European Commission

Monthly Highlights

No. 4 / 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 6 March 2025, the European Commission published evaluations of the Marine Strategy Framework Directive and the Bathing Water Directive, which have been in place since 2008 and 2006, respectively. The Directives, which deal with protection of EU seas and oceans and the quality of bathing water on land, have been assessed to measure their achievements and identify any gaps and potential for simplification. Both scored positively on certain obligations, such as setting up an EU-wide framework for the protection of marine biodiversity and the sustainable use of marine resources, improved cooperation across Member States and marine regions. 85% of bathing water sites at sea and on land in the EU were rated 'excellent' and minimum water quality standards were met at 96% of sites. However, the evaluation concluded that there was scope for enhancing the actual level of both health and environmental protection through improved alignment with the EU's One Health and Clean Competitiveness ambitions while reducing administrative burdens by enhancing coherence with the Water Framework Directive[1].

EU / Blue economy: From 3 to 7 March 2025, Brussels became the hub of ocean action as the **European Ocean Days** brought together researchers, policymakers, youth and industry leaders to discuss how to preserve Europe's marine ecosystems and boost its blue economy. With 14 events and more than 1,800 participants, the European Ocean Days covered topics from the **EU Mission 'Restore our Ocean and Waters'** to blue innovation and investment. It also helped shape two key upcoming EU policies: the **European Ocean Pact** and the **European Water Resilience Strategy**[2].

EU / Fishery: On 18 March 2025, the European Commission responded to concerns raised by the Advisory Councils (ACs) regarding their involvement in the work of the Scientific, Technical and Economic Committee for Fisheries (STECF). The Commission reaffirmed the importance of the ACs in maritime and fisheries policy and outlined steps to enhance their involvement. The Commission also acknowledged the role of ACs in shaping fisheries management and committed to improving communication channels and transparency in STECF decision-making. While some industry representatives remain sceptical, this response signals a step towards improving collaboration between policymakers and fisheries stakeholders[3].

EU / Fishery / Aquaculture: Leading EU fishing and aquaculture associations have issued a joint call to maintain and strengthen the European Maritime, Fisheries and Aquaculture Fund (EMFAF) as a standalone financial instrument in the next Multiannual Financial Framework (MFF). The appeal comes ahead of critical discussions by the European Council and Parliament on the post-2027 budget. Sector leaders expressed strong opposition to proposals that would merge EMFAF into a single multi-sector fund and concluded that an independent fisheries and aquaculture policy was essential for Europe's economy, environment and food security[4].

EU / Fish Producer Organisations: The European Association of Fish Producers Organisations (EAPO) published a position paper highlighting inconsistencies in the financial support for Producer Organisations (POs) across EU Member States. The report stressed the need for a level playing field in funding and regulatory implementation to strengthen the role of POs under the Common Market Organisation (CMO). Immediate steps were requested to address funding disparities, improve support for small-scale and transnational POs and uphold competition rules exemptions to maintain market stability. While the CMO framework is well-designed to help fishers organise supply chains and stabilise incomes, financial and regulatory inconsistencies threaten its effectiveness. According to EAPO, in order to ensure long-term sustainability, structured reforms are needed to provide all EU POs with the necessary resources to support the fishing industry and coastal communities[5].

Iceland / Fishery: In February 2025 Icelandic catches amounted to almost 70.000 tonnes, which is 3% more than in February 2024. There was a 5% decrease in demersal fish catches, while pelagic catches increased by 16%. In the period March 2024 to February 2025, a total of 987.000 tonnes were landed, which is 23% less than in the same period a year earlier. This is mostly due to the lack of capelin fishery in the winter of 2024[6].

[1] https://environment.ec.europa.eu/news/commission-evaluates-sea-protection-and-bathing-water-quality-laws-2025-03-06_en
[2] https://projects.research-and-innovation.ec.europa.eu/en/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe/restore-our-ocean-and-waters/european-ocean-days-2025-collective-action-europes-blue-future
[3] https://thefishingdaily.com/eu-fishing-industry-news/eu-commission-responds-to-fisheries-stakeholder-engagement-concerns/
[4] https://thefishingdaily.com/eu-fishing-industry-news/fishing-sector-urges-dedicated-fund-in-next-eu-budget-framework/
[5] https://thefishingdaily.com/eu-fishing-industry-news/eapo-calls-for-stronger-support-in-common-market-organization-implementation/
[6] https://statice.is/publications/news-archive/fisheries/fish-catch-in-february-2025/

2. MACROECONOMIC CONTEXT

2. 1. Marine fuel

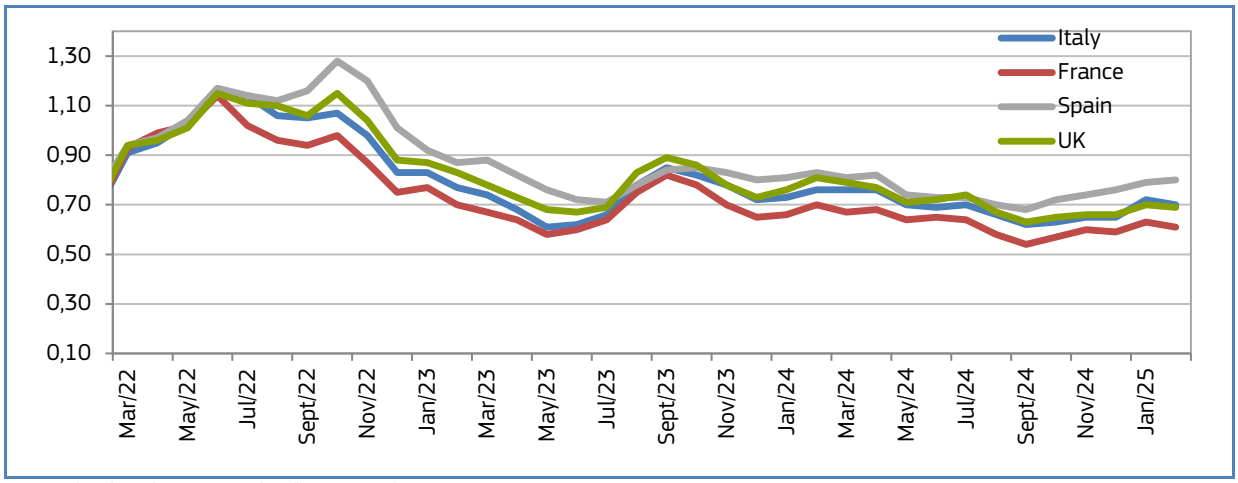
Average prices for marine fuel in **February 2025** ranged between 0,61 and 0,80 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices decreased by an average of about 1,4% compared with the previous month and by an average of 9,7% compared with the same month in 2024.

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)*	0,61	-3%	-13%
Italy *(ports of Ancona and Livorno)*	0,70	-3%	-8%
Spain *(ports of A Coruña and Vigo)*	0,80	1%	-4%
The UK *(ports of Grimsby and Aberdeen)*	0,69	-1%	-15%

Source: 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

In February 2025, the EU annual inflation rate was 2,7%, down from 2,8% in January 2025. A year earlier, the rate was 2,8%.

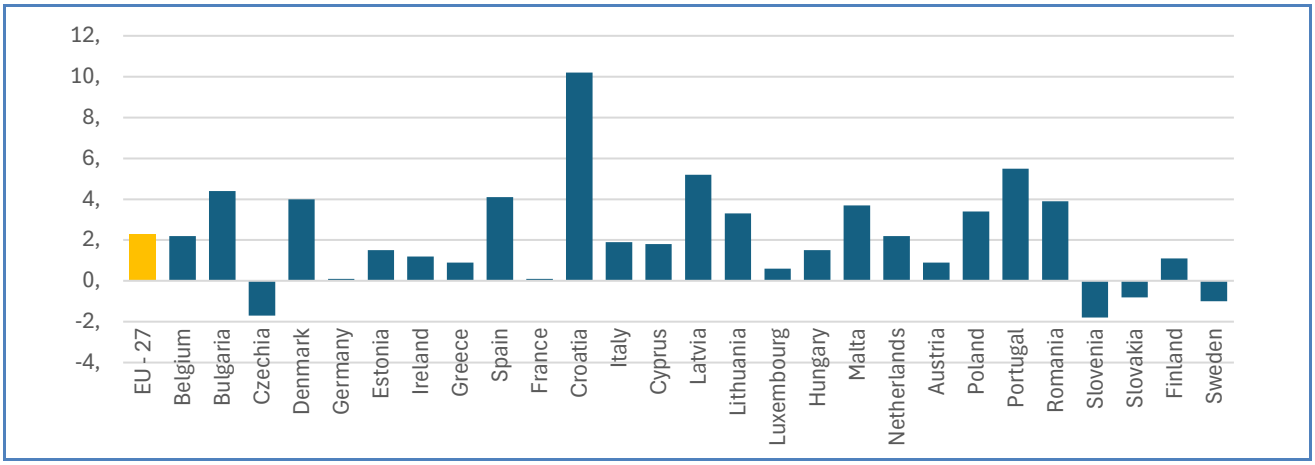
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR FEBRUARY 2025, COMPARED WITH FEBRUARY 2024**

Lowest inflation rates		Highest inflation rates	
France	+0,9%	Hungary	+5,7%
Ireland	+1,4%	Romania	+5,2%
Finland	+1,5%	Estonia	+5,1%

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 february 2025 (value expressed in percentage)**



Source: Eurostat.

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

	Feb 2023	Feb 2024	Jan 2025	Feb 2025	Change from Jan 2025	Change from Feb 2024
Food and non-alcoholic beverages	19,1	3,0	2,4	2,9	20,8%	-3,3%
Fish and seafood	14,6	3,2	2,5	2,3	-8,0%	-28,1%
Fresh or chilled fish	12,1	4,0	4,4	3,5	-20,5%	-12,5%
Frozen fish	20,8	1,7	0,3	0,6	100,0%	-64,7%
Fresh or chilled seafood	8,3	1,8	3,4	3,5	2,9%	94,4%
Frozen seafood	8,8	0,6	-0,4	-0,5	25,0%	-183,3%
Dried, smoked or salted fish and seafood	18,8	2,8	3,6	2,8	-22,2%	0,0%
Other preserved or processed fish and seafood and fish and seafood preparations	17,3	4,2	1,1	1,6	45,5%	-61,9%

Source: Eurostat.

2. 4. Exchange rates

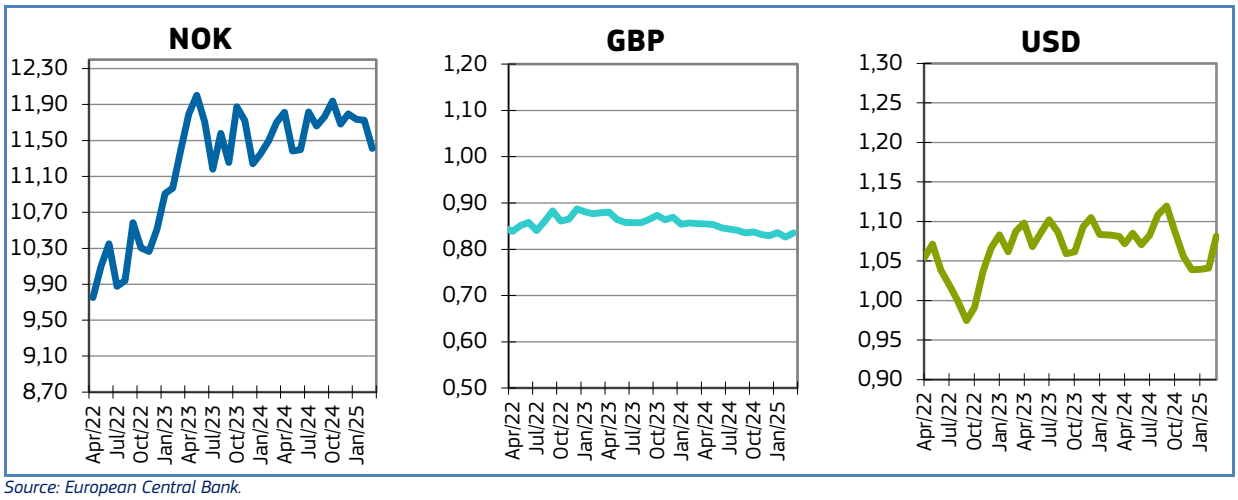
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Mar 2023	Mar 2024	Feb 2025	Mar 2025
NOK	11,3940	11,6990	11,7245	11,4130
GBP	0,8792	0,8551	0,8261	0,8354
USD	1,0875	1,0811	1,0411	1,0815

Source: European Central Bank.

In March 2025, the euro depreciated against the Norwegian krone (2,4%) and the British pound sterling (2,3%), while it remained stable against the US dollar, relative to the previous month. For the past six months, the euro has fluctuated around 11,7148 against the Norwegian krone. Compared with February 2025, the euro has depreciated 2,7% against the Norwegian krone and appreciated 1,1% against the British pound sterling and 3,9% against the US dollar.

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



Source: European Central Bank.

3. FIRST SALES IN EUROPE[7]

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

Increases in value and volume (Jan 2025 vs Jan 2024): Belgium, Bulgaria, Cyprus, Finland, France, Italy, Latvia, the Netherlands, Sweden and the United Kingdom recorded an increase in both first-sales value and volume. The sharpest increases in relative terms were in Sweden due mainly to sprat and herring.

Decreases in value and volume (Jan 2025 vs Jan 2024): Germany, Lithuania, Portugal and Norway recorded decreases in first-sales value and volume. Germany stood out with the most significant drops in relative terms, due to lower first sales of mackerel and Greenland halibut.

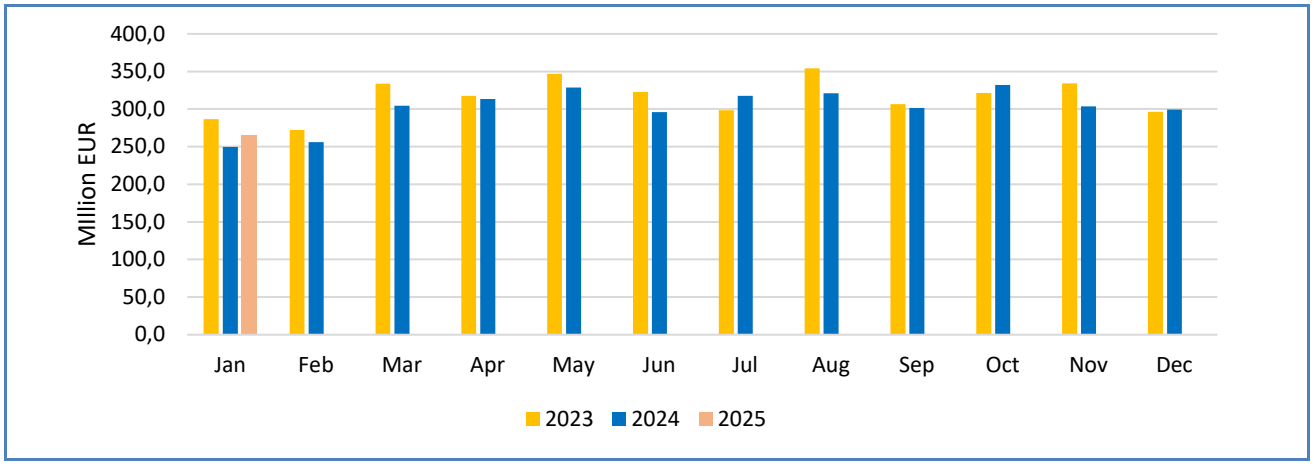
Table 5. **JANUARY OVERVIEW OF FIRST SALES FROM THE REPORTING COUNTRIES (volume in tonnes and value in million EUR) ***

	January 2023		January 2024		January 2025		Change from January – 2024	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Belgium	1.459	7,07	1.359	5,68	1.463	6,54	8%	15%
Bulgaria	1	0,00	12	0,02	20	0,07	70%	331%
Cyprus	22	0,17	16	0,12	26	0,19	59%	51%
Denmark	57.636	37,75	55.618	43,15	48.267	46,39	-13%	8%
Estonia	6.563	1,91	6.139	3,04	6.578	2,60	7%	-14%
Finland	7.200	2,05	4.430	1,71	7.846	2,34	77%	37%
France	15.721	63,92	14.805	48,35	15.197	57,59	3%	19%
Germany	6.193	8,39	6.001	7,63	1.825	2,04	-70%	-73%
Italy	4.698	20,93	4.249	17,97	4.350	21,03	2%	17%
Latvia	3.435	0,95	3.599	1,21	4.314	1,71	20%	42%
Lithuania	60	0,33	15	0,08	10	0,05	-35%	-41%
Netherlands	1.935	11,75	1.322	8,77	1.684	10,72	27%	22%
Portugal	4.762	20,90	4.306	18,30	3.569	16,78	-17%	-8%
Spain	24.446	99,90	21.397	90,62	19.620	90,32	-8%	0%
Sweden	21.800	10,39	1.045	2,93	9.604	6,98	819%	139%
Norway	272.241	266,78	224.512	239,44	215.364	304,84	-4%	27%
United Kingdom	50.535	85,36	52.338	110,29	53.435	116,05	2%	5%

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.*

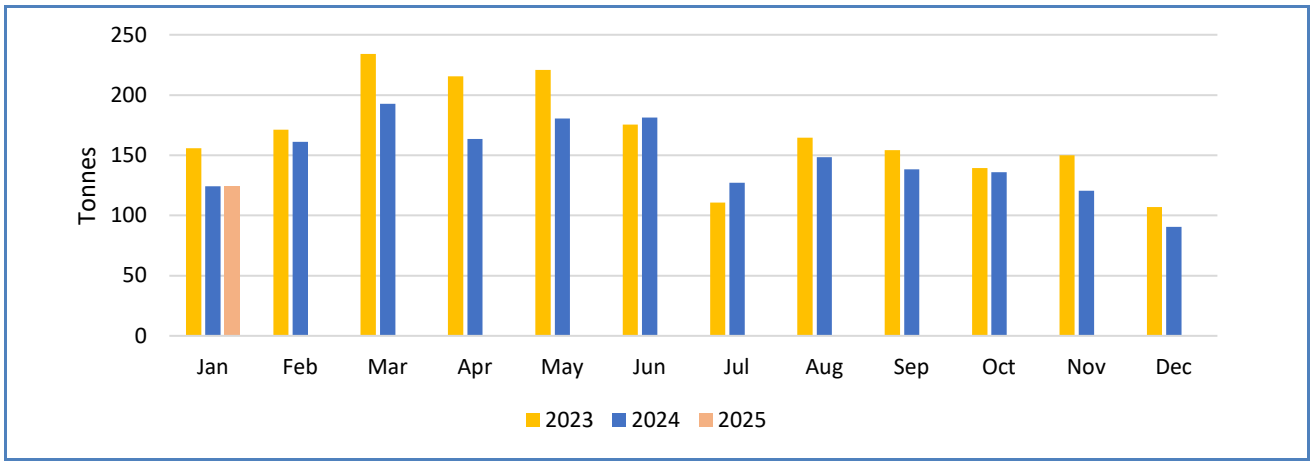
[7] During January 2025, 15 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section "First sales in Europe" are extracted from EUMOFA

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



In January 2025, first-sales value reached EUR 265,3 million, with a first-sales volume of 124.373 tonnes. Over the period analysed, first-sales values in 2023 were higher compared to 2024, except for July, October and December. In January 2025, first-sales value experienced a 7% decline compared to 2023, when cephalopods, groundfish and flatfish (-19%, -14% and -19% respectively) were mainly driving the decline, but saw a 6% increase compared to 2024 with small pelagics (+9%) being the CG contributing most to the increase. Similarly, first-sales volumes in 2024 decreased in most months, except for June and July. In January 2025, first-sale volumes remained stable compared to the same period in 2024, but showed a 20% decrease compared to January 2023, with small pelagics and groundfish (-17% and -55%, respectively) driving the decline.

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[8,9]

Bivalves and other molluscs and aquatic invertebrates

In January 2025, first-sales value of "Bivalves and other molluscs and aquatic invertebrates" amounted to EUR 21,6 million, a 10% increase compared to January 2024. First-sales volume came to 9.188 tonnes, an increase of 30% compared to the same period in 2024. Scallop and clam (+2% and +26% respectively) were the main commercial species driving the increase in value, while clam and mussel *Mytilus* spp. (+44% and +210%, respectively) were mainly responsible for the increase in volume.

Figure 6. **FIRST SALES VALUE AND VOLUME OF BIVALVES, JAN 2023 - JAN 2025**

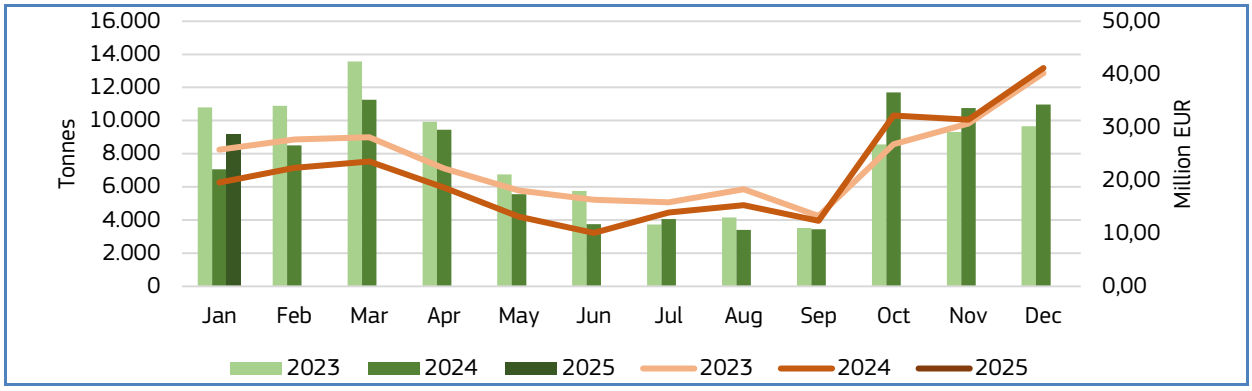


Table 6. **FIRST SALES PRICES OF BIVALVES MCS (JAN 2024 AND JAN 2025)**

Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
Italy	Clam	2,41 EUR/kg	2,63 EUR/kg	+9%
Spain	Clam	10,76 EUR/kg	12,01 EUR/kg	+12%
France	Scallop	2,32 EUR/kg	2,18 EUR/kg	-6%

Cephalopods

In January 2025, first-sales value of "Cephalopods" totalled EUR 29,4 million, an increase of 12% compared to January 2024. Landings came to 4.082 tonnes, a decrease of 3% compared to January 2024. Squid (+30%) and octopus (+6%) were the two main commercial species driving the increase in first sales value, while cuttlefish (-21%) and octopus (-9%) were the two main products responsible for the decrease in first-sales value.

[8] 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

[9] 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 2023 - JAN 2025**

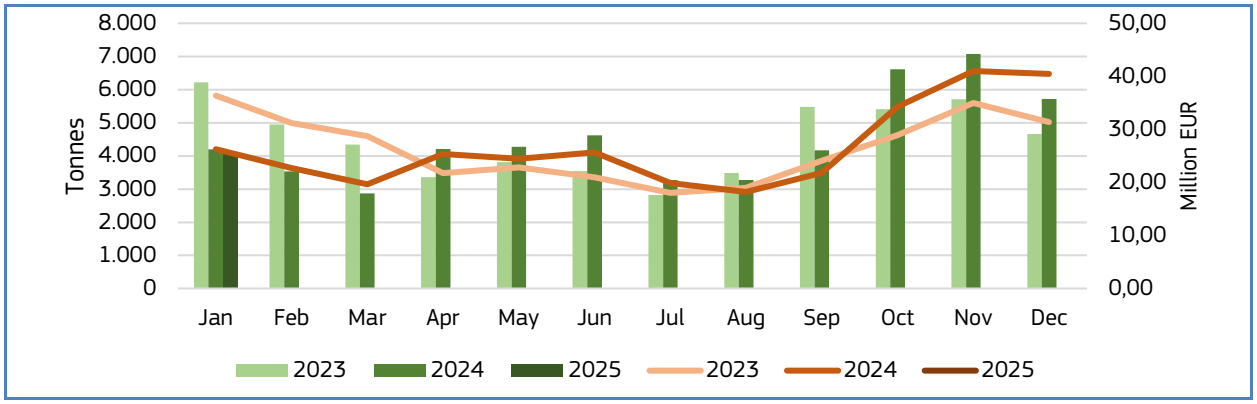


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN 2024 AND JAN 2025)**

Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
France	Squid	8,71 EUR/kg	8,90 EUR/kg	+2%
Belgium	Cuttlefish	3,18 EUR/kg	3,94 EUR/kg	+24%
Portugal	Octopus	7,16 EUR/kg	8,34 EUR/kg	+17%

Crustaceans

In January 2025, first-sales value of "Crustaceans" totalled EUR 25,0 million, an increase of 4% compared to January 2024. Landings amounted to 2.974 tonnes, an increase of 9% compared to the same period in 2024. Shrimp *Crangon* spp. (+80% and +71%) and Norway lobster (+24% and +28%) 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 2023 - JAN 2025**

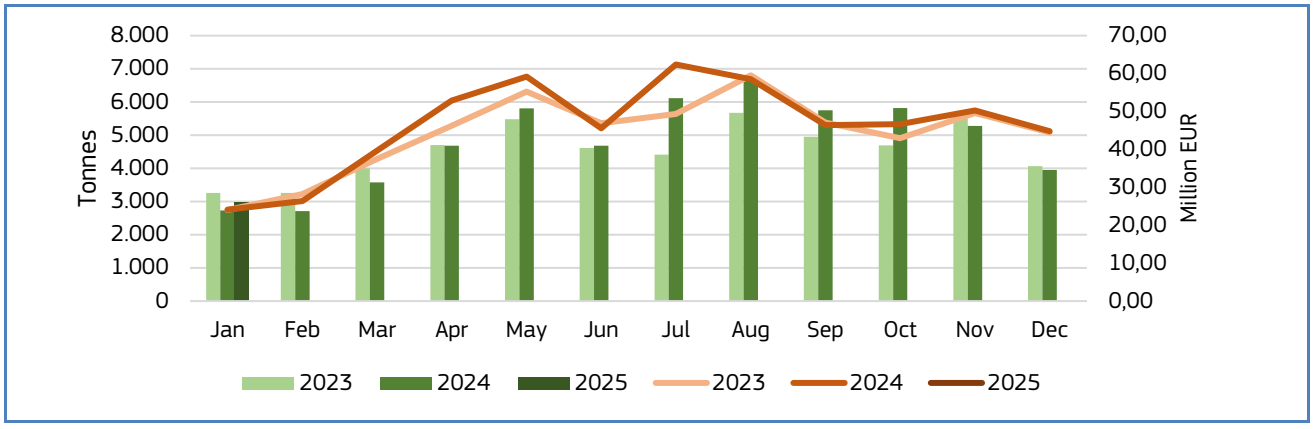


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN 2024 AND JAN 2025)**

Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
Spain	Miscellaneous shrimp	20,97 EUR/kg	22,73 EUR/kg	+8%
Spain	Warmwater shrimp	10,69 EUR/kg	9,30 EUR/kg	-13%
Sweden	Coldwater shrimp	9,76 EUR/kg	12,58 EUR/kg	+29%

Flatfish

In January 2025, first-sales value of "Flatfish" came to EUR 26,2 million, an increase of 2% compared to January 2024. Landings amounted to 3.279 tonnes, a decrease of 12% compared to January 2024. Common sole and turbot contributed mainly to the increase in first-sales value (+21% and +11%, respectively), while Greenland halibut and megrim were the main species driving the decrease in volume (-81% and -14%, respectively).

Figure 9. **FIRST SALES VALUE AND VOLUME OF FLATFISH, JAN 2023 - JAN 2025**

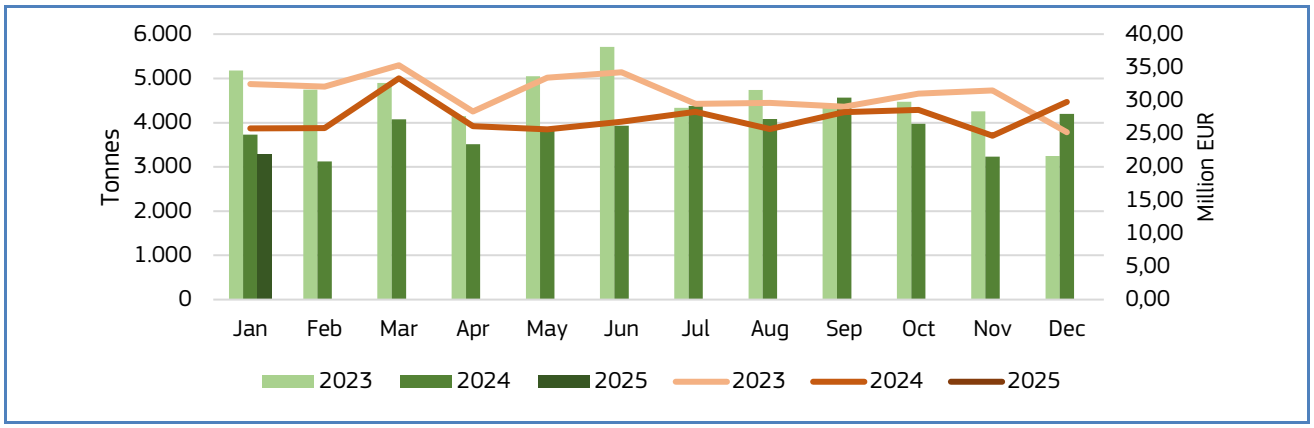


Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN 2024 AND JAN 2025)**

Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
France	Common sole	17,79 EUR/kg	17,41 EUR/kg	-2%
Netherlands	Common sole	17,46 EUR/kg	18,10 EUR/kg	+4%
Spain	Greenland halibut	5,29 EUR/kg	7,31 EUR/kg	+38%

Freshwater fish

In January 2025, the first-sales value of "Freshwater fish" came to EUR 2,4 million, an increase of 2% compared to 2024. Landings amounted to 113 tonnes, a decrease of 50% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+18%), while pike-perch was the main contributor to the decrease in volume (-72%).

Figure 10. **FIRST SALES VALUE AND VOLUME OF FRESHWATER FISH, JAN 2023 - JAN 2025**

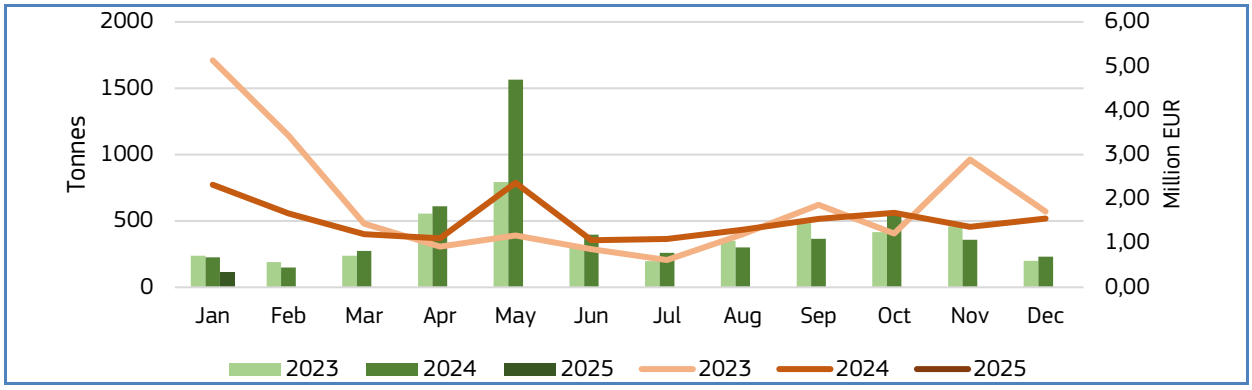


Table 10. **FIRST-SALES PRICE OF FRESHWATER FISH MCS (JAN 2024 AND JAN 2025)**

Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
France	Eel	60,40 EUR/kg	91,41 EUR/kg	+51%
Estonia	Other freshwater fish[10]	1,28 EUR/kg	2,01 EUR/kg	+57%
Netherlands	Pike-perch	9,63 EUR/kg	8,98 EUR/kg	-7%

Groundfish

In January 2025, first-sales value of "Groundfish" totalled EUR 42,0 million, an increase of 2% compared to 2024. Landings amounted to 10.786 tonnes, a decrease of 39% compared to 2024. Hake and cod (-2% and -15%) were mainly responsible for the increase in first-sales value (+9% and +64%) while blue whiting (-94%) was mainly responsible for the decrease in first-sales volume.

Figure 11. **FIRST SALES VALUE AND VOLUME OF GROUNDFISH, JAN 2023 - JAN 2025**

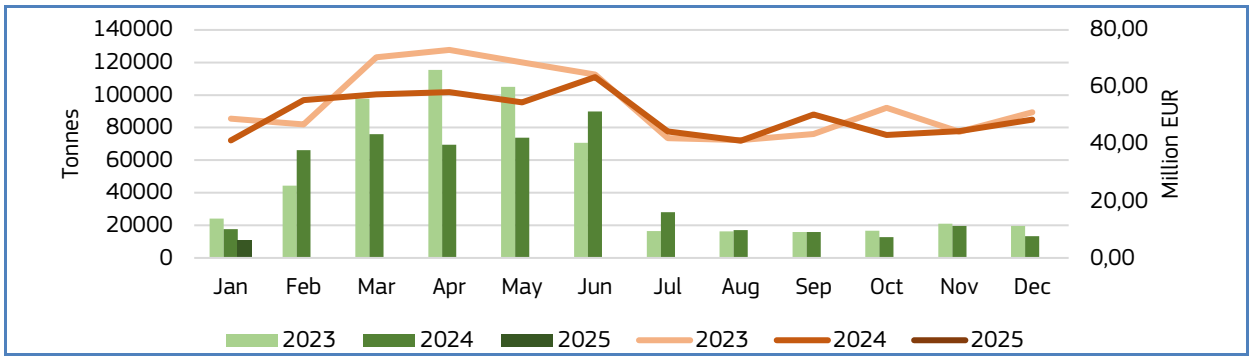


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN 2024 AND JAN 2025)**

Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
France	Hake	4,62 EUR/kg	4,73 EUR/kg	+3%
Spain	Cod	4,54 EUR/kg	8,21 EUR/kg	+81%
Spain	Hake	4,86 EUR/kg	4,33 EUR/kg	-11%

Other marine fish[11]

In January 2025, first-sales value of "Other marine fish" came to EUR 42,5 million, an increase of 2% compared to January 2024. Landings amounted to 15.325 tonnes, an increase of 10% compared to the same month in 2024. Other sharks[12] (+37% and +18%) and other marine fish[13] (+8% and +29%) were the two main commercial species contributing most to the increase in value and volume.

[10] European perch and roach represent 20% each of the total value of first sales of the MCS „Other freshwater fish" and together 79% of the total volume.
[11] In January 2025 seventeen Main Commertial Species are included in the Commmodity Group „Other Marine Fish" with monk representing ¼ of the total value and almost 11% of total volume.
[12] In January 2025, twentyfour species made up the „Other sharks" Main Commertial Species, with blue shark representing 73% of the total value and 64% of total volume.
[13] In January 2025, 240 species made up „Other marine fish" Main Commertial Species, with boarfishes nei, representing 30% of the total value and 82% of total volume.

Figure 12. **FIRST SALES VALUE AND VOLUME OF OTHER MARINE FISH, JAN 2023 - JAN 2025**

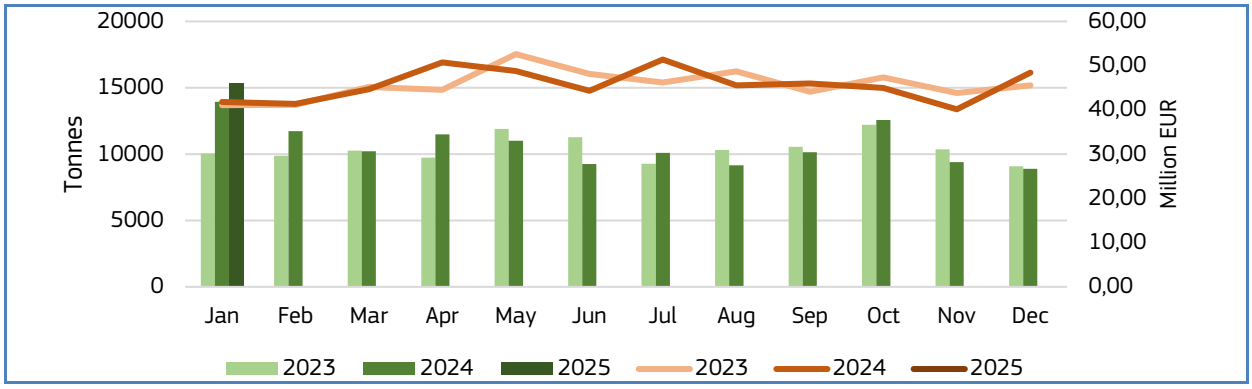


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN 2024 AND JAN 2025)**

Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
Spain	Other sharks[14]	2,75 EUR/kg	2,99 EUR/kg	+9%
Denmark	Other marine fish[15]	0,43 EUR/kg	0,42 EUR/kg	-3%
Denmark	Monk	4,94 EUR/kg	5,68 EUR/kg	+15%

Salmonids

In 2024, first-sales value of "Salmonids" came to EUR 373,2 a decrease of 98% compared to the same month in 2024. Landings amounted to 86,0 kg, a decrease of 90% compared to January 2024. Although salmon and trout are the two main commercial species in this group, they were not primarily responsible for the decrease in first-sales value and volume. This was due to increases recorded by other salmonid species[16] (-99% and -82%).

Figure 13. **FIRST SALES VALUE AND VOLUME OF SALMONIDS, PERIOD JAN 2023 - JAN 2025**

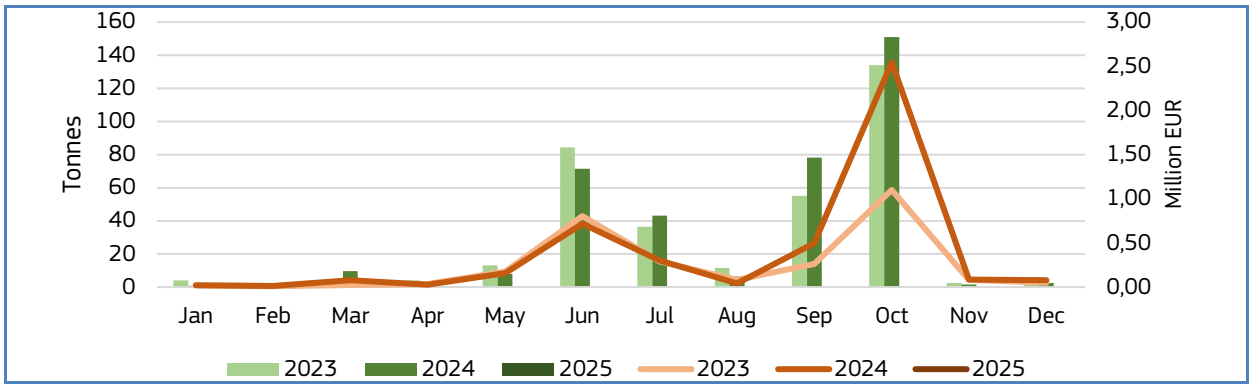


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN 2024 AND JAN 2025)**

Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
Germany	Trout	10,86 EUR/kg	7,00 EUR/kg	-36%
Estonia	Trout	13,54 EUR/kg	7,00 EUR/kg	-48%
Germany	Other salmonids[17]	3,05 EUR/kg	3,20 EUR/kg	+5%

[14] Blue shark represents 84% of the total value and 88% of the total volume of „Other Sharks" MCS.
[15] Boarfishes nei represents 99% of the total value and 99% of the total volume of „Other Marine Fish" MCS.
[16] In January 2025, „Other salmonid species" only includes European whitefish represented 100% of the MCS volume.
[17] European whitefish represents 100% of the total value and volume of „Other salmonids" MCS.

Small pelagics

In January 2025, first-sales value of "Small pelagics" amounted to EUR 57,5 million, an increase of 9% compared to January 2024. Landings amounted to 73.708 tonnes, an increase of 6% compared to the same month in 2024. The main commercial species contributing most to the increase in first-sales value and volume was herring (+44% and +78%).

Figure 14. **FIRST SALES VALUE AND VOLUME OF SMALL PELAGICS, JAN 2023 - JAN 2025**

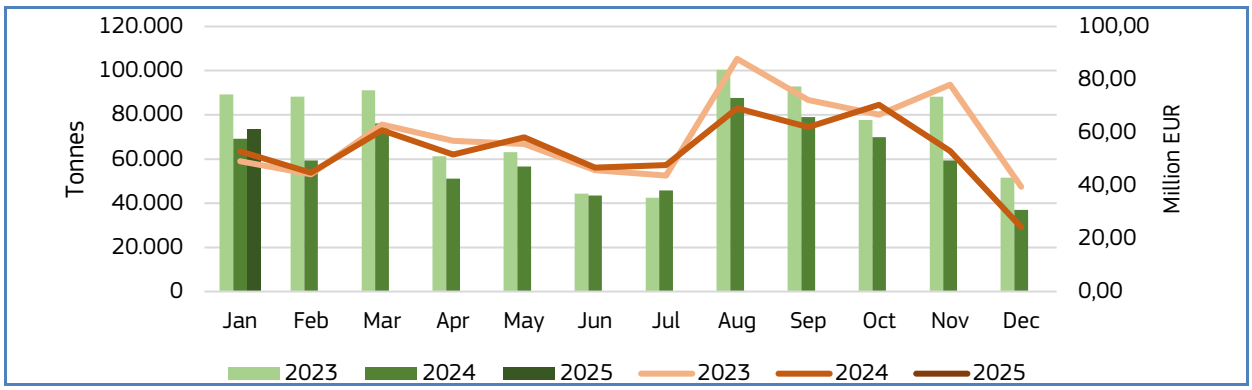


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN 2024 AND JAN 2025)**

Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
Denmark	Mackerel	1,71 EUR/kg	2,15 EUR/kg	+26%
Denmark	Herring	0,88 EUR/kg	0,83 EUR/kg	-6%
Sweden	Sprat	0,42 EUR/kg	0,45 EUR/kg	+8%

Tuna and tuna-like species

In 2024, first-sales value of "Tuna and tuna-like species" came to EUR 18,8 million, an increase of 21% compared to January 2024. Landings totalled 4.850 tonnes, an increase of 2% compared to the same month in 2024. Swordfish (+35% and +36%) and yellowfin tuna (+78% and +65%) were the two main commercial species driving the increase in first-sales value and volume.

Figure 15. **FIRST SALES VALUE AND VOLUME OF TUNA AND TUNA-LIKE SPECIES, JAN 2023 - JAN 2025**

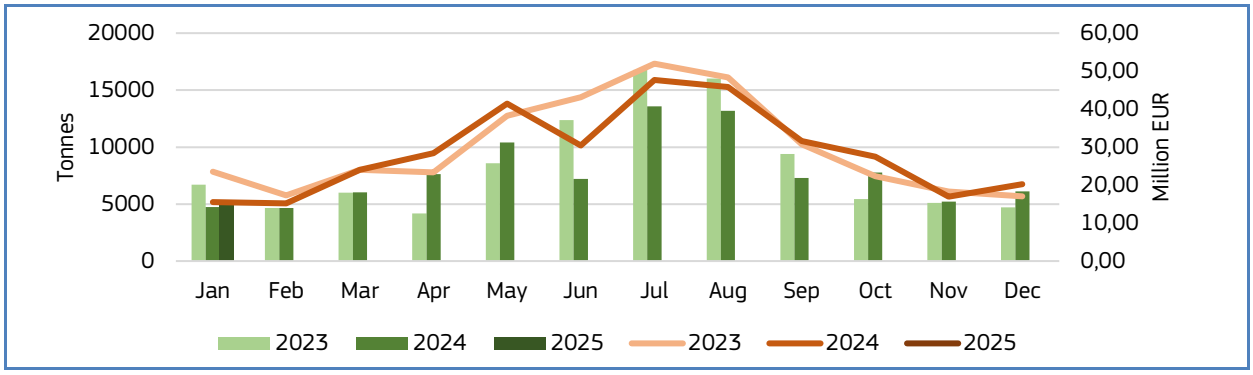


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN 2024 AND JAN 2025)**

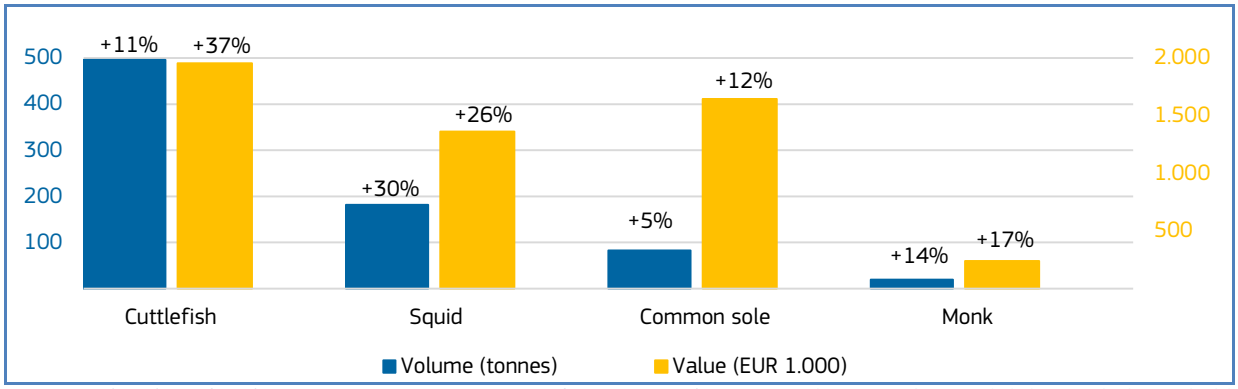
Country	Main Commercial Species	First-sales average price Jan 2024	First-sales average Price Jan 2025	Trend (Jan 2025 vs Jan 2024 %)
Spain	Swordfish	4,87 EUR/kg	4,97 EUR/kg	+2%
Spain	Yellowfin tuna	2,37 EUR/kg	2,58 EUR/kg	+9%
Spain	Bluefin tuna	10,45 EUR/kg	9,25 EUR/kg	-11%

3. 3. First sales in reporting countries[18]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 6,5 million, +15%	1,463 tonnes, +8%	Cuttlefish, squid, common sole, monk.

Figure 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, JANUARY 2025**

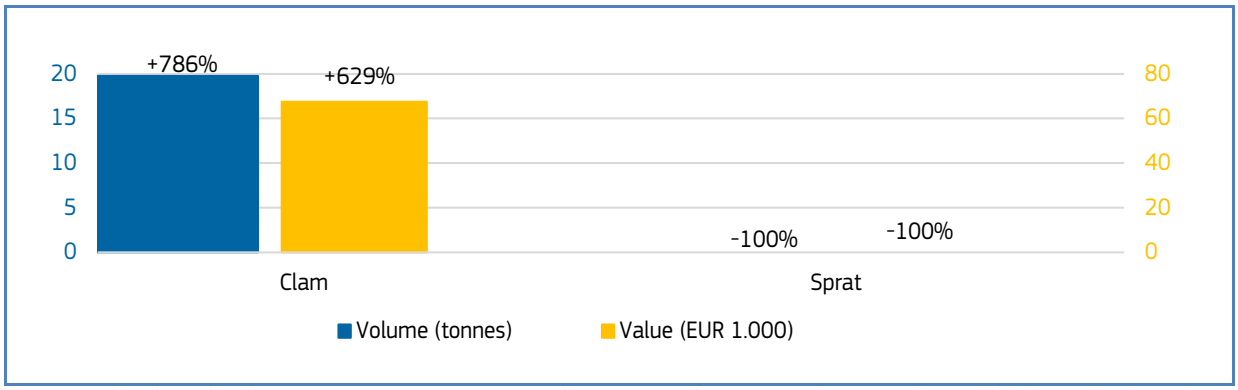


*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 0,07 million, +331%	20 tonnes, +70%	Clam, sprat

Figure 17. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, JANUARY 2025**



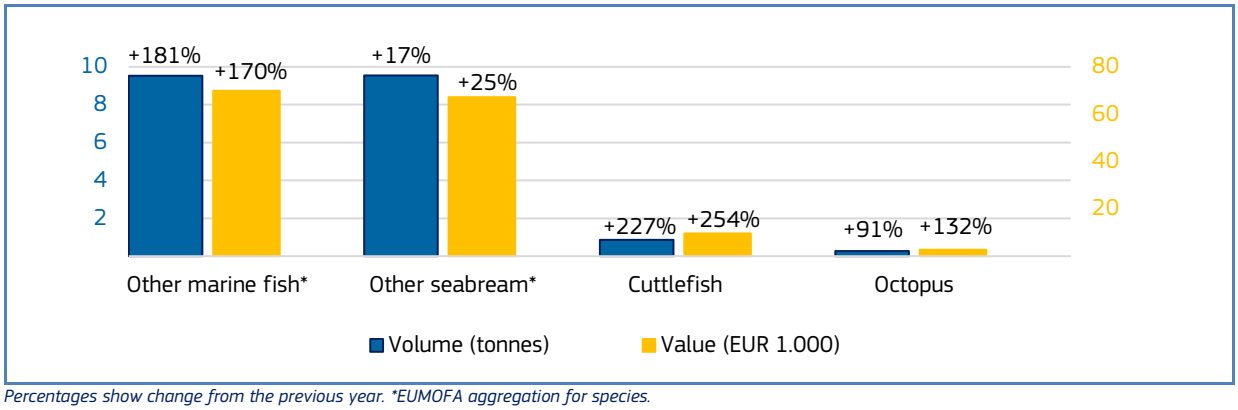
*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

[18] First-sales data updated on 25. 03. 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 CYPRUS**

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 0,2 million, +51%	26 tonnes, +59%	Other marine fish, other seabream, cuttlefish, octopus.

Figure 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, JANUARY 2025**



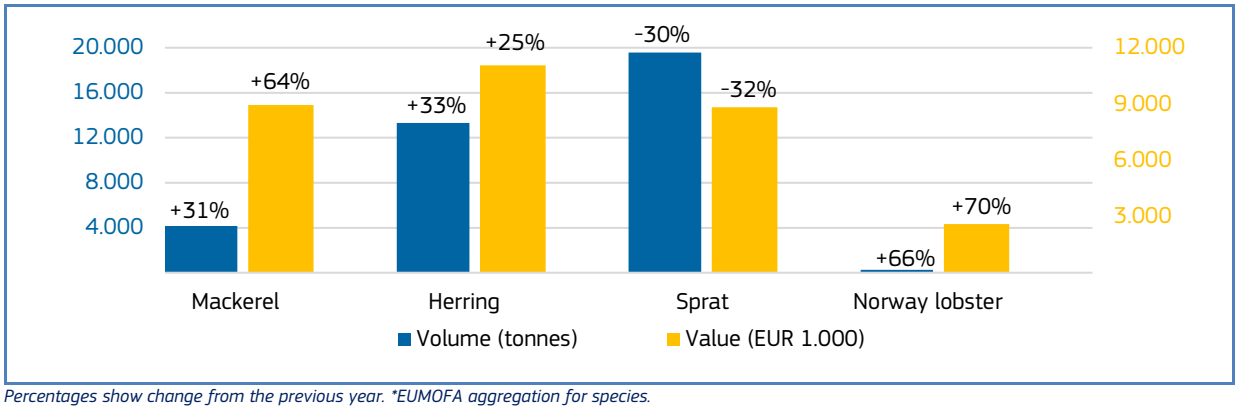
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 46,4 million, +8%	48.267 tonnes, -13%	Value: mackerel, herring, Norway lobster. Volume: sprat

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

Figure 19. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, JANUARY 2025**

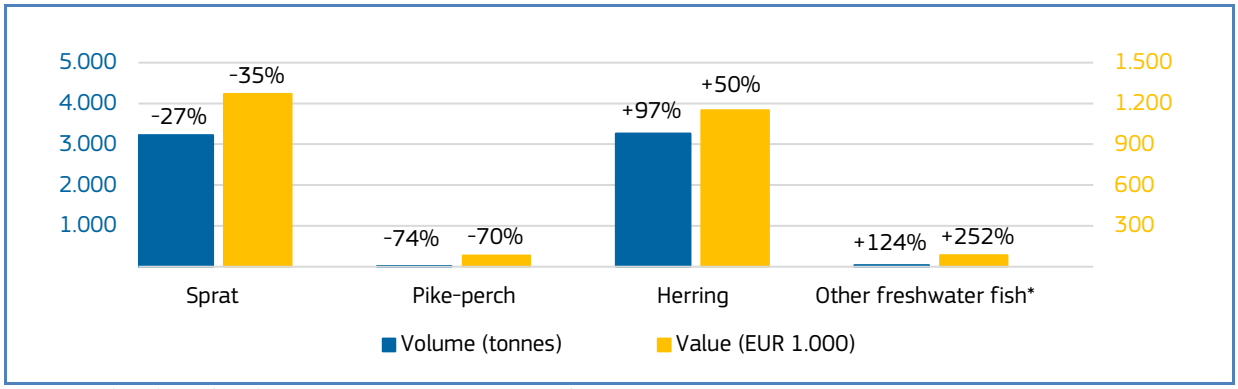


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 2,6 million, -14%	6.578 tonnes, +7%	**Value**: sprat, pike-perch. **Volume**: herring, other freshwater fish.

Figure 20. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, JANUARY 2025**

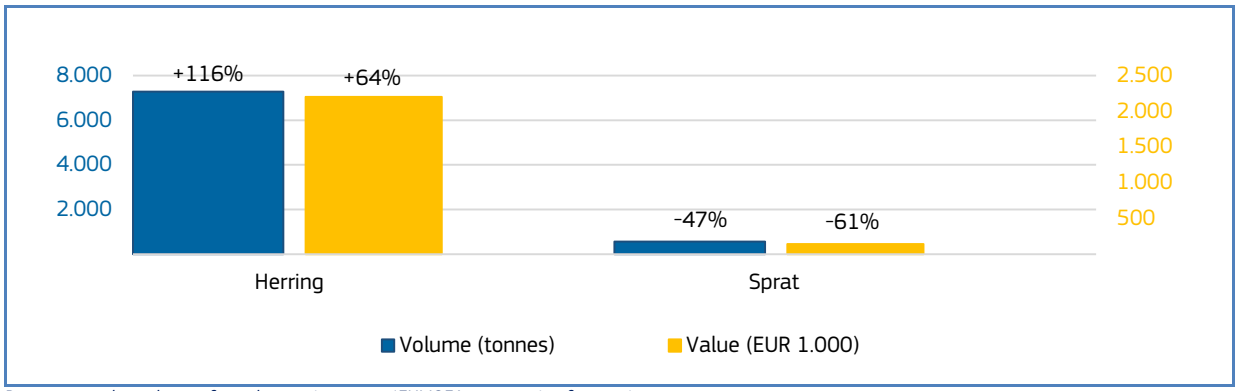


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 2,3 million, +37%	7.846 tonnes, +77%	**Value**: herring. **Volume**: sprat

Figure 21. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND, JANUARY 2025**

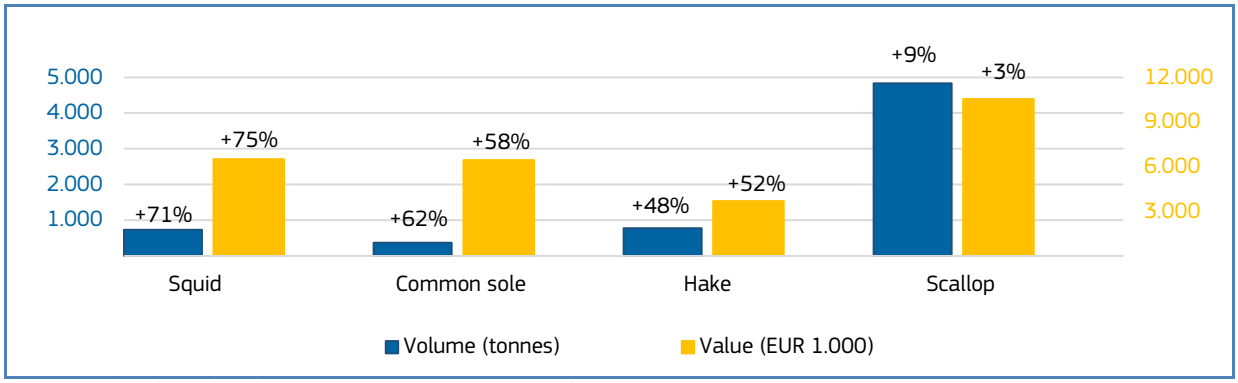


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 57,6 million, +19%	15.197 tonnes, +3%	Squid, common sole, hake, scallop.

Figure 22. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, JANUARY 2025**

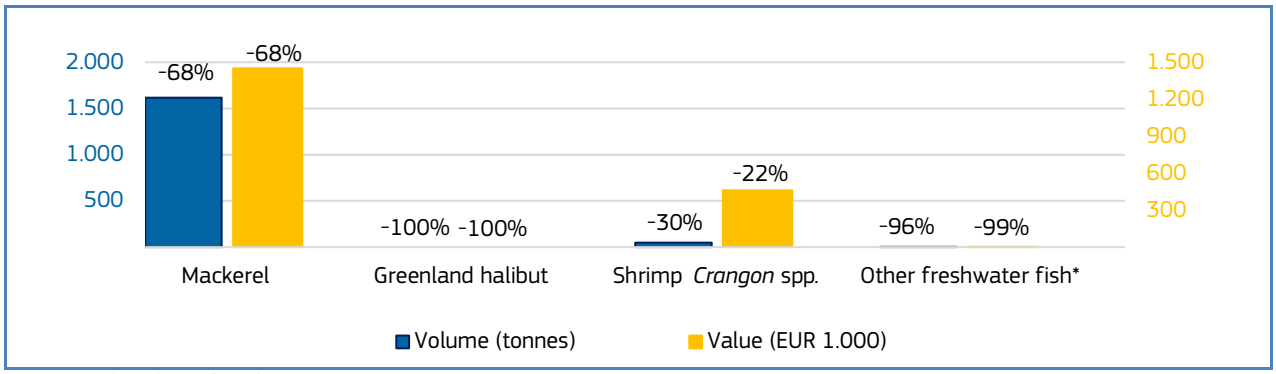


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan 2025 vs Jan 2024	EUR 2,0 million, -73%	1.825 tonnes, -70%	Mackerel, Greenland halibut, shrimp *Crangon* spp., other freshwater fish.	In January 2025, there was a decrease in first-sales value and volume of **Greenland halibut** compared to January 2024. The German Greenland halibut fishery takes place off the west coast of Greenland and is highly selective, with Greenland halibut comprising around 97% of total catches. Production recorded during January varied and these fluctuations can also be observed during the December months: December 2024 880 tonnes; December 2023 17 tonnes; December 2022 44 tonnes. The decrease observed in January 2025 can be the result of high landings recorded in December 2024.

Figure 23. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY, JANUARY 2025**



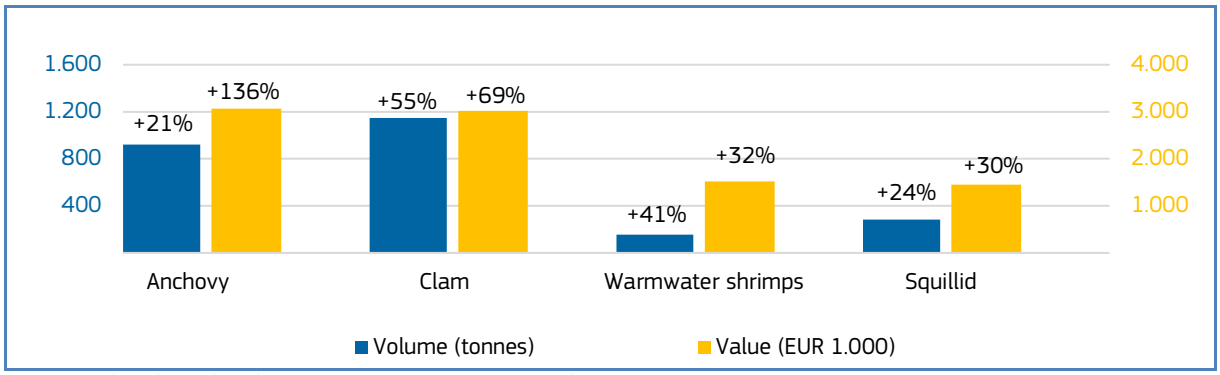
Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan 2025 vs Jan 2024	EUR 21,0 million, +17%	4.350 tonnes, +2%	Anchovy, clam, warmwater shrimps, squillid.	In January 2025 compared to January 2024, there were increases in both first-sales value and volume of **anchovy**. The moderate increase in volume is likely the

				result of natural fluctuations in the anchovy biomass. The more significant increase in value is attributed primarily to a substantial rise in the price per kg. Over that period, the average first-sales price rose from 1,71 EUR/kg to 3,33 EUR/kg. The main driver behind this sharp increase in price can be related to higher market demand and an increase in the average size of the harvested anchovies, which typically command a higher price on the market.[19]

Figure 24. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, JANUARY 2025**

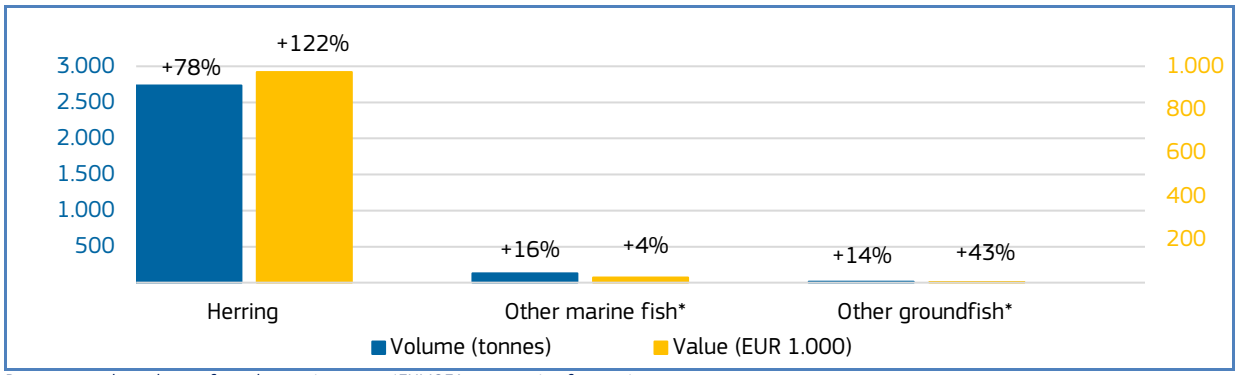


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	**First-sales value / trend %**	**First-sales volume / trend %**	**Main contributing species**
Jan 2025 vs Jan 2024	EUR 1,7 million, +42%	4.314 tonnes, +20%	Herring, other marine fish, other groundfish.

Figure 25. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, JANUARY 2025**



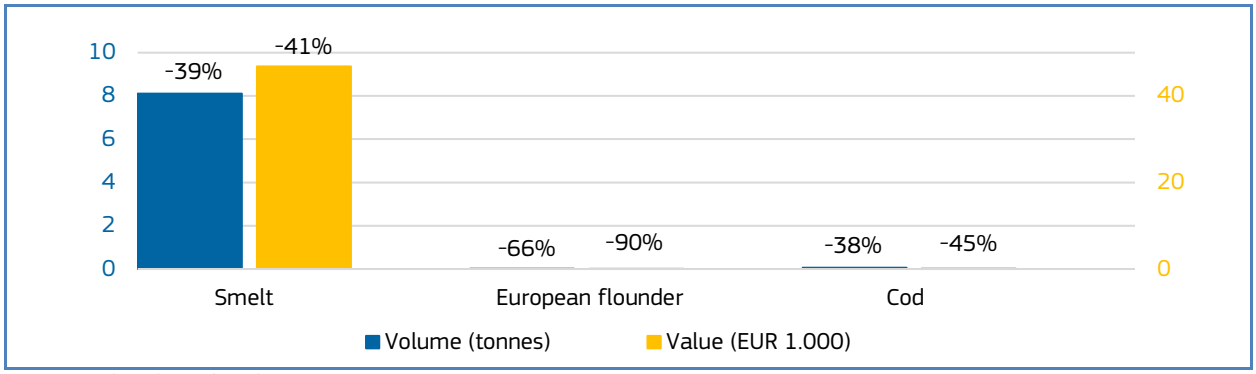
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

[19] https://gfcmsitestorage.blob.core.windows.net/website/5.Data/SAFs/SmallPelagics/2023/SAF_ANE_17_18_RefY2023.pdf

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 0,05 million, -41%	10 tonnes, -35%	Smelt, European flounder, cod.

Figure 26. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, JANUARY 2025**

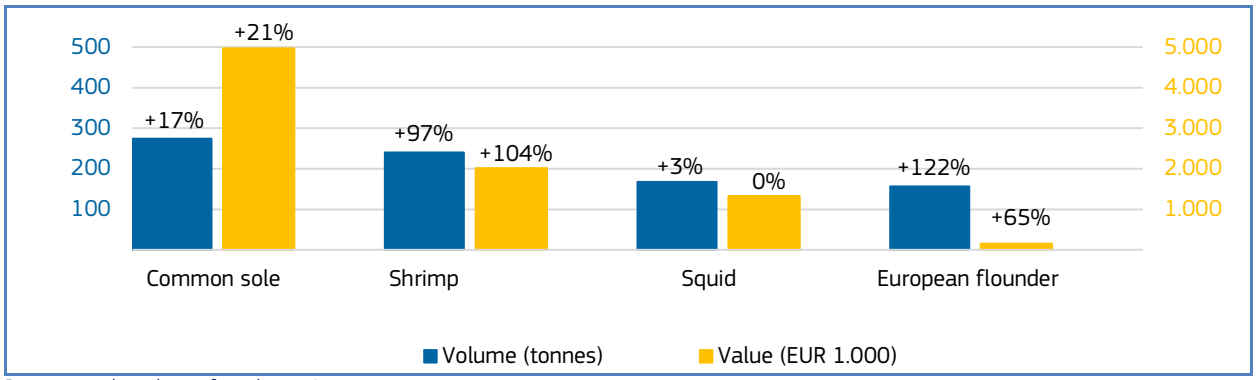


Percentages show change from the previous year.

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 2025 vs Jan 2024	EUR 10,7 million, +22%	1.684 tonnes, +27%	Common sole, shrimp *Crangon* spp., squid, European flounder.

Figure 27. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, JANUARY 2025**

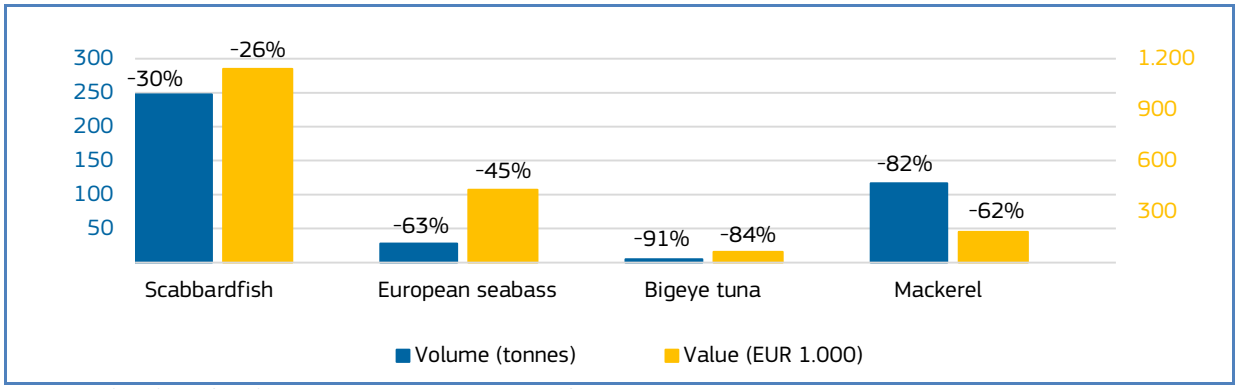


Percentages show change from the previous year.

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 16,8 million, -8%	3.569 tonnes, -17%	Scabbardfish, European seabass, bigeye tuna, mackerel

Figure 28. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, JANUARY 2025**

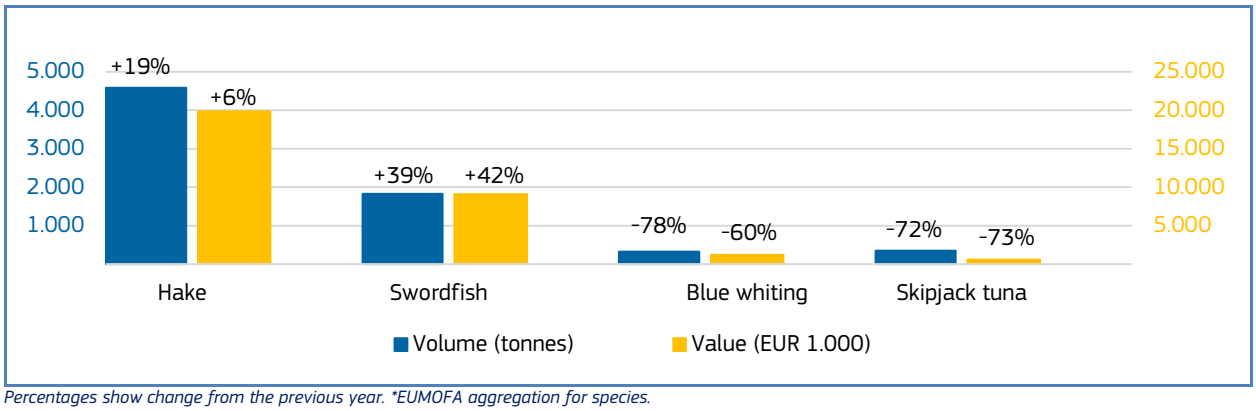


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 90,3 million 0%	19.620 tonnes, -8%	**Value**: hake, swordfish. **Volume**: blue whiting, skipjack tuna.

Figure 29. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, JANUARY 2025**

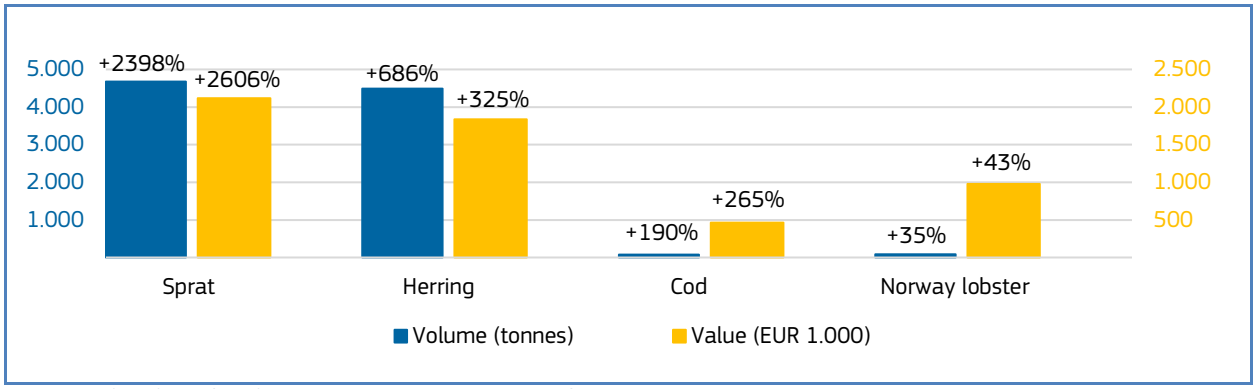


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 7,0 million, +139%	9.604 tonnes, +819%	Sprat, herring, cod, Norway lobster.

Figure 30. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, JANUARY 2025**

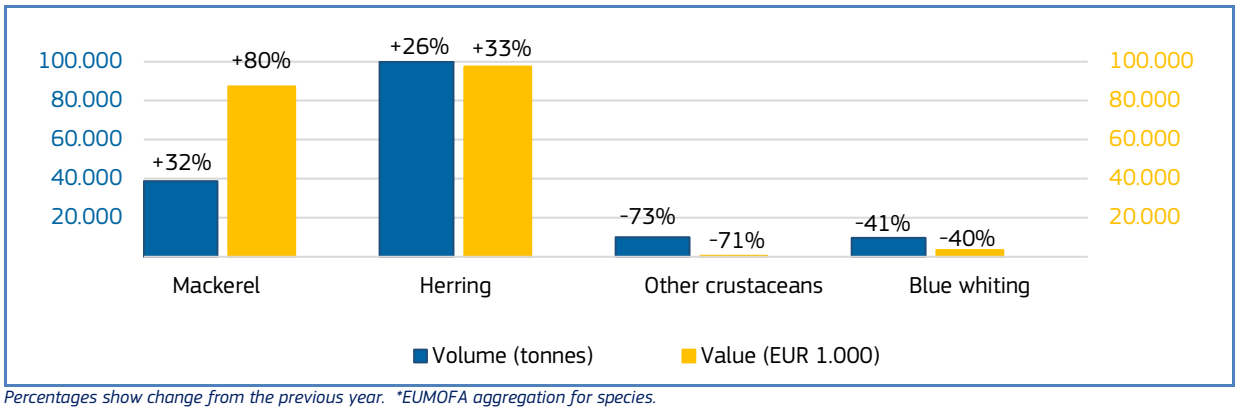


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2025 vs Jan 2024	EUR 304,9 million +27%	215.364 tonnes, -4%	**Value**: mackerel, herring. **Volume**: other crustaceans, blue whiting.

Figure 31. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, JANUARY 2025**

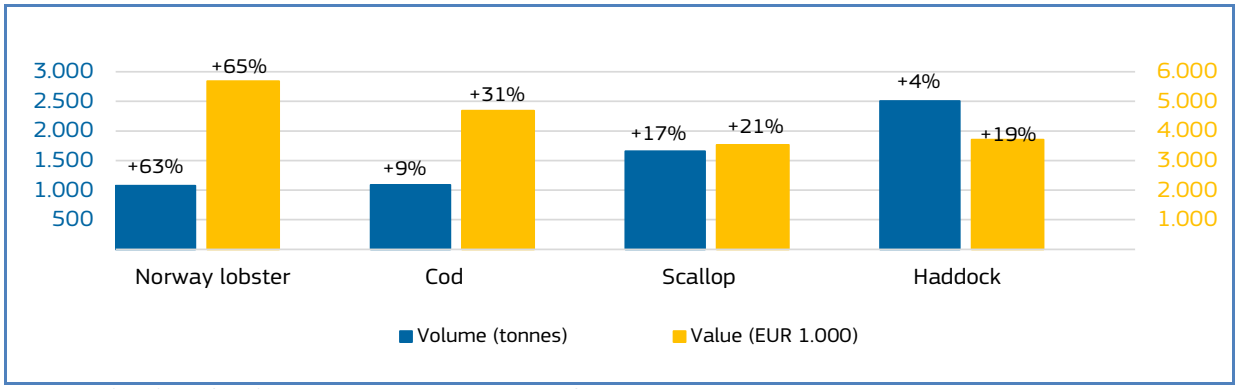


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 32. **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 2025 vs Jan 2024	EUR 116 million +5%	53.435 tonnes, +2%	Norway lobster, cod, scallop, haddock.

Figure 32. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, JANUARY 2025**



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

4. EXTRA-EU IMPORTS

Between January and November 2024, extra-EU imports in the EU-27 increased by 1% in volume and declined by 1% in value compared to the same period in 2023. Those MCSs contributing most to the decrease in import values were Alaska pollock (-25%), cod (-7%) and cuttlefish (-31%), while skipjack tuna (+21%), salmon (+5%) and blue whiting (+44%) contributed most to the increase in volume.

Increases in value and volume: Bulgaria, Ireland, Italy, Latvia, Lithuania, Luxembourg, the Netherlands, Portugal, Romania, Slovenia and Spain 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 (+166% and +112%), hake (+81% and +96%) and European seabass (+112% and +116%).

Decreases in value and volume: Belgium, Cyprus, Czechia, Denmark, Estonia, 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 in value and volume, due primarily to a decrease in bluefin tuna (-70% and -3%), mackerel (-51% and -54%) and sardine (-76% and -79%).

Table 33. **JANUARY-NOVEMBER OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)[20]**

	January – November 2023			January – November 2024			Change from January – November 2023		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	10,33	68.678	6,65	10,78	67.960	6,31	4%	-1%	-5%
Belgium	135,30	844.099	6,24	127,49	795.181	6,24	-6%	-6%	0%
Bulgaria	12,62	32.462	2,57	13,60	35.886	2,64	8%	11%	3%
Croatia	9,59	33.962	3,54	7,82	35.024	4,48	-18%	3%	26%
Cyprus	6,48	42.337	6,53	6,26	39.660	6,34	-3%	-6%	-3%
Czechia	14,44	65.531	4,54	13,40	60.656	4,53	-7%	-7%	0%
Denmark	835,30	3.368.202	4,03	786,96	3.044.778	3,87	-6%	-10%	-4%
Estonia	9,38	54.201	5,78	8,82	48.150	5,46	-6%	-11%	-5%
Finland	41,70	296.663	7,11	44,90	293.080	6,53	8%	-1%	-8%
France	535,74	2.958.068	5,52	542,97	2.952.099	5,44	1%	0%	-2%
Germany	352,31	1.635.933	4,64	312,55	1.446.412	4,63	-11%	-12%	0%
Greece	123,16	435.632	3,54	123,77	478.819	3,87	0%	10%	9%
Hungary	2,41	9.843	4,09	2,29	9.255	4,05	-5%	-6%	-1%
Ireland	112,36	194.590	1,73	152,88	201.501	1,32	36%	4%	-24%
Italy	394,67	2.382.172	6,04	433,31	2.527.263	5,83	10%	6%	-3%
Latvia	21,41	47.942	2,24	23,62	54.878	2,32	10%	14%	4%
Lithuania	45,30	163.204	3,60	48,84	170.838	3,50	8%	5%	-3%
Luxembourg	0,01	498	51,87	0,02	550	33,25	72%	10%	-36%
Malta	33,81	99.865	2,95	18,91	40.659	2,15	-44%	-59%	-27%
Netherlands	600,15	3.183.610	5,30	632,74	3.267.737	5,16	5%	3%	-3%
Poland	236,62	1.012.276	4,28	236,96	1.006.805	4,25	0%	-1%	-1%

[20] During January–November 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.

Portugal	141,38	619.991	4,39	158,27	715.490	4,52	12%	15%	3%
Romania	17,42	70.401	4,04	18,24	80.452	4,41	5%	14%	9%
Slovakia	5,70	19.190	3,36	4,98	15.471	3,11	-13%	-19%	-8%
Slovenia	5,21	20.851	4,00	7,07	27.591	3,90	36%	32%	-3%
Spain	1.055,10	5.025.465	4,76	1.112,88	5.186.781	4,66	5%	3%	-2%
Sweden	688,94	5.103.220	7,41	649,86	4.812.423	7,41	-6%	-6%	0%
EU-27	**5.446,85**	**27.788.891**	**5,10**	**5.500,15**	**27.415.400**	**4,98**	**1%**	**-1%**	**-2%**

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: Cephalopods, freshwater fish, other marine fish and tuna and tuna-like species were the commodity groups experiencing an increase in both value and volume. Highest increases were observed in the tuna and tuna-like species commodity group with skipjack tuna (+15% and +21%) and yellowfin tuna (+4% and +20%) driving the increase.

Decreases in value and volume: The commodity groups flatfish and small pelagics were the only ones experiencing a decrease in both extra-EU import value and volume. Flatfish experienced the largest decline, due primarily to reduced imports of Greenland halibut (-5% and -8%), while for small pelagics herring (-11% and -22%) and sardine (-17% and -20%), were mainly responsible for the decrease.

Table 34. **JANUARY- NOVEMBER OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER CG (volume in tonnes and value in million EUR)**

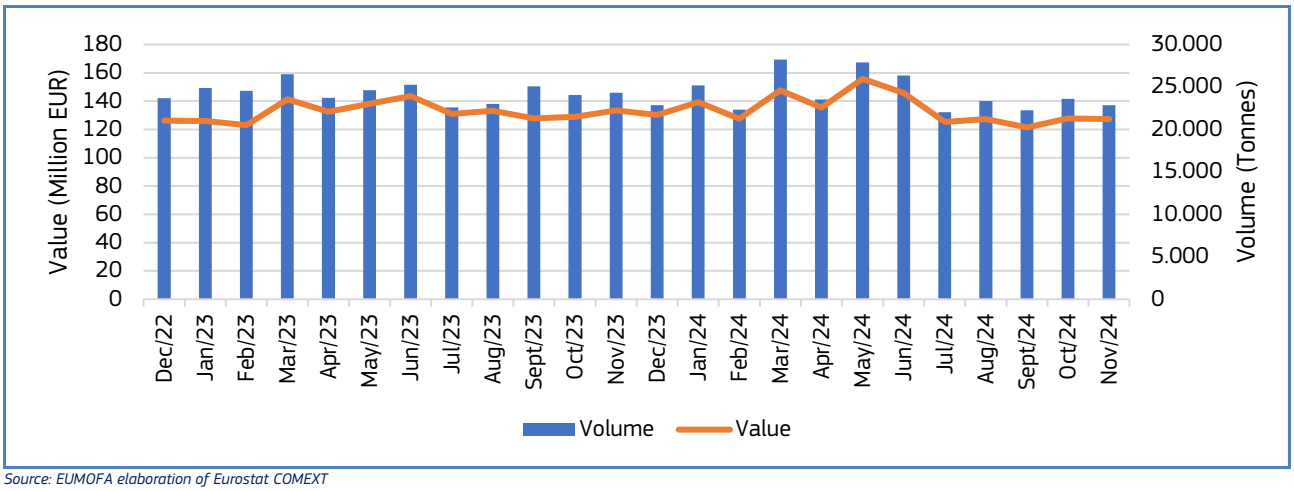
	January – November 2023			**January – November 2024**			**Change from January – November 2024**			
Commodity group	**Value**	**Volume**	**Price**	**Valu**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	611	121.080	5,04	602	126.283	4,76	-1%	4%	-6%	Scallop, other mussel.
Cephalopods	2.657	471.853	5,63	2.681	478.802	5,60	1%	1%	-1%	Cuttlefish, other cephalopods.
Crustaceans	4.213	595.036	7,08	4.118	609.781	6,75	-2%	2%	-5%	Warmwater shrimp, crab.
Flatfish	481	91.660	5,25	454	86.667	5,24	-6%	-5%	0%	Other flatfish, Greenland halibut.
Freshwater fish	495	121.880	4,06	513	128.113	4,00	4%	5%	-1%	Nile perch, tilapia.
Groundfish	4.432	985.705	4,50	4.095	999.204	4,10	-8%	1%	-9%	Alaska pollock, cod.
Other marine fish	1.480	267.575	5,53	1.606	288.410	5,57	8%	8%	1%	Gilthead seabream, other marine fish.
Salmonids	7.871	934.676	8,42	7.865	983.493	8,00	0%	5%	-5%	Salmon, trout.
Small pelagics	958	462.653	2,07	952	392.170	2,43	-1%	-15%	17%	Anchovy, mackerel.
Tuna and tuna-like species	2.776	535.949	5,18	2.943	629.521	4,68	6%	17%	-10%	Skipjack tuna, yellowfin tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of "Other marine fish[21]" in EU Member States

In the period January - November 2024, extra-EU imports of "other marine fish" accounted for a total value of EUR 1.480 million and total volume of 265.575 tonnes. Compared to the same period in 2023 the value of "other marine fish" increased by 1% while volume was stable.

Figure 33. **EXTRA-EU IMPORT VALUE, VOLUME AND PRICE OF OTHER MARINE FISH, 2022 – 2024 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

The value of extra-EU imports of other marine fish recorded a peak in June while highest import volumes occurred in March and May/June.

In the period January-November 2024, Spain, Italy and the Netherlands were the main importers of other marine fish in the EU and together imported from extra-EU countries about 52% of the total volume of other marine fish, with Spain (22%), Italy (17%) and the Netherlands (13%) respectively.

Table 35. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR OTHER MARINE FISH**

EU MS	Value (millions of Euros)			Volume (tonnes)			Main commercial species
	Jan-Nov 2023	Jan- Nov 2024	Trend (%)	Jan- Nov 2023	Jan- Nov 2024	Trend (%)	
Italy	292,1	334,2	14%	45.681	48.480	6%	Gilthead seabream, European seabass.
Netherlands	226,1	233,5	3%	39.204	38.076	-3%	Gilthead seabream, European seabass.
Spain	286,6	308,6	8%	55.020	63.481	15%	Gilthead seabream, cusk-eel.

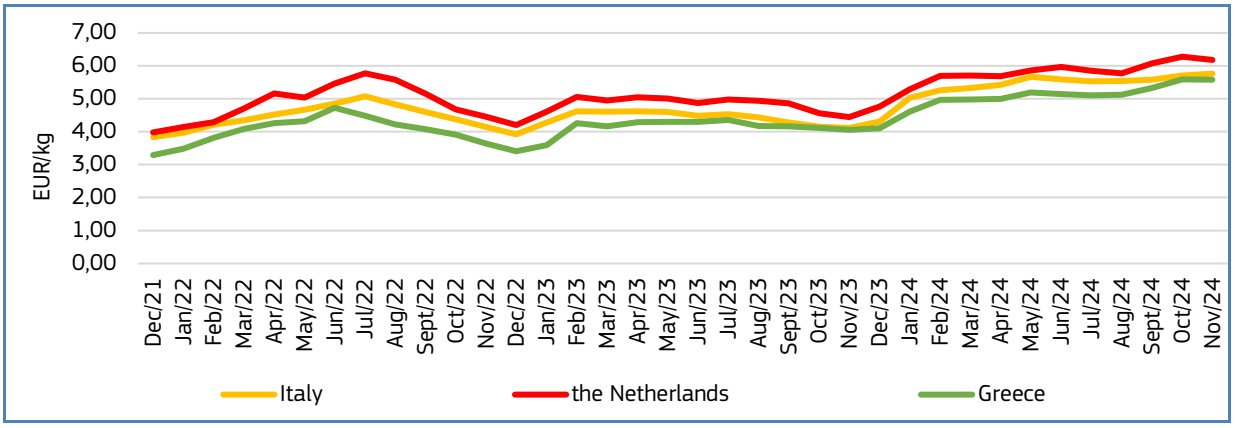
[21] 13 main commertial species are included in the Commodity Group „other marine fish" meaning cobia, cusk-eel, dogfish, monk, other marine fish, other shark, ray, ray´s bream, European seabass, other seabass, gilthead seabream, other seabream.

4.2. Extra EU imports of gilthead seabream in EU Member States

Gilthead seabream and European seabass represent the main commercial species of the commodity group of "other marine fish", where gilthead seabream represents 15% of the total value, followed by European seabass which represents 10%.

Italy, the Netherlands and Spain[22] imported the highest volume of gilthead seabream from extra-EU countries.

Figure 34. **EXTRA-EU IMPORT PRICE OF GILTHEAD SEABREAM IN ITALY, GREECE AND THE NETHERLANDS (DEC 2021 – NOV 2024)**



Between December 2021 and November 2024, the price of gilthead seabream fluctuated and increased in the three markets analysed: Italy (+15%), Greece (+19%) and the Netherlands (+16%). Between January and November 2024, the volume of gilthead seabream imported from Italy was 13.630 tonnes, 6% less compared with the same period in 2023, while price increased by 23%. In Italy the main imports in terms of volume came from Türkiye (76%), followed by Albania and Tunisia.

In the same period, 9.699 tonnes of gilthead seabream were imported to Greece, 33% more compared to 2023, with an average price increase of 24%. In terms of volume 100% of the total imported in 2024 was from Türkiye.

The Netherlands imported 99,8% of the 5.122 tonnes from Türkiye and the remainder from the United Kingdom. Between January and November 2024 import volumes decreased by 12% while prices increased by 21%.

In the three countries peaks in imports seem to occur between January and April.

Figure 35. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GILTHEAD SEABREAM IN ITALY, 2021 – 2024 (volume in tonnes, price in EUR/kg)**

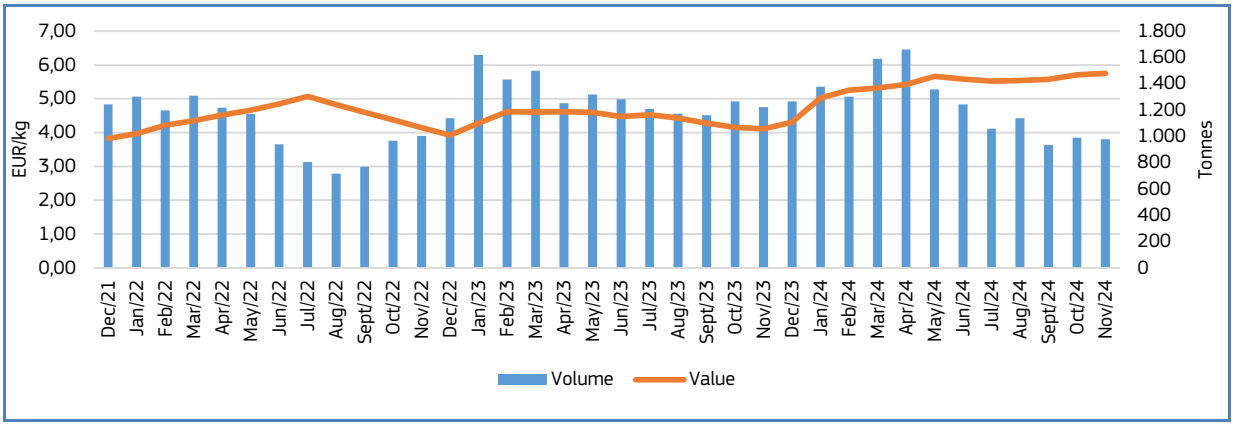


Figure 36. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GILTHEAD SEABREAM IN GREECE, DEC 2021 – NOV 2024 (volume in tonnes and price in EUR/kg)**

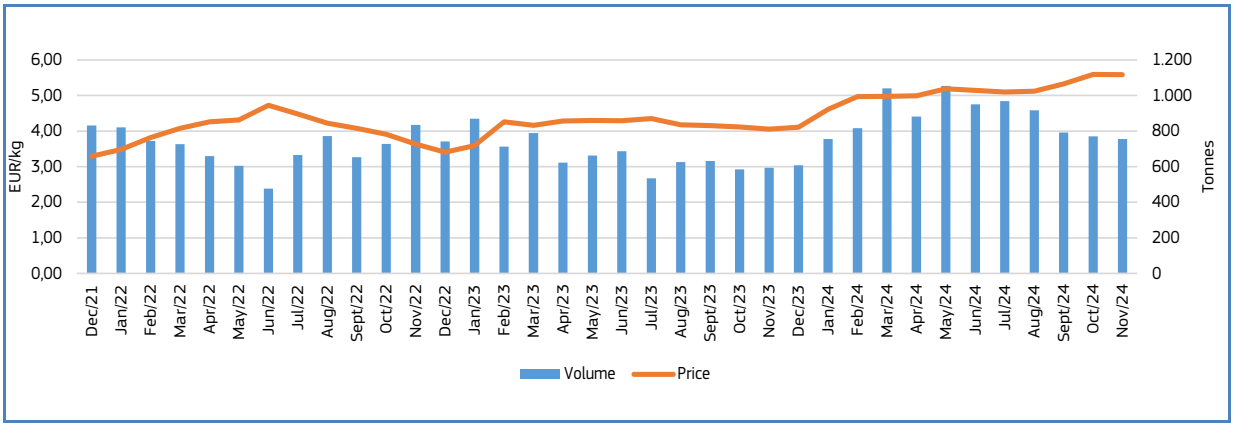
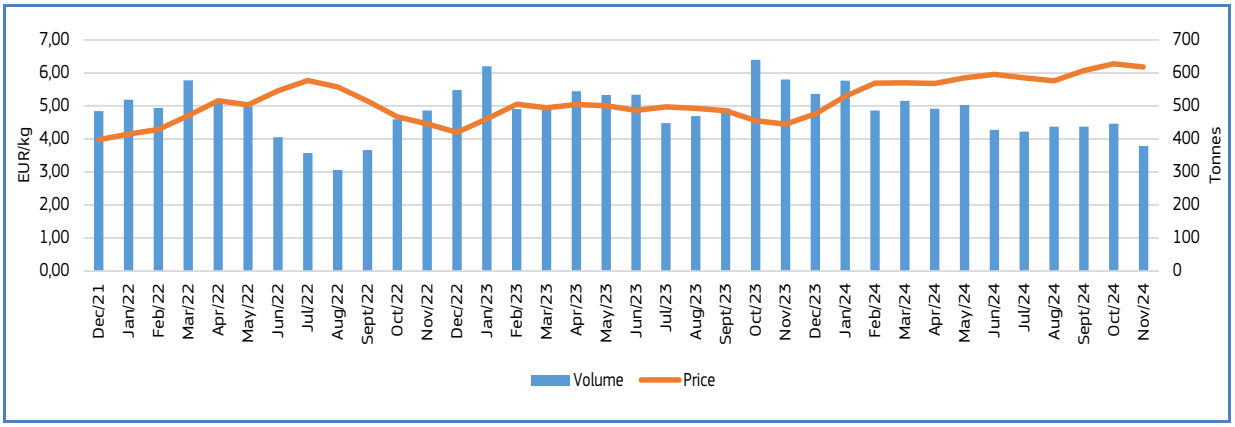


Figure 37. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GILTHEAD SEABREAM IN THE NETHERLANDS, DEC 2021 – NOV 2024 (volume in tonnes and price in EUR/kg)**



4.3. Extra EU imports of gilthead seabream by origin

In the period January-November between 2024 and 2023, EU imports of gilthead seabream[23] experienced an increasing trend in terms of volume (+4%) and value (+25%). From January to November 2024 the EU imported 42.976 tonnes of gilthead seabream for a value of EUR 239 million. The main extra-EU countries supplying gilthead seabream to the EU in 2024 were Türkiye (89%), Albania (6%), Morocco (3%) and Tunisia (2%). An increase of imports of gilthead seabream from Morocco (+1.046 tonnes) and Tunisia (+235 tonnes) was observed between January and September 2024 compared to the same period in 2023.

[23] 03028530 - Fresh or chilled gilt-head sea bream "*Sparus aurata*"
03038955 - Frozen gilt-head sea bream "*Sparus aurata*"

Table 36. **EXTRA-EU IMPORTS OF GILTHEAD SEABREAM BY ORIGIN IN 2024 (value in million EUR and volume in tonnes)**

Country	Jan-Nov 2022		Jan-Nov 2023		Jan-Nov 2024		January-November 2024/2023	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Türkiye	158	34.420	175	38.015	213	38.242	22%	1%
Albania	9	2.060	11	2.616	13	2.716	18%	4%
Morocco	1	99	2	164	8	1.210	356%	636%
Tunisia	0	3	2	536	4	771	69%	44%
Others	0	16	0	37	0	38	18%	2%
Total	**168**	**36.599**	**190**	**41.368**	**239**	**42.976**	**25%**	**4%**

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[24].

Compared with January 2024, in January 2025 household consumption of fresh fishery and aquaculture products decreased only in Sweden in both volume and value. Denmark, Germany, Hungary, Italy, Poland, Portugal, and Spain showed increases in both volume and value.

The highest increase was observed in Hungary, where consumed fish species were not specified.

Table 37. **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	January 2023		January 2024		January 2025		Change from Jan 2024 to Jan 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	900	15,44	904	18,09	1.093	20,51	21%	13%
France	32,58	13.419	193,35	12.872	180,26	12.883	189,18	0%	5%
Germany	12,49	5.496	83,94	4.551	79,49	4.819	82,86	6%	4%
Hungary	6,73	225	1,84	137	1,30	251	2,42	82%	86%
Ireland*	20,00	1.058	18,54	833	14,79	819	14,78	-2%	0%
Italy	30,01	17.504	221,71	15.574	204,81	17.385	238,30	12%	16%
Netherlands*	18,88	2.331	43,03	2.104	41,19	2.068	42,02	-2%	2%
Poland	13,68	2.852	25,01	2.938	31,25	3.100	36,96	5%	18%
Portugal	54,54	4.187	33,40	3.832	32,21	3.852	34,98	1%	9%
Spain	41,92	38.053	378,55	33.399	347,34	34.385	380,13	3%	9%
Sweden	22,46	448	6,94	398	6,12	357	5,85	-10%	-4%

** 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.*

5. 2. Overview of household consumption[25] for fresh gilthead seabream consumed in the EU

In the household consumption data used by EUMOFA, household consumption of fresh other marine species is monitored in four Member States (France, Italy, Portugal and Spain). In more detail at species level, in France consumption of fresh monk and gilthead seabream is monitored, whereas in Italy consumption is monitored for fresh European seabass and gilthead seabream, in Portugal

[24] Last update: 15.03.2025.
[25] 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.

for fresh scabbardfish, European seabass and gilthead seabream, and in Spain for fresh monk, European seabass and gilthead seabream. As gilthead seabream is consumed in all reporting countries, the species was selected for a more distinct comparison.

Figure 38. **HOUSEHOLD PURCHASES (in value) OF FRESH GILTHEAD SEABREAM IN FRANCE, ITALY, PORTUGAL AND SPAIN, FEBRUARY 2022 – JANUARY 2025**

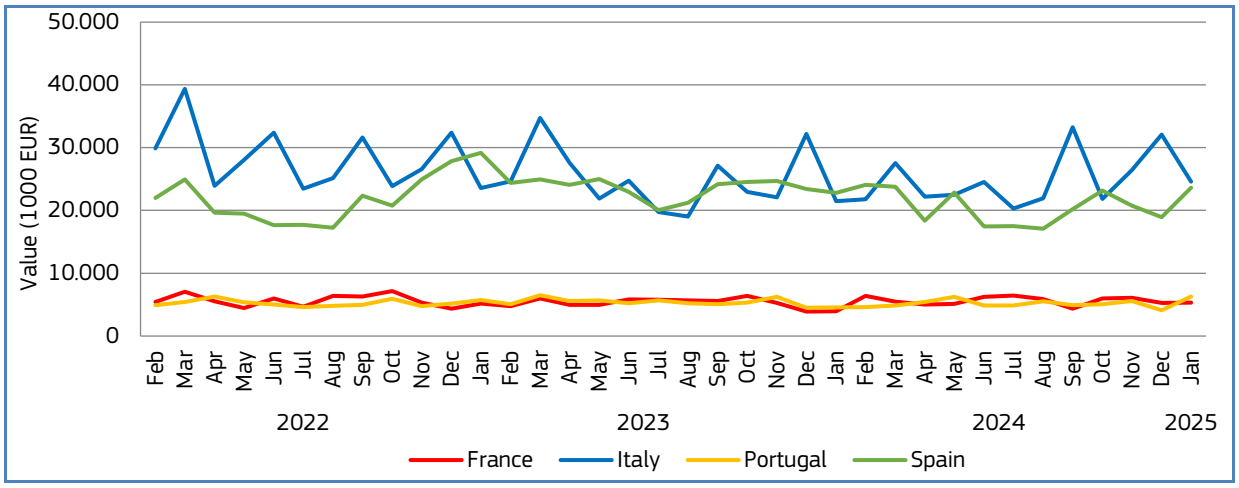
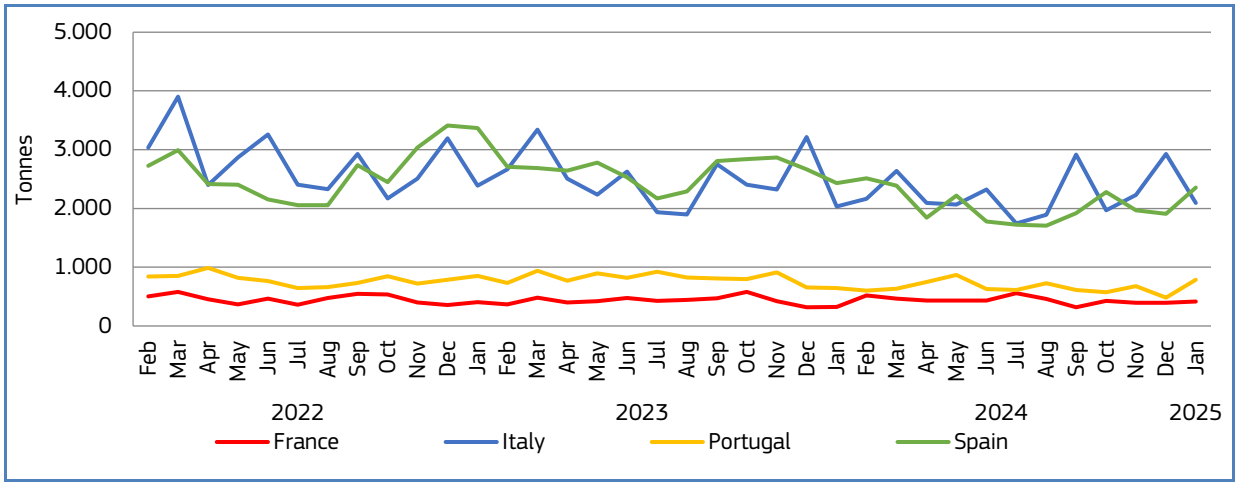


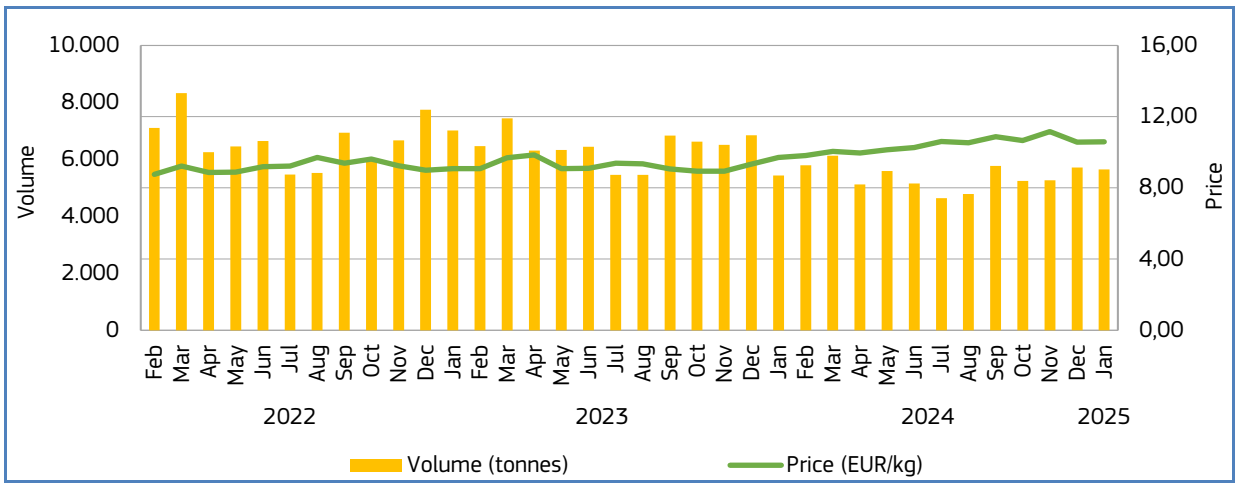
Figure 39. **HOUSEHOLD PURCHASES (in volume) OF FRESH GILTHEAD SEABREAM IN FRANCE, ITALY, PORTUGAL AND SPAIN, FEBRUARY 2022 – JANUARY 2025**



5.3. Household consumption trends of gilthead seabream - the most consumed species of other marine fish in reporting countries

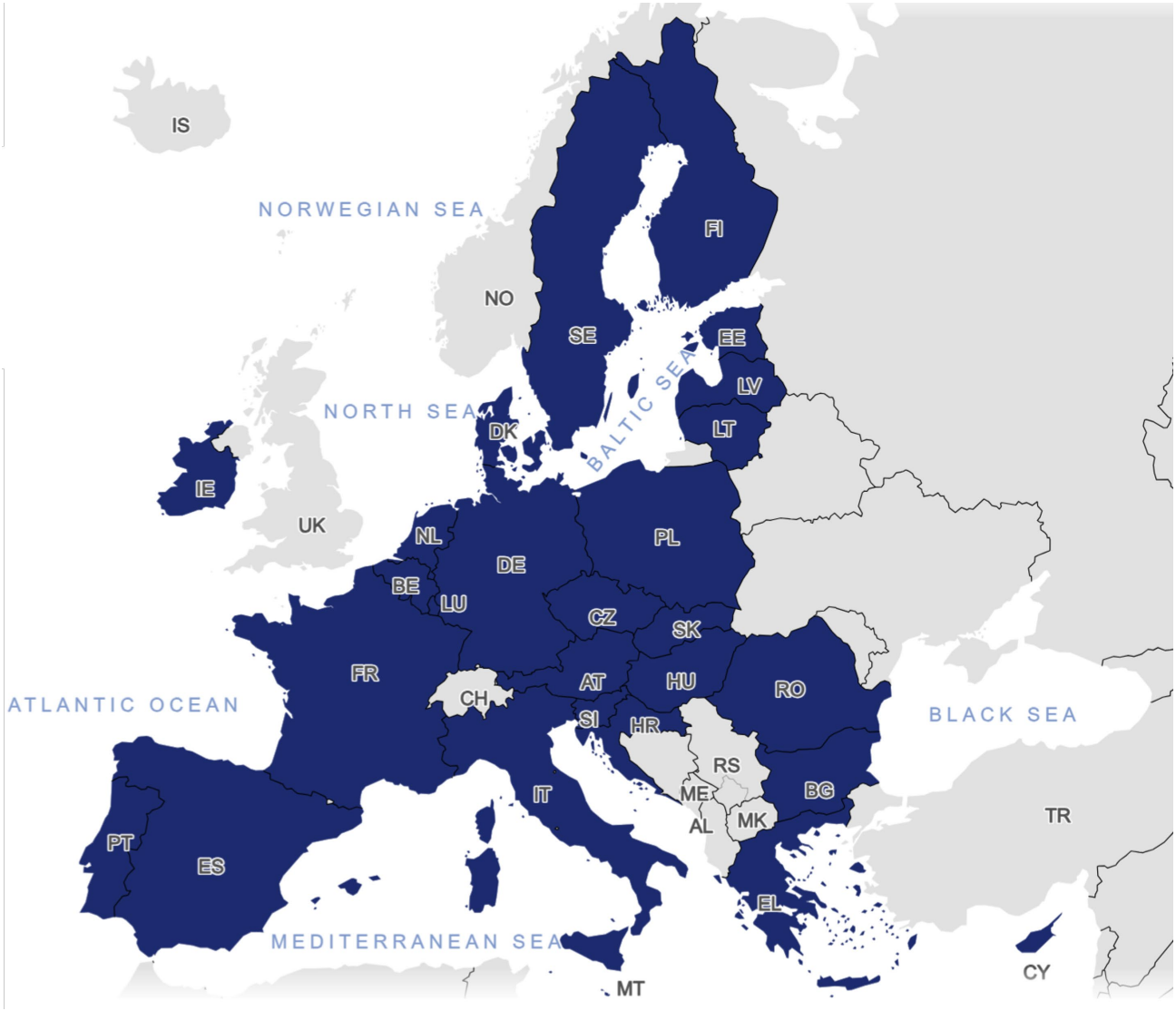
Long-term trend (February 2022 to January 2025): Downward trend in volume and slight upward trend in price.
Yearly average price: 9,13 EUR/kg (2022), 9,24 EUR/kg (2023), 10,36 EUR/kg (2024).
Yearly consumption: 80.545 tonnes (2022), 77,765 tonnes (2023), 64.642 tonnes (2024).
Short-term trend (January 2025): Slight downward trend in volume and slight upward trend in price.
Price: 10,58 EUR/kg.
Consumption: 5.652 tonnes.

Figure 40. **RETAIL PRICE AND VOLUME OF GILTHEAD SEABREAM PURCHASED BY HOUSEHOLDS IN FRANCE, ITALY, PORTUGAL AND SPAIN, FEBRUARY 2022 – JANUARY 2025**



Consumption of fresh gilthead seabream shows a downward trend in volume. While in January 2025 it was 4% higher than in the same period the previous year, it was still 24% lower than three years ago, in January 2022. Price has shown an upward trend; in January 2025 it was 9% higher than in January 2024 and 25% higher than in January 2022.

6. CASE STUDY: EU trade in fishery and aquaculture products



Source: Gisco.

The EU is a significant market for fishery and aquaculture products. The internal demand for these products within the EU is largely met through imports from major fishing nations in the North Atlantic, South America and Asian aquaculture producers. Trade between EU Member States is also essential to satisfy the aquatic food demand across various EU markets. In 2023, the EU's own fishery and aquaculture production accounted for 33% of its consumption, with the remainder covered by imports. Fish preferences vary among Member States, with Portugal having the highest estimated per capita consumption of aquatic food with 54,5 kg lwe in 2022, followed by Spain (41,9 kg lwe) and France (32,6 kg lwe). Conversely, Czechia had the lowest per capita consumption at 5,9 kg lwe in 2022.[26]

6. 1. EU supply balance of fishery and aquaculture

The supply balance is an estimate of the annual supply of fishery and aquaculture products available in the EU market. The EU supply of fishery and aquaculture products for human consumption includes the EU's own fishery and aquaculture production and imports from third countries. In 2023, supply totalled 11,8 million tonnes round weight, which was a drop of 6% (-700TT) from the year

[26] The EU fish market - Publications Office of the EU

before. EU exports of fishery and aquaculture products decreased by 5% in 2023 ending at 2,1 million tonnes round weight. Consequently, the EU's apparent consumption is estimated to have decreased by 6% in 2023 (-600TT) reaching 9,7 million tonnes.

In addition to the EU fisheries for human consumption there are fisheries destined for industrial use (fishmeal and fish oil production). In 2023, the industrial fishery in the EU amounted to 601.000 tonnes 83% of which was landed in Denmark[27].

Table 38. **SUPPLY BALANCE OF FISHERY AND AQUACULTURE PRODUCTS IN THE EU (live weight, million tonnes)**

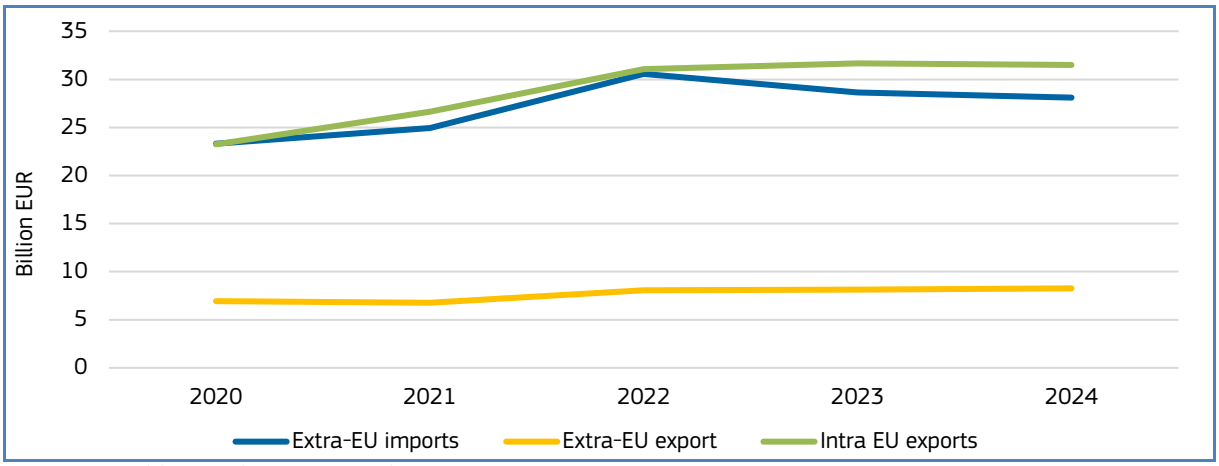
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*
Fishery and aquaculture	6,1	5,9	5,2	5,4	5,3	5,0	4,0	4,0	3,9	3,4
Import	8,8	8,7	9,0	9,2	9,4	9,5	8,9	8,9	8,8	8,4
Export	2,0	1,8	1,8	2,1	2,2	2,2	2,5	2,3	2,2	2,1
Apparent consumption	**12,9**	**12,8**	**12,4**	**12,5**	**12,5**	**12,3**	**10,4**	**10,6**	**10,5**	**9,7**

Source: The EU fish market reports up till 2022, 2023: KA preliminary estimate based on Eurostat data and EUMOFA elaboration of Trade data Monitor data, Statistics Denmark.

The EU trade balance in fishery and aquaculture products in terms of value is negative, confirming the EU's dependence on imports. In 2024, the fishery and aquaculture trade deficit reached EUR −19,8 billion, an improvement from the year before when the difference between export and import values was EUR 20,5 billion.

The EU is in a strong position when it comes to global trade and has several trade agreements with third countries[28]. The EU has concluded over 40 agreements with over 70 countries and regions. For about 20 further agreements, negotiations have been concluded but adoption and ratification is still ongoing. A few more agreements are currently being negotiated[29]. Every 3 years, the EU establishes autonomous tariff quotas (ATQs) for certain fish and fish products. An ATQ allows a certain quantity of a product to be imported into the EU at a reduced tariff rate[30]. The quotas help increase the supply at competitive prices of raw materials which the EU processing industry relies on at times when EU supply is not high enough to meet demand.

Figure 41. **EU TRADE FLOW (billion EUR)**



Source: EUMOFA elaboration of Eurostat-Comext data.

6. 2. International trade

Extra-EU Import of fishery and aquaculture products

In 2024, EU imports of fishery and aquaculture products from third countries amounted to 5,9 million tonnes (product weight) valued at EUR 29,2 billion. Compared to 2023 this was a 1% decrease in terms of volume and a 2% decrease in terms of value.

[27] Statistics | Eurostat
[28] EU trade policy - Consilium
[29] EU trade agreements - Consilium
[30] Trade - European Commission

The overall largest commodity group in terms of both volume and value was **salmonids** amounting to 1,1 million tonnes valued at EUR 8,6 billion in 2024. This was a 5% increase in volume while value remained unchanged from the year before. Fresh Atlantic salmon and trout were the biggest products accounting for 87% of the volumes and values in 2024. Frozen products accounted for 12% of the volumes and 11% of the values.

In terms of value, **crustaceans** were the second largest main commercial species amounting to 663.000 tonnes valued at EUR 4,5 billion. This was a 3% increase in volume and a 1% decrease in value compared to the year before. Frozen shrimp (Penaeus) was the largest product accounting for 50% of the volume and 44% of the value. Frozen shrimps and prawns were the second largest product accounting for 20% of the volume and 20% of the value, and prepared or preserved shrimp on third place accounting for 12% of the volume and 13% of the value. Other species of importance within this group are coldwater shrimp, crab and lobster.

Groundfish was the second largest commodity group in terms of volume and third in terms of value amounting to 1,0 million tonnes valued at EUR 4,1 billion in 2024. This was a 9% decrease in terms of volume and a 16% decrease in terms of value from the year before. There are many species and products within this group of which cod, Alaska pollock and hake were the three largest and together accounted for 67% of the volume and 80% of the value. Cod and cod products were on top accounting for 32% of the volume and 53% of the value followed by Alaska pollock (24% of the volume and 15% of the value) and hake (12% of the volume and 11% of the value).

Tuna and tuna-like species was the second largest in terms of volume and the fourth largest in terms of value amounting to 674.000 tonnes valued at EUR 3,2 billion in 2024, a 17% increase in volume and a 6% increase in value from the year before. Skipjack and yellowfin tuna were the largest species together accounting for 84% of the volume and 82% of the value in 2024. Prepared or preserved tuna (canned) accounted for most of the supply with 73% of the volume and 78% of the value.

Cephalopods amounted to 513.000 tonnes valued at nearly EUR 2,9 billion in 2024, a 2% increase in volume and value from the year before. The products were mainly frozen octopus, cuttlefish and squid.

Other marine fish amounted to 306.000 tonnes valued at EUR 1,7 billion in 2024, a 5% increase in terms of volume and a 7% increase in terms of value from the year before. The products were mainly fresh and frozen seabass, seabream, monkfish, rays and skates and different other unspecified products.

Non-food use products totalled 698.000 tonnes worth EUR 1,1 billion a 11% decrease in terms of volume and a 14% decrease in terms of value from 2023. The products included a share of 29% fishmeal and 21% fish oil. In terms of value, fish oil ranked highest with 53% of total value. Other non-food use products were categorised as other products not destined for human consumption, such as fish waste and seaweed. However, according to the available level of detail on data, it is not possible to identify the products included in this latter category more precisely.

Products categorized as **Small pelagics** were ranked as the seventh largest in terms of value and reached nearly 429.000 tonnes valued at EUR 1,0 billion in 2024. This was a 14% decrease in volume and 1% increase in value from the year before. Main products were prepared/canned products (sardines, anchovy), fillets of herring and frozen mackerel.

Freshwater fish consists mainly of frozen fillets of pangasius and tilapia. In 2024, this group amounted to 143.000 tonnes valued at EUR 575 million. This was an 8% increase in volume and 7% increase in value from the year before.

Miscellaneous aquatic products imported to the EU in 2024 reached 127.000 tonnes valued at EUR 524 million. This was a 2% decrease in terms of volume and a 6% decrease in terms of value from the year before. In terms of volume, surimi is the largest product within this group accounting for 51% of the volume and 30% of the value. A large share of the surimi comes from Alaska pollock. Other products of importance are fish livers and roes, soups, caviar and caviar substitutes.

EU imports of **Flatfish** amounted to 93.000 tonnes valued at EUR 492 million in 2024, a 6% decrease in volume and value from the year before. Most important species in the flatfish category was Greenland halibut accounting for 38% of the volume and 40% of the value in 2024. Important products within the flatfish group were also fresh and frozen fillets of unspecified flatfish, fresh sole, European plaice, megrim and turbot.

The main commercial species **Bivalves and other molluscs and aquatic invertebrates** mainly consist of mussels, clams and scallops, which together accounted for 91% of the volume and 89% of the value. 80% of the volumes within this category were prepared or preserved products, 11% were frozen and 9% were fresh.

Table 39. **TOTAL EU IMPORT OF FISHERY AND AQUACULTURE PRODUCTS BY COMMODITY GROUP (volume in 1.000 tonnes product weight, value in 1000 EUR)**

Commodity group	2020		2021		2022		2023		2024		% Change 23/24	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Salmonids	1.077	6.149	1.091	6.699	1.066	8.581	1.026	8.608	1.074	8.606	5 %	0 %
Crustaceans	598	4.036	674	4.802	689	5.642	647	4.587	663	4.528	3 %	-1 %
Groundfish	1.142	4.221	1.210	4.063	1.092	4.985	1.105	4.897	1.006	4.116	-9 %	-16 %
Tuna and tuna-like species	725	2.703	648	2.519	653	3.224	574	2.966	674	3.158	17 %	6 %
Cephalopods	457	1.992	519	2.618	530	3.217	501	2.810	513	2.876	2 %	2 %
Other marine fish	309	1.295	300	1.401	291	1.591	290	1.602	306	1.714	5 %	7 %
Non food use	825	898	815	875	833	1.159	780	1.319	698	1.134	-11 %	-14 %
Small pelagics	526	919	509	905	470	932	499	1.035	429	1.043	-14 %	1 %
Freshwater fish	133	429	117	414	137	590	132	536	143	575	8 %	7 %
Misc. aquatic products	140	553	127	496	135	598	130	559	127	524	-2 %	-6 %
Flatfish	102	471	103	452	107	550	99	524	94	492	-6 %	-6 %
Bivalves, oth. molluscs, aquatic invertebrates	121	543	127	590	124	650	119	503	123	478	3 %	-5 %
Total	**6.155**	**24.208**	**6.238**	**25.833**	**6.126**	**31.720**	**5.902**	**29.945**	**5.848**	**29.242**	**-1 %**	**-2 %**

Source: EUMOFA elaboration of Eurostat-Comext data.

Of the EU imports from third countries, **Norway** ranked number one in terms of volume and value reaching nearly 1,5 million tonnes valued at EUR 8,4 billion last year. This was a 6% decrease in volume and a 4% decrease in value from 2023. Norway is in a special position as supplier and accounted for 26% of the import value for fishery and aquaculture products in 2024. Salmon, cod and herring are main species with salmon overall most important accounting for 81% of the import value from Norway in 2024. Of salmonid imports to the EU, Norway accounted for 78% of the volumes and values in 2024. Other important salmonid suppliers were the UK, the Faroe Islands, Iceland and Chile. In 2024, EU imports of salmon accounted for 29% of the value, and cod accounted for 7% of the import values to the EU. Of the salmon and cod supply, Norway, Iceland, the UK, Faroe Islands and Russia together accounted for 91% of the volume and 93% of the value of which Norway ranked number one. Norway is also the largest supplier of herring to the EU market amounting to 116.000 tonnes valued at EUR 206 million in 2024, which is 65% of the volume and 70% of the value.

The second largest supplier in terms of value was **Ecuador** reaching 383.000 tonnes and a value of EUR 1,9 billion last year. Imports from Ecuador accounted for 6% of the value in 2024. The largest species imported from Ecuador was warm water shrimp and different tuna species. Most products were frozen or prepared/preserved products. Frozen shrimp (Pineau's) was the largest and accounted for 46% of the volume and 49% of the value from Ecuador in 2024. Next came different prepared or preserved skipjack and yellowfin tuna products.

Imports from **Morocco** ranked third largest and amounted to 309.000 tonnes valued at EUR 1,8 billion in 2024. Imports from Morocco accounted for 6% of imports in terms of value in 2024. Main products were frozen squid and octopus and different canned/prepared/preserved products of anchovies and sardines. Morocco has a large processing/canning industry of which a large share of the products is exported to the EU.

The United Kingdom is an important supplier of fishery and aquaculture products to the EU market reaching 353.000 tonnes valued at EUR 1,6 billion in 2024. This accounted for 5% of the supply in terms of value. Main products coming from the UK were fresh Atlantic salmon, frozen Norway lobster and frozen mackerel.

Imports from **China** reached 345.000 tonnes valued at EUR 1,4 billion in 2024 and accounted for 4% of the EU import value. Main products were different frozen fillet products of Alaska pollock, pacific salmon, cod, tunas and frozen shrimps and prawns.

Supply from **Iceland** reached 315.000 tonnes valued at EUR 1,34 billion in 2024 and supply accounted for 4% of the import value to the EU. Iceland is an important supplier of fresh and frozen cod (fillets, H/G) and of fresh Atlantic salmon.

US imports were 217.000 tonnes valued at EUR 873 million in 2024, and accounted for 3% of total EU import value. Main products were frozen fillets of Alaska pollock and hake, frozen sockeye salmon, surimi of Alaska pollock and lobsters.

Imports from **India** reached 164.000 tonnes valued at EUR 851 million. Main species coming from India to the EU market were shrimp, cephalopods, squid and octopus.

Türkiye imports reached 133.000 tonnes worth EUR 842 million and main species were seabass, seabream, trout, tuna and other marine fish.

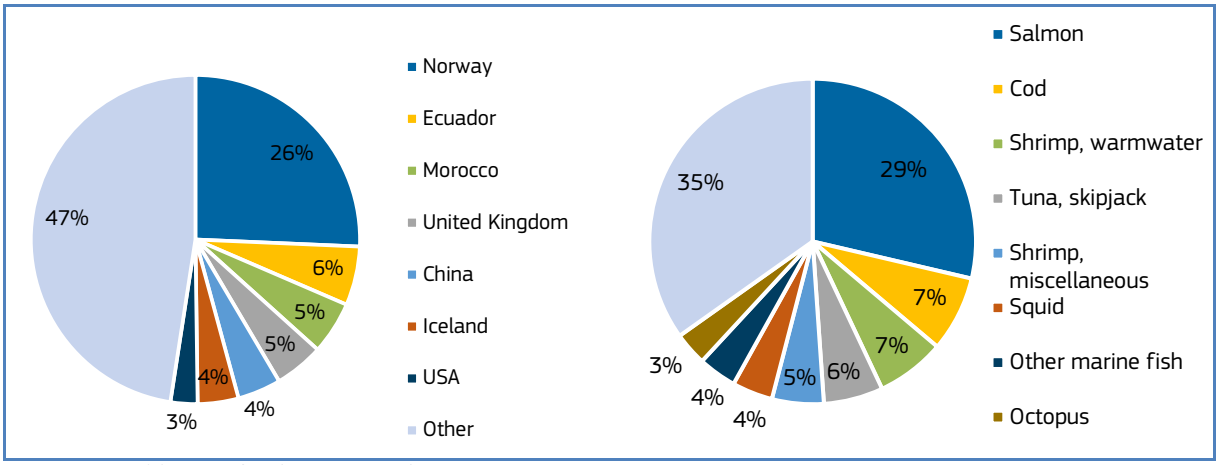
Imports from **Vietnam** was 207.000 tonnes valued at EUR 832 million. Warm water shrimp, catfish, clams and different tunas accounted for 76% of the volumes and 79% of the import values in 2024.

Table 40. **TOTAL EU IMPORT OF FISHERY AND AQUACULTURE PRODUCTS BY TRADE PARTNER (volume in 1.000 tonnes product weight, value in 1000 EUR)**

Import from	2020		2021		2022		2023		2024		% Change 23/24	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Norway	1.676	6.414	1.668	6.797	1.589	8.558	1.563	8.757	1.470	8.392	-6 %	-4 %
Ecuador	276	1.241	297	1.403	311	1.748	315	1.652	383	1.874	22 %	13 %
Morocco	321	1.297	331	1.656	308	1.609	329	1.828	309	1.755	-6 %	-4 %
United Kingdom	411	1.741	368	1.506	322	1.502	326	1.454	353	1.586	8 %	9 %
China	427	1.520	379	1.367	388	1.816	388	1.658	345	1.407	-11 %	-15 %
Iceland	317	1.018	380	1.177	342	1.324	315	1.324	316	1.340	0 %	1 %
USA	246	839	216	809	191	923	163	759	217	873	33 %	15 %
India	124	606	149	754	181	1.176	159	890	164	851	3 %	-4 %
Türkiye	110	511	113	559	113	678	122	731	133	842	9 %	15 %
Vietnam	188	780	196	813	233	1.255	192	829	207	832	8 %	0 %
Other	2.060	8.241	2.142	8.992	2.148	11.130	2.029	10.064	1.952	9.491	-4 %	-6 %
Total	**6.155**	**24.207**	**6.238**	**25.833**	**6.126**	**31.720**	**5.902**	**29.945**	**5.848**	**29.242**	**-1 %**	**-2 %**

Source: EUMOFA elaboration of Trade Data Monitor data.

Figure 42. **EXTRA-EU IMPORTS BY TRADE PARTNER (left) AND MAIN COMMERCIAL SPECIES (right) IN 2024 (by value)**



Source: EUMOFA elaboration of Trade Data Monitor data.

EU export of fishery and aquaculture products

The export volume from the EU to non-EU countries reached 2,2 million tonnes in 2024, a 1% decrease compared to 2023. The total value reached EUR 8,27 billion, up from EUR 8,1 billion in 2023 (+2%).

Salmonid exports in 2024 were valued at EUR 1,4 billion, up by 3% compared to 2023. Export volumes amounted to 100.143 tonnes, a 3% increase from the year before. Exports of salmonids accounted for 5% of the export volume and 17% of the export value of all commercial species in 2024, which was up by 1% in terms of volume from the year before, while value share was the same as in 2023. The main export markets for salmon are the United States, Switzerland and Australia, which together absorbed 64% of the extra-EU export values and 53% of the volumes.

Exports to the United States decreased 3% in both value and volume from 2023 to 2024. In 2024 they totalled 36.300 tonnes at a value of EUR 601 million. EU exports to Switzerland are relatively small compared to the US. In 2024, exports reached 9.600 tonnes (up by 12%) and EUR 181 million (up by 10%). EU exports to Australia increased by 15% in terms of volume and by 10% in terms of value to 7.400 tonnes and EUR 117 million.

Non-food use is the second largest main commercial species in terms of both export volume and value, reaching 495.000 tonnes valued at EUR 1,2 billion in 2024. This was a 19% increase in terms of export value compared to 2023. Export volumes increased by 6% from the previous year. Within this group, fishmeal and fish oil exports to Norway and the UK accounted for a large share of the volume and value.

In 2024, EU exports of fish oil amounted to 137.000 tonnes valued at EUR 658 million. Of this, Norway and the UK accounted for 92% of the volume and 87% of the value. Exports of fishmeal amounted to 171.000 tonnes valued at EU 357 million in 2024. Norway and the UK were the overall largest recipients accounting for 69% of the volume and 68% of the value. Other important markets were China and Canada. Other non-food use consists mainly of fish or marine mammal solubles, seaweed and algae, fish or crustaceans, molluscs etc. unfit for human consumption, and fish waste. These products are mainly exported to Norway, the USA, the UK, Australia and Russia.

EU exports of **Small pelagics** amounted to 459.000 tonnes valued at EUR 856 million in 2024, a 5% decrease in volume and value on the same level as the previous year. Main species exported were mackerel, herring, anchovy and sardines, of which most (70%) was exported round frozen. Main markets for round frozen products were Nigeria, Egypt and Ukraine. Prepared and preserved products accounted for 12% of the volume and 38% of the value and were mainly exported to the UK, the USA, Ukraine and Norway. Live/fresh products accounted for 15% of the volume and 12% of the value. These products were mainly herring and mackerel landed in the Faroe Islands, the UK and Norway.

In the category **Other marine fish,** volume decreased by 2% to 123.400 tonnes and value increased by 7% to EUR 811 million in 2024. Within this category a large share was exported to the UK (27% of volume, 20% of value), Switzerland (13% of volume, 23% of value) and the USA (8% of volume, 11% of value). Main products were fresh and chilled fish (other marine fish, seabass, seabream) which accounted for 37% of the volume and 59% of the value; frozen fish (other marine fish, sharks, seabass) accounted for 47% of the volumes and 29% of the value; and prepared and preserved products (other marine fish) accounted for 15% of the volume and 10% of the value.

Exports of **Tuna and tuna-like species** amounted to 210.000 tonnes valued at EUR 784 million in 2024, a 14% decrease in terms of volume and 13% decrease in terms of value from the year before. In terms of value, Japan represents the overall largest market covering only 7% of the volume but 22% of the value. This was followed by the US and the UK with volume and value 2% and 9% and 3% and 7% respectively. In terms of volume, the Philippines and Ecuador ranked highest each covering 15% of the volume. Skipjack tuna represented the largest species within this category accounting for 66% of the volume and 39% of the value in 2024. Of this, the majority was frozen and prepared preserved skipjack tuna. Miscellaneous tuna accounted for 9% of the volume and 27% of the value of which the majority was frozen fillets and prepared and preserved tunas (skipjack, bonito and others). Bluefin tuna export volume reached around 11.300 tonnes which covers 5% of the volume while export value reached EUR 157 million which covers 20% of the total value. Bluefin tuna was mostly exported fresh or frozen to Japan, the USA and China.

Exports of **Crustaceans** amounted to 125.000 tonnes valued at EUR 766 million in 2024. In this category, coldwater shrimp (mainly frozen cooked) were the main species accounting for 58% of the export volume and 41% of the export value. Miscellaneous shrimp (mainly prepared/preserved) ranked second largest and accounted for 14% of the volume and 22% of the value in 2024. Main export markets were China (31% of the volume, 29% of the value), the UK (8% of the volume, 12% of the value) and Morocco (17% of the

volume, 11% of the value). Shrimp exports to Morocco were mainly peeled by specialist units, sometimes owned by Dutch companies and re-exported to the EU market[31].

Exports of **Miscellaneous aquatic products** reached 190.000 tonnes valued at EUR 764 million in 2024, a 3% increase in terms of volume and 5% increase in terms of value from 2023. This group contains several prepared and preserves products, soups, food preparations, caviar and surimi, of which soups and broths and food preparations were the largest. Export markets are the UK (28% of the volume, 31% of the value), the USA (6% of the volume, 7% of the value) and China (4% of the volume, 6% of the value).

Groundfish exports reached 360.000 tonnes valued at EUR 679 million, a 3% increase in terms of volume and 3% decrease in terms of value from last year. Cod, blue whiting, and hake were the most important species ranked by value. Exports of cod reached 50.000 tonnes valued at EUR 333 million, which accounted for 14% of the volume and 49% of the value within this group. Exports of blue whiting reached 232.000 tonnes valued at EUR 128 million which was 64% of the volume and 19% of the value. Exports of hake reached 41.000 tonnes valued at EUR 88 million which is 11% of the volume and 13% of the value in the groundfish group. Main export markets for cod were the UK, Brazil and China, mainly exported frozen to China and Brazil and as frozen fillets and prepared and preserved to the UK. Blue whiting was mainly exported round frozen to the African markets (Nigeria, Cameroon, Ivory coast). In 2024, 70% of the hake volumes were exported to Ukraine, Serbia, Moldova and Morocco.

Cephalopods exports reached nearly 56.000 tonnes valued at EUR 380 million in 2024, a 1% decrease in terms of volume and a 5% increase in terms of value from the year before. Main species were octopus (36% of the volume, 60% of the value) and squid (46% of the volumes, 25% of the values). Octopus was mainly exported frozen to the USA, Switzerland and the UK and squid was mainly exported frozen to Morocco, China and South Korea.

Flatfish exports reached 50.500 tonnes valued at EUR 344 million, a 5% decrease in terms of volume and a 12% decrease in terms of value from the year before. Of this, Greenland halibut exports accounted for 85% of the volume and 77% of the value. Sole accounted for 2% of the volume and 7% of the value. Most of the halibut was exported frozen to China (34.400 tonnes) and Taiwan (4.900 tonnes) and most of the sole was exported frozen to the US.

Exports of **Bivalves and other molluscs and aquatic invertebrates** reached 21.200 tonnes valued at EUR 163 million, a 12% decrease in terms of volume and an 11% decrease in terms of value from 2023. In terms of value, oysters, molluscs and scallop were the most important together accounting for 60% of the volume and 71% of the value. Important export markets were Hong Kong, Switzerland, China, the UK and the US.

Exports of **Freshwater fish** amounted to 11.200 tonnes valued at EUR 73 million in 2024, a 10% decrease in terms of volume and a 4% decrease in terms of value from 2023. Export products were mainly different frozen fillet products of catfish, tilapia and other freshwater species. Main markets in terms of value were Switzerland, Georgia, the USA and Brazil.

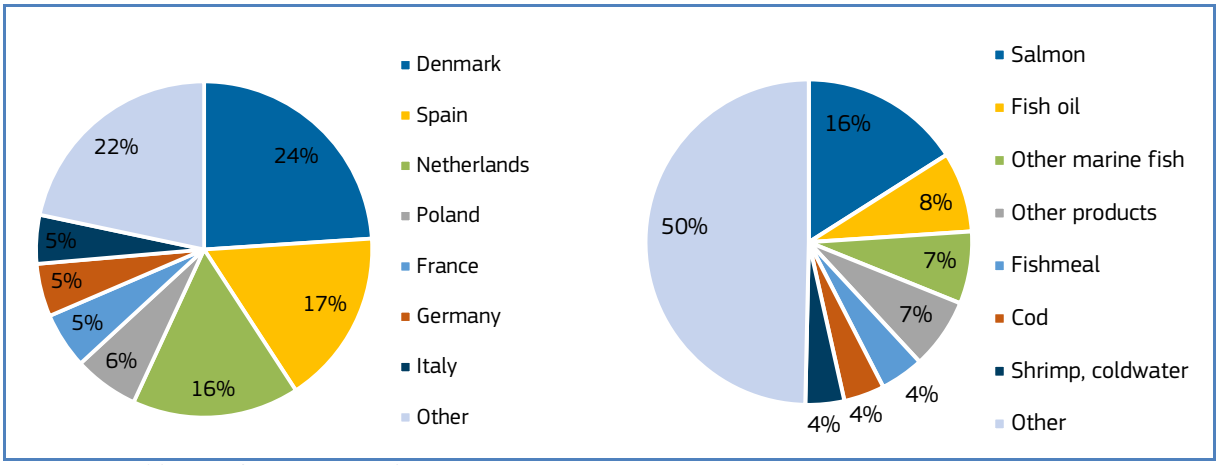
Table 41. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM THE EU BY MAIN COMMERCIAL SPECIES (volume in tonnes, value in 1.000 EUR)**

	2020		2021		2022		2023		2024	
Commodity group	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Salmonids	151.885	1.203	95.892	994	103.277	1.325	96.788	1.374	100.143	1.409
Non-food use	500.886	735	497.121	754	475.999	887	464.615	1.040	494.656	1.242
Small pelagic	628.086	869	584.473	853	527.362	884	485.525	858	458.838	856
Other marine fish	147.054	664	137.040	593	120.622	700	126.436	756	123.414	811
Tuna and tuna-like species	278.235	748	252.267	802	237.409	971	243.887	902	210.347	784
Crustaceans	121.591	666	125.208	672	125.014	806	118.384	784	124.978	766
Miscellaneous aquatic products	209.131	626	202.500	639	197.504	702	184.692	729	189.979	764
Groundfish	384.734	733	368.547	627	330.978	730	349.990	700	360.171	679
Cephalopods	33.496	182	47.307	299	65.244	408	56.810	360	55.973	380

Flatfish	63.413	306	59.394	297	61.490	390	57.423	360	50.508	344
Bivalves, molluscs and aquatic invertebrates	29.237	170	28.025	180	25.330	181	23.934	183	21.174	163
Freshwater fish	14.451	46	17.043	52	14.921	65	12.472	70	11.246	73
Total	**2.562.199**	**6.947**	**2.414.817**	**6.762**	**2.285.150**	**8.048**	**2.220.957**	**8.117**	**2.201.428**	**8.271**

Source: EUMOFA elaboration of Eurostat-COMEXT data.

Figure 43. **EXTRA-EU EXPORTS BY MEMBER STATE (left) AND MAIN COMMERCIAL SPECIES (right) IN 2024 (by value)**

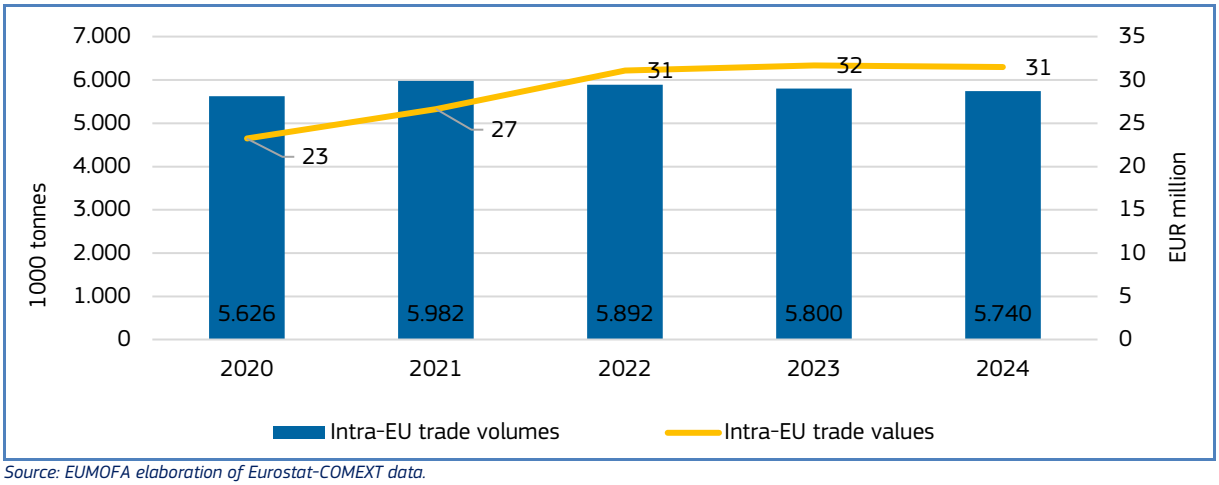


Source: EUMOFA elaboration of Eurostat-COMEXT data.

6. 3. Trade flows in the EU – Intra EU trade

In 2024, intra-EU trade[32] of fishery and aquaculture products amounted to 5,7 million tonnes worth EUR 31,5 billion. In volume terms trade decreased by 1% and in value terms, intra-EU trade decreased by 0,6% from 2023. Trade within the EU largely consist of re-exports of products originally imported from third countries[33]. These products may also have been going through different steps of processing and value adding before going into the end markets. The creation of added value along the supply chains and the crossing of borders within the EU boosts the value of intra-EU exports.

Figure 44. **INTRA-EU TRADE OF FISHERY AND AQUACULTURE PRODUCTS**



Source: EUMOFA elaboration of Eurostat-COMEXT data.

[32] Intra-EU trade is based on intra-EU exports
[33] Despite "exports" are reported as such by Eurostat-COMEXT, in most cases the northern EU Member States are not the actual exporters but rather countries through which products are transported.

6. 4. Main intra-EU traded species

Intra-EU exports of **salmonids** was the largest traded species group in terms of volume and value. In 2024, salmonid intra-EU trade amounted to 1,1 million tonnes valued at EUR 10,8 billion.

Atlantic salmon accounted for 92% of the volume and 94% of the value. Three Member States: Sweden, Denmark and Poland accounted for 76% of the volume and 73% of the value of the salmon exports in 2024. Sweden ranked first and accounted for half of the value and 42% of the volume. Sweden is a main EU entrance point for Atlantic salmon from Norway to the EU. Most of the exports from there are fresh Atlantic salmon, which is also the case for exports from Denmark. Since Poland has a thriving smoking industry, which is mainly for salmon from Norway, its exports mainly include smoked products and, to a lesser extent, fresh products[34].

In 2024, the volume of **groundfish** traded in the EU amounted to 744.000 tonnes valued at EUR 3,8 billion and represented the second largest species group in terms of value.

Cod is the second most valued species among all fishery and aquaculture products traded in the EU. In 2024, 286.000 tonnes of cod with a value of EUR 2,1 billion were exported by EU Member States to other Member States. This represents 38% of the groundfish trade volume and 56% of the value. The Netherlands accounted for 37% of the cod volumes and 38% of the cod values with 107.000 tonnes valued at EUR 808 million. Most of these exports went to Spain and France, and frozen fillets were the main product. Other major cod exporters within the EU are Denmark and Sweden.

[34] The EU Fish Market 2023 edtion

7. CASE STUDY: Horse and jack mackerel in the EU

In 2022[35], catches of horse and jack mackerel species reached 2,2 million tonnes, representing 2,3% of global catches. It is caught mainly by Chile and Namibia in the Southeast Pacific and the Southeast Atlantic respectively. Catches by EU MS reached 168.929 tonnes in 2022, mostly in the Northeast Atlantic and Southeast Pacific, mainly by the Lithuanian and Spanish fleets, and to a lesser extent the Dutch, Polish and Portuguese fleets. In 2022, landings of horse and jack mackerel in the EU reached 113.755 tonnes for a value of EUR 115 million, with the Netherlands accounting for 34% of the total volume, followed by Spain (25%), Portugal (18%) and Ireland (16%). The EU market supply is supplemented by imports of frozen horse and jack mackerel mostly from Chile and the United Kingdom. In the EU, horse and jack mackerel are mainly consumed in Spain and Portugal, while the Netherlands acts as trade-hub for imports from non-EU countries destined for the EU market. A significant amount of the EU supply is exported (62% of the volume), mostly as frozen products to Egypt, Japan and Côte d'Ivoire. The main exporters are the Netherlands, Spain and Ireland.

7. 1. Biology, exploitation and management

Horse and jack mackerel are members of the genus *Trachurus* of the family Carangidae, which includes numerous species around the world. The most commercially important are Chilean jack mackerel, Cape horse mackerel, Japanese jack mackerel and to a lesser extent Cunene horse mackerel and Atlantic horse mackerel. The latter, *Trachurus trachurus*, is the most commonly found in Europe and represented 5% of the volume of world catches in 2022.

The Atlantic horse mackerel[36] is a benthopelagic demersal fish that lives in large schools on sandy bottoms of the continental shelf and slope between 100 and 200 metres; it can reach a depth of 1.050 metres[37] during winter. It is a more of a nocturnal hunter that returns to the depths during the day. This vertical migration is also coupled with seasonal migration: towards the north in summer and returning to southern waters in winter when temperatures decrease. It feeds mainly on crustaceans (copepods, shrimps, etc.), small fish and squid.

The Atlantic horse mackerel is a slender dark blue fish with a darker back and silvery flank. It has a large head with large eyes and is characterised by the presence of approximately 75 scutes on its lateral line[38]. Measuring between 30 cm and 40 cm, males reach sexual maturity at the age of 5 years (20 cm-length), while females mature at 3 years. The spawning period is long and varies according to the population: in the Northeast Atlantic, spawning occurs during spring; in the North Sea, stocks spawn in summer; while the spawning season for the Central and Southeast Atlantic goes from November to January. The Atlantic horse mackerel is predominantly fished during the spring and summer seasons.

Horse and jack mackerel are mostly fished using pelagic trawls, as well as by seines, hooks and line and gillnets. EU fisheries catching horse and jack mackerel are managed through TACs and quotas set according to ICES advice for eight stocks: JAX/4BC7D, JAX/2A-14, JAX/08C, JAX/09, JAX/34PRT, JAX/341PRT, JAX/34SPN and CJM/SPRFMO. A minimum catch size of 15 cm[39] is also enforced in all fishing areas.

[35] Latest data available at the time of writing
[36] https://fish-commercial-names.ec.europa.eu/fish-names/species/trachurus-trachurus_en
[37] https://doris.ffessm.fr/Especes/Trachurus-trachurus-Chinchard-commun-921/(rOffset)/0
[38] Ibidem
[39] https://fish-commercial-names.ec.europa.eu/fish-names/species/trachurus-trachurus_en

7. 2. Production

Global catches

The global production of horse and jack mackerel reached 2,2 million tonnes in 2022. It was mostly caught in the Southeast Pacific (48%) and to a lesser extent the Southeast Atlantic (20%) and Eastern Central Atlantic (13%). The main species caught were Chilean jack mackerel (48% of the total), jack and horse mackerel nei[40] (17%), Cape horse mackerel (15%) and to a lesser extent Japanese jack mackerel (8%), Cunene horse mackerel (6%), and Atlantic horse mackerel (5%). The main producers were Chile (36%), Namibia (12%), the EU-27 (8%), Peru (8%), and Angola (7%). Other important countries were Japan, Belize and Russia. Horse and jack mackerel are not farmed in aquaculture.

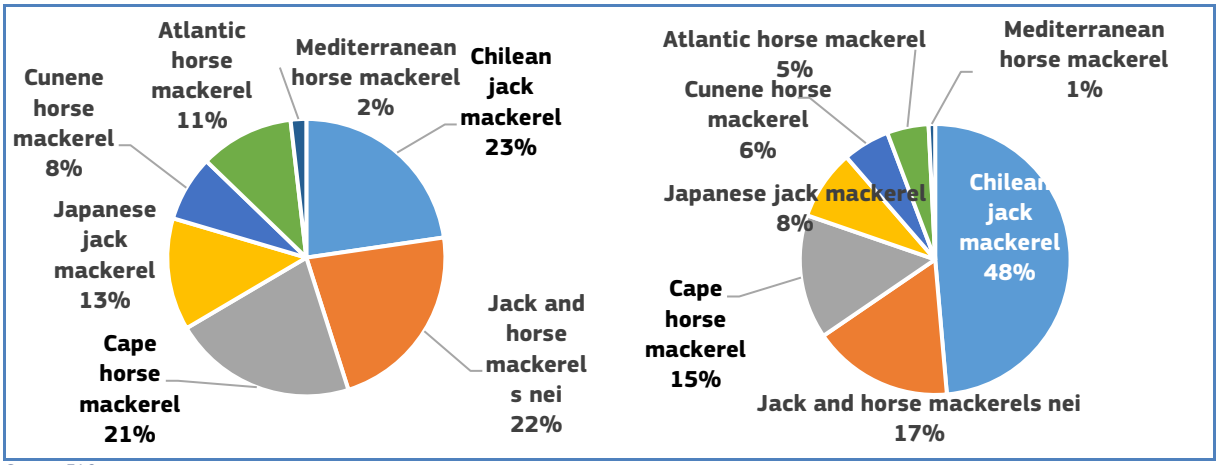
Over the last decade (2013-2022), the global production of horse and jack mackerel increased by 38%, though with some interannual fluctuations, due mostly to Chilean jack mackerel. Catches of Chilean jack mackerel have been increasing since the implementation of precautionary management measures by the South Pacific Regional Fishing Management Organisation (RFMO) in 2013 (following the stock collapse in 2011), resulting in MSC certification in 2019[41]. Total catches have been increasing since 2020.

Table 42. **WORLD CATCHES OF HORSE AND JACK MACKEREL SPECIES (volume in 1.000 tonnes live weight)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Chile	231	272	289	323	355	445	466	556	633	785
Namibia	295	269	322	331	322	306	296	182	250	255
EU-27	312	298	254	289	356	198	202	138	185	169
Peru	81	82	23	15	10	58	140	159	118	167
Angola	75	131	89	71	81	49	68	79	128	150
Japan	151	146	152	125	145	118	97	98	90	100
Belize	5	24	37	37	49	77	82	70	76	76
Russia	111	74	105	98	112	81	51	53	55	69
Georgia	1	1	1	10	18	52	70	55	50	55
China	40	63	70	59	67	65	63	62	50	50
Morocco	32	32	42	42	32	25	29	31	34	44
Others	236	308	354	341	314	268	292	249	313	250
World	**1.571**	**1.699**	**1.737**	**1.742**	**1.861**	**1.742**	**1.857**	**1.734**	**1.982**	**2.170**

Source: FAO.

Figure 45. **WORLD CATCHES OF HORSE AND JACK MACKEREL BY SPECIES IN 2013 (left) AND 2022 (right) (% volume)**



Source: FAO.

[40] Not elsewhere included.
[41] Chilean Jack Mackerel: Bust To Boom | Marine Stewardship Council

EU catches

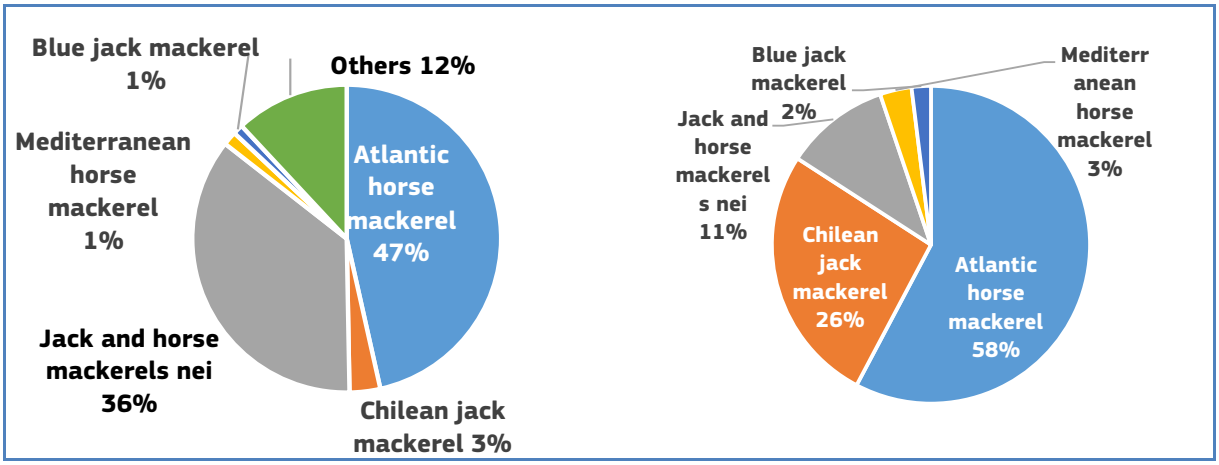
In 2022, EU catches of horse and jack mackerel reached 168.929 tonnes. Most of these catches occurred in the Northeast Atlantic (55%), caught almost exclusively by the Spanish fleet (24%), Portuguese fleet (22%), Dutch fleet (22%) and Irish fleet (17%). Catches in the Southeast Pacific (26%) were caught exclusively by the Lithuanian (50%) and Polish fleets (50%). The Eastern Central Atlantic accounted for 13% of total EU catches (mostly by the Lithuanian fleet), and the Mediterranean and Black Sea for 5% (Spanish fleet, and to a lesser extent Greek, Italian and Croatian fleets). In 2022, Atlantic horse mackerel accounted for 58% of EU catches, Chilean jack mackerel for 26% and jack and horse mackerel nei for 11%. The main EU producers were Lithuania (23% of the total EU catch) and Spain (17%). Other significant producers were the Netherlands (14%), Poland (13%), Portugal (12%) and Ireland (9%). Over the last decade (2013-2022), EU catches experienced a strong decrease (46%) due to the decrease in Atlantic horse mackerel catches (33%) which was not offset by the increase in Chilean jack mackerel catches (341%).

Table 43. **EU CATCHES OF HORSE AND JACK MACKERELS (volume in 1.000 tonnes live weight)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Lithuania	45	49	44	44	37	23	25	21	24	38
Spain	41	39	32	49	47	44	53	49	35	28
Netherlands	63	38	58	30	151	31	32	20	25	24
Poland	28	38	40	39	43	26	12	1	24	23
Portugal	23	25	26	30	27	21	21	18	23	21
Ireland	36	33	22	28	24	26	29	13	19	16
Others	76	78	33	69	28	27	30	16	36	19
EU-27	**312**	**298**	**254**	**289**	**356**	**198**	**202**	**138**	**185**	**169**

Source: FAO.

Figure 46. **EU CATCHES OF HORSE AND JACK MACKERELS BY SPECIES IN 2013 (left) AND 2022 (right) (% volume)**



Source: FAO.

EU landings

In 2022, landings of horse and jack mackerel in the EU amounted to 113.655 tonnes for a value of EUR 115 million. Most of these landings occurred in the Netherlands (34% of the total volume) and in Spain (25%). Other main landing countries were Portugal (18%), Ireland (16%), and to a lesser extent France, Greece and Italy. Most of the landings are fresh fish (79%). Frozen horse and jack mackerel account for a fifth (21%) of EU landings, mostly occurring in the Netherlands. In 2022, EU landings were significantly lower than the catches. Although the Lithuanian and Polish fleets are the most important in terms of catches, no landings have been

recorded in Lithuania or Poland in the past years. It is likely that their catches are landed in Africa, especially in Côte d'Ivoire, Togo and Ghana, as suggested by available export data. A part of the Lithuanian catches is also landed in Dutch fishing ports[42].

Over the 2013-2022 period, EU landings decreased by 33%, mostly due to decreased landings in the Netherlands (39%) and in Spain (30%).

Table 44. **LANDINGS OF HORSE MACKERELS IN THE EU (volume in tonnes net weight)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Netherlands	62.548	32.985	76.677	32.968	42.363	38.207	39.319	21.311	42.891	38.197
Spain	40.946	38.565	31.951	48.717	47.246	44.875	53.836	49.576	34.781	28.662
Portugal	19.584	18.478	23.862	25.002	23.732	19.763	20.766	18.106	22.708	20.639
Ireland	35.239	34.658	20.773	32.548	28.342	24.847	30.195	17.429	18.819	18.409
France	5.156	4.518	3.038	4.159	3.982	3.736	4.661	2.544	2.524	3.344
Greece	1.809	1.545	1.452	1.254	1.505	1.448	1.809	1.519	1.266	1.663
Italy	2.772	2.550	2.897	2.443	3.147	3.396	2.320	1.044	1.337	1.215
Others	1.605	3.490	2.640	3.819	11.048	2.960	4.413	2.584	4.638	1.625
EU-27	**169.659**	**136.789**	**163.289**	**150.910**	**161.365**	**139.232**	**157.318**	**114.113**	**128.965**	**113.755**

Source: EUMOFA elaboration based on EUROSTAT.

7. 3. First sales in the EU

In 2024, reported first sales of horse and jack mackerel in EU Member States amounted to a volume of 35.153 tonnes and a value of EUR 48,8 million[43]. The main countries in terms of first-sales volume and value were by far Portugal (49% of total volume and 49% of total value) and Spain (43% of total volume and 43% of the value). All first sales consist of whole fresh products (99,5% in volume), and more precisely of fresh Atlantic horse mackerel (82% of the total value; 79% of the total volume), and to a lesser extent of fresh blue jack mackerel (7% in value and 10% in volume) and Mediterranean horse mackerel (8% of total value and 8% of total volume). In 2024, first sales decreased by 8% in volume compared to 2023 and by 50% compared to 2022, in relation with the 55% decrease in volume of Atlantic horse mackerel first sales.

Over the period (2015-2024), average first-sale prices of Atlantic horse mackerel were higher than those of blue jack mackerel. In 2024, they reached respectively 1,44 EUR/kg and 0,98 EUR/kg. Since 2022, first-sale prices of Atlantic horse mackerel increased by 25% (in relation to the volume decrease) while those of blue jack mackerel decreased by 11%.

In 2023, the most important places of sale reported for horse and jack mackerel in volume terms were: Sesimbra and Peniche in Portugal (32% and 23% of the Portuguese total volume); Santa Eugenia A Coruña, Ponte de Porto in Spain (11%, 11%, and 7% of the total volume in Spain, respectively).

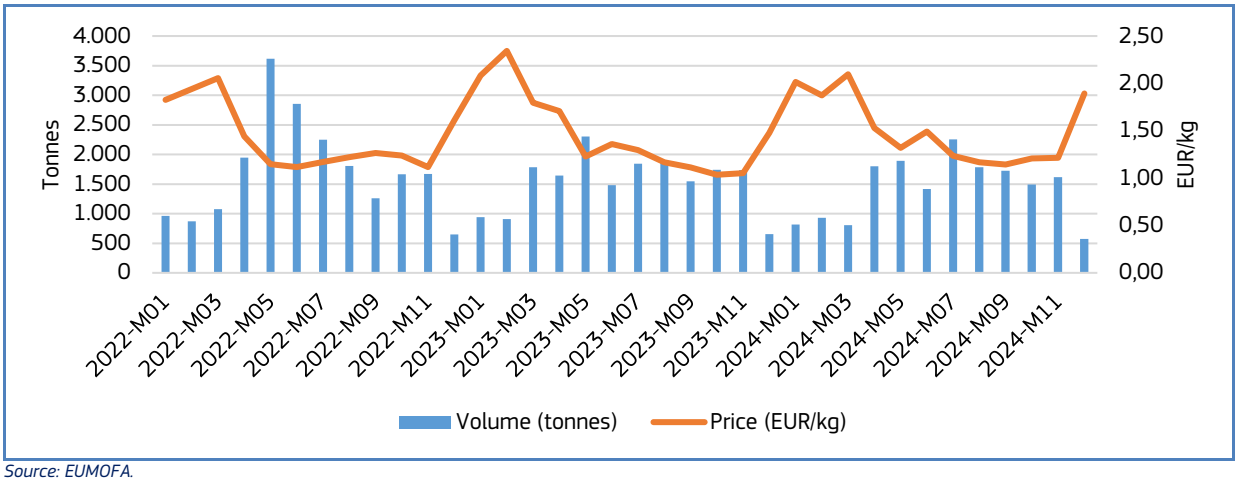
First sales of horse and jack mackerel are seasonal with larger volumes in spring and summer, with around 70% of the first sales in volume occurring between May and November in Portugal and between May and October in Spain.

In **Portugal**, over the 2022-2024 period, monthly first sales peaked at approximately 3.600 tonnes in May 2022 and reached their lowest level at 575 tonnes in December 2024. Monthly prices of jack and horse mackerel fluctuated between 1,04 and 2,34 EUR/kg.

In **Spain**, over the 2022-2024 period, monthly first sales of horse and jack mackerel peaked at approximately 3.463 tonnes in September 2022 and reached their lowest level at 480 tonnes in February 2023. Monthly prices of jack and horse mackerel fluctuated between 0,92 and 2,33 EUR/kg.

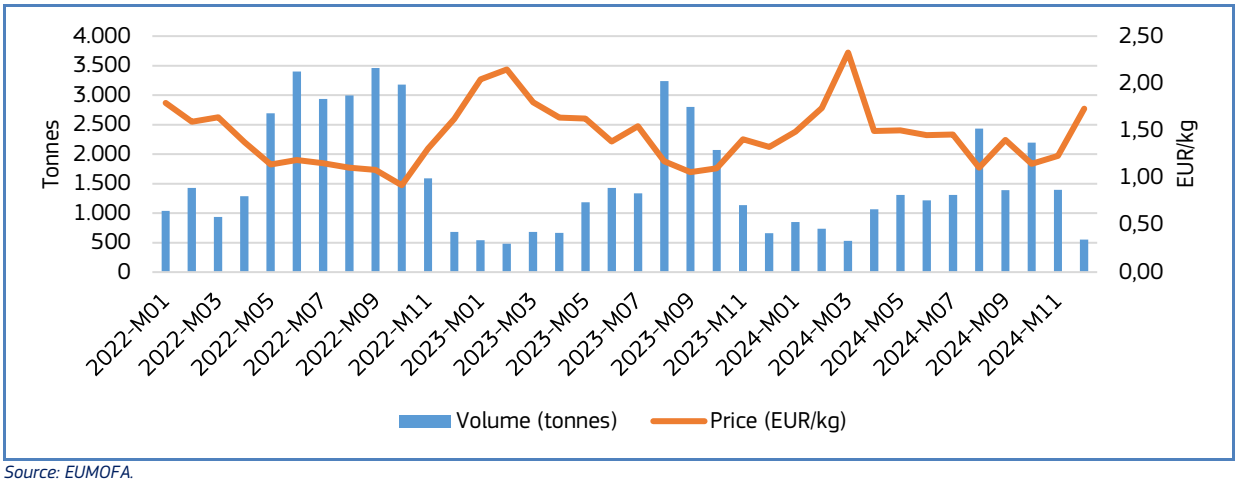
[42] https://www.lavoixdunord.fr/655054/article/2019-10-21/le-margiris-un-gigantesque-navire-usine-qui-inquiete-les-pecheurs-francais
[43] Source: EUMOFA.

Figure 47. **FIRST SALES OF HORSE AND JACK MACKEREL IN PORTUGAL (volume in tonnes net weight and price in EUR/kg)**



Source: EUMOFA.

Figure 48. **FIRST SALES OF HORSE AND JACK MACKEREL IN SPAIN (volume in tonnes net weight and price in EUR/kg)**



Source: EUMOFA.

7. 4. Import – Export

In the Combined Nomenclature used for registering EU import-export data, horse and jack mackerel are specifically reported whole live/fresh or frozen[44].

In 2024, the EU-27 imported 10.260 tonnes of horse and jack mackerel at a value of EUR 13,3 million. Frozen Chilean jack mackerel accounted for 51% of the imported volume, and frozen Atlantic horse mackerel for 46%. Chilean jack mackerel was provided almost exclusively to the EU market by Chile (99% of the imported volume of Chilean jack mackerel), accounting for 44% of the extra-EU total import value. The United Kingdom was the main provider of Atlantic horse mackerel (67% of the imported volume of Atlantic horse mackerel), accounting for 26% of the total extra-EU import value, followed by Norway (19% of the Atlantic horse mackerel imported volume) which accounted for 22% of the total extra-EU import value. The Netherlands was by far the main entry point in the EU market accounting for 51% of the horse and jack mackerel extra-EU import value (83% of the imported volume of Atlantic

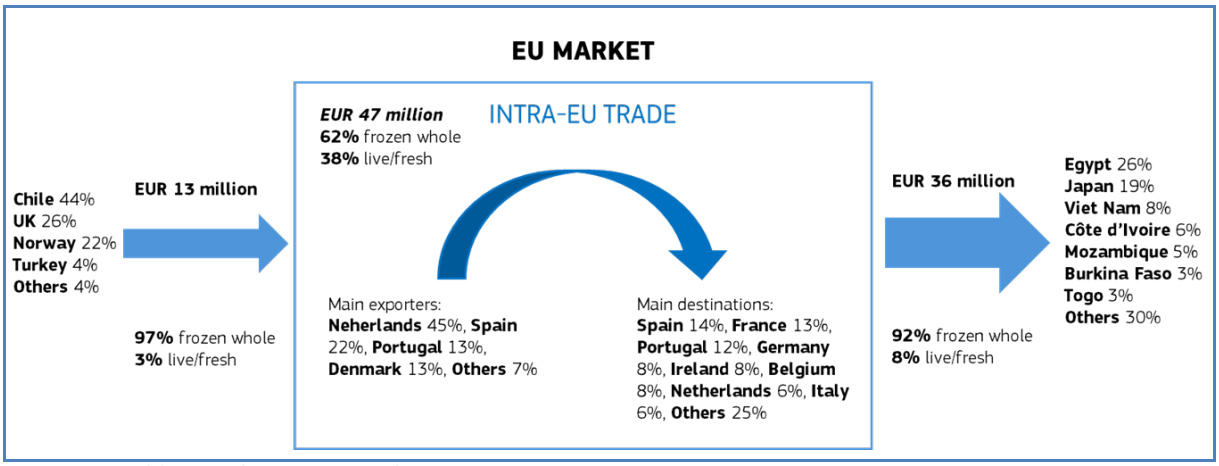
[44] 03024510 - Fresh or chilled Atlantic horse mackerel "*Trachurus trachurus*"
03024530 - Fresh or chilled Chilean jack mackerel "*Trachurus murphyi*"
03024590 - Fresh or chilled jack and horse mackerel "*Trachurus* spp." "(excl. Atlantic horse mackerel and Chilean jack mackerel)
03035510 - Frozen Atlantic horse mackerel "*Trachurus trachurus*"
03035530 - Frozen Chilean jack mackerel "*Trachurus murphyi*"
03035590 - Frozen jack and horse mackerel "*Trachurus* spp." "(excl. Atlantic horse mackerel and Chilean jack mackerel)

horse mackerel and 14% of the imported volume of Chilean jack mackerel), followed by France which accounted for 26% of the extra-EU imported value (57% of the imported volume of Chilean jack mackerel).

In the same year, EU exports to third countries were much higher and amounted to 24.738 tonnes at a value of EUR 36 million. Frozen products accounted for 92% of the total extra-EU export value. Frozen Atlantic horse mackerel was by far the main product exported, accounting for 78% of exports in volume in 2024, followed by frozen and Chilean jack mackerel (17% of the exported volume). Fresh or chilled products accounted for 8% of the total extra-EU export value in 2024. By far the main destinations for frozen Atlantic horse mackerel in value terms were Egypt (32% of the value) and Japan (24%), followed to a lesser extent by Vietnam (11%). Frozen Chilean jack mackerel was mainly exported to Côte d'Ivoire (45% of the value) and Burkina Faso (28%). The Netherlands was by far the main EU exporter of Atlantic mackerel to third countries (40% of the exported value), followed by Ireland (26%) and Spain (23%). Frozen Chilean jack mackerel products were exported almost exclusively by the Netherlands (93% of the extra-EU export value). Denmark was the largest exporter of fresh jack and horse mackerel, accounting for 6% of the total extra-EU export value. Fresh products were mainly exported to Israel in 2024, accounting for 4% of the total export value.

In 2024, intra-EU exports amounted to 19.243 tonnes of horse and jack mackerel products at a value of EUR 47 million. The intra-EU trade was dominated by frozen products, which accounted for 62% of the export value (frozen Atlantic horse mackerel accounted for 26% of the total intra-EU export value), whereas live/fresh products accounted for 38% of the total export value (fresh Atlantic horse mackerel accounted for 25% of the intra-EU export value). The main exporting countries within the EU were by far the Netherlands (45% of the intra-EU export value), followed by Spain (22%), and to a lesser extent by Portugal (13%) and Denmark (13%). The main destinations of intra-EU exports were Spain (14% of intra-EU export value), followed by France (13%) and Portugal (12%). Other destinations were Germany, Ireland and Belgium (each accounted for 8% of intra-EU export value), the Netherlands and Italy (6% each).

Figure 49. **THE HORSE AND JACK MACKEREL TRADE MARKET IN 2024, IN VALUE**



Source: EUMOFA elaboration of Eurostat-COMEXT data.

7. 5. Consumption

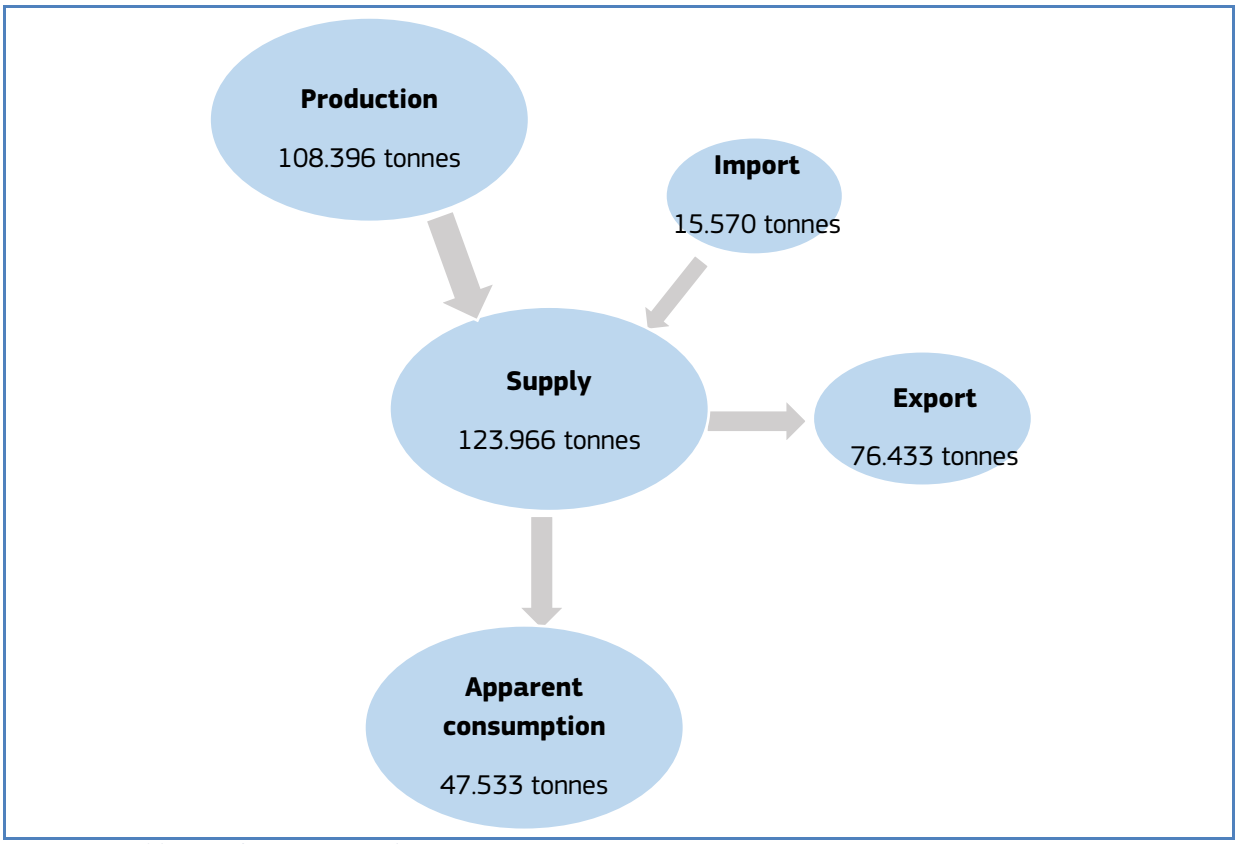
In 2022 apparent consumption of horse mackerel (Atlantic horse mackerel and other species of horse mackerel) at EU level was estimated at 47.532 tonnes LWE. Supply reached 123.966 tonnes LWE of which 87% in volume originated from EU catches and 13% was imported. Exports represented 62% of the overall supply, so apparent consumption accounted for 38% in 2022.

Total supply of Atlantic horse mackerel amounted to 100.756 tonnes LWE in 2022 (81% of the total EU supply of horse mackerel), originating almost exclusively from EU production (93% of the supply), and to a small extent from imports (7% of the EU supply). Almost three-quarters of the supply was exported (71%) and the apparent consumption of Atlantic horse mackerel was estimated at 29.426 tonnes LWE in 2022, corresponding to a consumption of 0,066 kg LWE per capita.

At MS level, it is not feasible to make estimates of apparent consumption given the available data. However, it can be estimated that in 2022, Spain and Portugal were the main consumption markets of horse mackerel (Atlantic horse mackerel and other species of horse mackerel), with consumption estimated at 17.785 tonnes LWE and 15.699 tonnes LWE, respectively. In both countries, horse mackerel is much appreciated for its flavour and its cheap price. It can be consumed grilled, fried (for the smaller fish), marinated, cooked or salted/dried (in the Azores especially).

Apparent consumption data for jack mackerel are not available in EUMOFA. However, there is a growing interest by the EU market in Chilean jack mackerel since MSC certification, with major retailers starting to favour it at the expense of North Atlantic mackerel[45]. As the supply of North Atlantic mackerel is tightening every year due to quota reductions, Chilean jack mackerel appears to be a stable and cheaper alternative for EU operators[46]. Although some Chilean jack mackerel is marketed for human consumption, much of the volume is processed into fishmeal or oil and animal feed[47].

Figure 50. **APPARENT CONSUMPTION OF HORSE MACKEREL* IN THE EU IN 2022 (LWE)**



Source: EUMOFA elaboration of Eurostat-COMEXT data.
**data concern Atlantic horse mackerel and other species of horse mackerel.*

[45] Chilean jack mackerel recovery leading to increased competition with European species | Seafood Source
[46] 3MMI - Mackerel: Tighter Supplies, Growing Jack Mackerel Market Share in Europe
[47] https://oceana.org/marine-life/chilean-jack-mackerel/

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FOR MORE INFORMATION AND COMMENTS:

Directorate-General for Maritime Affairs and Fisheries
B-1049 Brussels
E-mail: **contact-us@eumofa.eu**

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: GFCM.

Case studies: The EU Fish Market, Eurostat, European Council, FAOSTAT, Eurostat COMEXT, Councul regulations, European Commission, DORIS, Marine Stewardship Council, La Voix Du Nord, SeafoodSource, TRADEX, Oceana.

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

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

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

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

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

The EUMOFA website is publicly available at the following address: www.eumofa.eu.

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