European Commission

Monthly Highlights

No. 3 / 2025

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

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Contents

Maritime Affairs and Fisheries

1. GLOBAL HIGHLIGHTS

EU / Fishery: On 21 February 2025, the Commissioner for Fisheries and Oceans, Costas Kadis, launched the first Fisheries and Ocean Dialogue, a crucial step in shaping the European Ocean Pact. The high-level roundtable gathering brought together a diverse array of policymakers, stakeholders and experts to discuss the future of the EU's ocean governance. Participants tackled pressing issues facing the EU's ocean governance model, including challenges and priorities for addressing them. Measures to protect biodiversity and promote ecosystem-based management of the ocean were explored, as well as opportunities for sustainable growth and job creation in the EU's blue economy and supporting the resilience and sustainability of coastal communities and cities in the EU's various sea basins. The Dialogue marked a significant step forward in shaping the European Ocean Pact, which is expected to play a crucial role in ocean governance.[1]

EU / Seafood consumption: On 20 February 2025, the results of a survey of the Eurobarometer were announced and showed new trends in the consumption of fishery and aquaculture products. Seafood products remained a staple in European diets, although a decline in overall consumption frequency was revealed since the 2021 survey. The survey also revealed that perceived increases in prices affected consumers' decisions, leading to more cautious decisions in their spending due to the current economic context. Proximity to the sea strongly influenced higher consumption of fish and seafood, and those living closer to the coast were more likely to prefer wild-caught products to farmed ones. Practical and product-specific information on the labels remained essential for half of the respondents: expiry date, species name, method of production and origin were the information most expected. For the first time, questions on seaweed and algae were also included in the survey. Although seaweed and algae products have not yet reached mainstream acceptance, two thirds of respondents have eaten algae products at least once in the last year. Half of the respondents like the taste and one-third believe algae are beneficial for health[2].

EU / Fishery: On 12 February 2025 the European Union established for the first time a harmonised system to collect catch data from recreational fisheries in marine coastal areas across the EU. To manage fish stocks sustainably, it is important to understand the factors that affect them, including the impact of recreational fishing. The new implementing regulation has been adopted to harmonise the reporting process for recreational fishing data from Member States to the Commission. This will help establish a comprehensive and accurate understanding of the current recreational fishing landscape[3].

Faroe Islands / Fishery: The Faroese Ministry of Fisheries has allocated 6.500 tonnes of blue whiting for industrial fishing trials, focusing on innovation and gear efficiency. The application deadline was 31 January 2025. Following an internal review, the Ministry approved eight applications, to support innovation and value-added processing within the fishing sector.

Norway / Fishery: During week 8 of 2025, Norwegian fishers landed 40 tonnes of fresh king crab, with a total market value of EUR 1,52 million. This represented a decrease from 54 tonnes and EUR 2,12 million landed during the previous week. So far in 2025, Norwegian vessels have delivered a total of 3.922 tonnes of snow crab, with 1.556 tonnes sold for EUR 16,1 million. King crab landings have declined, while snow crab deliveries remain steady, contributing significantly to Norway's seafood market. Industry stakeholders continue to monitor market trends and pricing fluctuations in both segments[4].

Iceland / Fishery: Landed catch in January 2025 was amounted to approx. 79.000 tonnes, which was 12% less than in January 2024. During the twelve-month period from February 2024 to January 2025, the total catch was 985.000 tonnes, slightly lower than the 1,36 million tonnes registered the year before. The reduction was mainly due to no capelin being caught[5].

[1] https://oceans-and-fisheries.ec.europa.eu/news/commissioner-kadis-kicks-european-ocean-pact-high-level-fisheries-and-ocean-dialogue-2025-02-21_en
[2] https://oceans-and-fisheries.ec.europa.eu/news/eurobarometer-survey-shows-new-trends-fishery-and-aquaculture-products-consumption-2025-02-20_en
[3] https://oceans-and-fisheries.ec.europa.eu/news/eu-takes-steps-harmonise-collection-catch-data-recreational-fisheries-2025-02-12_en
[4] https://thefishingdaily.com/norwegian-fishing-industry-blog/week-08-of-2025-norwegian-king-crab-and-snow-crab-landings-decline/
[5] https://statice.is/publications/news-archive/fisheries/fish-catch-in-january-2025/

2. MACROECONOMIC CONTEXT

2.1. Marine fuel

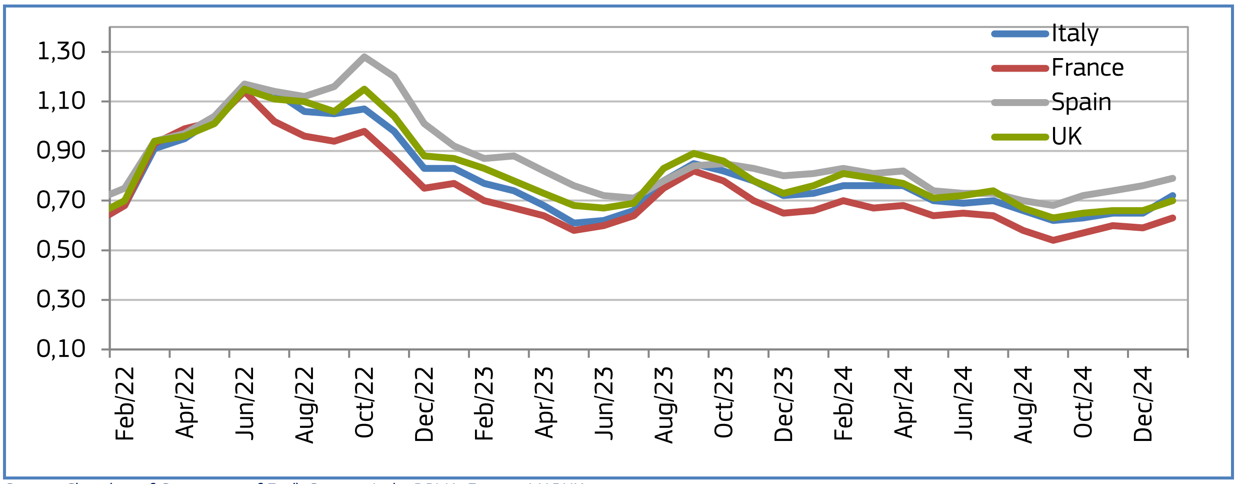
Average prices for marine fuel in **January 2025** ranged between 0,63 and 0,79 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 6,8% compared with the previous month and decreased by an average of 4,1% compared with the same month in 2024.

Table 1. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/LITRE)**

Country	January 2025	Change from Dec 2024	Change from Jan 2024
France *(ports of Lorient and Boulogne)*	0,63	7%	-5%
Italy *(ports of Ancona and Livorno)*	0,72	11%	-1%
Spain *(ports of A Coruña and Vigo)*	0,79	4%	-2%
The UK *(ports of Grimsby and Aberdeen)*	0,70	6%	-8%

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

Figure 1. **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.

2. 2. Consumer prices and inflation

The EU annual inflation rate was 2,8% in January 2025, up from 2,7% in December 2024. A year earlier, the rate was 3,1%.

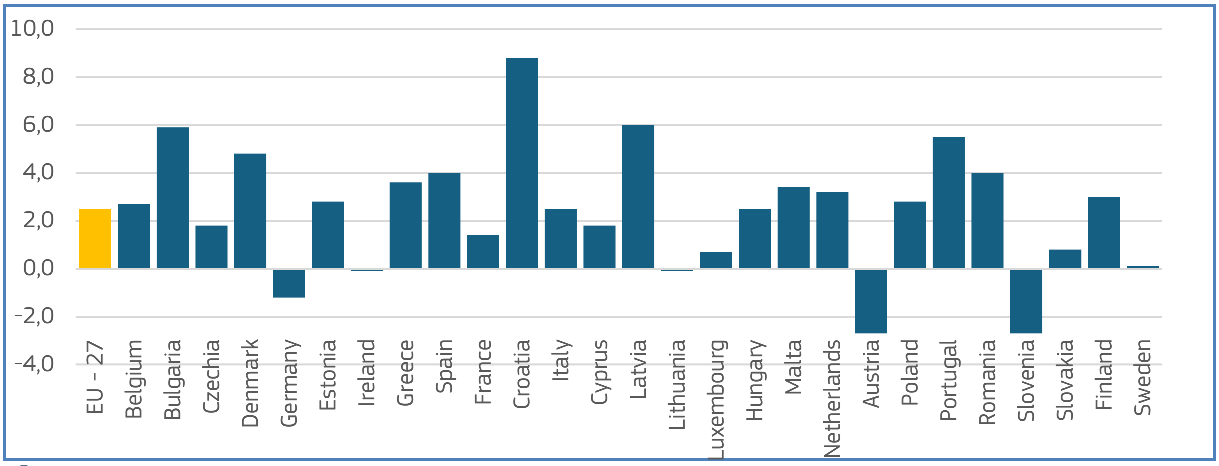
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR JANUARY 2025, COMPARED WITH JANUARY 2024**

Lowest inflation rates		Highest inflation rates	
Denmark	+1,4%	Hungary	+5,7%
Ireland, Italy	+1,7%	Romania	+5,3%
Finland	+1,7%	Croatia	+5,0%

Source: Eurostat.

2. 3. Annual inflation rate of fish and seafood products in the EU

Figure 2. **ANNUAL RATE OF CHANGE FOR FISH AND SEAFOOD PRODUCTS IN JANUARY 2025 (value expressed in percentage)**



Source: Eurostat.

Table 3. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)**

	Jan 2023	Jan 2024	Dec 2024	Jan 2025	Change from Dec 2024	Change from Jan 2024
Food and non-alcoholic beverages	18,0	5,1	2,4	2,4	0,0%	-52,9%
Fish and seafood	13,9	3,8	2,6	2,5	-3,8%	-34,2%
Fresh or chilled fish	11,7	3,2	4,8	4,4	-8,3%	37,5%
Frozen fish	19,0	3,7	-0,3	0,3	-200,0%	-91,9%
Fresh or chilled seafood	8,2	2,6	2,7	3,4	25,9%	30,8%
Frozen seafood	9,0	0,8	-1,1	-0,4	-63,6%	-150,0%
Dried, smoked or salted fish and seafood	17,7	4,0	3,8	3,6	-5,3%	-10,0%
Other preserved or processed fish and seafood and fish and seafood preparations	16,9	5,7	1,5	1,1	-26,7%	-80,7%

Source: Eurostat.

2. 4. Exchange rates

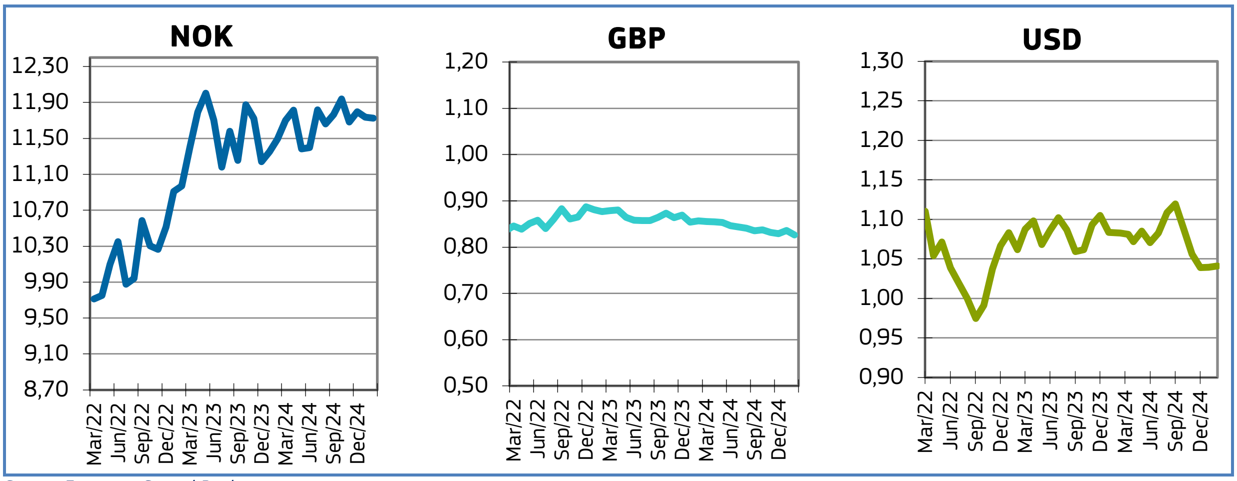
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Feb 2023	Feb 2024	Jan 2025	Feb 2025
NOK	10,9713	11,4920	11,7373	11,7245
GBP	0,8770	0,8566	0,8361	0,8261
USD	1,0619	1,0826	1,0393	1,0411

Source: European Central Bank.

In February 2025, the euro depreciated against the Norwegian krone (0,1%) and the British pound sterling (1,2%), while it appreciated against the US dollar (0,2%), relative to the previous month. For the past six months, the euro has fluctuated around 0,8327 against the British pound sterling. Compared with January 2025, the euro has appreciated 2,0% against the Norwegian krone and depreciated 3,6% against the British pound sterling and 3,8% against the US dollar.

Figure 3. **TREND OF EURO EXCHANGE RATES**



Source: European Central Bank.

3. FIRST SALES IN EUROPE[6]

3. 1. Year-to-date comparison of first sales

Increases in value and volume (Jan-Dec 2024 vs Jan-Dec 2023): Bulgaria, Ireland and the United Kingdom recorded an increase in both first-sales value and volume. Increases in Bulgaria were mainly due to clam.

Decreases in value and volume (Jan-Dec 2024 vs Jan-Dec 2023): Cyprus, Denmark, Finland, Germany, Italy, Portugal, Sweden and Norway recorded decreases in first-sales value and volume. Sweden stood out with the most significant drops in relative terms, due to lower first-sales of sprat and herring.

Table 5. **JANUARY-DECEMBER OVERVIEW OF FIRST SALES FROM THE REPORTING COUNTRIES (volume in tonnes and value in million EUR) ***

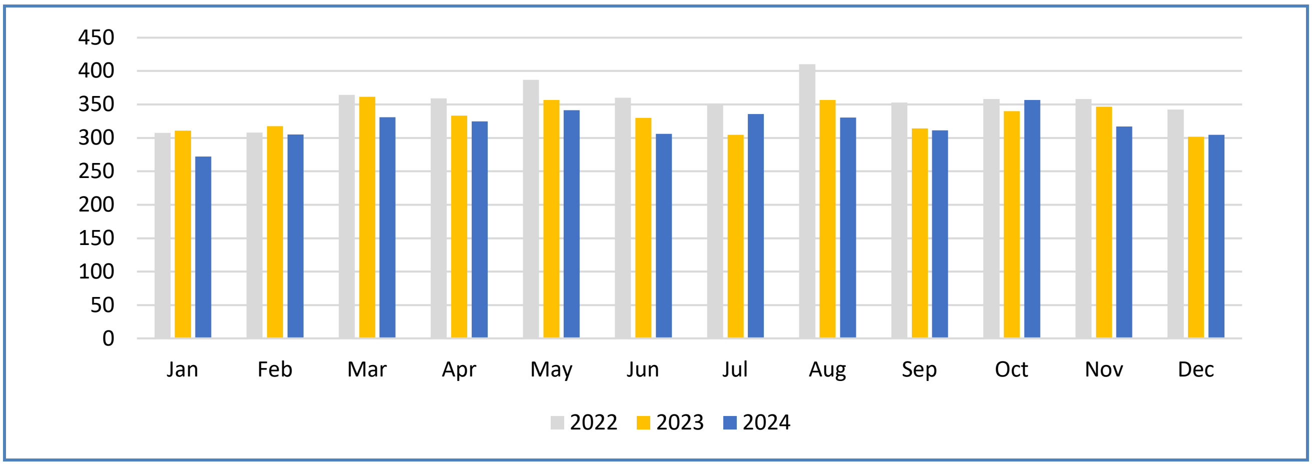
	January – December 2022		January – December 2023		January – December 2024		Change from January – December 2023	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Bulgaria	1.946	1,36	2.783	1,50	3.174	2,49	14%	66%
Cyprus	661	3,19	655	3,30	600	3,19	-8%	-3%
Denmark	617.373	465,57	733.343	541,03	681.455	502,02	-7%	-7%
Estonia	66.917	18,76	72.667	30,61	65.123	31,69	-10%	4%
Finland	54.021	13,56	56.254	17,41	46.393	16,80	-18%	-3%
France	276.133	792,60	247.894	731,32	247.310	728,51	0%	0%
Germany	36.307	105,95	36.870	75,64	26.060	52,09	-29%	-31%
Ireland	176.426	285,34	176.178	247,77	188.439	249,72	7%	1%
Italy	83.855	376,55	73.046	327,25	62.117	282,89	-15%	-14%
Latvia	43.840	9,85	45.018	13,20	39.796	14,55	-12%	10%
Lithuania	792	0,62	306	0,66	325	0,51	6%	-23%
Netherlands	95.132	201,68	62.404	146,15	23.430	148,85	-62%	2%
Poland	55.134	13,83	64.942	27,33	59.585	29,96	-8%	10%
Portugal	111.772	291,59	122.328	299,04	113.640	290,07	-7%	-3%
Spain	456.473	1.589,56	415.483	1.428,08	398.071	1.421,81	-4%	0%
Sweden	126.672	88,56	111.729	82,95	51.416	60,26	-54%	-27%
Norway	2.886.786	3.310,28	2.898.413	3.130,64	2.684.533	3.027,07	-7%	-3%
United Kingdom	310.180	656,09	353.062	696,53	364.035	710,56	3%	2%

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 (nominal values without VAT). For Norway, prices are reported in EUR/kg of live weight.*

[6] During January–December 2024, 16 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.

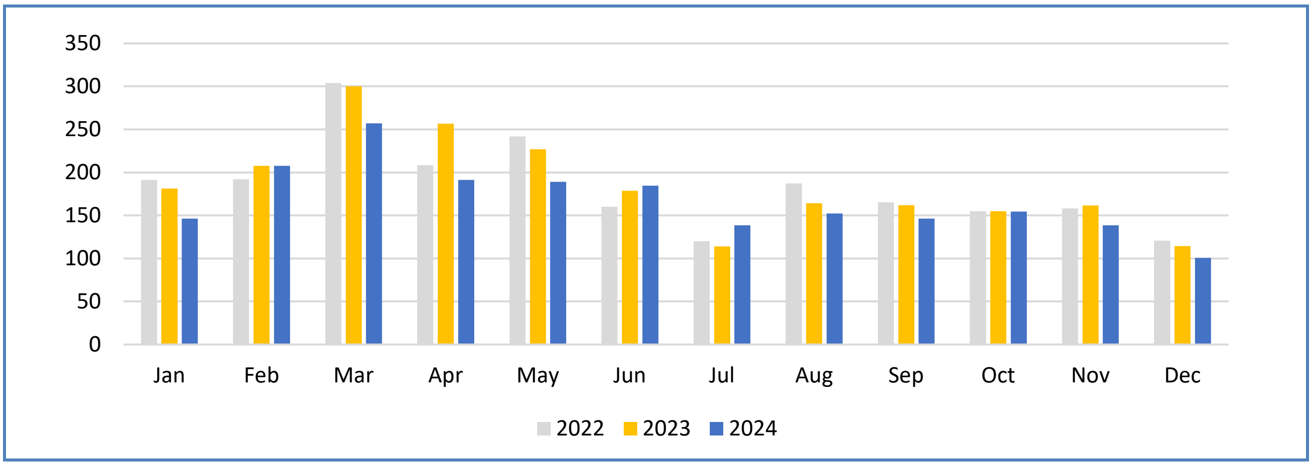
The overall value in the period January-December in 2024 was EUR 3,8 billion, a 3% decrease compared to 2023 and 10% less compared to 2022. While the overall volume was 2,0 million tonnes, this was a 10% decrease compared to 2023 and a 9% decrease compared to 2022.

Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VALUE FROM THE REPORTING COUNTRIES (value in million EUR)**



From January to December 2024, monthly first-sales values decreased compared to the previous two years, except in July and October. Of the three years analysed, 2022 recorded the highest total first sales values, with peaks observed in May and August. While the decline was already observed in 2023, first sales values in May and August 2024 showed a further decrease of -12% and -19%, respectively, compared to 2022. Similarly, first sales volumes in 2024 decreased across most months, except for February, June and July, when they increased compared to 2022 and 2023. The most significant drops in first-sales volume compared to 2022 were recorded in January (-23%), May (-22%) and August (-19%).

Figure 5. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VOLUME FROM THE REPORTING COUNTRIES (volume in 1000 tonnes)**



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3. 2. First-sales evolution at commodity group level[7,8]

Bivalves and other molluscs and aquatic invertebrates

In 2024, first-sales value of “Bivalves and other molluscs and aquatic invertebrates” amounted to EUR 249,5 million, a 10% decrease compared to 2023. First-sales volume came to 96.159 tonnes, a decrease of 7% compared to 2023. Clams and scallops were the main commercial species driving the decline in the value of the commodity group (-10% and -5%, respectively), while mussels Mytilus spp. and clams were the main contributors to the decrease in volume (-35% and -7%, respectively).

Figure 6. **FIRST SALES VALUE AND VOLUME OF BIVALVES, JAN 2022 - DEC 2024**

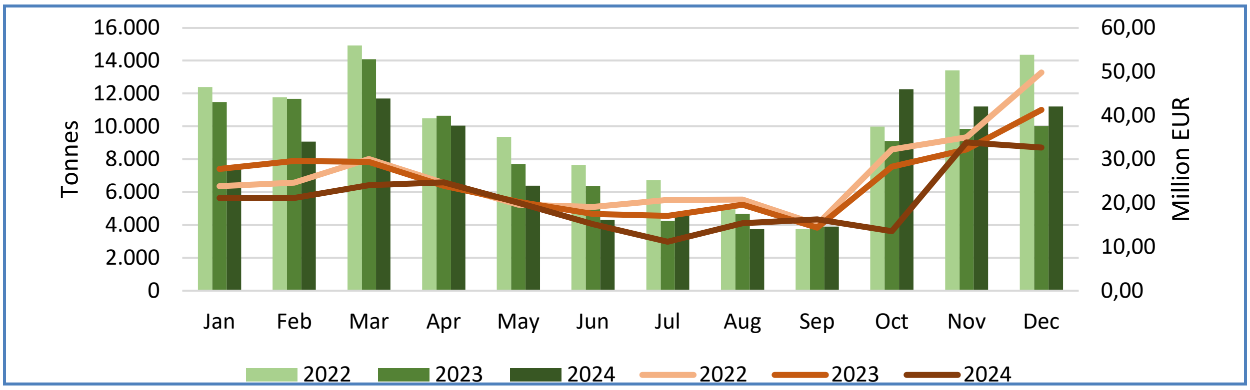


Table 6. **FIRST SALES PRICES OF BIVALVES MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
Spain	Clam	10,47 EUR/kg	10,80 EUR/kg	+3%
France	Scallop	2,69 EUR/kg	2,46 EUR/kg	-8%
Denmark	Clam	0,85 EUR/kg	0,88 EUR/kg	+4%

Cephalopods

In 2024, first-sales value of “Cephalopods” totalled EUR 306,4 million, a stable value compared to 2023. Landings came to 50.810 tonnes, a decrease of 1% compared to 2023. Octopus (-19%) and cuttlefish (-21%) were the two main commercial species driving the decline in first sales volume.

[7] This section explores the evolutionary trends at commodity group level, covering volume, value and price dynamics alongside the composition of the primary species since the start of the year. It emphasizes those species that exert the greatest influence in terms of value contribution and explores the trajectory of their price fluctuations over time. https://eumofa.eu/documents/20124/35680/Metadata+2+-+DM+-+Annex+3+Corr+of+MCS_CG_ERS.PDF/1615c124-b21b-4bff-880d-a1057f88563d?t=1618503978414

[8] The data analyzes in this section (figures and tables) is donwloaded from the EUMOFA database and is provided by national sources or collected through their related website. https://eumofa.eu/sources-of-data

Figure 7. **FIRST SALES VALUE AND VOLUME OF CEPHALOPODS, JAN 2022 – DEC 2024**

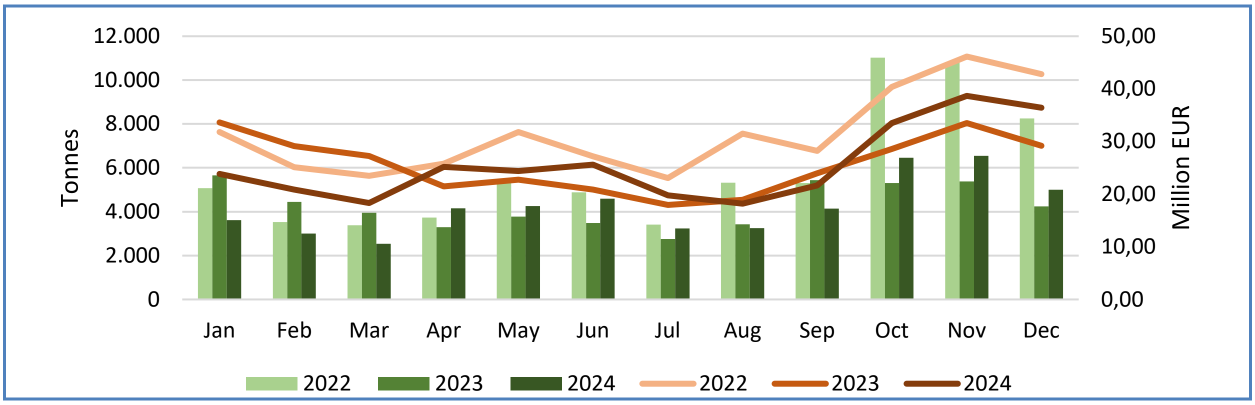


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
Portugal	Octopus	7,76 EUR/kg	7,94 EUR/kg	+2%
France	Octopus	6,42 EUR/kg	7,18 EUR/kg	+12%
Italy	Octopus	7,32 EUR/kg	7,71 EUR/kg	+5%

Crustaceans

In 2024, first-sale value of "Crustaceans" totalled EUR 642,3 million, an increase of 7% compared to 2023. Landings amounted to 78.154 tonnes, an increase of 18% compared to 2023. Shrimp *Crangon* spp. (+35% and +33%) and crab (+24% and +73%) were the two main products responsible for the increase in first-sales value and volume.

Figure 8. **FIRST SALES VALUE AND VOLUME OF CRUSTACEANS, JAN 2022 – DEC 2024**

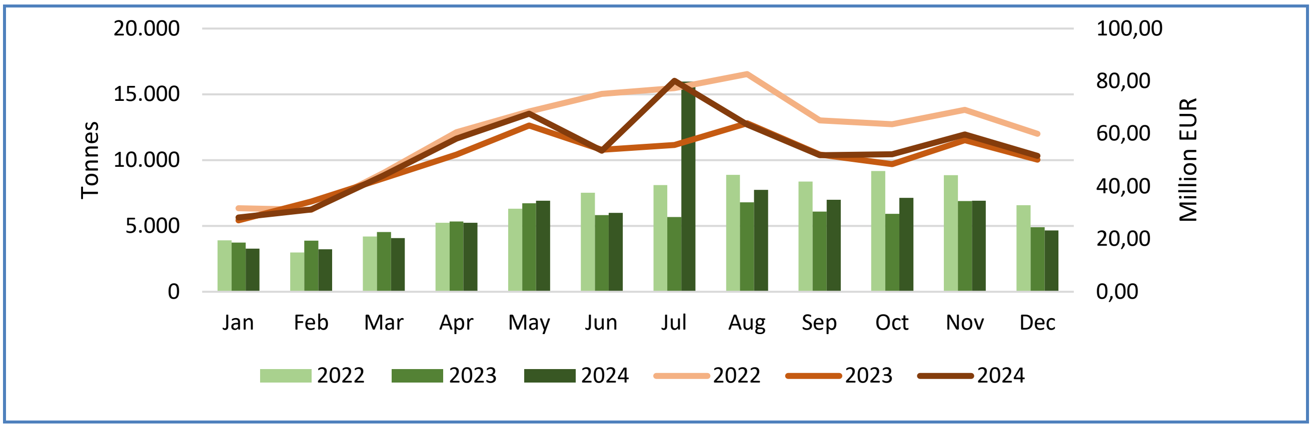


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
The Netherlands	Shrimp *Crangon* spp.	6,63 EUR/kg	6,20 EUR/kg	-7%
France	Crab	2,71 EUR/kg	1,51 EUR/kg	-45%
Spain	Deep-water rose shrimp	8,79 EUR/kg	9,48 EUR/kg	+8%

Flatfish

In 2024, first-sales value of "Flatfish" came to EUR 298,0 million, a decrease of 10% compared to 2023. Landings amounted to 47.796 tonnes, a decrease of 18% compared to 2023. European plaice and Greenland halibut contributed mainly to the decline in first sales value (-25% and -21%, respectively), while European flounder and European plaice were the main species driving the decrease in volume (-40% and -15%, respectively).

Figure 9. **FIRST SALES VALUE AND VOLUME OF FLATFISH, JAN 2022 – DEC 2024**

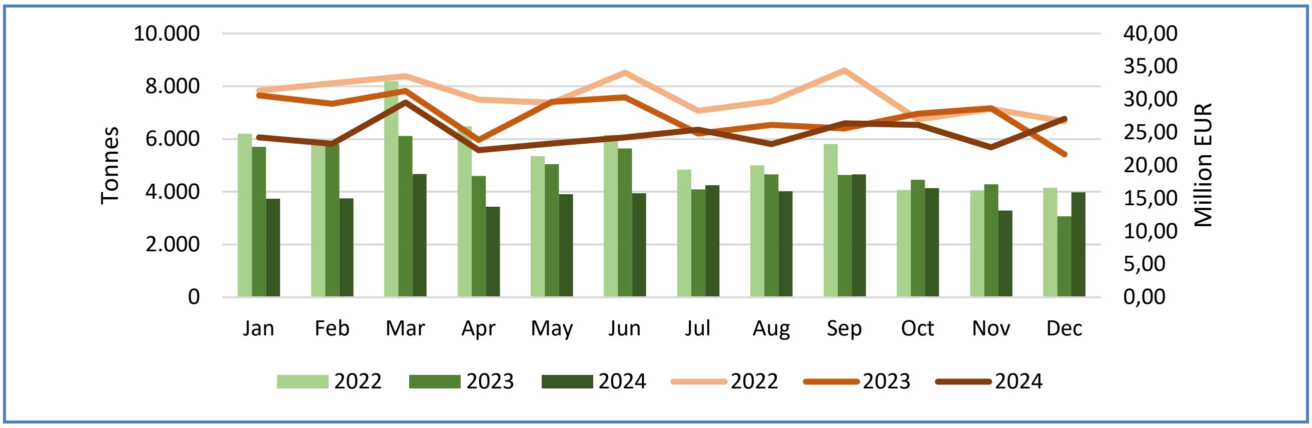


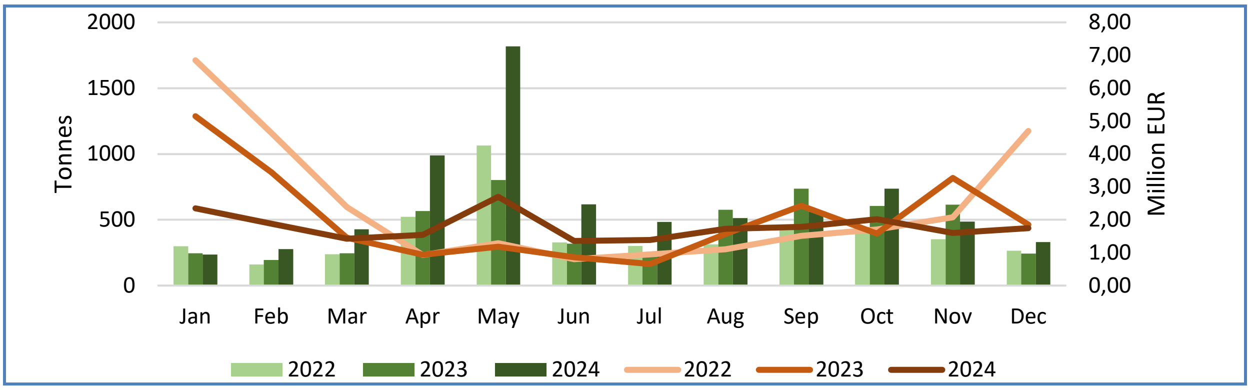
Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
Netherlands	European plaice	2,90 EUR/kg	2,60 EUR/kg	-10%
Netherlands	Common sole	16,71 EUR/kg	17,38 EUR/kg	+4%
Denmark	European plaice	3,28 EUR/kg	2,77 EUR/kg	-16%

Freshwater fish

In 2024, the first-sales value of "Freshwater fish" came to EUR 21,51 million, a decrease of 12% compared to 2023. Landings amounted to 7.482 tonnes, an increase of 39% compared to 2023. Eel was the main species responsible for the decrease in first sales value (-33%), while other freshwater fish[9] was the main contributor to the increase in volume (+50%).

Figure 10. **FIRST SALES VALUE AND VOLUME OF FRESHWATER FISH, JAN 2022 – DEC 2024**



[9] The commodity group "Freshwater Fish" includes seven Main Commercial Species (MCS): carp, eel, freshwater catfish, pike, pike perch, tilapia, and other freshwater fish. During the analyzed period, „Other freshwater fish" encompassed 29 different freshwater species. Among them, the most significant were European perch, freshwater bream, round goby, and roach, which together accounted for nearly 90% of the total volume within this MCS.

Table 10. **FIRST-SALES PRICE OF FRESHWATER FISH MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
France	Eel	41,48 EUR/kg	20,62 EUR/kg	-50%
Denmark	Eel	9,39 EUR/kg	9,67 EUR/kg	+3%
Estonia	Pike	2,00 EUR/kg	1,74 EUR/kg	-13%

Groundfish

In 2024, first-sales value of “Groundfish” totalled EUR 644,5 million, a decrease of 7% compared to 2023. Landings amounted to 587.200 tonnes, a decrease of 9% compared to 2023. Cod (-15% and -19%) and hake (-2% and -15%) were mainly responsible for the decrease in first-sales value and volume.

Figure 11. **FIRST SALES VALUE AND VOLUME OF GROUNDFISH, JAN 2022 – DEC 2024**

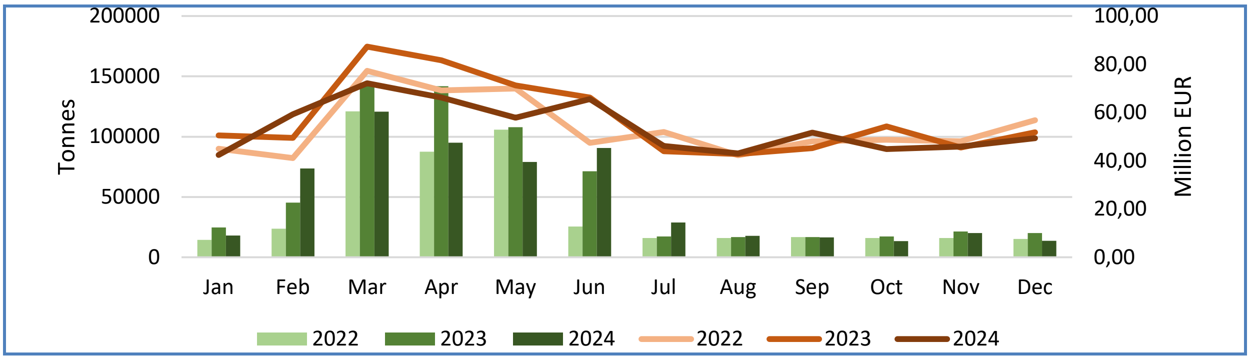


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
Germany	Cod	6,60 EUR/kg	5,96 EUR/kg	-10%
France	Blue whiting	2,24 EUR/kg	2,10 EUR/kg	-6%
Italy	Hake	4,91 EUR/kg	5,68 EUR/kg	+16%

Other marine fish[10]

In 2024, first-sales value of “Other marine fish” came to EUR 557,0 million, a stable value compared to 2023. Landings amounted to 144.552 tonnes, an increase of 4% compared to 2023. Other marine fish[11] and ray were the two main commercial species contributing most to the increase in volume (+26% and +9%).

[10] Seventeen Main Commertial Species are included in the Commmodity Group „Other Marine Fish“ with monk representing more than ¼ of the total value and almost 20% of total volume.
[11] The "Other Marine Fish" Main Commercial Species (MCS) comprised 366 products during the analyzed period. Among them, boarfish, boarfishes nei, Norway pout, and Thinlip grey mullet accounted for nearly 50% of the total volume.

Figure 12. **FIRST SALES VALUE AND VOLUME OF OTHER MARINE FISH, JAN 2022 - DEC 2024**

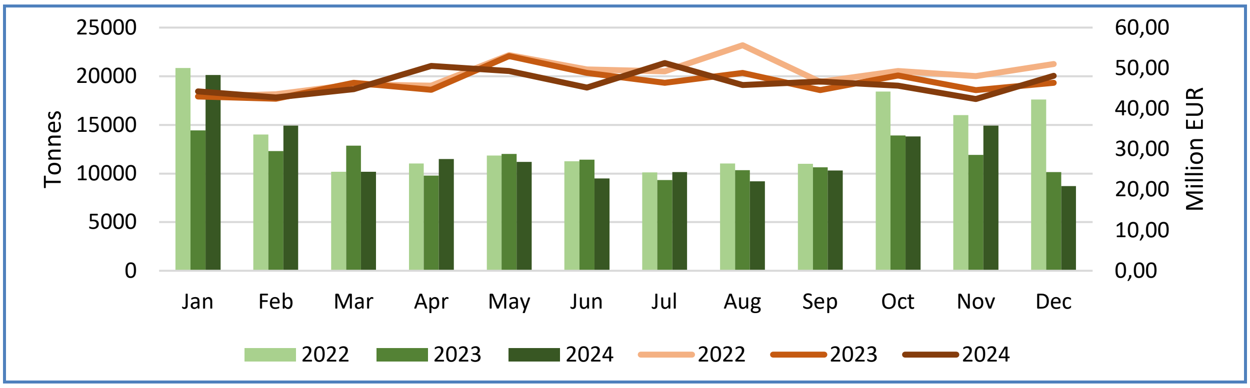


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
Ireland	Monk	4,55 EUR/kg	4,56 EUR/kg	0%
Italy	Red mullet	4,50 EUR/kg	4,85 EUR/kg	+8%
Sweden	Monk	5,29 EUR/kg	5,86 EUR/kg	+11%

Salmonids

In 2024, first-sales value of "Salmonids" came to EUR 4,83 million, an increase of 53% compared to 2023. Although salmon and trout are the two main commercial species in this group, they were not primarily responsible for the increase in first sales value and volume. This was due to increases recorded by other salmonid species[12] (+105% and +18%).

Figure 13. **FIRST SALES VALUE AND VOLUME OF SALMONIDS, JAN 2022 – DEC 2024**

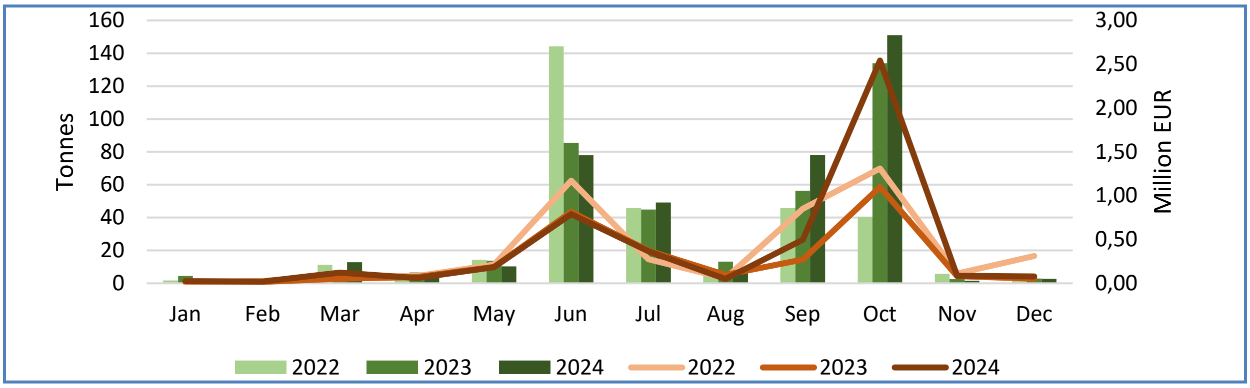


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
Poland	Trout	11,23 EUR/kg	11,68 EUR/kg	+4%
France	Salmon	72,30 EUR/kg	73,47 EUR/kg	+2%
Lithuania	Trout	8,93 EUR/kg	7,28 EUR/kg	-18%

[12] „Other salmonid species" includes vendance, European whitefish, whitefishes nei and grayling. In the period analyzed vendance represented 93% of the MCS volume.

Small pelagics

In 2024, first-sales value of "Small pelagics" amounted to EUR 739,3 million, a decrease of 7% compared to 2023. Landings amounted to 845.274 tonnes, a decrease of 15% compared to 2023. The two main commercial species contributing most to the decrease in first-sales value and volume were herring (-17% and -22%) and sprat (-16% and -17%).

Figure 14. **FIRST SALES VALUE AND VOLUME OF SMALL PELAGICS, JAN 2022 - DEC 2024**

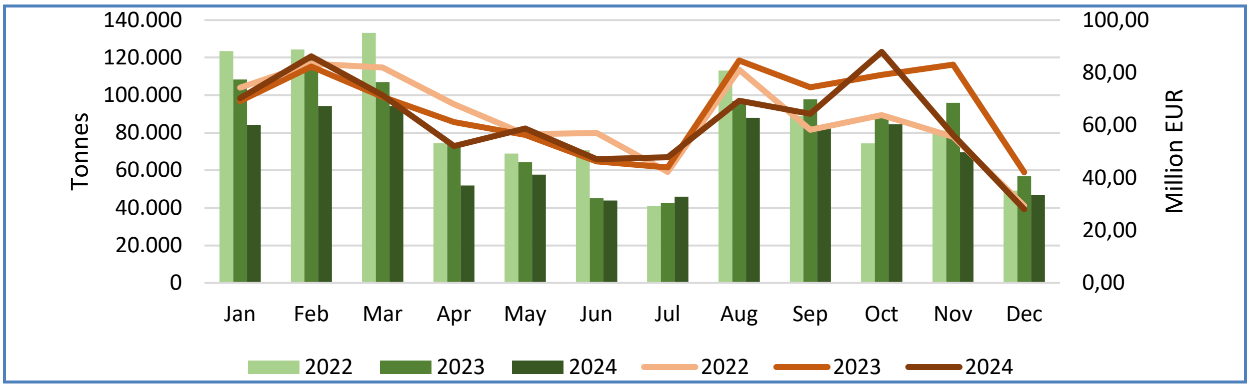


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
Denmark	Herring	0,81 EUR/kg	0,82 EUR/kg	+2%
Denmark	Sprat	0,46 EUR/kg	0,43 EUR/kg	-6%
Sweden	Sprat	0,34 EUR/kg	0,37 EUR/kg	+9%

Tuna and tuna-like species

In 2024, first-sales value of "Tuna and tuna-like species" came to EUR 347,7 million, a decrease of 4% compared to 2023. Landings totalled 95.315 tonnes, a decrease of 6% compared to 2023. Skipjack tuna and bigeye tuna (-26% and -18% respectively) were the two main commercial species driving the decline in first-sales value, while skipjack and albacore tuna (-26% and -18% respectively) were mainly behind the decrease in first-sales volume.

Figure 15. **FIRST SALES VALUE AND VOLUME OF TUNA AND TUNA-LIKE SPECIES, JAN 2022 - DEC 2024**

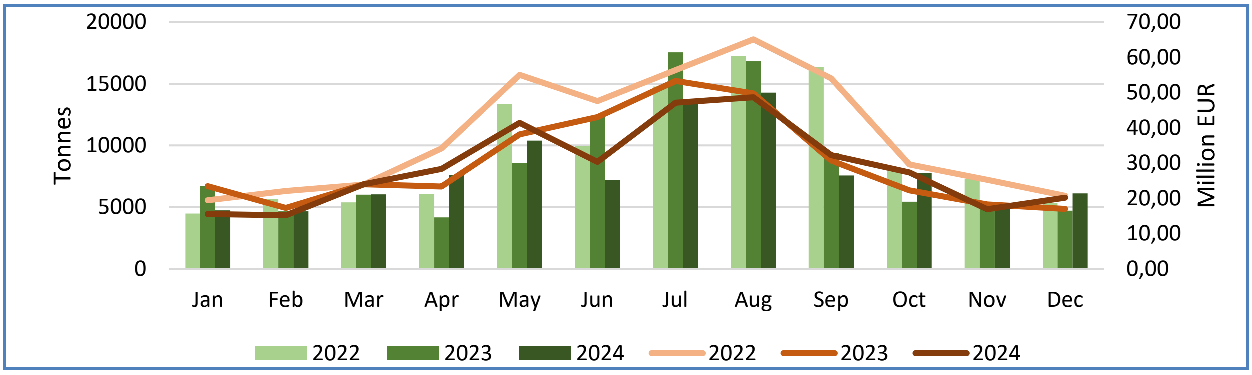


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-DEC 2023 AND JAN-DEC 2024)**

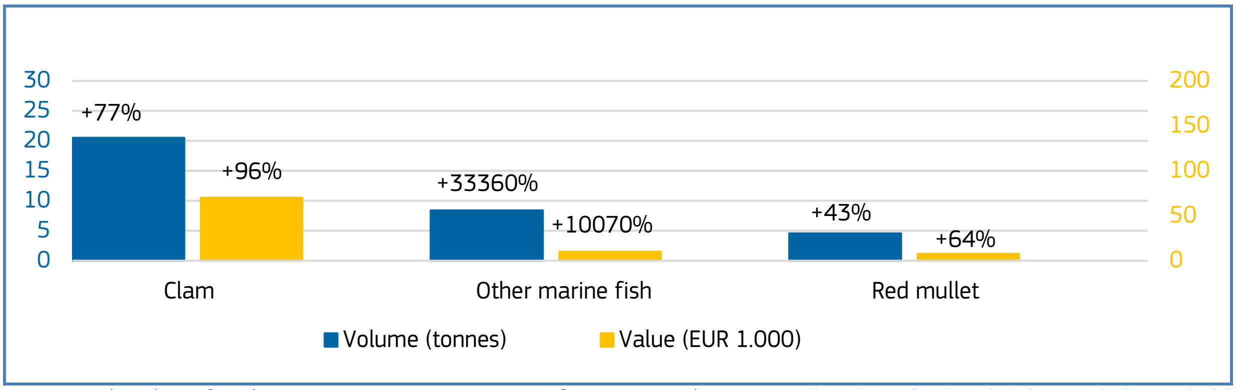
Country	Main Commercial Species	First-sales average price Jan-Dec 2023	First-sales average Price Jan-Dec 2024	Trend (Jan-Dec 2024 vs Jan-Dec 2023 %)
Spain	Swordfish	5,99 EUR/kg	5,02 EUR/kg	-16%
Spain	Skipjack tuna	1,65 EUR/kg	1,60 EUR/kg	-3%
Spain	Bigeye tuna	2,47 EUR/kg	2,45 EUR/kg	-1%

3.3. First sales in reporting countries[13]

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 2,5 million, +66%	3,2 tonnes, +14%	Clam, other marine fish*, red mullet.
Dec 2024 vs Dec 2023	EUR 0,1 million, +84%	0,4 tonnes, +9%	Clam, other marine fish*, red mullet.

Figure 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, DECEMBER 2024**

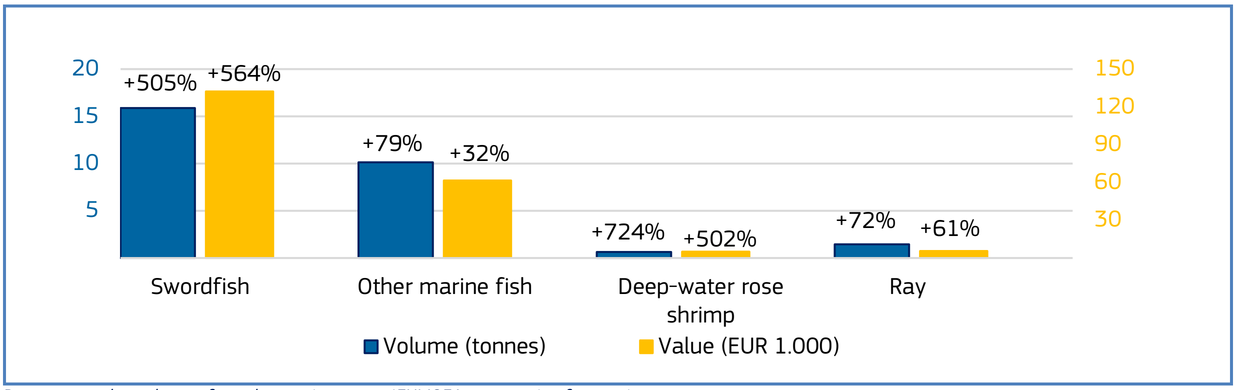


*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 3,2 million, -3%	600 tonnes, -8%	Albacore tuna, picarel, red mullet, other seabream*.
Dec 2024 vs Dec 2023	EUR 0,3 million, +45%	43 tonnes, +65%	Swordfish, other marine fish*, deep-water rose shrimp, ray.

Figure 17. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, DECEMBER 2024**



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

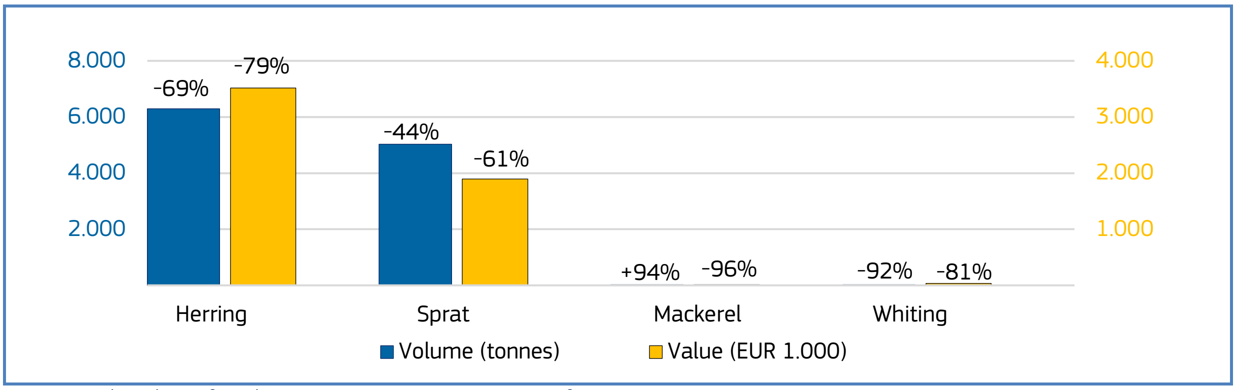
[13] First-sales data updated on 20. 02. 2025. This section covers all countries for which data is available on the date of the extraction and analysis.

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 502 million, -7%	681.455 tonnes, -7%	Herring, other groundfish*, sprat, European plaice.
Dec 2024 vs Dec 2023	EUR 20,6 million, -42%	17.708 tonnes, -48%	Herring, sprat, mackerel, whiting.

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

Figure 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, DECEMBER 2024**



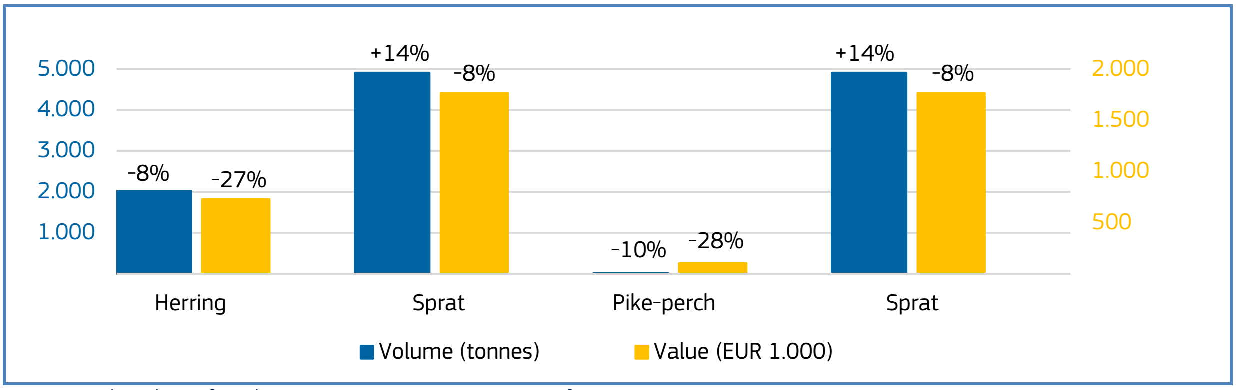
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 31,7 million, +4%	65.123 tonnes, -10%	**Value**: sprat, other freshwater fish*, smelt. **Volume**: herring, sprat.
Dec 2024 vs Dec 2023	EUR 2,8 million, -10%	7.055 tonnes, +7%	**Value**: herring, sprat, pike-perch. **Volume**: sprat.

**EUMOFA aggregation for species*

Figure 19. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, DECEMBER 2024**

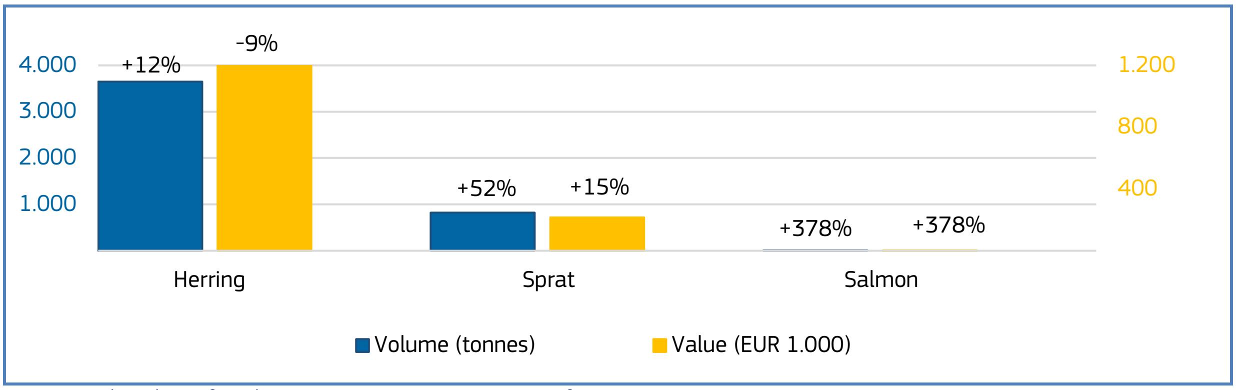


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 16,8 million, -3%	46.393 tonnes, -18%	Sprat, salmon, cod.
Dec 2024 vs Dec 2023	EUR 1,4 million, -6%	4.469 tonnes, +17%	**Value**: herring. **Volume**: herring, sprat, salmon.

Figure 20. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND, DECEMBER 2024**

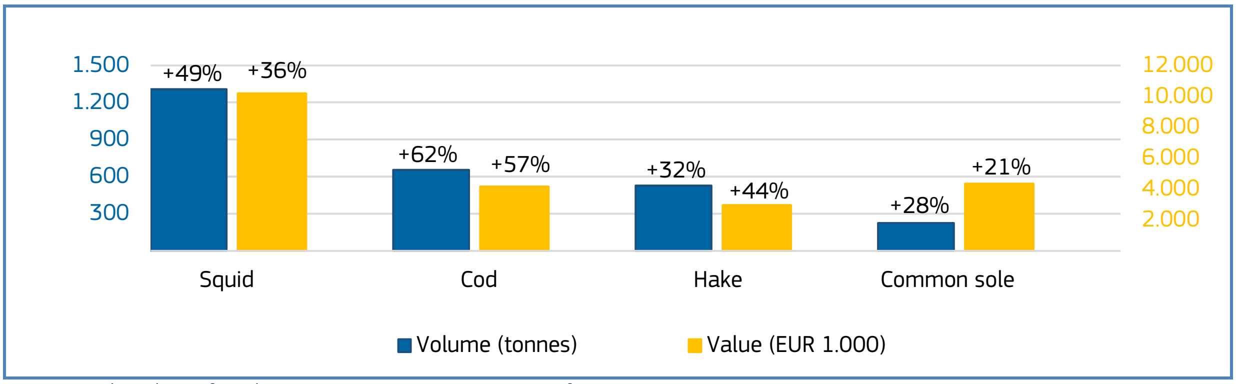


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 728,5 million, 0%	247.310 tonnes, 0%	**Value**: scallop, monk, common sole. **Volume**: seaweed and other algae, scallop, sardine.
Dec 2024 vs Dec 2023	EUR 77,9 million, +7%	16.400 tonnes, +3%	Squid, cod, hake, common sole.

Figure 21. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, DECEMBER 2024**

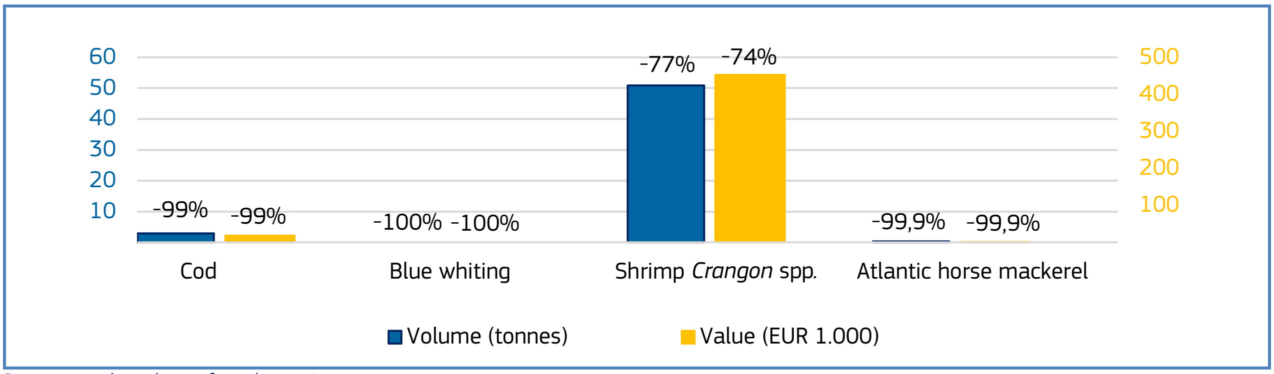


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 22. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY**

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Dec 2024 vs Jan-Dec 2023	EUR 52,1 million, -31%	26.060 tonnes, -29%	Shrimp *Crangon* spp., cod, blue whiting, Greenland halibut.	In December 2024 compared to December 2023 there was a decrease in first-sales value and volume of **cod**. This was due to the decline in cod stocks across the Baltic Sea and to cod fishery management measures in the North Sea.[14]
Dec 2024 vs Dec 2023	EUR 5,2 million, -30%	2.897 tonnes, -63%	Cod, blue whiting, shrimp *Crangon* spp., Atlantic horse mackerel.	

Figure 22. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY, DECEMBER 2024**

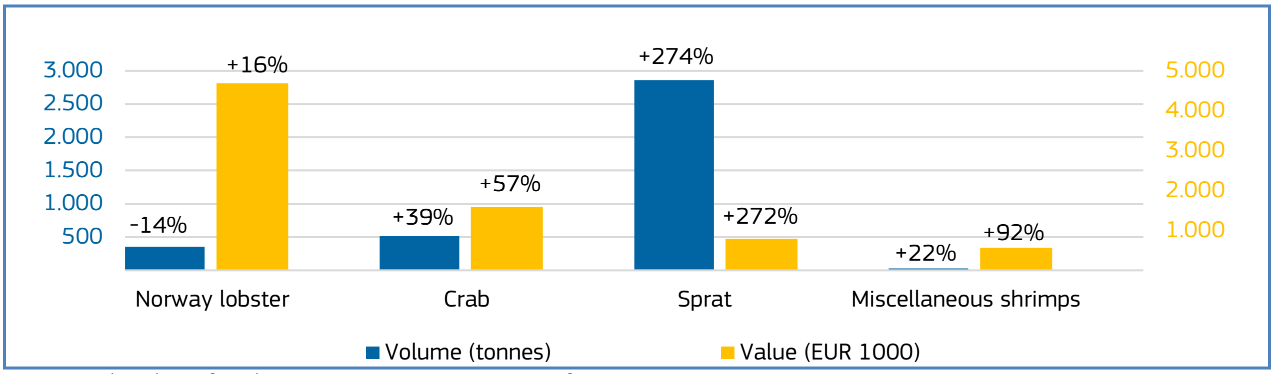


Percentages show change from the previous year.

Table 23. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND**

Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Dec 2024 vs Jan-Dec 2023	EUR 249,7 million, +1%	188.439 tonnes, +7%	Norway lobster, sprat, other marine fish*, albacore tuna.	First-sales value and volume of sprat recorded significant increases in December 2024 compared to December 2023. This trend is explained by the intra-annual fluctuation in sprat biomass, which is common for small pelagic species.
Dec 2024 vs Dec 2023	EUR 12,3 million, +5%	5.979 tonnes, +12%	Norway lobster, crab, sprat, miscellaneous shrimps. *	

Figure 23. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND, DECEMBER 2024**



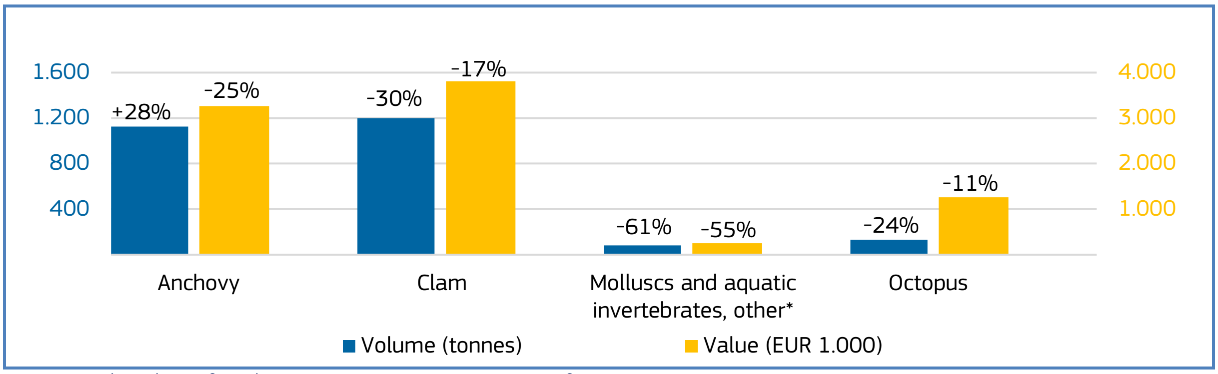
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

[14] COUNCIL REGULATION (EU) 2023/194 of 30 January 2023 fixing for 2023 https://eur-lex.europa.eu/eli/reg/2023/194/oj/eng

Table 24. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY**

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 282,9 million, -14%	62.117 tonnes, -15%	Anchovy, hake, deep-water rose shrimp, octopus.
Dec 2024 vs Dec 2023	EUR 26,2 million, -7%	4.993 tonnes, -11%	Anchovy, clam, other molluscs and aquatic invertebrates*, octopus.

Figure 24. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, DECEMBER 2024**

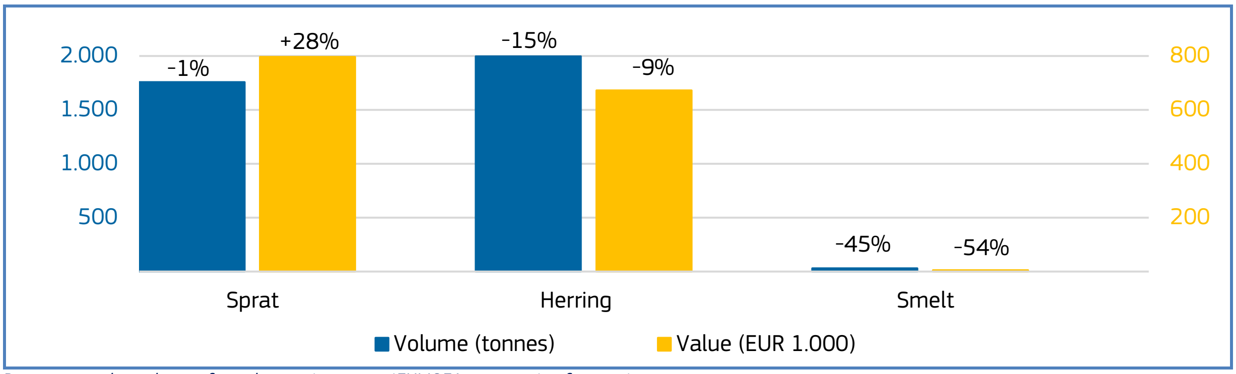


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 25. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA**

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 14,6 million, +10%	39.796 tonnes, -12%	**Value**: sprat, other freshwater fish*, cod. **Volume**: herring, sprat, smelt.
Dec 2024 vs Dec 2023	EUR 1,5 million, +8%	3.903 tonnes, -9%	Sprat, herring, smelt.

Figure 25. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, DECEMBER 2024**

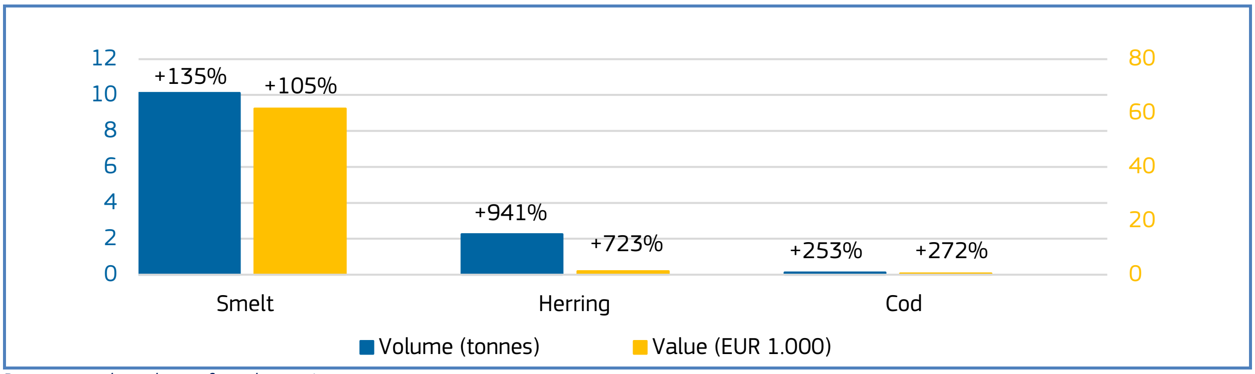


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 26. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA**

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 0,5 million, -23%	325 tonnes, +6%	**Value**: smelt, herring. **Volume:** other freshwater fish*, other groundfish.
Dec 2024 vs Dec 2023	EUR 0,06 million, +104%	13 tonnes, +152%	Smelt, herring, cod.

Figure 26. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, DECEMBER 2024**

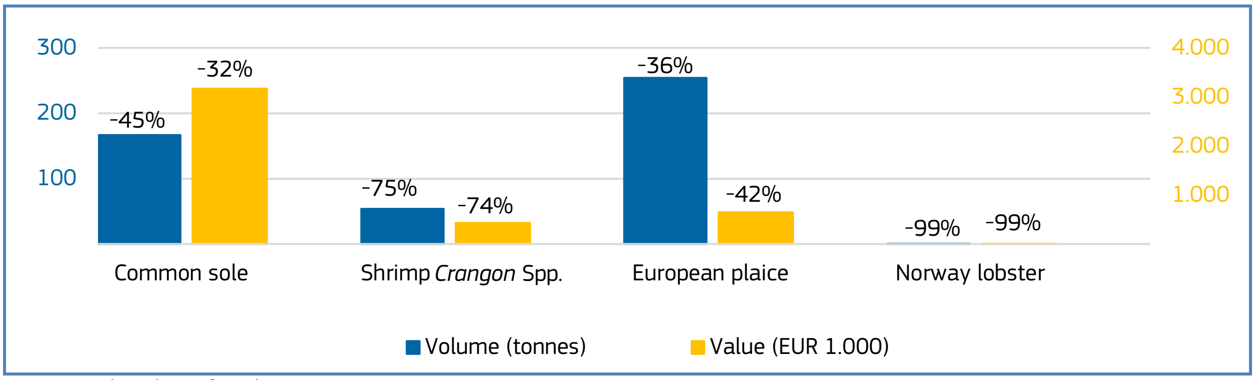


Percentages show change from the previous year.

Table 27. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS**

The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 148,9 million, +2%	23.430 tonnes, -62%	**Value**: shrimp *Crangon* spp., squid, cuttlefish. **Volume**: blue whiting, mackerel, herring.
Dec 2024 vs Dec 2023	EUR 7,8 million, -25%	1.144 tonnes, -28%	Common sole, shrimp *Crangon* spp., European plaice, Norway lobster.

Figure 27. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, DECEMBER 2024**



Percentages show change from the previous year.

Table 28. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND**

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Dec 2024 vs Jan-Dec 2023	EUR 30,0 million, +10%	59.585 tonnes, -8%	**Value**: sprat, other freshwater fish*, eel. **Volume**: herring, European flounder sprat.	In December 2024 compared with December 2023 a sharp increase in first sales value and volume were recorded for the MCS grouping "other freshwater fish" (mostly European perch and freshwater bream).
Dec 2024 vs Dec 2023	EUR 2,3 million, +19%	5.993 tonnes, +83%	Sprat, herring, pike-perch, other freshwater fish*.	

Figure 28. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, DECEMBER 2024**

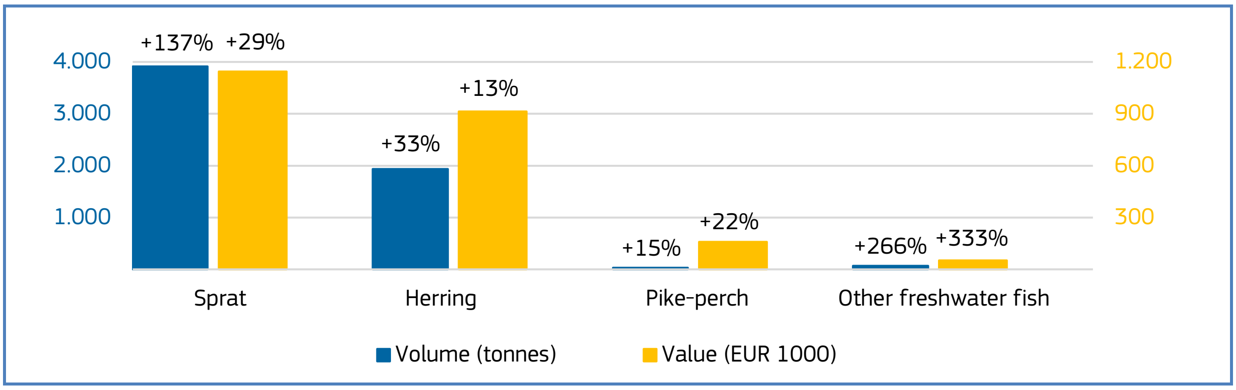
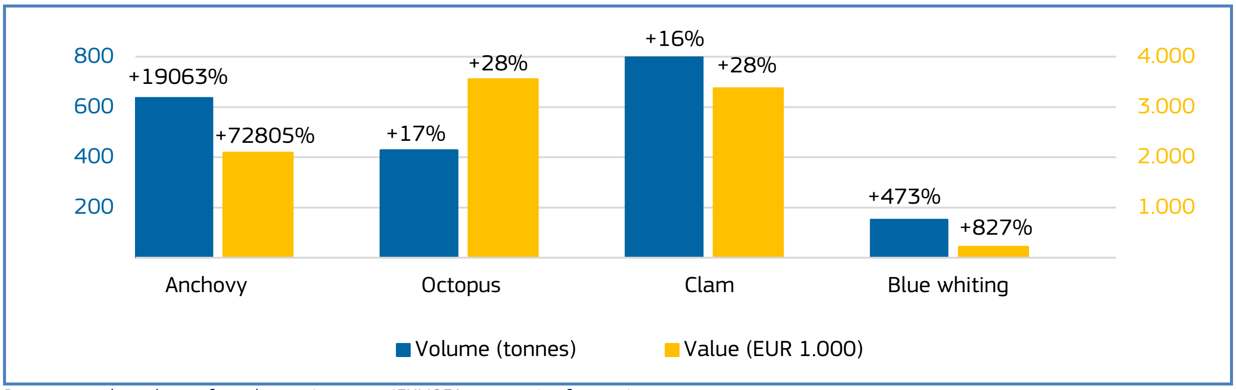


Table 29. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL**

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Dec 2024 vs Jan-Dec 2023	EUR 290,0 million, -3%	113.640 tonnes, -7%	Octopus, mackerel, anchovy, bigeye tuna.	First sales of anchovy in December 2024 were significantly higher than in December 2023. Anchovy stocks are highly influenced by environmental factors and food availability, particularly during early growth stages which are critical for recruitment success. High availability of anchovy resources led to an exponential increase in landings in December 2024.
Dec 2024 vs Dec 2023	EUR 22,1 million, +27%	4.886 tonnes, +1%	Anchovy, octopus, clam, blue whiting.	

Figure 29. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, DECEMBER 2024**

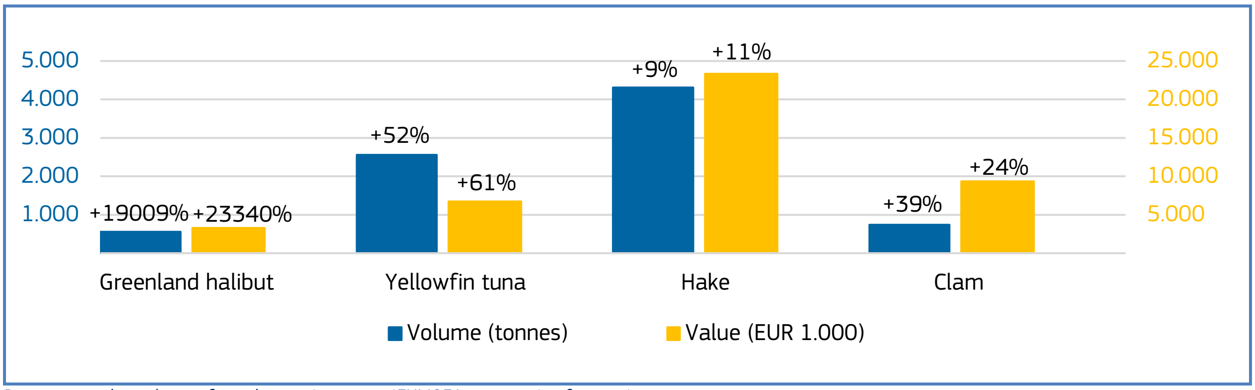


*Percentages show change from the previous year. *EUMOFA aggregation for species*

Table 30. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN**

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Dec 2024 vs Jan-Dec 2023	EUR 1.422,8 million, 0%	398.071 tonnes, -4%	**Value**: hake, anchovy, swordfish **Volume**: hake, mackerel, blue whiting.	In December 2024 compared to December 2023, first sales of Greenland halibut increased sharply. In the context of historical patterns and trends, this value aligns with fluctuations in previous years.
Dec 2024 vs Dec 2023	EUR 120,0 million +12%	21.629 tonnes, +6%	Greenland halibut, yellowfin tuna, hake, clam.	

Figure 30. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, DECEMBER 2024**

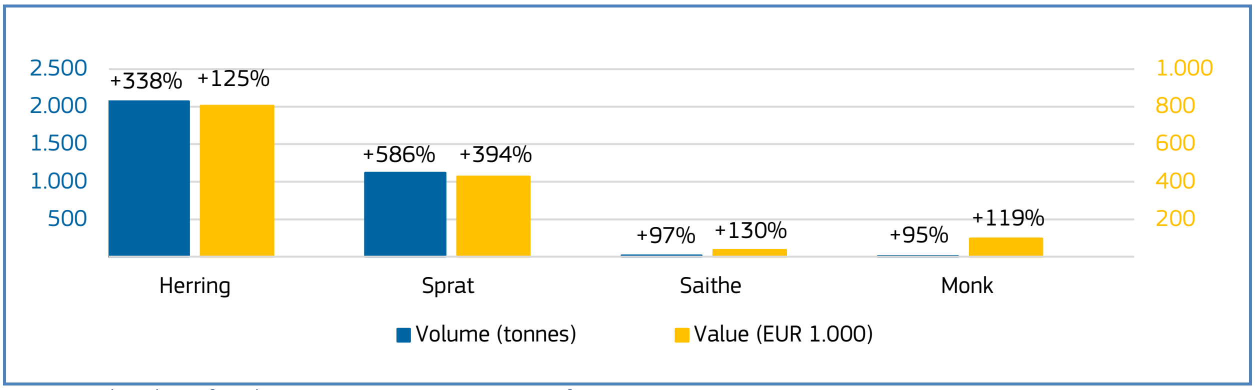


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 31. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN**

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 60,3 million, -27%	51,416 tonnes, -54%	Sprat, herring, other groundfish*, coldwater shrimps*.
Dec 2024 vs Dec 2023	EUR 3,9 million, +18%	3.467 tonnes, +266%	Herring, sprat, saithe, monk.

Figure 31. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, DECEMBER 2024**

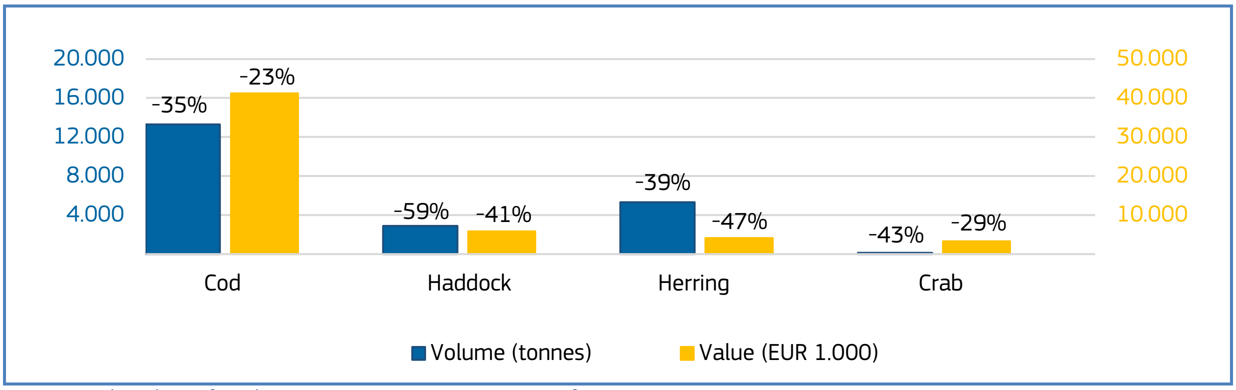


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 32. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY**

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 3.027,1 million, -3%	2.684.533 tonnes, -7%	Cod, herring, saithe.
Dec 2024 vs Dec 2023	EUR 88,6 million -19%	49.146 tonnes, -34%	Cod, haddock, herring, crab.

Figure 32. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, DECEMBER 2024**

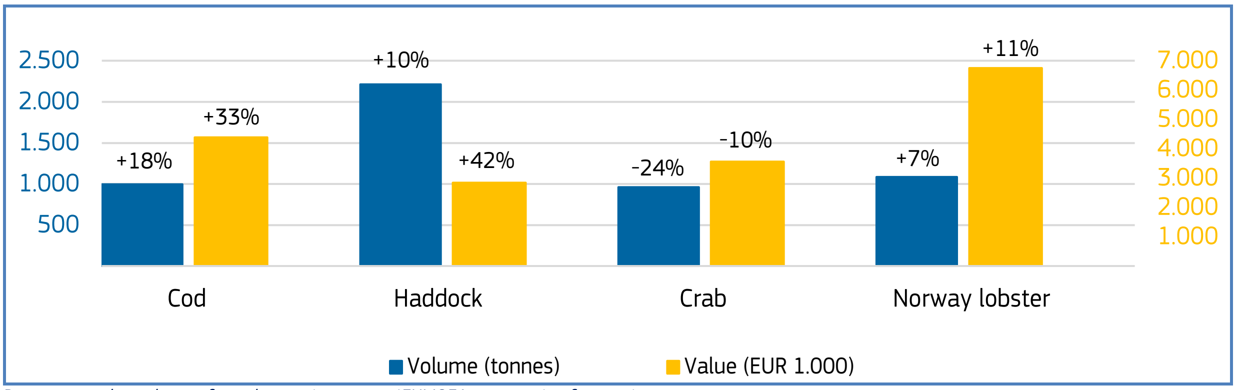


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 33. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM**

United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2024 vs Jan-Dec 2023	EUR 710,6 million, +2%	11.307 tonnes, -8%	**Value**: mackerel, herring, cod. **Volume**: herring, blue whiting, mackerel.
Dec 2024 vs Dec 2023	EUR 37,0 million +2%	11.307 tonnes, -8%	**Value**: cod, haddock **Volume**: crab, Norway lobster.

Figure 33. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, DECEMBER 2024**



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

4. EXTRA-EU IMPORTS

Between January and October 2024, extra-EU imports in the EU-27 increased by 1% in volume and declined by 2% in value compared to the same period in 2023. Those MCSs contributing most to the decrease in import values were Alaska pollock (-27%), cod (-7%) and cuttlefish (-34%), while skipjack tuna (+20%), salmon (+5%) and blue whiting (+46%) contributed most to the increase in volume.

Increases in value and volume: Ireland, Italy, Latvia, Lithuania, the Netherlands, Portugal, Romania and Slovenia and recorded an increase in extra-EU imports in both value and volume. The most significant increases were recorded in Slovenia, driven by a rise in gilthead seabream (+179% and +128%), hake (+51% and +63%) and miscellaneous tuna (+96% and +82%).

Decreases in value and volume: Belgium, Cyprus, Czechia, Denmark, Germany, Hungary, Malta, Slovakia and Sweden recorded decreases in extra-EU imports in value and volume. Malta experienced the most significant declines in absolute terms of value and volume, due primarily to a decrease in bluefin tuna (-70% and -3%), mackerel (-61% and -63%) and sardine (-80% and -82%).

Table 34. **JANUARY-OCTOBER OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)**[15]

	January – October 2023			January – October 2024			Change from January – October 2023		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	9,45	63.639	6,73	9,95	61.724	6,21	5%	-3%	-8%
Belgium	123,58	767.243	6,21	116,60	720.954	6,18	-6%	-6%	0%
Bulgaria	11,74	29.824	2,54	11,58	30.710	2,65	-1%	3%	4%
Croatia	8,93	31.592	3,54	7,12	31.947	4,49	-20%	1%	27%
Cyprus	6,05	39.356	6,50	5,88	37.149	6,31	-3%	-6%	-3%
Czechia	13,15	60.090	4,57	11,86	53.925	4,55	-10%	-10%	-1%
Denmark	743,23	3.036.395	4,09	712,39	2.752.792	3,86	-4%	-9%	-5%
Estonia	8,29	48.228	5,82	8,29	44.924	5,42	0%	-7%	-7%
Finland	36,28	260.133	7,17	39,35	257.698	6,55	8%	-1%	-9%
France	490,68	2.709.762	5,52	491,22	2.676.431	5,45	0%	-1%	-1%
Germany	319,88	1.479.118	4,62	277,36	1.277.985	4,61	-13%	-14%	0%
Greece	114,71	403.379	3,52	113,60	441.176	3,88	-1%	9%	10%
Hungary	2,16	9.025	4,17	2,13	8.491	3,98	-1%	-6%	-5%
Ireland	103,70	173.751	1,68	145,14	177.376	1,22	40%	2%	-27%
Italy	360,67	2.180.279	6,05	391,00	2.264.375	5,79	8%	4%	-4%
Latvia	18,32	42.706	2,33	21,10	49.215	2,33	15%	15%	0%
Lithuania	39,77	143.162	3,60	42,40	144.957	3,42	7%	1%	-5%
Luxembourg	0,01	422	53,37	0,02	466	30,90	91%	10%	-42%
Malta	31,81	98.182	3,09	16,72	38.207	2,28	-47%	-61%	-26%
Netherlands	542,61	2.888.010	5,32	572,99	2.958.069	5,16	6%	2%	-3%
Poland	207,64	897.648	4,32	208,84	891.791	4,27	1%	-1%	-1%
Portugal	128,50	565.851	4,40	144,07	650.613	4,52	12%	15%	3%
Romania	15,84	64.513	4,07	16,84	74.295	4,41	6%	15%	8%

[15] During January–October 2024, 27 EU Member States (MS), reported Extra-EU imports data for 12 commodity groups. Extra-EU imports are goods recorded by Member States when they enter the territory of the EU where transit is not included.

Slovakia	5,18	17.795	3,44	4,51	13.976	3,10	-13%	-21%	-10%
Slovenia	4,67	18.431	3,95	6,11	24.448	4,00	31%	33%	1%
Spain	960,89	4.602.929	4,79	1.011,19	4.704.646	4,65	5%	2%	-3%
Sweden	608,38	4.564.735	7,50	576,89	4.315.472	7,48	-5%	-5%	0%
EU-27	**4.916,11**	**25.196.199**	**5,13**	**4.965,13**	**24.703.812**	**4,98**	**1%**	**-2%**	**-3%**

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: Other marine fish and tuna and tuna-like species were the only commodity group experiencing an increase in both value and volume. Highest increases were observed in gilthead seabream (+26% and +5%) and European seabass (+27% and 36%), skipjack tuna (+12% and +20%) and yellowfin tuna (+4% and +21%).

Decreases in value and volume: The commodity group flatfish was the only one experiencing a decrease in both extra-EU import value and volume. Flatfish experienced the largest decline, due primarily to reduced imports of Greenland halibut (-9% and -12%).

Table 35. **JANUARY- OCTOBER OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER CG (volume in tonnes and value in million EUR)**

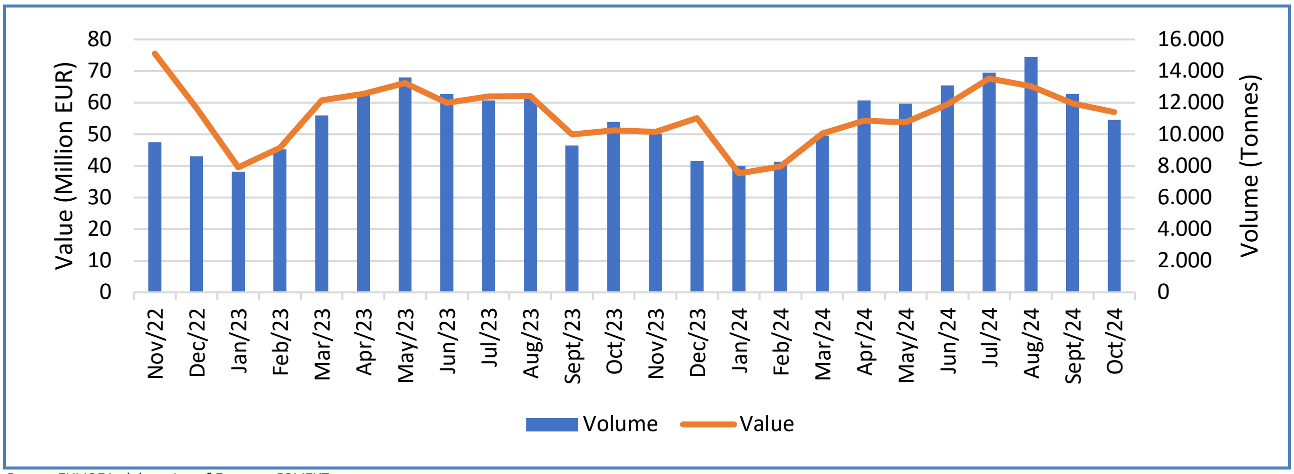
	January – October 2023			January – October 2024			Change from January – October 2023			
Commodity group	**Value**	**Volume**	**Price**	**Valu**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	560	111.066	5,04	545	115.551	4,71	-3%	4%	-7%	Scallop, other mussel.
Cephalopods	2.480	439.033	5,65	2.440	438.778	5,56	-2%	0%	-2%	Cuttlefish, other cephalopods.
Crustaceans	3.768	528.872	7,12	3.685	547.847	6,73	-2%	4%	-6%	Warmwater shrimp, crab.
Flatfish	434	83.237	5,22	403	77.513	5,20	-7%	-7%	0%	Other flatfish, Greenland halibut.
Freshwater fish	453	112.145	4,04	462	116.397	3,97	2%	4%	-2%	Nile perch, tilapia.
Groundfish	4.008	889.781	4,50	3.688	907.891	4,06	-8%	2%	-10%	Alaska pollock, cod.
Other marine fish	1.353	244.728	5,53	1.459	262.520	5,56	8%	7%	1%	Gilthead seabream, other marine fish.
Salmonids	7.077	828.268	8,54	7.045	871.272	8,09	0%	5%	-5%	Salmon, trout.
Small pelagics	829	393.607	2,10	837	342.616	2,44	1%	-13%	16%	Anchovy, mackerel.
Tuna and tuna-like species	2.588	497.585	5,20	2.701	578.420	4,67	4%	16%	-10%	Skipjack tuna, yellowfin tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of bivalves in EU Member States

In the period January - October 2024, extra-EU imports of bivalves accounted for a total value of EUR 544,6 million and total volume of 115.551 tonnes, with a price of 4,71 EUR/kg for the ten main commercial species[16]. Compared to the same period in 2023 the value of bivalves decreased by 3% while volume increased by 4%.

Figure 34. **EXTRA-EU IMPORT VALUE, VOLUME AND PRICE OF BIVALVES, 2022 – 2024 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

Prices of extra-EU imports of bivalves have been decreasing (-13%) in the period analysed. Highest import volumes of bivalves occurred between May and August.

In the period January-October 2024, Spain, France and Italy were the main importers of bivalves in the EU and together imported from extra-EU countries about 73% of the total volume of bivalves, with Spain (35%), France (22%) and Italy (17%) respectively.

Table 36. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR BIVALVES**

EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan-Sep 2023	Jan-Sep 2024	Trend (%)	Jan-Sep 2023	Jan-Sep 2024	Trend (%)	
Spain	170,17	196,50	15%	38.836	45.505	17%	Clam, scallop.
France	173,10	158,31	-9%	23.972	22.350	-7%	Scallop, clam.
Italy	59,07	58,37	-1%	18.470	20.036	8%	Clam, scallop.

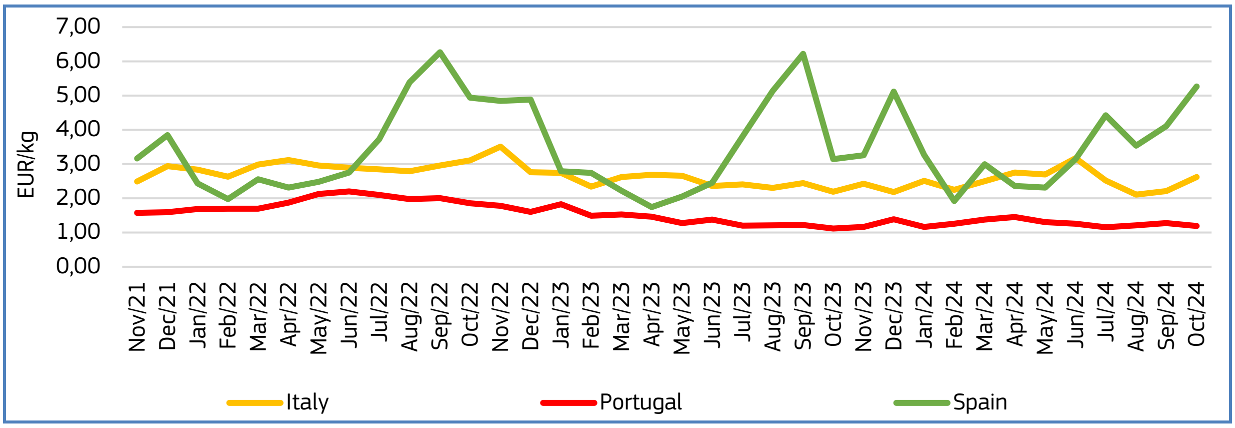
[16] Abalone, clam, jellyfish, other molluscs and aquatic invertebrates, Mussel *Mytilus* spp., other mussels, oyster, scallop, sea cucumber, sea urchin.

4.2. Extra EU imports of clam in EU Member States

The species grouping “other mussels”, clam and scallop represent the main commercial species of the commodity group of bivalves. Clam comprises 32% of total volume and 19% of total value, followed by scallop that represents 15% and 42% respectively.

Spain, Italy and Portugal are importing the highest volume of clam from extra-EU countries.

Figure 35. **EXTRA-EU IMPORT PRICE OF CLAM IN ITALY, PORTGAL AND SPAIN (NOV 2021 – OCT 2024)**



Between November 2021 and October 2024, the price of clam fluctuated and increased in Italy (+2%) and Spain (+19%) and decreased in Portugal (-9%). Between January and October 2024, the volume of clam imported from Italy was 10.434 tonnes, 9% more compared with the same period in 2023, while price increased by 3%. In Italy the peak in imports seemed to occur in April and May while the main imports in terms of volume came from Vietnam (74%), followed by Thailand, and Türkiye.

In the same period, 6.551 tonnes of clam were imported in Portugal, 10% less compared to 2023, with an average price decrease of 4%. In terms of volume almost 100% of the total is imported from Vietnam.

Spain imported 80% of the 17.700 tonnes from Vietnam, followed by the United Kingdom and Türkiye. The peak in import volume seemed to occur in August. Between January and October 2024 import volume increased by 17% while prices remained stable with peaks occurring most often in September/October and December.

Figure 36. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF CLAM IN ITALY, 2021 – 2024 (volume in tonnes, price in EUR/kg)**

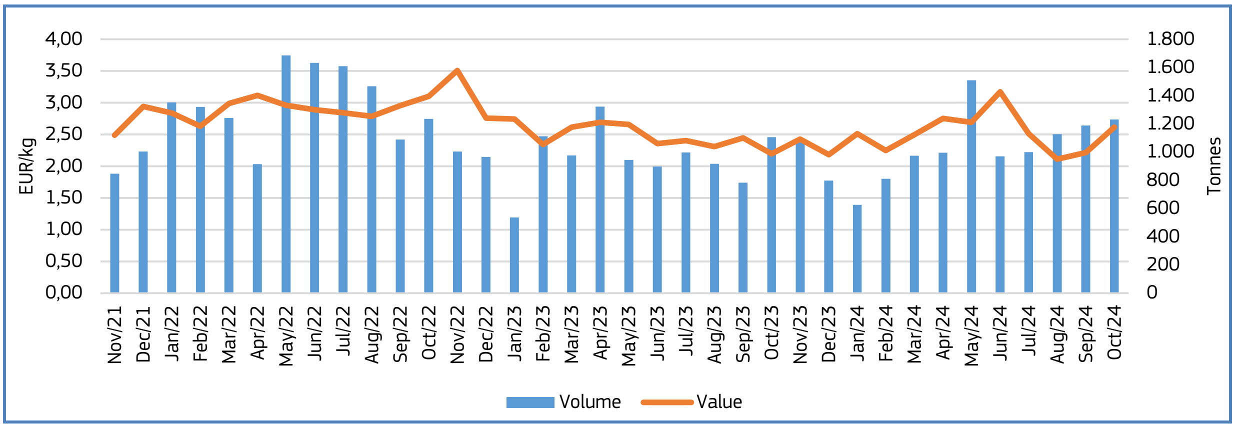


Figure 37. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF CLAM IN PORTUGAL, DEC 2021 – SEP 2024 (volume in tonnes and price in EUR/kg)**

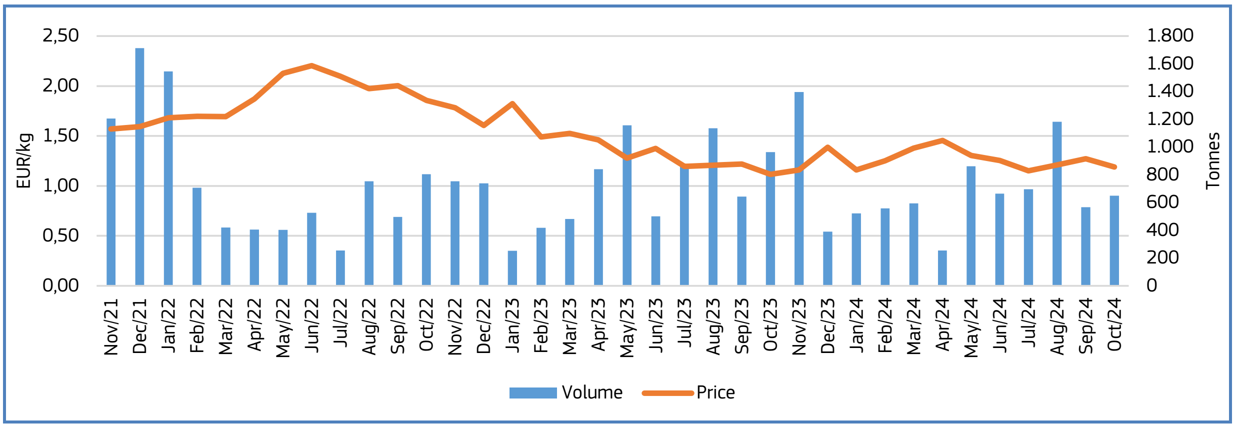
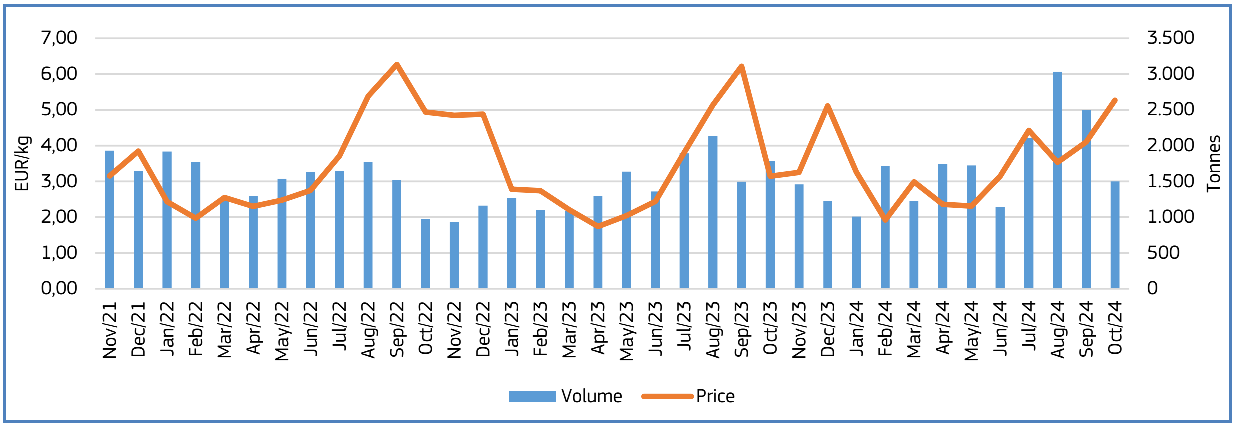


Figure 38. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF CLAM IN SPAIN, DEC 2021 – SEP 2024 (volume in tonnes and price in EUR/kg)**



4.3. Extra EU imports of clam by origin

In the period January-October between 2024 and 2023, EU imports of clam[17] experienced an increasing trend in terms of volume (+7%) and value (+10%). From January to October 2024 the EU imported 37.493 tonnes of clam for a value of EUR 104 million. The main extra-EU countries supplying clam to the EU in 2024 were Vietnam (82%), the United Kingdom (6%), Türkiye (5%) and Thailand (4%). An increase of imports of clam from Vietnam (+7%) and Türkiye (+9%) was observed between January and September 2024 compared to the same period in 2023.

[17] 03077100 - Live, fresh or chilled, even in shell, clams, cockles and ark shells "families Arcidae, Arcticidae, Cardiidae, Donacidae, Hiatellidae, Mactridae, Mesodesmatidae, Myidae, Semelidae, Solecurtidae, Solenidae, Tridacnidae and Veneridae"
03077210 - Striped venus or other "Veneridae", even in shell, frozen
03077290 - Frozen, even in shell, clams, cockles and ark shells "families Arcidae, Arcticidae, Cardiidae, Donacidae, Hiatellidae, Mactridae, Mesodesmatidae, Myidae, Semelidae, Solecurtidae, Solenidae, Tridacnidae"
03077900 - Smoked, dried, salted or in brine, even in shell, clams, cockles and ark shells "families Arcidae, Arcticidae, Cardiidae, Donacidae, Hiatellidae, Mactridae, Mesodesmatidae, Myidae, Semelidae, Solecurtidae, Solenidae, Tridacnidae and Veneridae"
16055600 - Clams, cockles and arkshells, prepared or preserved (excl. smoked)

Table 37. **EXTRA-EU IMPORTS OF CLAM BY ORIGIN IN 2024 (value in million EUR and volume in tonnes)**

Country	Jan-Oct 2022		Jan-Oct 2023		Jan-Oct 2024		January-October 2024/2023	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Viet Nam	73	32.267	47	28.705	47	30.727	1%	7%
United Kingdom	20	1.742	27	2.287	26	2.161	-4%	-5%
Türkiye	7	1.424	8	1.588	9	1.728	8%	9%
Thailand	6	2.393	3	1.446	3	1.375	-12%	-5%
Others	10	1.276	8	874	18	1.502	116%	72%
Total	**116**	**39.102**	**94**	**34.900**	**104**	**37.493**	**10%**	**7%**

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[18].

Compared with December 2023, in December 2024 household consumption of fresh fishery and aquaculture products decreased in both volume and value in France, Hungary, Italy, the Netherlands, Portugal, Spain and Sweden. Denmark, Germany, Ireland and Poland showed increases in both volume and value.

The highest increase was observed in Ireland, due mainly to crustaceans (volume 37,8%, value 23,19%), haddock (volume 40,72%, value 56,10%), and hake (volume 32,71%, value 43,09%).

Table 38. **MONTHLY OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita consumption 2022* (live weight equivalent, LWE) kg/capita/year	December 2022		December 2023		December 2024		Change from Dec 2023 to Dec 2024		Change from Jan-Dec 2023 to Jan-Dec 2024	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	814	17,36	1.109	24,50	1.231	27,10	11%	11%	11%	10%
France	32,58	23.634	317,96	23.450	318,44	21.977	302,41	-6%	-5%	-1%	-1%
Germany	12,49	6.739	105,27	6.349	100,13	6.387	100,89	1%	1%	-4%	-3%
Hungary	6,73	1.278	9,96	1.439	12,88	1.362	10,87	-5%	-16%	13%	6%
Ireland*	20,00	879	16,88	939	18,55	1.161	22,30	24%	20%	-2%	0%
Italy	30,01	35.743	457,80	32.157	417,39	29.744	403,59	-8%	-3%	-7%	-2%
Netherlands*	18,88	3.752	81,16	3.789	83,38	3.447	77,24	-9%	-7%	-8%	-6%
Poland	13,68	10.169	83,13	9.968	92,16	10.852	99,48	9%	8%	2%	14%
Portugal	54,54	5.754	52,06	4.945	44,11	4.527	42,21	-8%	-4%	-6%	0%
Spain	41,92	46.280	485,18	43.876	481,12	38.949	452,77	-11%	-6%	-6%	-1%
Sweden	22,46	820	13,00	1.032	15,94	859	12,95	-17%	-19%	7%	5%

** Estimating apparent consumption at EU and Member State levels are different, the first based on data and estimates as described in the Methodological background, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes. Where EUMOFA estimations on 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. These are marked with a *, where data were provided by the following National sources: Dutch Fish Marketing Board (Netherlands) and Institute of Agricultural and Food Economics - National Research Institute (Poland). The estimate for Denmark was provided by the University of Copenhagen; for Ireland it was the estimate of EUMOFA.*

In 2024 compared to the previous year, consumption of fresh products decreased in both volume and value in France, Germany, Italy, the Netherlands and Spain. In Denmark, Hungary, Poland and Sweden both volume and value increased. The highest increase was registered in Hungary, where consumed species were not specified, and in Denmark due mainly to higher consumption of dab (volume 160%, value 143%) and halibut (volume 60% and value 36%). The highest decrease was observed in the Netherlands, due mainly to lower consumption of shrimp *Crangon* spp. (volume -49%, value -38%), flatfish (volume -27%, value -13%) and cod (volume -20%, value -19%).

[18] Last update: 15.02.2025.

5. 2. Overview of household consumption[19] for fresh bivalves consumed in the EU

In the household consumption data used by EUMOFA, household consumption of bivalves is monitored in five Member States (Denmark, Germany, Italy, the Netherlands and Portugal). In more detail at species level, in Denmark, Germany and the Netherlands consumption of mussels (*Mytilus* spp.) is monitored, whereas in Italy consumption is monitored for both mussels and clams, and in Portugal for clams only.

Figure 39. **HOUSEHOLD PURCHASES (in value) OF FRESH BIVALVES IN DENMARK, GERMANY, ITALY, THE NETHERLANDS AND PORTUGAL, JANUARY 2022 – DECEMBER 2024**

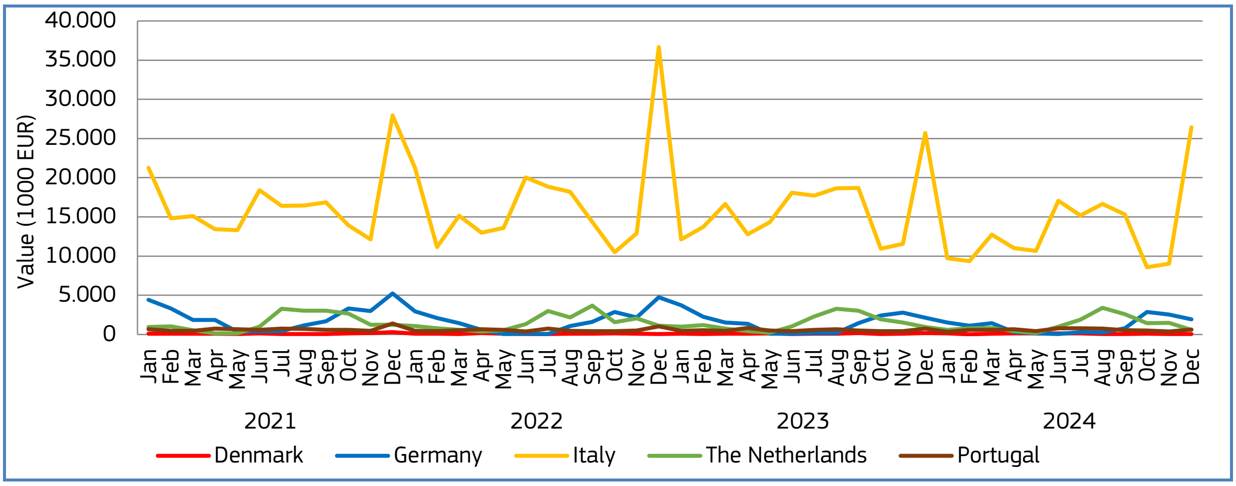
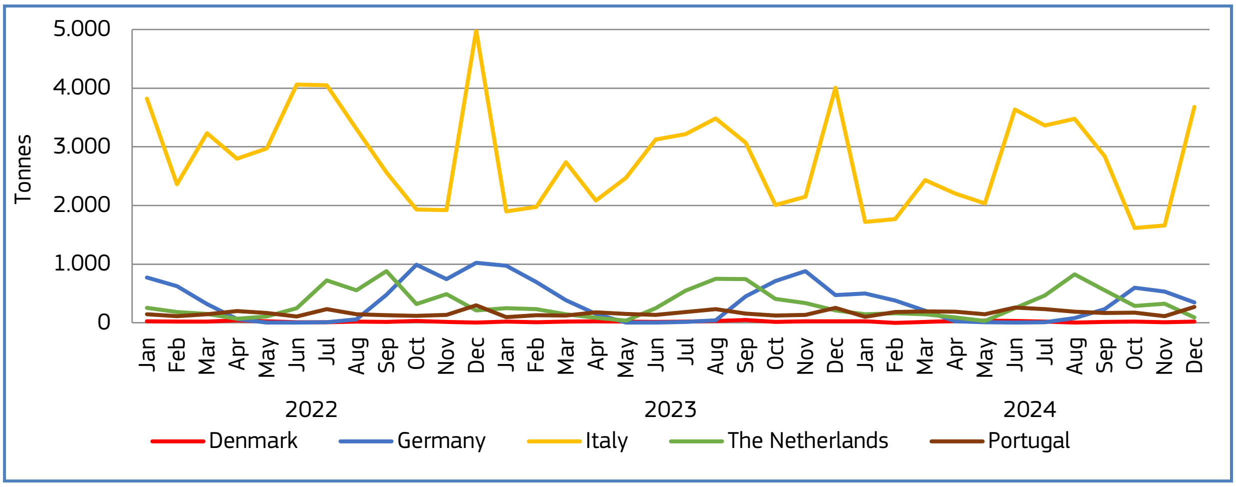


Figure 40. **HOUSEHOLD PURCHASES (in volume) OF FRESH BIVALVES IN DENMARK, GERMANY, ITALY, THE NETHERLANDS AND PORTUGAL, JANUARY 2022 – DECEMBER 2024**

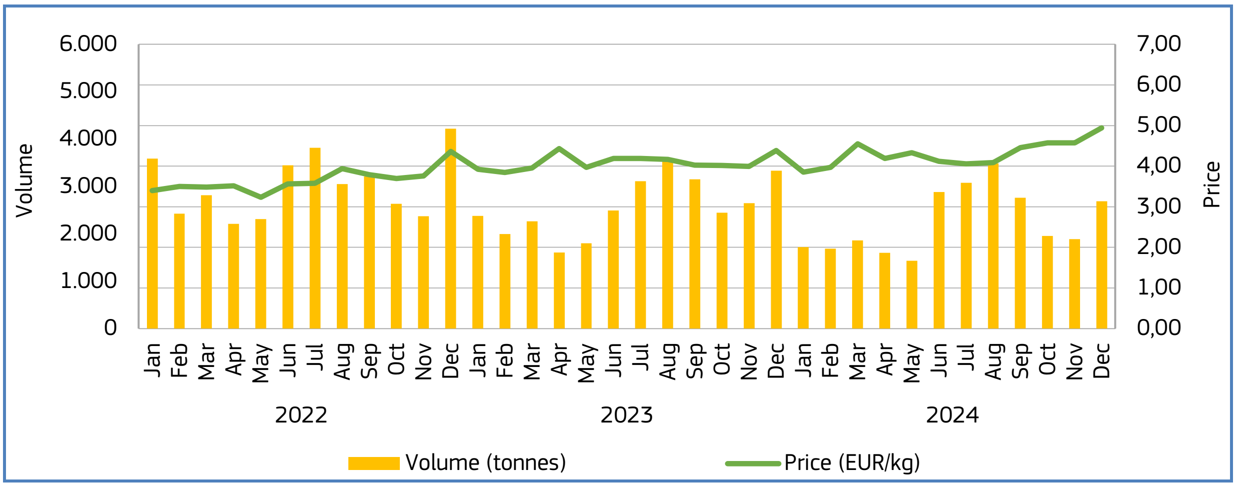


[19] *The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the available data and may not reflect the full scope of consumption across all Member States.*

5. 3. Household consumption trends of fresh mussel (*Mytilus* spp.) – the main species of bivalves in reporting countries

Long-term trend (January 2022 to December 2024): Downward trend in volume and slightly upward trend in price.
Yearly average price: 3,65 EUR/kg (2022), 4,09 EUR/kg (2023), 4,31 EUR/kg (2024).
Yearly consumption: 36.099 tonnes (2022), 30.756 tonnes (2023), 27.040 tonnes (2024).
Short-term trend (January to December 2024): Slightly upward trend in price and upward trend in volume.
Price: 4,31 EUR/kg.
Consumption: 27.040 tonnes.

Figure 41. **RETAIL PRICE AND VOLUME OF FRESH MUSSEL (*MYTILUS* SPP.) PURCHASED BY HOUSEHOLDS IN DENMARK, GERMANY, ITALY AND THE NETHERLANDS, JANUARY 2022 – DECEMBER 2024**



Fresh mussel consumption shows annual variability. Over the period observed, January 2022 and December 2024, consumption showed a downward trend. Price has shown a slightly upward trend with a higher peak in December.

5. CASE STUDY: Plaice in the EU

Plaice is one of the most important species for EU demersal coastal fisheries in the North Sea. However, over the last years, EU catches and landings reported very strong decreases, catches being far lower than the EU combined TAC. The fall in EU production was not compensated by increased imports. This reduced supply caused increases in prices that were reported at all stages of the supply chain (first-sale, import, consumption).

5. 1. Biology resource and exploitation

European plaice (*Pleuronectes platessa)* is a species of flatfish from the Pleuronectidae family. The species has bright red to orange spots, distinguishing it from other flatfishes, with the underside pearly white. Spawning period is from December to March with peaks in January-February.

Source: Scandinavian Fishing Year Book

It lives mostly on sandy bottoms, although it can also be found on gravel and mud and is often seen on sandy patches in rocky areas. They are most common between depths of 10-50 m but occur over depths of 0-200 m. Juvenile fish in their first year live mostly in very shallow water and can often be found in sandy tidal pools; they only start to move into deeper water in their second year. Plaice feed on bottom-living animals, particularly shellfish such as cockles and razor shells, but also consume worms, crustaceans, brittle stars and sandeel[20].

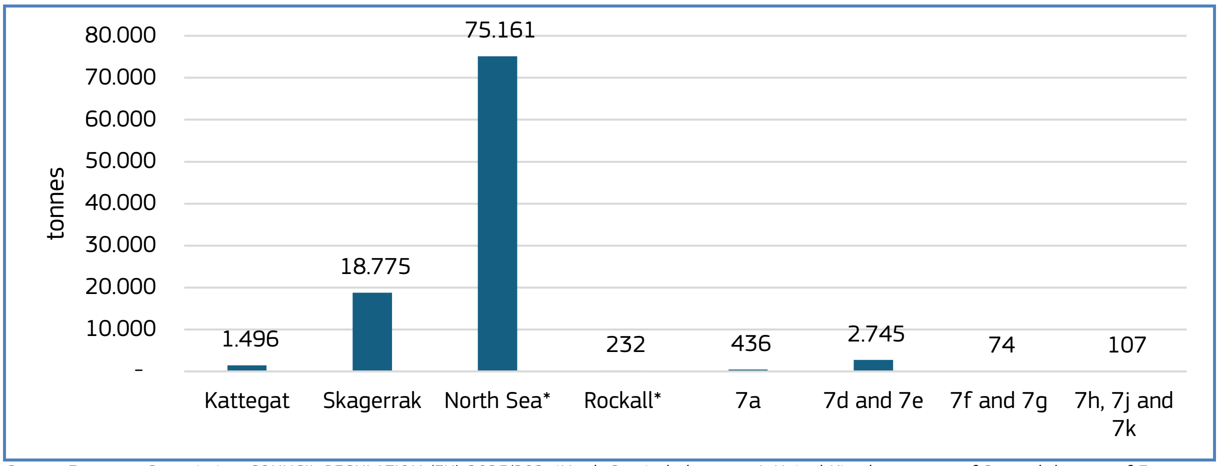
Plaice can be found on the continental shelf from the Bay of Biscay in the south, through the English Channel, North Sea, and Irish Sea to the Baltic, and up the Norwegian coasts to the Barents Sea.

Plaice is commonly fished in mixed fisheries with sole. Common gears used in plaice fisheries are trammel net, gillnet, Danish seine and beam and demersal trawl. For the Belgian fleet, plaice is caught throughout the year, with peaks in autumn and early winter (September-January). Plaice catches are subject to a minimum conservation size of 27 cm in the main fishing areas, except for some regions of the Baltic where it is 25 cm[21].

European plaice is subject to TACS and quotas. In 2025, the sum of EU total allowable catches was 99.026 tonnes. North Sea and Skagerrak stocks accounted for most of the EU TAC, respectively 76% and 19% of the total.

[20] https://www.fishbase.se/summary/pleuronectes-platessa.html
[21] https://fish-commercial-names.ec.europa.eu/fish-names/species/pleuronectes-platessa_en

Figure 42. **EU TOTAL ALLOWABLE CATCH FOR EUROPEAN PLAICE IN 2025**



*Source: European Commission, COUNCIL REGULATION (EU) 2025/202. *North Sea includes area 4, United Kingdom waters of 2a, and the part of 3a not covered by the Skagerrak and the Kattegat. Rockall includes area 6, United Kingdom and international waters of 5b and international waters of 12 and 14. 7a: Irish Sea; 7d and 7e: English Channel; 7f and 7g: Bristol Channel and Celtic Sea North; 7h, 7j and 7k: Celtic Sea South, South-West of Ireland.*

5. 2. Production

Catches

In 2022 global production of plaice amounted to 48.609 tonnes. The leading producer by volume was the EU-27, accounting for 50% of global catches, followed by Russia (20%), Iceland (15%) and the UK (12%). The main EU countries in terms of global catch volume were the Netherlands (23% of world catches, 47% of EU catches) and Denmark (16% of world catches, 32% of EU catches), together accounting for 78% of total EU catches in 2022.

Between 2013 and 2022, global catches of plaice decreased by 55%, due particularly to EU producers (-67%), among those the Netherlands (-67%) and Denmark (-65%), but also in the United Kingdom (-72%), while producers such as Russia and Iceland experienced a 36% and 23% increase, respectively. Over the decade, the EU fell from 67% of the global market share to 50%.

Table 39. **AVERAGE FIRST-SALE AND IMPORT PRICES OF EUROPEAN PLAICE IN THE EU (in EUR/kg)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	% change 2022/2013
EU-27	72.502	66.907	73.155	77.931	68.512	58.136	51.340	41.088	35.217	24.202	-67%
Russia	7.221	7.381	7.594	8.256	8.769	9.231	10.551	10.485	8.509	9.796	+36%
Iceland	5.979	5.928	6.758	7.468	6.707	8.383	6.843	7.671	8.767	7.330	+23%
United Kingdom	21.226	19.143	18.874	21.225	17.676	12.331	9.745	7.291	6.514	5.841	-72%
Norway	1.383	1.014	661	809	848	718	836	699	795	886	-36%
Others	449	454	537	899	875	739	764	713	647	554	+23%
Total	**108.760**	**100.827**	**107.579**	**116.588**	**103.387**	**89.538**	**80.079**	**67.946**	**60.448**	**48.609**	**-55%**

Source: FAO.

Landings in the EU

In 2022, landings of plaice in the EU-27 amounted to 30.042 tonnes for a value of almost EUR 93 million. The fact that the volume of plaice caught by the EU fleet (in live weight equivalent) is much higher than the volume landed (in net weight) in the EU suggests that a share of EU catches could be landed in third countries (but not in the United Kingdom according to Eurostat data).

Since 2013, the Netherlands has been the main landing country for plaice in the EU, accounting for 47% of the total EU landing volumes in 2022 (linked to its catch volumes), followed by Denmark (38%).

From 2013 to 2022, EU-27 landings of plaice decreased (-53%), but to a lesser extent than catches (-67%). Since 2015, EU-27 landings have been continuously decreasing, reaching their lowest level over the decade in 2022 while the peak over the period was reached in 2015. This decreasing trend was mostly attributable to the biggest landing countries (Netherlands -19.000 tonnes, -57%; Denmark -10.000 tonnes, -47%), whereas volumes increased slightly among smaller landing countries (Ireland +209.000 tonnes, +81%; Portugal +119.000 tonnes, +321%). Plaice is mostly landed live or fresh (99%), and whole or gutted (99%).

Table 40. **LANDINGS OF PLAICE IN THE EU (volume in tonnes)**[22]

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Netherlands	32.971	25.711	49.742	35.198	32.203	26.484	21.841	18.319	17.567	14.233
Denmark	21.637	24.547	24.216	27.012	21.683	16.967	14.687	15.686	14.733	11.420
Belgium	4.647	6.811	5.872	5.352	5.442	4.605	3.647	2.174	2.010	1.585
Germany	609	509	815	975	3.352	1.748	2.129	1.405	1.162	973
France	2.995	3.393	2.530	2.337	2.119	2.597	2.293	1.232	962	866
Ireland	259	283	378	700	561	444	424	338	438	468
Others	957	858	717	612	689	1.055	1.377	1.076	814	496
Total	**64.076**	**62.112**	**84.271**	**72.185**	**66.048**	**53.899**	**46.398**	**40.230**	**37.687**	**30.042**

Source: EUROSTAT.

5. 3. Plaice: first sales in the EU

First sales of plaice in 2024 have been reported to EUMOFA by 12 EU countries (Belgium, Denmark, Estonia, France, Germany, Ireland, Lithuania, Netherlands, Poland, Portugal, Spain, Sweden). In more detail, the first sales cover two species of plaice: European plaice (*Pleuronectes platessa*) and American plaice (*Hippoglossoides platessoides*), with European plaice representing most of the sales (99% in volume and value). Over the last 5 years, the average price of European plaice was 137% to 198% higher than that of American plaice, after which it matched it in the EU, reaching 2,69 EUR/kg.

In 2024, overall first sales of plaice in EU reporting countries amounted to 15.156 tonnes at a value of over EUR 41 million and an average price of 2,69 EUR/kg. In line with previous years, both production and value have decreased (55% in volume, 45% in value). Produced value has resisted the drop in volumes due to increasing prices during 2020-2024 (+23%).

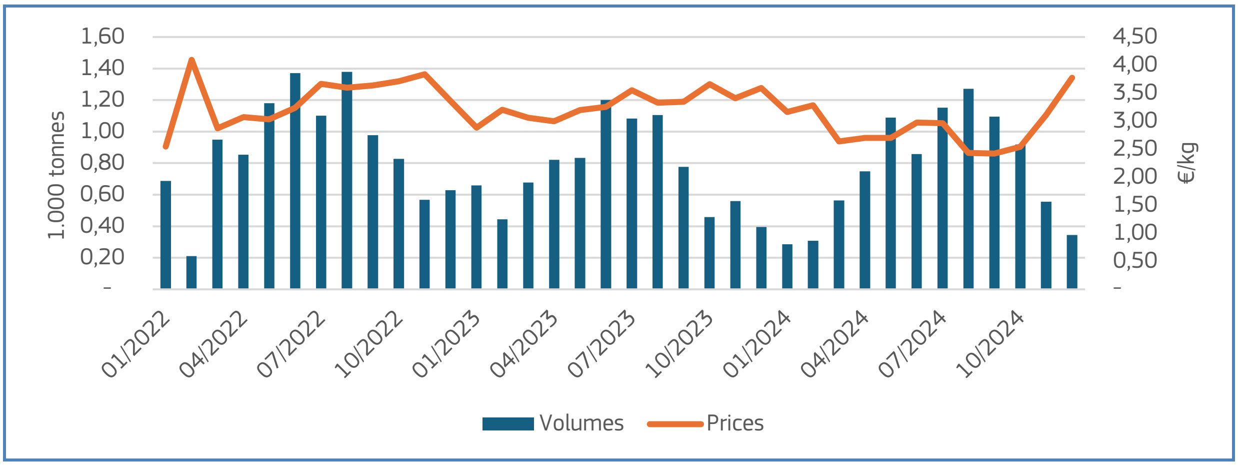
Among the reporting countries, Denmark accounted for most first-sale volumes (60%) in 2024, followed by the Netherlands (25%). While the Netherlands had a diminishing share of first-sale volumes during 2020-2023, Denmark's position tended to be prominent at EU level (respectively -17 % versus +14 % in development of country share of total first-sales volume in the reporting countries), although both main countries reported significant diminishing volumes (-41% for Denmark, -73% for the Netherlands).

First-sales data show different seasonality patterns among reporting countries, with the majority of first sales occurring during summer for Denmark and the Netherlands: on average, 54% of first sales in Denmark take place between May and September, and 48% in the Netherlands, the peak often reached between June and August. However, seasonality is scarcer in Germany or France for instance, where the peak is more often reached in January. Though not always clear, first-sale price variations in 2024 were more sharply correlated with first-sales volumes (with price peaks when volumes lowest). Prices recorded in Denmark between January 2020 and December 2024 (2,75 EUR/kg on average) were higher than prices recorded in the Netherlands (2,47 EUR/kg) and on average in the EU (2,60 EUR/kg) over the same period.

In 2024, six of the main recorded ten places of sale for plaice (in volume terms) were in the Netherlands. Places of sale in Denmark were not reported due to rules on confidentiality. Among main reporting places of sale, the top two - Urk (11% of first-sales in EU) and IJmuiden/Velsen (8%) - are located in the Netherlands, followed by Zeebrugge (4%) and Oostende (3%) in Belgium. In Germany, Maasholm (1%) is ranked 8th, while other countries were not included in the top ten.

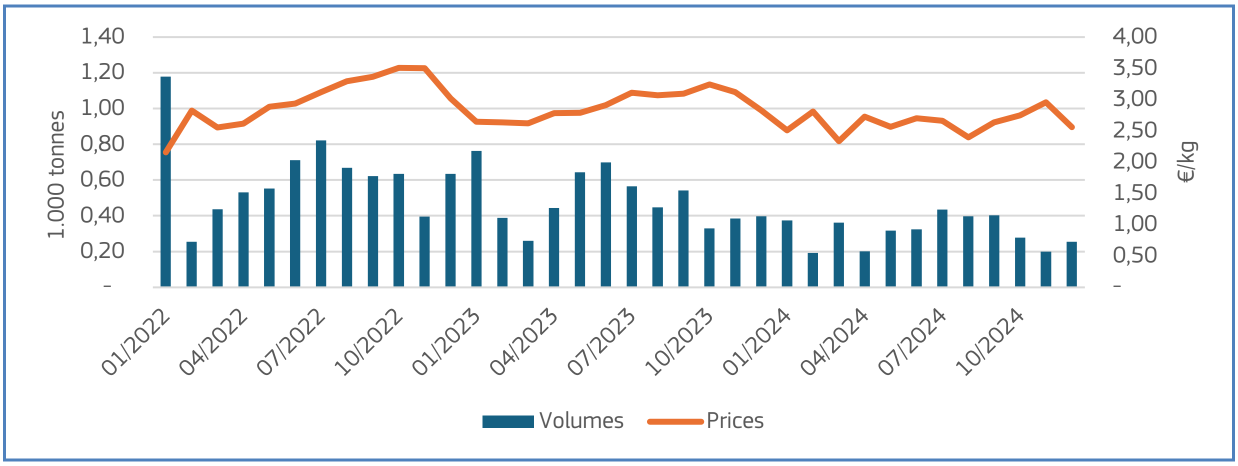
[22] Totals do not correspond exactly to actual sums because of roundings.

Figure 43. **FIRST SALES: PLAICE IN DENMARK**



Source: EUMOFA.

Figure 44. **FIRST SALES: PLAICE IN THE NETHERLANDS**



Source: EUMOFA.

5. 4. International trade

In the CN[23] used for registering EU import-export data, plaice was specifically reported as frozen, fresh or chilled[24].

In 2024, the EU-27 imported 12.362 tonnes of plaice at a value of EUR 37 million from third countries, mostly presented as whole or gutted (99,7% of volumes), and preserved as live or fresh (87%) or frozen (13%). The imported plaice was exclusively European plaice. The major provider of plaice to the EU market was Iceland (37% of imported volumes), accounting for 39% of the extra-EU import value, while the United Kingdom was second in terms of imported volumes (30%) and import value (28%). Despite the war of aggression by Russian on Ukraine and subsequent EU sanctions against Russia, plaice imports from Russia increased significantly in 2024 (99% in volumes compared to 2022, 55% compared to 2020). 77% of imports in 2024 were reported in the Netherlands (being a trade hub), 15% in Denmark and 6% in France. These three countries accounted for 97% of extra-EU import value. However, when considering intra-EU flows, plaice from the Netherlands was largely exported to Italy and Germany (30% for each, in volumes). Compared to the 16.046 tonnes imported from inside and outside the EU, the Netherlands exported 8.382 tonnes inside and outside the EU, making the Netherlands a transit for flows of plaice within the EU. Among those intra-EU flows, most intra-EU exports from main exporters such as Denmark, Germany, Belgium and France, were bound for the Netherlands (respectively 76%, 83%, 94% and 75% of national exported volumes).

[23] The Combined Nomenclaure (CN) is the EU's eight-digit coding system, comprising the Harmonised System (HS) codes with further EU subdisions. It serves the EU's common customs tariff and provides statistics for trade within the EU and between the EU and the rest of the world.
[24] 0302 22 00 - Fresh or chilled plaice "Pleuronectes platessa"; 0303 32 00 - Frozen plaice "Pleuronectes platessa"; 0304 83 10 - Frozen fillets of plaice "Pleuronectes platessa".

In the same year, EU exports to third countries amounted to 1.210 tonnes at a value of EUR 11 million. Frozen plaice accounted for 98% of the total extra-EU export value whereas live or fresh plaice accounted for 2% of the total export value. The main destination in value terms was the United Kingdom, accounting for EUR 7 million (66% of the total extra-EU export value in 2024), followed by the United States (20%).

Over the 2020-2023 period, imported volumes of plaice (exclusively European plaice) in the EU increased by 5% while first-sales volumes dropped to 55%. Import value increased by 26% whereas first sales value fell by 45%. Both for frozen and fresh imported plaice, prices increased from 32% (for fresh plaice, accounting for 84% of imported volumes) to 62% (for frozen imported plaice), while price reached 39% for first sales of fresh plaice in the EU (and not relevant analysis for frozen plaice due to weak volumes at stake).

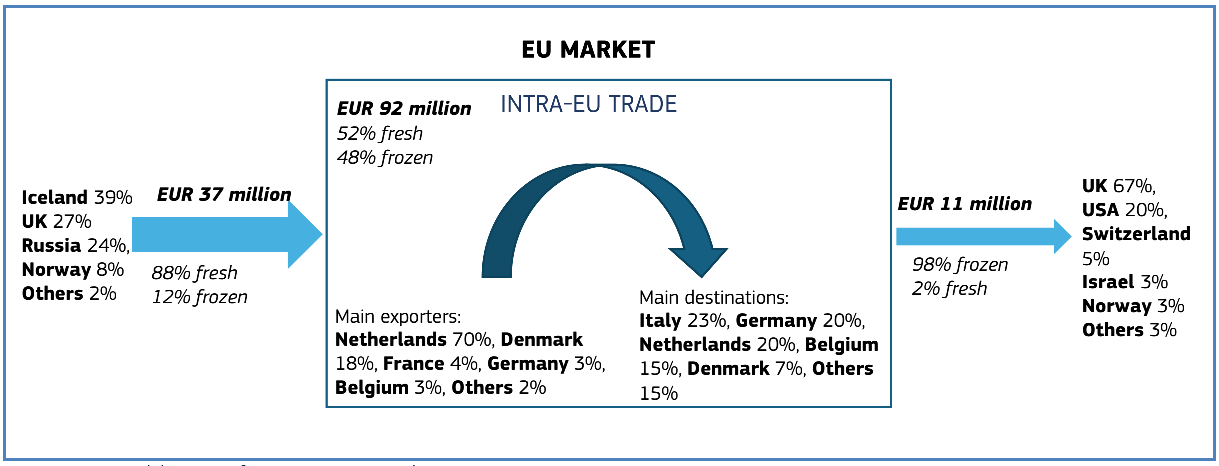
Table 41. **AVERAGE FIRST-SALE AND IMPORT PRICES OF EUROPEAN PLAICE IN THE EU (in EUR/kg)**

Country	**2020**		**2021**		**2022**		**2023**		**2024**	
	Frozen	Fresh	Frozen	Fresh	Frozen	Fresh	Frozen	Fresh	Frozen	Fresh
Import price	2,13	2,55	2,35	2,67	3,74	3,61	3,46	3,36	2,93	2,98
First-sale price	2,24	2,20	none	2,40	3,18*	3,11	1,80*	3,06	1,76*	2,69

Source: EUROSTAT. * Prices based on very weak volumes (<100kg).

In 2024, intra-EU exports of plaice products amounted to 15.929 tonnes at a value of EUR 92 million. The intra-EU trade was dominated by live or fresh plaice, which accounted for 52% of the trade value, followed by frozen fish (48%). Italy (23% of trade value) and Germany (20%) were the main destinations for the intra-EU exports.

Figure 45. **THE PLAICE EU-TRADE MARKET IN 2023, IN VALUE**

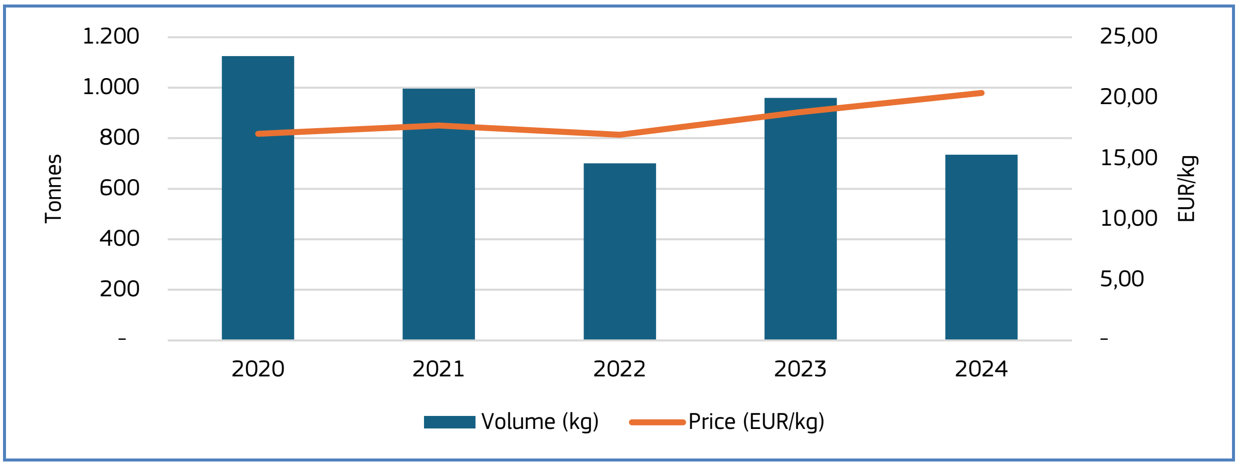


Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

5. 5. Consumption

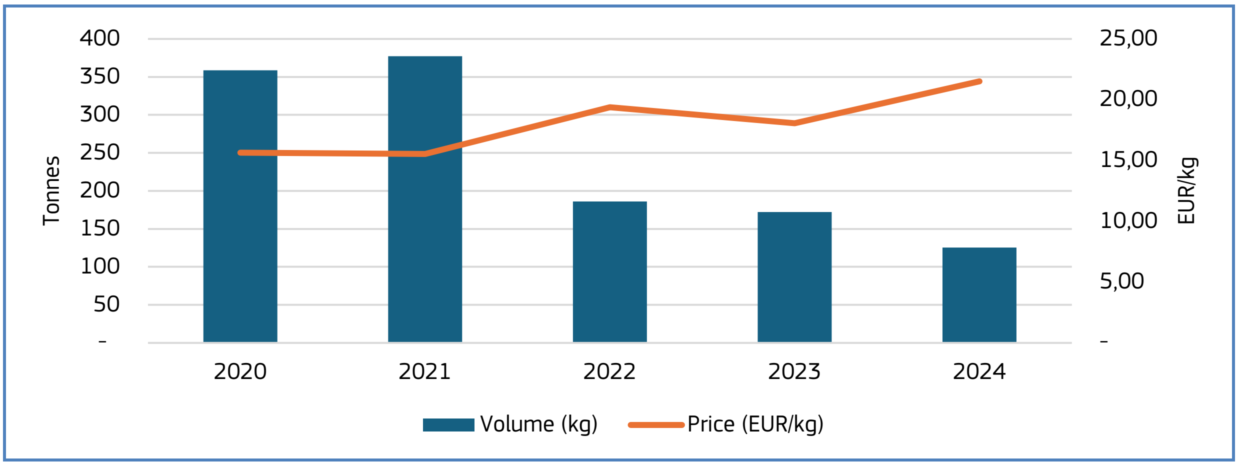
Plaice is mostly consumed as fresh fillets. Europanel data cover the volumes and values of household consumption of fresh plaice in Germany and in the Netherlands. Over the 2020-2024 period, decreasing trends were observed in both countries in terms of volumes, directly linked with the reduction of supply at EU level: -35% in Germany and -65% in the Netherlands. Consequently, average prices increased significantly over the period: +20% in Germany and +38% in the Netherlands.

Figure 46. **HOUSEHOLD CONSUMPTION: FRESH PLAICE IN GERMANY**



Source: EUMOFA.

Figure 47. **HOUSEHOLD CONSUMPTION: FRESH PLAICE IN THE NETHERLANDS**



Source: EUMOFA.

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

Global highlights: European Commission, Fishing Daily, Statistics Iceland.

Macroeconomic context: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX, Eurostat, European Central Bank.

First sales: Eur-lex.

Case studies: European Commission, Fishbase, Eurostat, Europanel.

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

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

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

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

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

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