023, EU first sales increased by 10% in volume but decreased by 1% in value compared to 2022, with various evolutions between countries in first-sales volume (Denmark: +46%, Ireland: +7%, France: -26%) and value (Denmark: +16%, Ireland: +7%, France: -23%).

In Denmark, breakdown by sales venues for haddock is not available for confidentiality reasons. In other main producers, in 2023, Greencastle in Ireland accounted for 11% of the total first-sale volume in the EU, and 36% of Irish volumes. Other main Irish ports for haddock were Kilmore Quay (13%) and Midleton (7%). The main ports in France were located in Brittany – St Quay Portrieux (26% of France volumes), Le Guilvinec (15%), Erquy and Lorient (14% for each).

First-sales data shows a slight seasonality pattern with higher volumes sold in summer compared to the rest of the year. This seasonality is observed in France and Denmark, where price trends are related to these volume fluctuations with higher prices in winter and lower prices in summer when higher volumes are available.

In **Denmark**, over the 2020–2023 period, monthly first sales of haddock peaked at approximately 958 tonnes in September 2023, and reached their lowest level at 42 tonnes in March 2021. Monthly prices of haddock fluctuated between 0,54 and 3,06 EUR/kg.

In **Ireland**, over the 2020–2023 period, monthly first sales of haddock peaked at approximately 515 tonnes in July 2021, and reached their lowest level at 70 tonnes in December 2021. Monthly prices of haddock fluctuated between 1,60 and 2,71 EUR/kg.

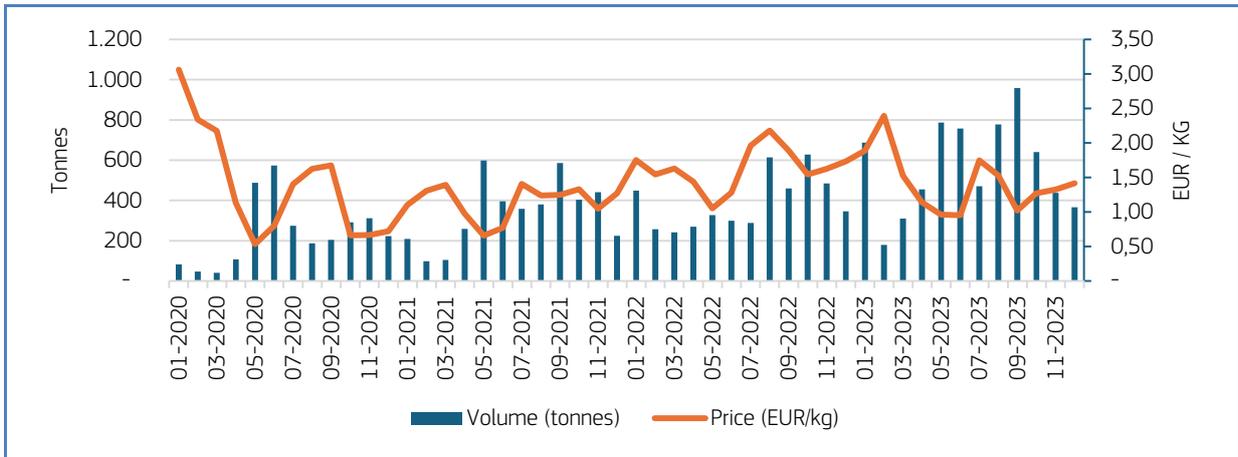
In **France**, over the 2020–2023 period, monthly first sales of haddock peaked at approximately 468 tonnes in November 2021, and reached their lowest level at 88 tonnes in April 2020. Monthly prices of haddock fluctuated between 1,96 and 3,23 EUR/kg.

<sup>49</sup> Totals do not correspond exactly to actual sums because of roundings.

<sup>50</sup> Belgium, Denmark, France, Germany, Ireland, Netherlands, Spain and Sweden.

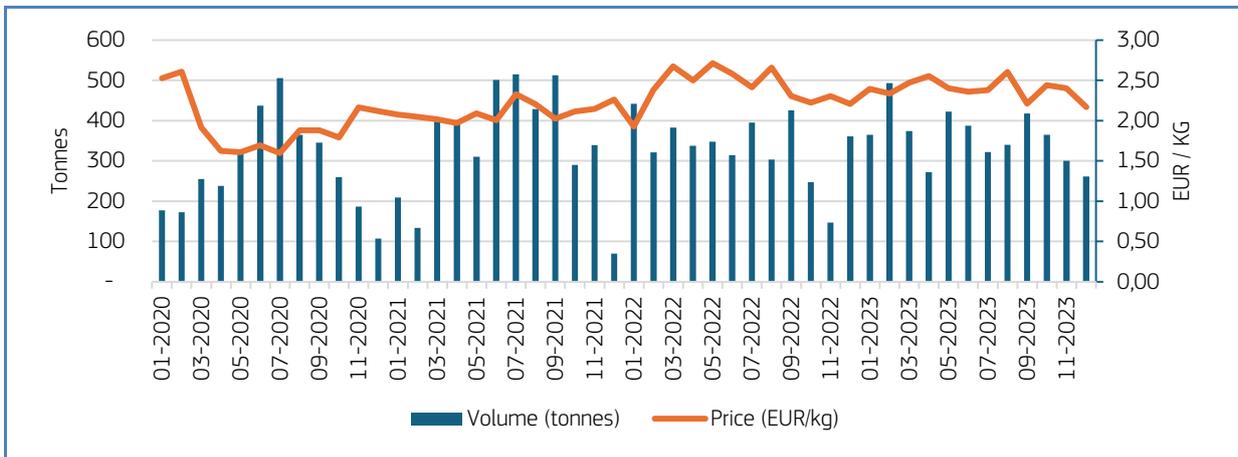
<sup>51</sup> Source: EUMOFA.

Figure 54. **FIRST SALES: HADDOCK IN DENMARK (volume in tonnes net weight and price in EUR/KG)**



Source: FAO.

Figure 55. **FIRST SALES: HADDOCK IN IRELAND (volume in tonnes net weight and price in EUR/KG)**



Source: FAO.

Figure 56. **FIRST SALES: HADDOCK IN FRANCE (volume in tonnes net weight and price in EUR/KG)**



Source: FAO.

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## 5. 4. Import – Export

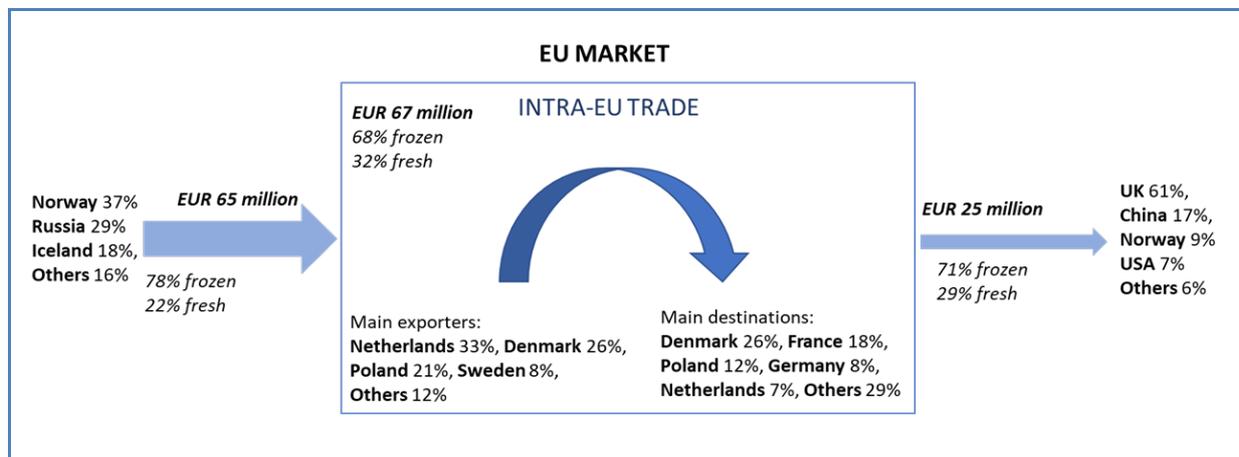
In the Combined Nomenclature used for registering EU import-export data, haddock is specifically reported as fresh or frozen, whole, in fillets or as frozen fish meat<sup>52</sup>.

In 2023, the EU-27 imported 20.462 tonnes (net weight) of haddock at a value of EUR 65 million, mostly frozen (78% of the total import value) and presented as whole/gutted fish and fillets (61% and 37% of import value respectively). The major providers of haddock to the EU market were Norway, accounting for 49% of the extra-EU import volume and 37% of extra-EU value, Russia (25% in import volume, 29% in value), and Iceland (11% in import volume, 18% in value). The Netherlands, Poland and Denmark were the main entry points of these imports to the EU, together accounting for 81% of haddock extra-EU import volume and 79% of import value.

In the same year, EU exports to third countries were much lower and amounted to 7.013 tonnes at a value of EUR 25 million. Frozen products accounted for 71% of the total extra-EU export value, and whole/gutted fishes accounted for 50% of the total value (47% for fillets). The main destinations in value terms were the United Kingdom (61% of the total value), China (17%), Norway (9%) and the USA (7%). Poland (33% of the total extra-EU export value) was the main EU exporter of haddock to third countries, followed by Denmark (25%) and the Netherlands (23%).

In 2023, intra-EU exports amounted to 22.812 tonnes, at a value of EUR 67 million. Intra-EU trade was dominated by frozen products which accounted for 68% of the export value – similar to extra-EU exports – whereas fresh products accounted for only 32% of the total export value. Half of the value was gutted/whole fish, and 46% for fillets. The main exporting countries within the EU were the Netherlands (33% of the intra-EU export value), Denmark (26%) and Poland (21%), while Denmark, France and Poland represented the main destination of intra-EU exports (26%, 18% and 12% respectively of intra-EU export value).

Figure 57. **THE HADDOCK TRADE MARKET IN 2023, IN VALUE**



Source: EUMOFA elaboration of Eurostat-COMEXT data.

<sup>52</sup> 03025200 - Fresh or chilled haddock "Melanogrammus aeglefinus"  
 03036400 - Frozen haddock "Melanogrammus aeglefinus"  
 03047200 - Frozen fillets of haddock "Melanogrammus aeglefinus"  
 03049530 - Frozen meat, whether or not minced, of haddock "Melanogrammus aeglefinus" (excl. fillets and surimi)

## 6. Global highlights

**EU/Baltic Sea:** On 23 October 2024, the European Council reached an agreement on fishing opportunities in the Baltic Sea for 2025. The Council adopted TACs for several key stocks, including sprat (-31%) and plaice (rollover). Eastern and western cod will be limited to by-catch only. The agreement considerably increases catches of Bothnian herring (+21%), Riga herring (+10%) and central Baltic herring (+108%). While the Council followed much of the Commission's August 2024 proposal, the Commission is concerned that parts of the agreement are less likely to contribute to the recovery of certain stocks and may not be in line with the applicable legal framework, including the Baltic multiannual plan.<sup>53</sup>



**EU/Bulgaria:** On 15 October 2024, Bulgaria and Romania endorsed the Charter of the EU Mission 'Restore our Ocean and Waters by 2030', committing to accelerate the restoration of the Danube River and Black Sea region. High-level representatives from both countries endorsed the Charter at the 'From the Danube source to Black Sea – Healthy Waters and healthy life' conference in Burgas, Bulgaria. The conference highlighted the EU Mission's efforts to empower communities in the Danube River and Black Sea region to become climate-neutral, sustainable and resilient by leveraging research and innovation projects.<sup>54</sup>

**EU/NAFO:** Between 23-27 September 2024, the 46<sup>th</sup> Annual Meeting of the Northwest Atlantic Fisheries Organization (NAFO) took place in Halifax, Nova Scotia, Canada. The meeting focused on the sustainable management of key fish stocks in the Northwest Atlantic. NAFO reopened a fishery and established a revised sharing agreement for Northern cod, proportionally increasing the EU share from 1991 levels to reflect its current composition. NAFO agreed to a new methodology for the management of Greenland halibut stocks and will set fishing opportunities according to the new Harvest Control Rule. The EU supported an approach to redfish that takes into account scientific uncertainty about the status of the stock, reducing catches but not closing the fisheries.<sup>55</sup>

**EU/EFCA:** On 17 October 2024, the Administrative Board of the European Fisheries Control Agency (EFCA) approved the Agency's work programme for 2025 and Multiannual Work Programme for 2025-2029. The Agency's focus for 2025 will be on providing support as the Commission and Member States prepare to apply the new rules and requirements set out in the revised Fisheries Control Regulation. Internationally, the Agency will implement new projects to fight IUU fishing in Western Africa and the Southwestern Indian Ocean.<sup>56</sup>

**EU-Africa:** On 10 October 2024, the Africa-Europe Ocean Strategic Group presented its report on how to help the two continents work together on ocean issues. The group was set up by the European Commission in partnership with the African Union Commission. It is run by the Africa-Europe Foundation with funding from the European Maritime, Fisheries and Aquaculture Fund (EMFAF). The new report aims to help Europe and Africa strengthen cooperation on ocean-related matters, identifying 17 main actions within the priority areas of ocean governance, capacity-sharing, and finance and investment.<sup>57</sup>

<sup>53</sup> [https://oceans-and-fisheries.ec.europa.eu/news/agreement-reached-2025-fishing-opportunities-baltic-sea-2024-10-23\\_en](https://oceans-and-fisheries.ec.europa.eu/news/agreement-reached-2025-fishing-opportunities-baltic-sea-2024-10-23_en)

<sup>54</sup> [https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/bulgaria-and-romania-endorse-eu-mission-ocean-and-waters-charter-2024-10-15\\_en&pk\\_campaign=rtd\\_news](https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/bulgaria-and-romania-endorse-eu-mission-ocean-and-waters-charter-2024-10-15_en&pk_campaign=rtd_news)

<sup>55</sup> [https://oceans-and-fisheries.ec.europa.eu/news/nafo-annual-meeting-2024-key-decisions-cod-and-red-fish-stocks-2024-10-01\\_en](https://oceans-and-fisheries.ec.europa.eu/news/nafo-annual-meeting-2024-key-decisions-cod-and-red-fish-stocks-2024-10-01_en)

<sup>56</sup> <https://thefishingdaily.com/latest-news/efca-approves-2025-work-programme-at-43rd-administrative-board-meeting/>

<sup>57</sup> [https://oceans-and-fisheries.ec.europa.eu/news/africa-europe-ocean-strategic-group-drives-partnership-between-two-continents-2024-10-14\\_en](https://oceans-and-fisheries.ec.europa.eu/news/africa-europe-ocean-strategic-group-drives-partnership-between-two-continents-2024-10-14_en)

## 7. Macroeconomic Context

### 7.1. Marine fuel

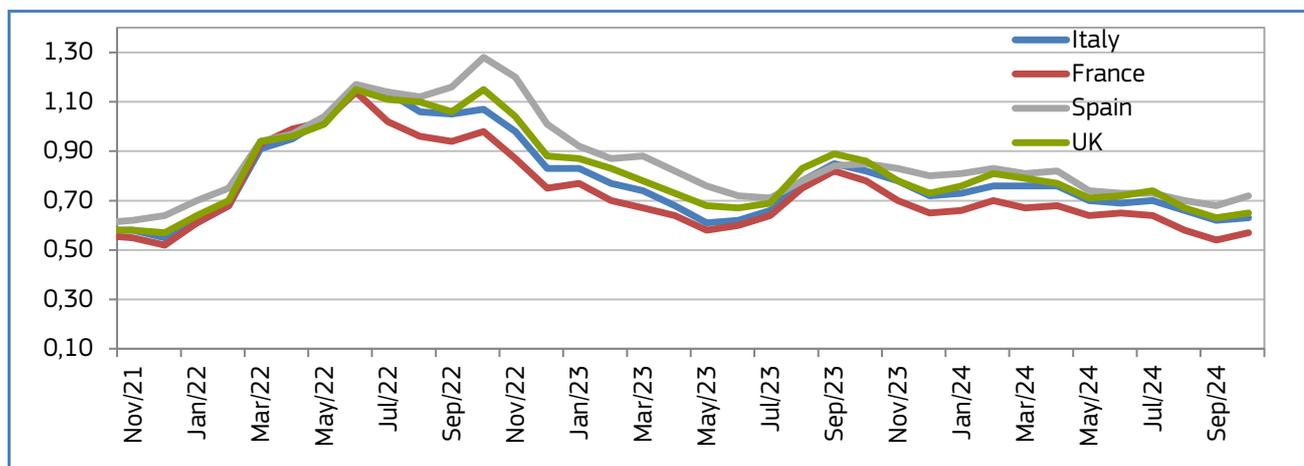
Average prices for Marine fuel in **October 2024** ranged between 0,57 and 0,72 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of 4% compared with the previous month and decreased by an average of 22,4% compared with the same month in 2023.

Table 36. **AVERAGE PRICE OF MARINE DIESEL IN FRANCE, ITALY, SPAIN, AND THE UK (EUR/litre)**

Member State	Sep 2024	Change from Aug 2024	Change from Sep 2023
France <i>(ports of Lorient and Boulogne)</i>	0,57	6%	-27%
Italy <i>(ports of Ancona and Livorno)</i>	0,63	2%	-23%
Spain <i>(ports of A Coruña and Vigo)</i>	0,72	6%	-15%
The UK <i>(ports of Grimsby and Aberdeen)</i>	0,65	3%	-24%

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

Figure 58. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**

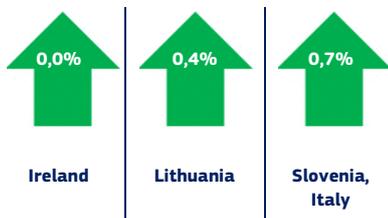


Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

### 7.2. Consumer prices

The EU annual inflation rate was 2,1% in September 2024, down from 2,4% in August 2024. A year earlier, the rate was 4,9%.

**Inflation: lowest rates in September 2024, compared with August 2024.**



**Inflation: highest rates in September 2024, compared with August 2024.**



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Table 37. HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)

	Sep 2022	Sep 2023	Aug 2024	Sep 2024	Change from Aug 2024		Change from Sep 2023	
<b>Food and non-alcoholic beverages</b>	128,29	140,30	143,08	143,38	↑	0,2%	↑	2,2%
<b>Fish and seafood</b>	129,44	138,84	141,53	141,39	↓	0,1%	↑	1,8%

Source: Eurostat.

### 7.3. Exchange rates

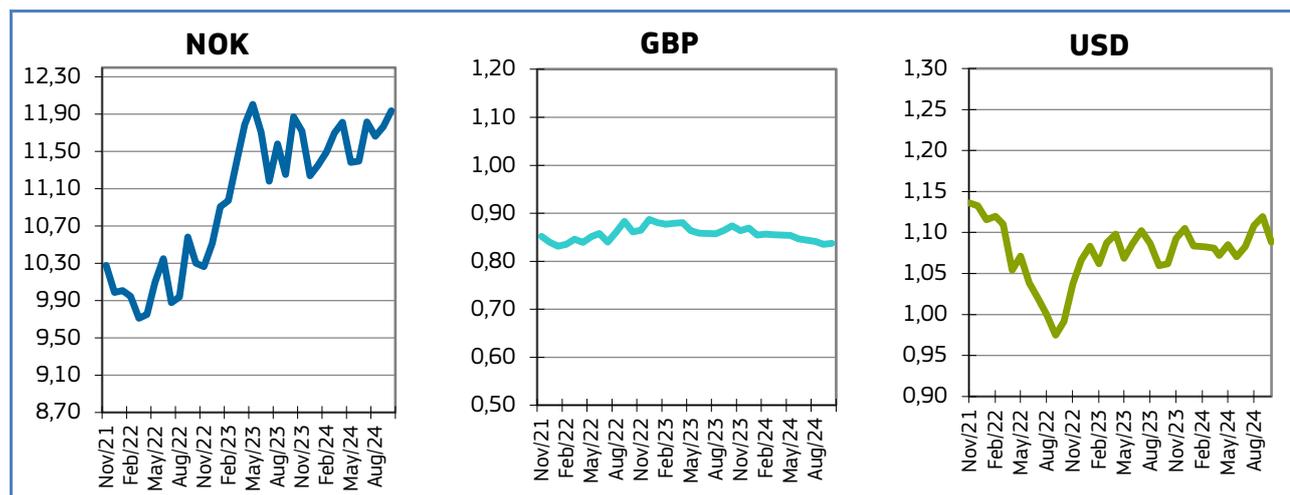
Table 38. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Oct 2022	Oct 2023	Sep 2024	Oct 2024
NOK	10,3028	11,8735	11,7645	11,9385
GBP	0,8612	0,8737	0,8354	0,8375
USD	0,9914	1,0619	1,1196	1,0882

Source: European Central Bank.

In October 2024, the euro depreciated against the US dollar (2,8%) and appreciated against the Norwegian krone (1,5%) and the British pound sterling (0,3%) relative to the previous month. For the past six months, the euro has fluctuated around 0,8430 against the British pound sterling. Compared with October 2023, the euro has depreciated 4,1% against the British pound sterling and appreciated 0,5% against the Norwegian krone and 2,5% against the US dollar.

Figure 59. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

Manuscript completed in November 2024

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

**First sales:** ICES, ICCAT, Fishsource, FAO, Eurofish, GFCM-FAO, EUR-lex, BIM, Produits de la mer, Trinity College Dublin, The University of Dublin.

**Consumption:** Dutch Fish Marketing Board, Polish Institute of Agricultural and Food Economics - National Research Institute, University of Copenhagen, FishBase.

**Case studies:** Australian Department of Agriculture, Fisheries and Forestry, Australian Fisheries Management Authority, Department of Natural Resources and Environment Tasmania, Australian Prawn Farmers Association, Australian Southern Bluefin Tuna Industry, International Oyster Symposium Proceedings, Australian Barramundi Farmers Association, EU Commission, Seafood Industry Australia, ITC Trademap, FAO, Eurostat, Fishbase, EUR-lex, Scandinavian Fishing Yearbook.

**Global highlights:** European Commission, The fishing daily, Statistics Iceland.

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

The underlying first-sales data are 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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