European Commission

Monthly Highlights

No. 5 / 2025

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

eumofa.eu @EU_MARE #EUMOFA

Contents

1. GLOBAL HIGHLIGHTS

EU / Fishery: On 24 April 2025, the European Commission presented a proposal to integrate into EU law the landmark international Agreement on Marine **Biological Diversity of Areas Beyond National Jurisdiction (BBNJ)** , which aims to protect the ocean, tackle environmental degradation, fight climate change and curb biodiversity loss. This will also help Member States implement it in their national systems. The Agreement – also known as the Treaty of the High Seas – will help reach the goals and targets set under the **Kunming-Montreal Global Biodiversity Framework**. The Framework includes protecting at least 30% of the ocean by 2030 and increasing benefit sharing from genetic resources and digital sequence information[1,2].

EU / Fishery: On 14 April 2025, the European Commission considered the International Maritime Organisation (IMO) Net-zero framework agreement to be a meaningful step towards achieving net-zero greenhouse gas (GHG) emissions from global shipping by 2050. It was an important step in the fight against climate change, marking a significant advancement in reducing the environmental impact of the shipping industry on a global scale. While the agreement does not yet ensure the sector's full contribution to achieving the Paris Agreement goals, it constitutes a strong foundation for starting the required energy transition of shipping. In line with the **2023 IMO Strategy**, the agreement includes a new measure of setting a global standard for gradually reducing the GHG intensity of marine fuels. The measure applies to the full lifecycle of GHG emissions of shipping fuels. It uses standardised criteria and a common certification scheme for fuels that facilitates a level-playing field, irrespective of where a fuel is produced, transported or used. As a result, it will prevent emissions from shifting to other sectors and encourage sustainable investments that will reduce emissions throughout the entire lifecycle across the globe[3].

EU/Fishery: The European Commission has recently published a list of landing ports eligible for a margin of tolerance derogation in catch reporting for unsorted pelagic fisheries. This allows for a more flexible approach to logbook reporting, reducing administrative burden for operators. Ports on the list must meet strict control and monitoring standards to ensure accurate catch reporting. The list can be updated based on Member State requests and compliance with control requirements. This move responds to long-standing industry demands and supports effective fisheries control[4].

GFCM / Aquaculture: A mission led by the General Fisheries Commission for the Mediterranean (GFCM) of FAO, in collaboration with the Department of Fisheries and Marine Research of the Ministry of Agriculture of the Republic of Cyprus, has been set up to understand how climate change is affecting aquaculture. It is part of a broader effort to assess resilience across the Mediterranean, following similar missions in Tunisia and Croatia. The insights gathered from this mission will contribute to a broader understanding of climate change impacts on Mediterranean aquaculture, as well as potential mitigation and adaptation measures for the sector[5].

Iceland / Fishery: The Icelandic catch amounted to almost 66.000 tonnes, which is 9% more than in March 2024. Demersal catches increased by 23% and were 48.600 tonnes in March 2025. During the twelve-month period from April 2024 to March 2025, the total catch was 992.000 tonnes, compared with 1,073 million tonnes the previous year. The reduction is mainly due to no capelin being caught during most of the period[6].

[1] https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1098
[2] https://oceans-and-fisheries.ec.europa.eu/ocean/international-ocean-governance/protecting-ocean-time-action_en
[3] https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1037
[4] https://oceans-and-fisheries.ec.europa.eu/news/commission-streamlines-reporting-obligation-small-pelagic-unsorted-catches-listing-specific-landing-2025-05-15_en
[5] https://www.fao.org/gfcm/news/detail/en/c/1735249/
[6] https://statice.is/publications/news-archive/fisheries/fish-catch-in-march-2025/

2. MACROECONOMIC CONTEXT

2.1. Marine fuel

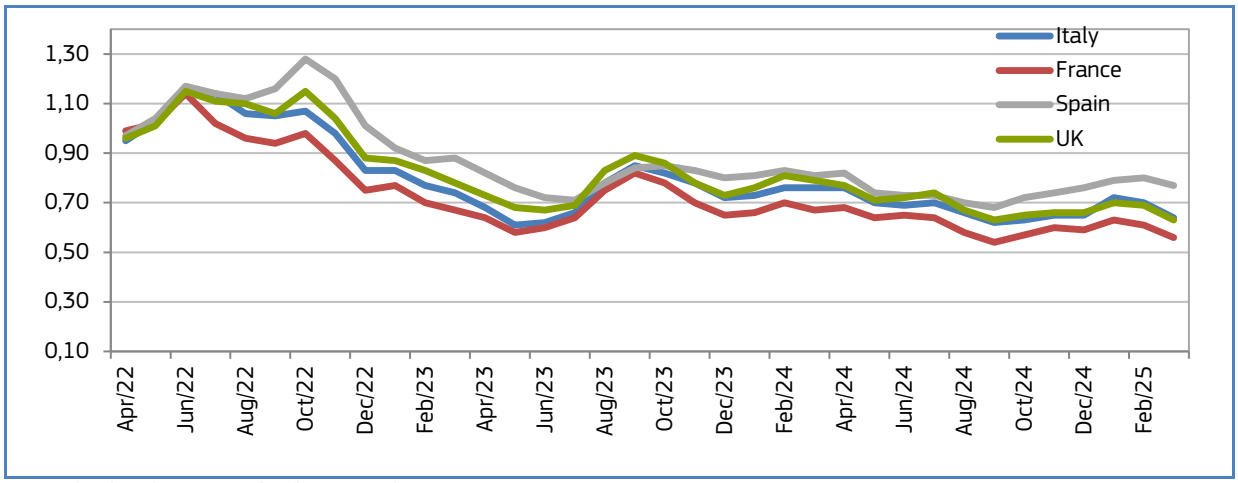
Average prices for marine fuel in **March 2025** ranged between 0,56 and 0,77 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices decreased by an average of about 7,1% compared with the previous month and decreased by an average of 14,2% compared with the same month in 2024.

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

Country	March 2025	Change from Feb 2025	Change from Mar 2024
France *(ports of Lorient and Boulogne)*	0,56	-8%	-16%
Italy *(ports of Ancona and Livorno)*	0,64	-9%	-16%
Spain *(ports of A Coruña and Vigo)*	0,77	-4%	-5%
The UK *(ports of Grimsby and Aberdeen)*	0,63	-9%	-20%

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

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



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

2. 2. Consumer prices and inflation

The EU annual inflation rate was 2,5% in March 2025, down from 2,7% in February 2024. A year earlier, the rate was 2,6%.

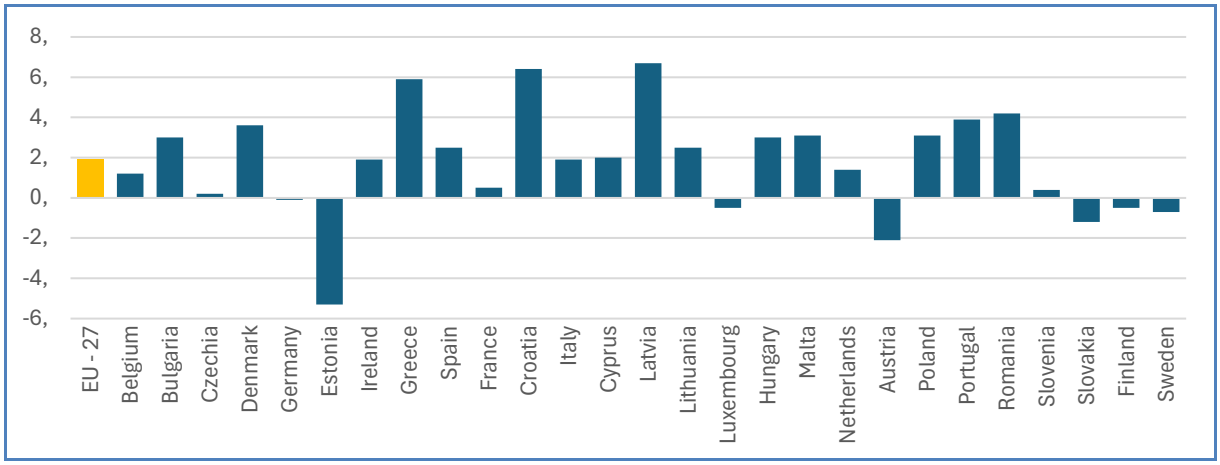
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR MARCH 2025, COMPARED WITH MARCH 2024**

Lowest inflation rates		Highest inflation rates	
France	+0,9%	Romania	+5,1%
Denmark	+1,4%	Hungary	+4,8%
Luxembourg	+1,5%	Poland	+4,4%

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 MARCH 2025 (value expressed in percentage)**



Source: Eurostat.

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

	Mar 2023	Mar 2024	Feb 2025	Mar 2025	Change from Feb 2025	Change from Mar 2024
Food and non-alcoholic beverages	19,2	1,5	2,9	3,3	13,8%	120,0%
Fish and seafood	13,7	2,3	2,3	1,9	-17,4%	-17,4%
Fresh or chilled fish	10,7	2,7	3,5	2,3	-34,3%	-14,8%
Frozen fish	19,8	1,3	0,6	0,8	33,3%	-38,5%
Fresh or chilled seafood	6,7	2,3	3,5	3,0	-14,3%	30,4%
Frozen seafood	8,9	-0,6	-0,5	0,8	-260,0%	-233,3%
Dried, smoked or salted fish and seafood	17,9	1,6	2,8	3,3	17,9%	106,3%
Other preserved or processed fish and seafood and fish and seafood preparations	17,5	3,2	1,6	1,1	-31,3%	-65,6%

Source: Eurostat.

2. 4. Exchange rates

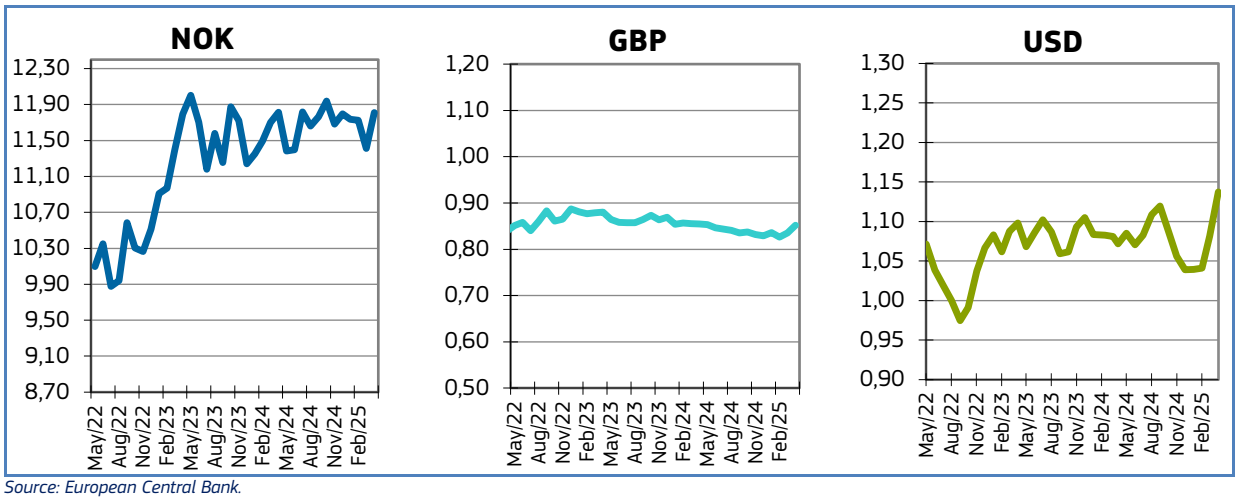
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Apr 2023	Apr 2024	Mar 2025	Apr 2025
NOK	11,7910	11,8150	11,4130	11,8090
GBP	0,8805	0,8548	0,8354	0,8518
USD	1,0981	1,0718	1,0815	1,1373

Source: European Central Bank.

In April 2025, the euro appreciated against the Norwegian krone (3,5%), the British pound sterling (2,0%), and the US dollar (5,2%), relative to the previous month. For the past six months, the euro has fluctuated around 1,0657 against the US dollar. Compared with April 2024, the euro has appreciated 6,1% against the US dollar and depreciated 0,3% against the British pound sterling and 0,1% against the Norwegian krone.

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-Feb 2025 vs Jan-Feb 2024): Cyprus, Finland, France, Ireland, Latvia, the Netherlands and Portugal recorded an increase in both first-sales value and volume. Increases in Finland were mainly due to herring.

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

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

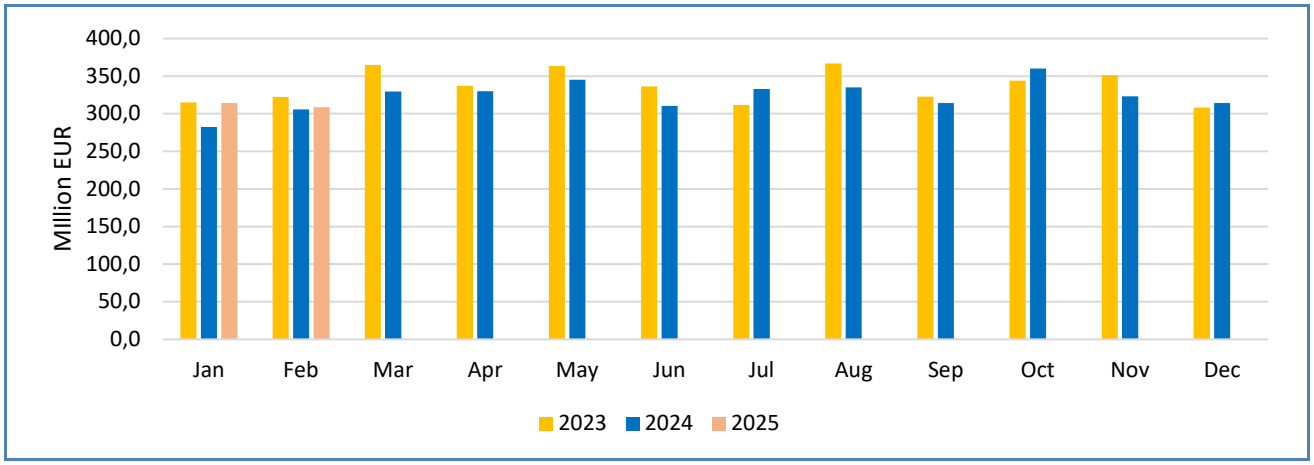
	January – February 2023		January – February 2024		January – February 2025		Change from January – February 2024	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Belgium	3.012	15,11	2.710	12,42	2.666	13,74	-2%	11%
Bulgaria	5	0,02	238	0,18	34	0,10	-86%	-46%
Cyprus	46	0,35	40	0,32	46	0,33	13%	2%
Denmark	129.387	73,48	143.437	90,17	103.974	84,36	-28%	-6%
Estonia	14.307	4,17	14.314	6,85	15.099	5,97	5%	-13%
Finland	15.255	4,32	8.768	3,50	18.093	5,52	106%	58%
France	33.795	128,88	30.457	100,86	32.939	123,56	8%	23%
Germany	7.860	10,46	11.372	12,11	1.946	2,29	-83%	-81%
Ireland	48.875	78,83	54.585	76,23	67.718	93,44	24%	23%
Italy	10.332	46,85	9.105	40,40	7.869	38,10	-14%	-6%
Latvia	8.269	2,41	9.227	3,18	9.555	3,92	4%	23%
Lithuania	85	0,40	28	0,13	16	0,07	-42%	-45%
Netherlands	3.438	21,01	2.612	18,21	3.104	19,68	19%	8%
Portugal	9.544	41,14	8.189	35,73	8.996	40,04	10%	12%
Spain	48.812	190,34	42.560	175,64	39.070	178,39	-8%	2%
Sweden	43.014	19,69	16.930	11,81	16.846	13,39	0%	13%
Norway	565.634	590,46	608.960	618,23	512.261	625,24	-16%	1%

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–February 2024, 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.

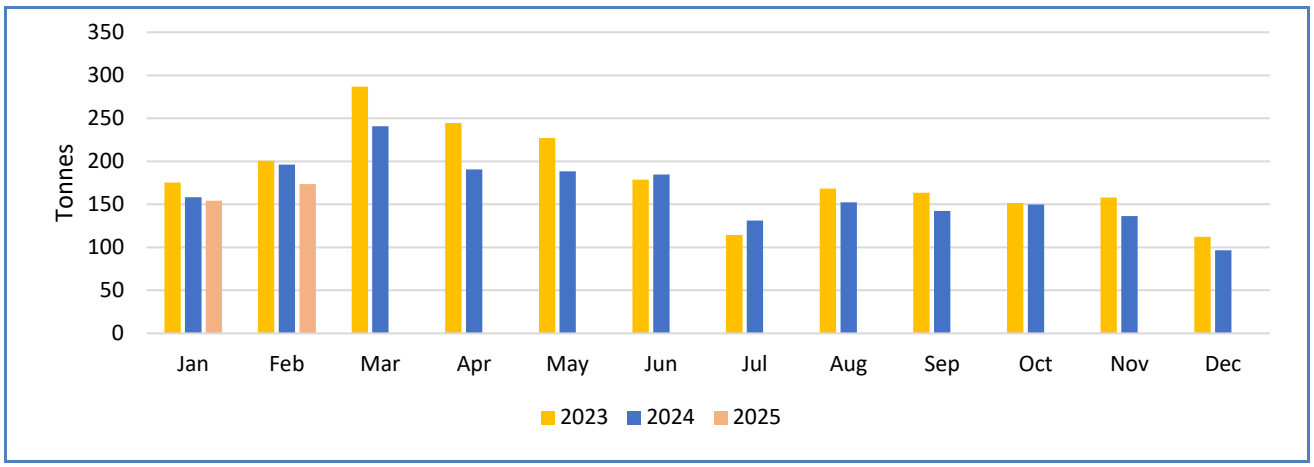
The overall value in the period January-February in 2025 was EUR 622,9 million, a 6% increase compared to 2024 and 2% less compared to 2023. While the overall volume was 327.972 tonnes, this was an 8% decrease compared to 2024, and a 13% decrease compared to 2023.

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



In January and February 2025, monthly first-sales value increased in both months compared to the same period in 2024, while it decreased compared to 2023. In the first two-months of 2025 first-sales volume decreased compared to January and February in both 2024 and 2023. Between January and February 2025, first-sales value experienced a 6% increase compared to 2024, when mainly small pelagics (+8%), were driving the growth, but saw a 2% decrease compared to 2023 with cephalopods and flatfish (-19% and -17% respectively) contributing most to the decline. Similarly, in the same period in 2025, first-sales volume decreased compared to the same period in both 2024 and 2023 with groundfish (-38%) mainly responsible for the decline in the first period and small pelagics and groundfish (-16% and -19% respectively) in the second period.

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



3. 2. First-sales evolution at commodity group level[8,9]

Bivalves and other molluscs and aquatic invertebrates

In 2025, first-sales value of "Bivalves and other molluscs and aquatic invertebrates" amounted to EUR 48,9 million, a 7% increase compared to the same period in 2024. First-sales volume came to 20.983 tonnes, an increase of 25% compared to 2024. Scallop and clam were the main commercial species driving the increase in the value of the commodity group (+12% and +5%, respectively), while scallop and mussels Mytilus spp. were the main contributors to the increase in volume (+26% and +74%, respectively).

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

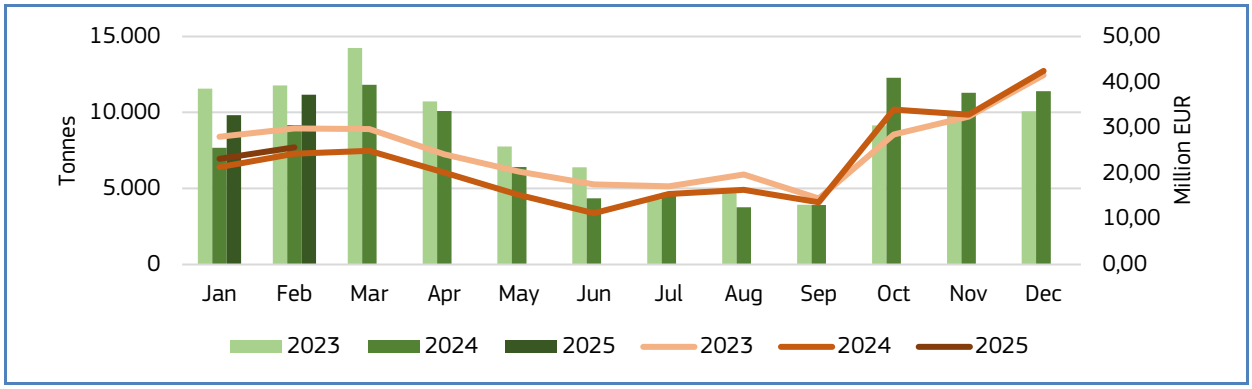


Table 6. **FIRST SALES PRICES OF BIVALVES MCS (JAN-FEB 2024 AND JAN-FEB 2025)**

Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
France	Scallop	2,34 EUR/kg	2,07 EUR/kg	-11%
Spain	Clam	11,56 EUR/kg	11,05 EUR/kg	-4%
Ireland	Scallop	2,56 EUR/kg	2,23 EUR/kg	-13%

Cephalopods

In 2025, first-sales value of "Cephalopods" totalled EUR 54,7 million, an 11% increase compared to 2024. First-sales volume came to 7.514 tonnes, a decrease of 3% compared to 2024. In value terms, octopus (+19%) and squid (+14%) were the two main commercial species driving the growth in first sales value, while mainly cuttlefish (-18%) led the decrease in first-sales volume.

[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 - FEB 2025**

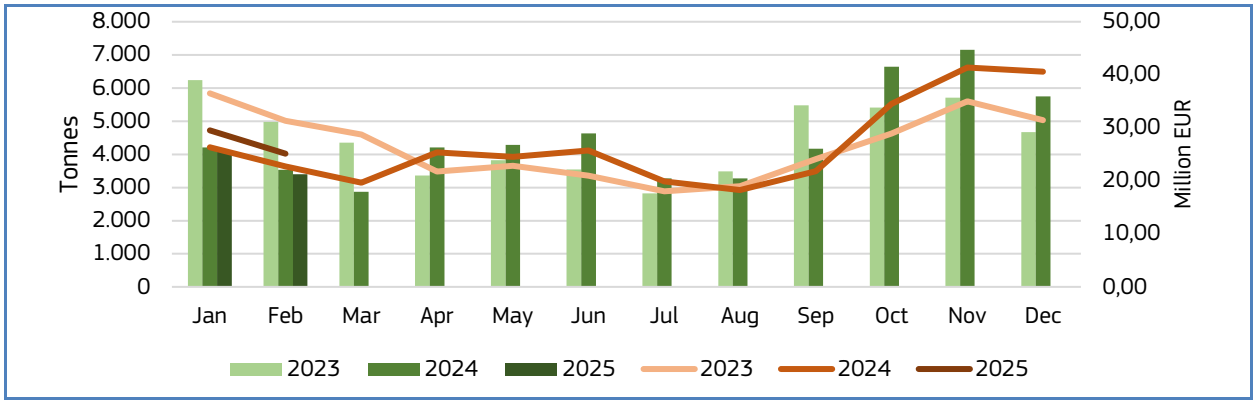


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN-FEB 2024 AND JAN-FEB 2025)**

Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
France	Squid	9,28 EUR/kg	9,31 EUR/kg	0%
Portugal	Octopus	7,39 EUR/kg	8,59 EUR/kg	+16%
Belgium	Cuttlefish	3,24 EUR/kg	4,10 EUR/kg	+27%

Crustaceans

In 2025, first-sale value of "Crustaceans" totalled EUR 67,1 million, an increase of 12% compared to 2024. First-sales volume amounted to 7.770 tonnes, an increase of 19% compared to 2024. Deep-water rose shrimps (+32% and +49%) and Norway lobster (+16% and +33%) 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 - FEB 2025**

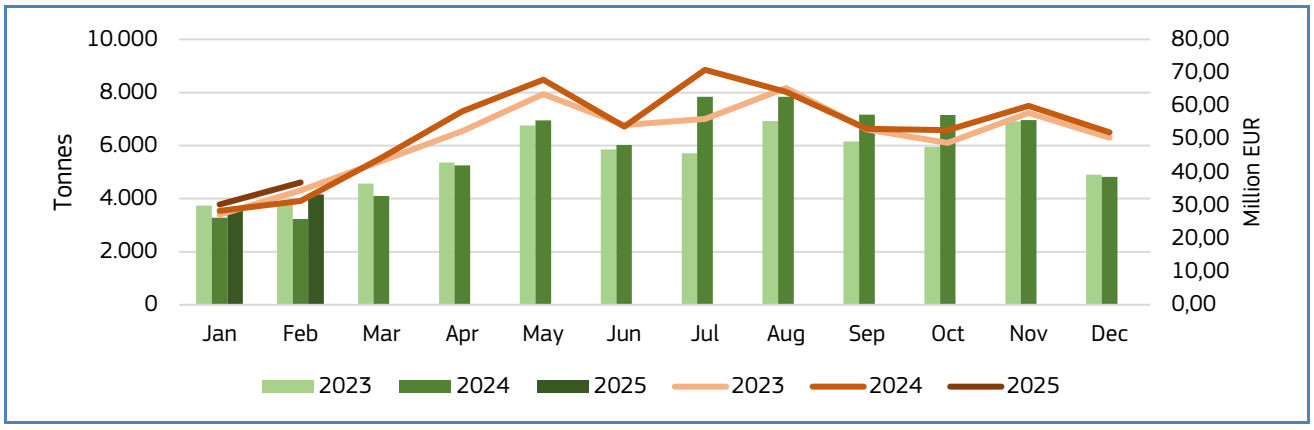


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-FEB 2024 AND JAN-FEB 2025)**

Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
Denmark	Norway lobster	9,42 EUR/kg	7,54 EUR/kg	-20%
Spain	Deep-water rose shrimp	9,09 EUR/kg	7,49 EUR/kg	-18%
The Netherlands	Shrimp *Crangon* spp.	8,65 EUR/kg	8,37 EUR/kg	-3%

Flatfish

In 2025, first-sales value of "Flatfish" came to EUR 55,1 million, an increase of 4% compared to 2024. First-sales volume amounted to 6.914 tonnes, a decrease of 3% compared to 2024. Common sole contributed mainly to the increase in first-sales value (+13%), while Greenland halibut was the main species driving the decrease in volume (-58%).

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

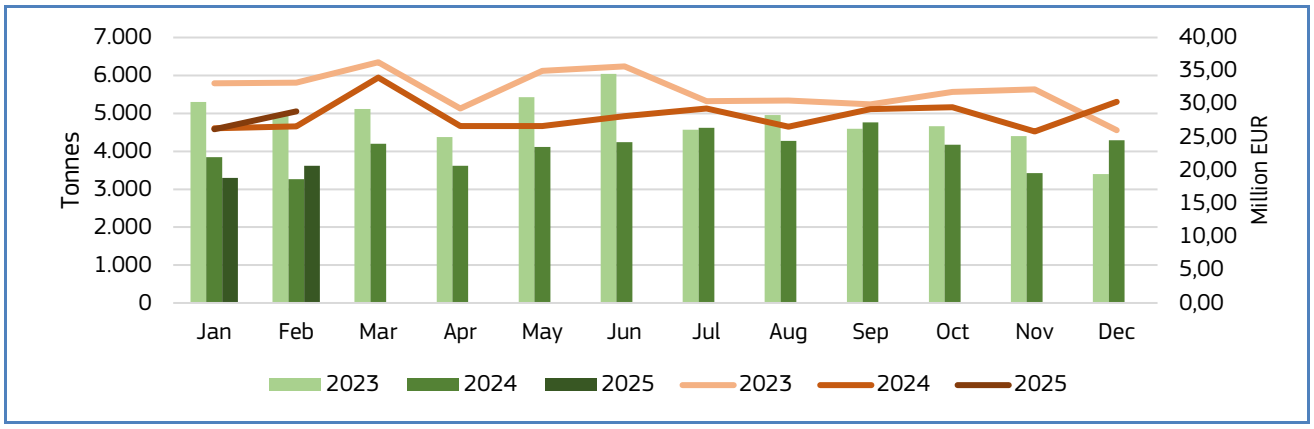


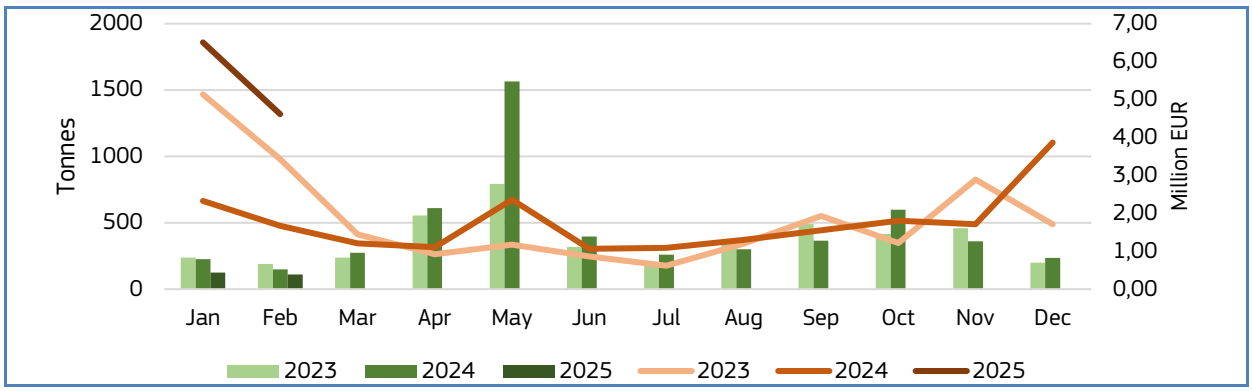
Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN-FEB 2024 AND JAN-FEB 2025)**

Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
France	Common sole	18,36 EUR/kg	17,34 EUR/kg	-6%
Spain	Greenland halibut	6,24 EUR/kg	6,95 EUR/kg	+11%
Netherlands	Common sole	17,23 EUR/kg	17,68 EUR/kg	+3%

Freshwater fish

In 2025, first-sales value of "Freshwater fish" came to EUR 11,1 million, an increase of 179% compared to 2024. First-sales volume amounted to 231 tonnes, a decrease of 38% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+240%), while other freshwater fish[10] was the main contributor to the decrease in volume (-42%).

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



[10] The commodity group "Freshwater Fish" includes seven Main Commercial Species (MCS): carp, eel, freshwater catfish, pike, pike perch, tilapia, and other freshwater fish. During the analyzed period, „Other freshwater fish" encompassed 23 different freshwater species. Among them, the most significant were European perch, roach, and freshwater bream, which together accounted for nearly 83% of the total volume within this MCS.

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

Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
France	Eel	62,69 EUR/kg	199,91 EUR/kg	+219%
Estonia	Other freshwater fish[11]	1,22 EUR/kg	1,78 EUR/kg	+3%
Denmark	Other freshwater fish[12]	2,00 EUR/kg	1,74 EUR/kg	-13%

Groundfish

In 2025, first-sales value of "Groundfish" totalled EUR 95,7 million, a decrease of 6% compared to 2024. First-sales volume amounted to 57.329 tonnes, a decrease of 38% compared to 2024. Blue whiting (-43% and -48%) was mainly responsible for the decrease in first-sales value and volume.

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

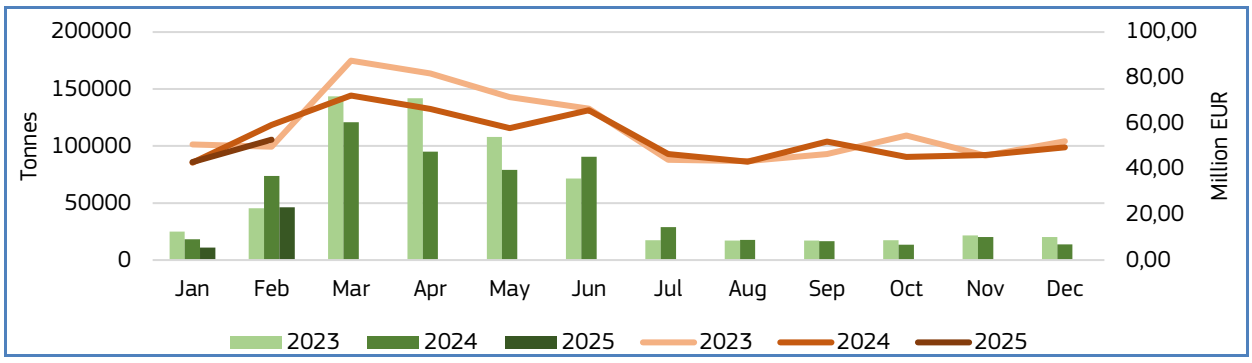


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-FEB 2024 AND JAN-FEB 2025)**

Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
Denmark	Blue whiting	0,33 EUR/kg	0,36 EUR/kg	+12%
Spain	Blue whiting	2,05 EUR/kg	3,39 EUR/kg	+65%
Germany	Cod	6,19 EUR/kg	1,34 EUR/kg	-78%

Other marine fish[13]

In 2025, first-sales value of "Other marine fish" came to EUR 91,8 million, an increase of 4% compared to 2024. First-sales volume amounted to 38.859 tonnes, an increase of 9% compared to 2024. Other sharks[14] (+9% and +6%) and other marine fish[15] (+6% and +20%) were the two main commercial species contributing most to the increase in first-sales value and volume (+26% and +9%).

[11] Twelve species belong to the MCS „Other freshwater fish" MCS in Estonia of which roach, European perch and freshwater bream represent 87% of the total volume.
[12] „Other freshwater fish" in Denmark comprises 2 products roach and European perch which respresent 63% and 37% respectively of the total volume.
[13] Seventeen Main Commertial Species are included in the Commmodity Group „Other Marine Fish" with monk representing more than ¼ of the total value and almost 20% of total volume.
[14] The „Other sharks" Main Commercial Species (MCS) comprises 28 products during the analyzed period and among them blue shark more than half of the volume (58%).
[15] The "Other Marine Fish" Main Commercial Species (MCS) comprised 284 products during the analyzed period. Among them, boarfish and boarfishes nei, accounted for 91% of the total volume.

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

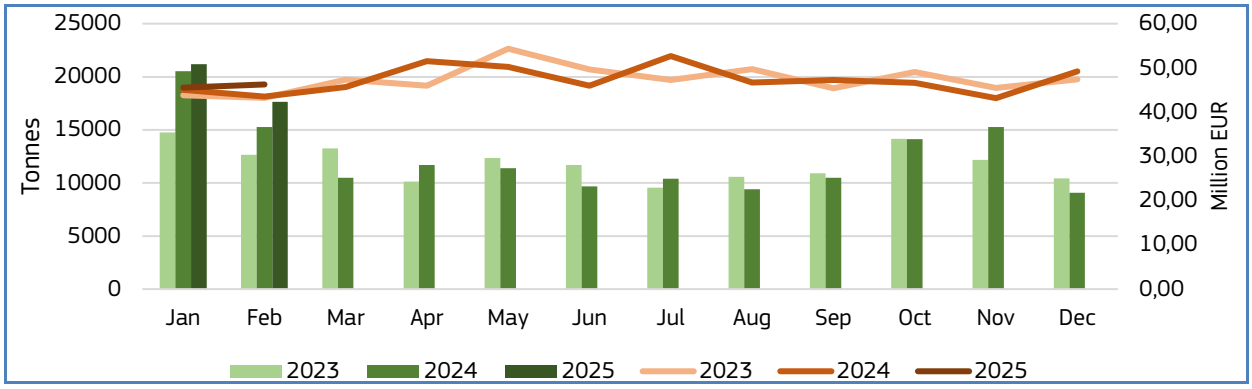


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-FEB 2024 AND JAN-FEB 2025)**

Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
Denmark	Other marine fish[16]	0,44 EUR/kg	0,41 EUR/kg	-7%
Italy	Other sharks[17]	3,03 EUR/kg	3,03 EUR/kg	0%
Denmark	Monk	5,10 EUR/kg	6,01 EUR/kg	+18%

Salmonids

In 2025, first-sales value of "Salmonids" came to EUR 1.914, a decrease of 95% compared to 2023, while first-sale volume amounted to 364 kg, a decrease of 85% compared to 2024. Other salmonid species[18] (-96% and -82%) and trout (-93% and -86%) were mainly responsible for the decrease in both first-sales value and volume of salmonids.

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

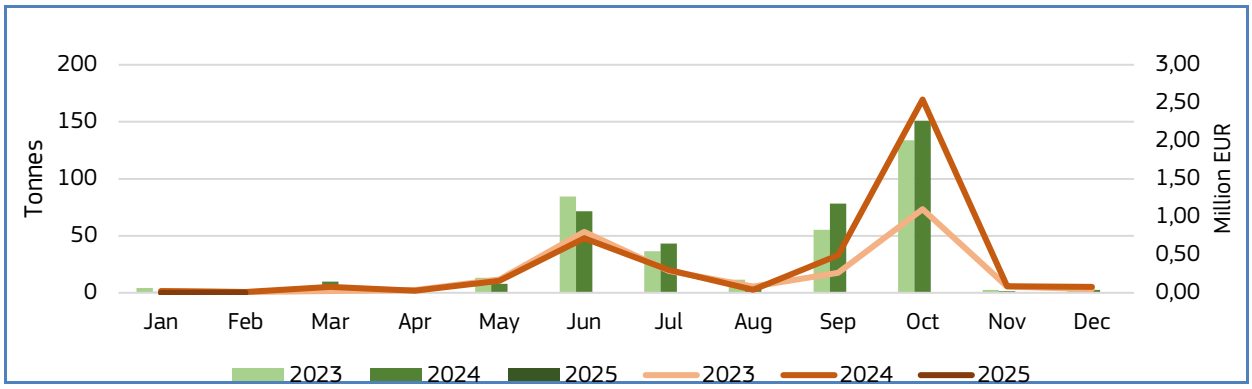


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-FEB 2024 AND JAN-FEB 2025)**

Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
Germany	Trout	9,66 EUR/kg	8,62 EUR/kg	-11%
Germany	Other salmonids[19]	2,89 EUR/kg	3,20 EUR/kg	+11%
Estonia	Trout	13,06 EUR/kg	7,99 EUR/kg	-39%

[16] „Other marine fish" in Denmark includes 3 products of which Boarfishes nei represents 98% of the total volume.
[17] „Other sharks" MCS comprises 16 species in Spain in the period analyzed of which 86% of the total volume is made by blue shark.
[18] „Other salmonid species" includes European whitefish, and whitefishes nei. In the period analyzed European whitefish represented 73% of the MCS volume.
[19] „Other salmonids" MCS in Germny include only Atlantic salmon (100%).

Small pelagics

In 2025, first-sales value of "Small pelagics" amounted to EUR 167 million, an increase of 8% compared to 2024. First-sales volume amounted to 180.479 tonnes, an increase of 2% compared to 2024. Atlantic horse mackerel and mackerel (+161% and +9%) were two main commercial species contributing most to the increase in first-sales value, while miscellaneous small pelagics (-31%) contributed most to the decline in first-sales volume.

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

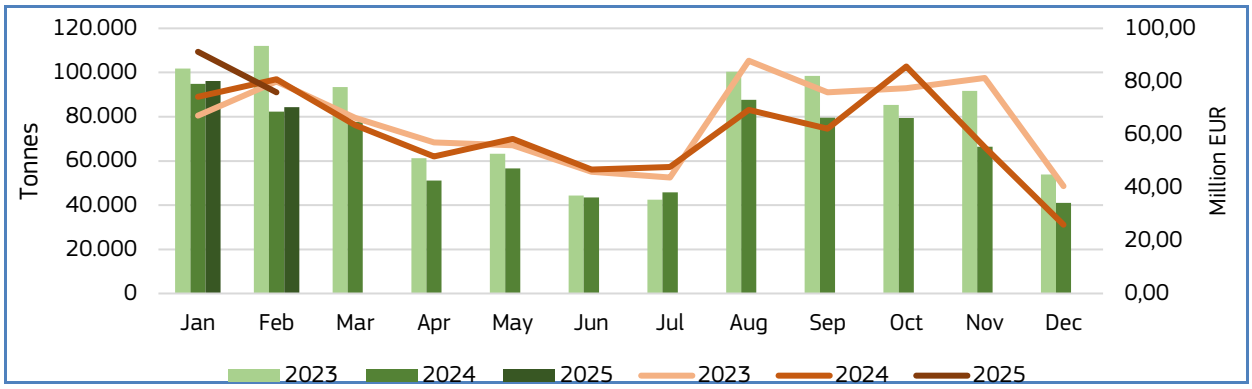


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-FEB 2024 AND JAN-FEB 2025)**

Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
Ireland	Atlantic horse mackerel	1,17 EUR/kg	1,14 EUR/kg	-2%
Ireland	Mackerel	1,61 EUR/kg	2,16 EUR/kg	+32%
Portugal	Anchovy	6,08 EUR/kg	2,76 EUR/kg	-35%

Tuna and tuna-like species

In 2025, first-sales value of "Tuna and tuna-like species" came to EUR 31,5 million, an increase of 3% compared to 2024. First-sales volume totalled 7.658 tonnes, a decrease of 19% compared to 2024. Swordfish and bluefin tuna (+24% and +78% respectively) were the two main commercial species driving the increase in first-sales value, while skipjack and bigeye tuna (-84% and -58% respectively) were mainly behind the decrease in first-sales volume.

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

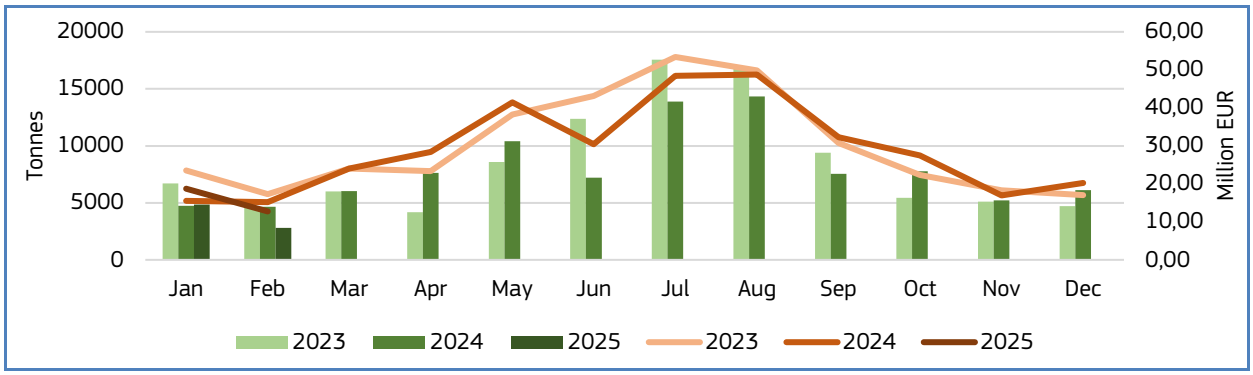


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-FEB 2024 AND JAN-FEB 2025)**

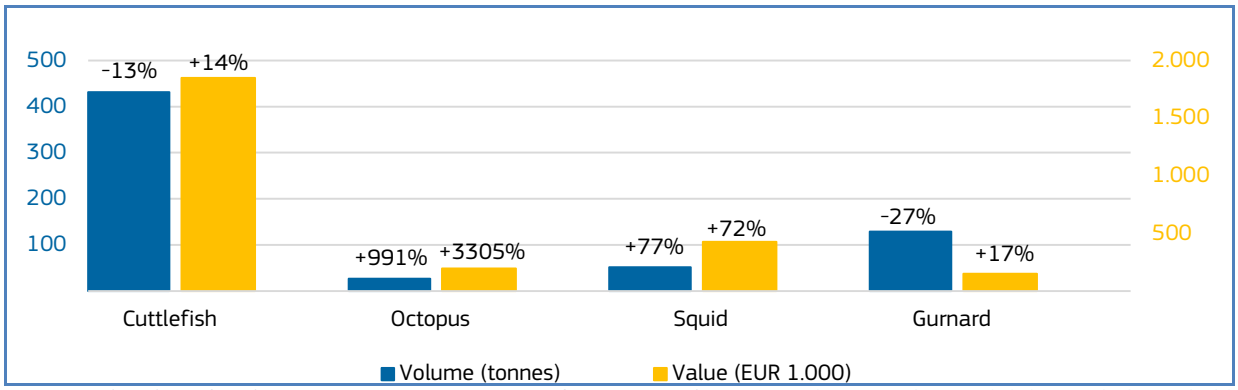
Country	Main Commercial Species	First-sales average price Jan-Feb 2024	First-sales average Price Jan-Feb 2025	Trend (Jan-Feb 2025 vs Jan-Feb 2024 %)
Spain	Swordfish	5,03 EUR/kg	5,04 EUR/kg	0%
Spain	Bluefin tuna	10,47 EUR/kg	9,35 EUR/kg	-11%
Spain	Yellowfin tuna	2,39 EUR/kg	2,64 EUR/kg	+10%

3.3. First sales in reporting countries[20]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 1,3 million, +11%	2.666 tonnes, -2%	**Value**: cuttlefish, squid, octopus **Volume**: gurnard
Feb 2025 vs Feb 2024	EUR 7,2 million, +7%	1.202 tonnes, -11%	**Value**: cuttlefish, octopus, squid **Volume**: gurnard

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

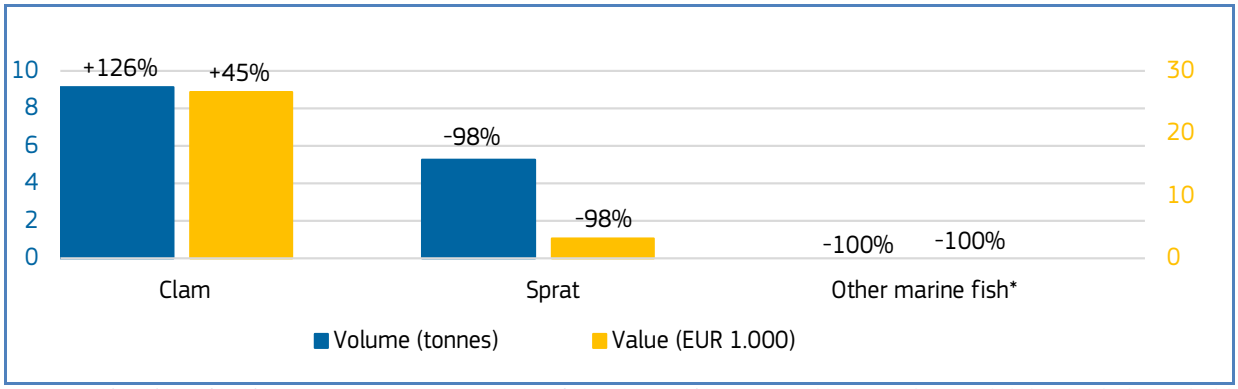


*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 0,1 million, -46%	34 tonnes, -86%	Clam, sprat, other marine fish*
Feb 2025 vs Feb 2024	EUR 0,03 million, -82%	14 tonnes, -94%	Clam, sprat, other marine fish*

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



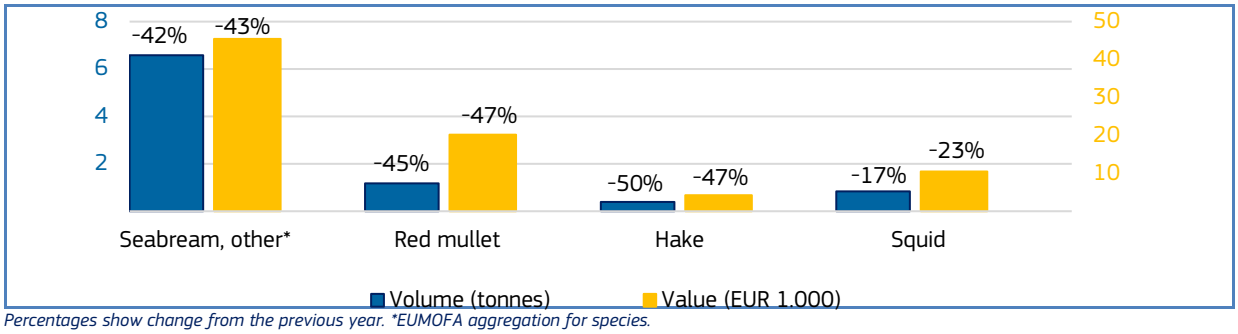
*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

[20] First-sales data updated on 20. 04. 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-Feb 2025 vs Jan-Feb 2024	EUR 0,3 million, +2%	46 tonnes, +13%	Other marine fish*, cuttlefish, picarel.
Feb 2025 vs Feb 2024	EUR 0,1 million, -28%	20 tonnes, -18%	Other seabream*, red mullet, hake, squid.

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



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

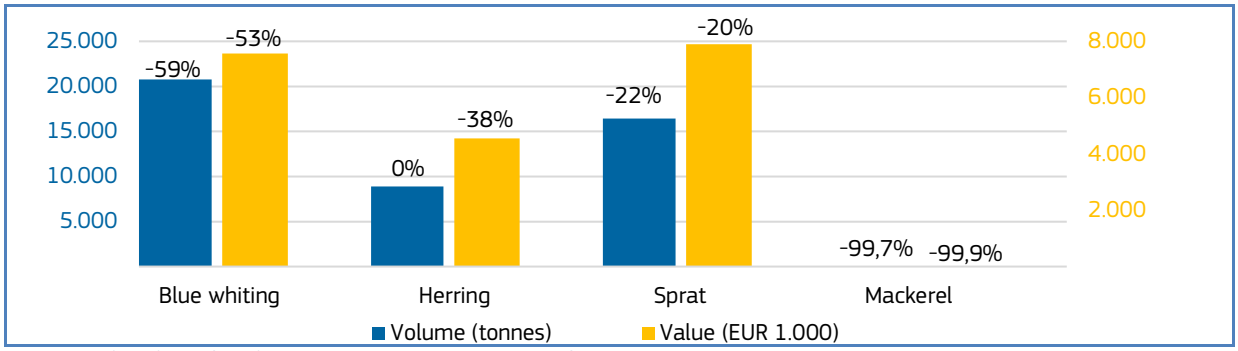
Table 19. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK**

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Feb 2025 vs Jan-Feb 2024	EUR 84 million, -6%	103.974 tonnes, -28%	Blue whiting, sprat, herring, common sole.	In February 2025, there was an increase in first sales of **Norway lobster** compared to February 2024. The increase in production is explained by the increase in the Danish quota in ICES area 3a for 2025 (5.848 tonnes vs 5.763 tonnes in 2024).[21,22]
Feb 2025 vs Feb 2024	EUR 38,1 million, -19%	55.738 tonnes, -37%	Blue whiting, herring, sprat, mackerel.	

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

[21] COUNCIL REGULATION (EU) 2024/257 of 10 January 2024 fixing for 2024, 2025 and 2026 the fishing opportunities for certain fish stocks, applicable in Union waters and, for Union fishing vessels, in certain non-Union waters, and amending Regulation (EU) 2023/194 https://eur-lex.europa.eu/eli/reg/2024/257/oj/eng
[22] COUNCIL REGULATION (EU) 2025/202 of 30 January 2025 fixing for 2025 and 2026 the fishing opportunities for certain fish stocks, applicable in Union waters and, for Union fishing vessels, in certain non-Union waters, and amending Regulation (EU) 2024/257 as regards fishing opportunities for 2025 https://eur-lex.europa.eu/eli/reg/2025/202/oj/eng

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



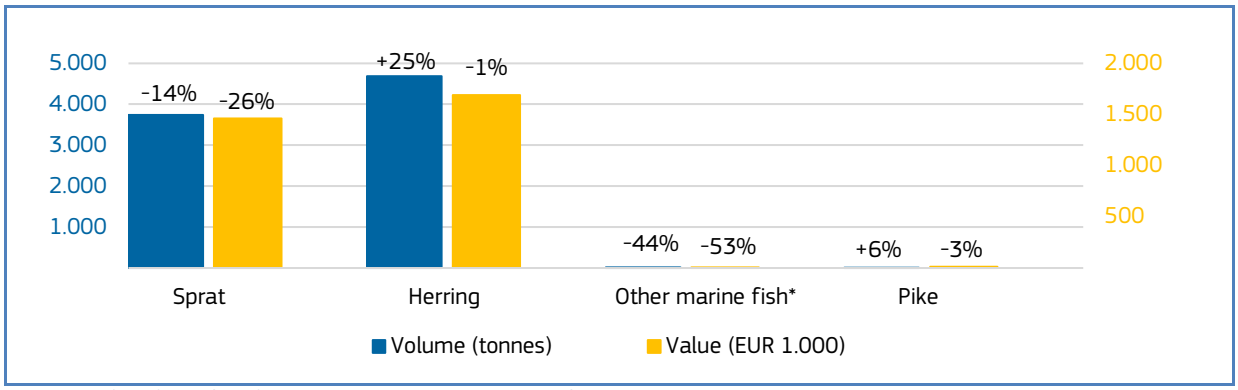
*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 6 million, -13%	15.099 tonnes, +5%	**Value**: sprat, pike-perch other marine fish*. **Volume**: herring, other freshwater fish*.
Feb 2025 vs Feb 2024	EUR 3,4 million, -12%	8.521 tonnes, +4%	**Value**: sprat, herring, other marine fish*. **Volume**: herring.

**EUMOFA aggregation for species*

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

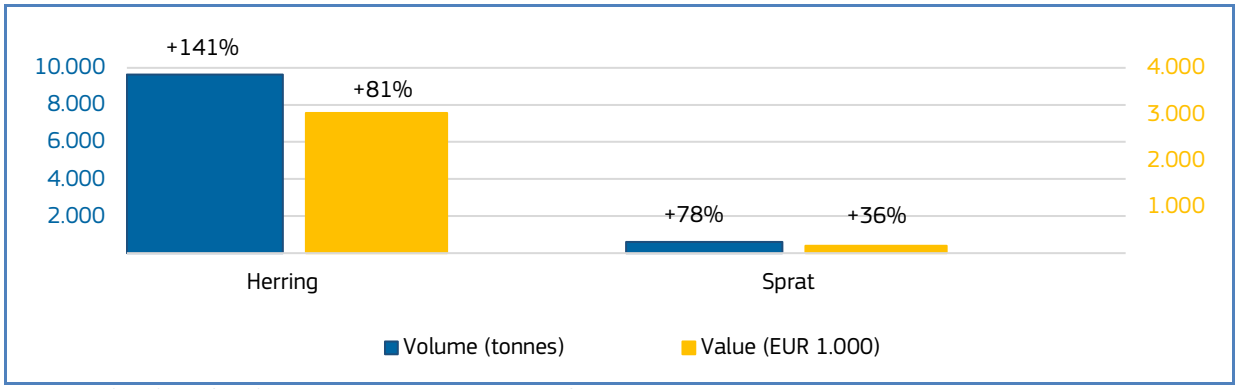


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 5,5 million, +58%	18.093 tonnes, +106%	Herring.
Feb 2025 vs Feb 2024	EUR 3,2 million, +78%	10.242 tonnes, +136%	Herring, sprat.

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

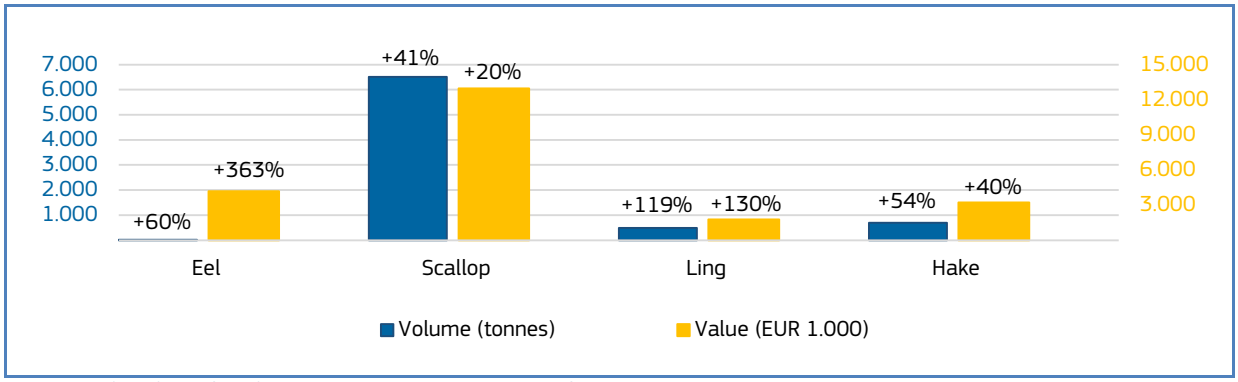


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Feb 2025 vs Jan-Feb 2024	EUR 123,6 million, +23%	32.939 tonnes, +8%	Eel, common sole, squid, scallop, hake.	In February 2025, first sales of **eel** in France increased significantly compared to the same month in 2024. In February 2024, marketed volume dropped to 13.710 kg, as well as value. The average price fell to 66 EUR/kg, well below the usual 130–180 EUR/kg range in previous years. This reduction was due to strict regulatory and biological constraints. ICES recommended a total ban on eel catches in 2024 due to the stock's critical status[23], while also calling for reductions in pollution, migration barriers and illegal fishing. These pressures led to record low volumes and prices, creating an exceptionally low baseline. In February 2025, the market showed a significant recovery. The average price tripled to 191 EUR/kg, accounting for over 80% of the growth in value.
Feb 2025 vs Feb 2024	EUR 61,5 million, +17%	17.613 tonnes, +13%	Eel, scallop, ling, hake.	

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



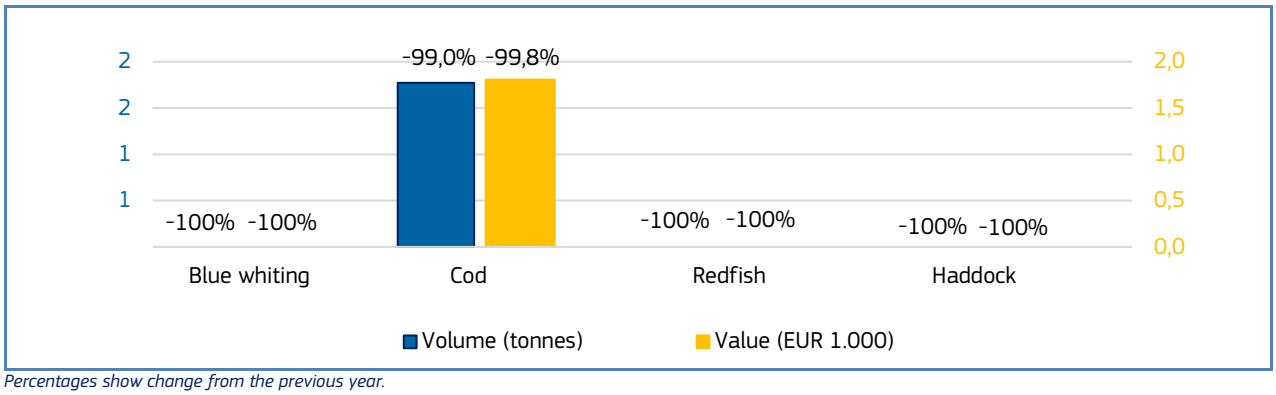
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

[23] https://ices-library.figshare.com/articles/report/European_eel_i_Anguilla_anguilla_i_throughout_its_natural_range/21907860?file=49507353

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Feb 2025 vs Jan-Feb 2024	EUR 2,3 million, -81%	1.946 tonnes, -83%	Mackerel, Greenland halibut, blue whiting, redfish.	In February 2025, first sales in **Germany** declined compared to February 2024, driven by a drop in production volume and a rise (+142%) in the average ex-vessel price (from 0,83 EUR/kg to 2,02 EUR/kg). This price change reflects a shift in landing composition, in particular the drop in blue whiting production from 4.624 tonnes to zero accounting for 90% of the volume decline. The drop in blue whiting, previously driven by strong demand, led to significant decreases in 2025. With the German fleet not supplying blue whiting, market demand was met by foreign sources. Decreases were also caused partly by a lower supply of cod, flounder, plaice and beaked redfish in February 2025.
Feb 2025 vs Feb 2024	EUR 0,2 million, -95%	122 tonnes, -98%	Blue whiting, cod, haddock.	

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



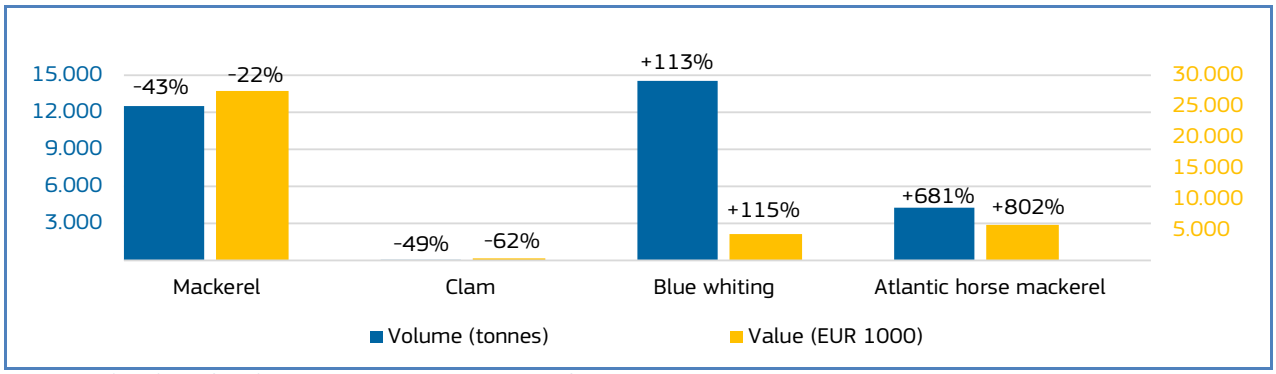
Percentages show change from the previous year.

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

Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Feb 2025 vs Jan-Feb 2024	EUR 93,4 million, +23%	67.718 tonnes, +24%	Atlantic horse mackerel, mackerel, blue whiting, crab,	In February 2025, there was an increase in first sales of **Atlantic horse mackerel** compared to February 2024. In February 2025, the increase in production followed those recorded in January 2025 (3.794 tonnes) compared to zero in January 2024, leading to an increase of 1.373% over the first two months of the year. Such an evolution is mostly explained by the increased observed in the Irish quota for the ICES area 2a-14[24] from 3.182 tonnes to 16.406 tonnes (+13.200 tonnes or 413%)[25].
Feb 2025 vs Feb 2024	EUR 47,9 million, -4%	37.648 tonnes, +7%	**Value**: mackerel, clam. **Volume**: blue whiting Atlantic Horse mackerel.	

[24] United Kingdom waters of 2a and 4a; 6, 7a-c, e-k; 8a-b, d-e; United Kingdom and international waters of 5b; international waters of 12 and 14.
[25] Irish fish quotas 2025

Figure 24. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND, FEBRUARY 2025**

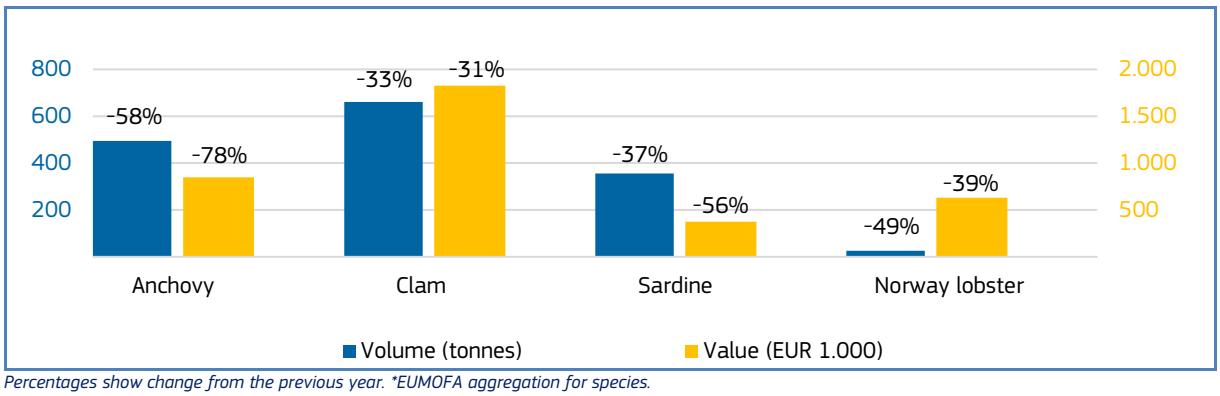


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 38,1 million, -6%	7.869 tonnes, -14%	Anchovy, common sole, cuttlefish, sardine.
Feb 2025 vs Feb 2024	EUR 18,3 million, -7%	3.686 tonnes, -24%	Anchovy, clam, sardine, Norway lobster.

Figure 25. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, FEBRUARY 2025**

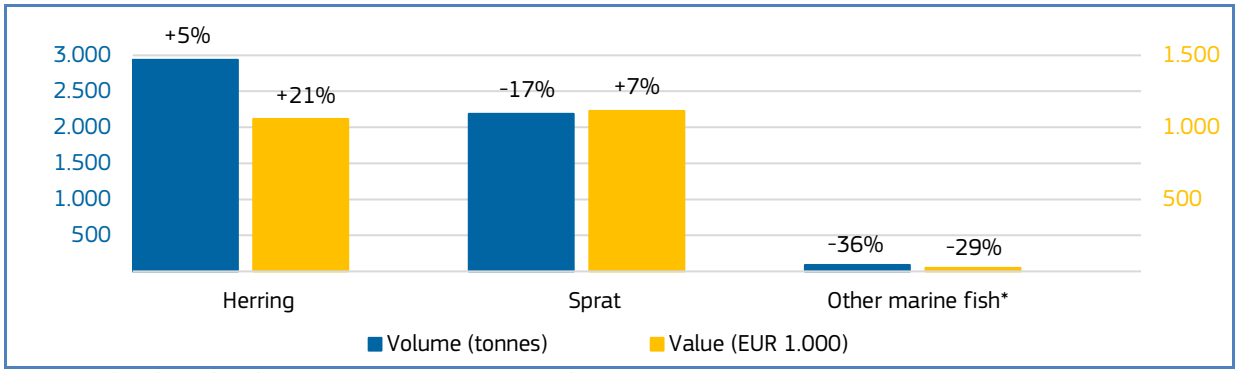


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 3,9 million, +23%	9.555 tonnes, +4%	Herring, sprat, other groundfish*.
Feb 2025 vs Feb 2024	EUR 2,2 million, +12%	5.241 tonnes, -7%	**Value**: herring, sprat. **Volume**: sprat, other marine fish*.

Figure 26. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, FEBRUARY 2025**

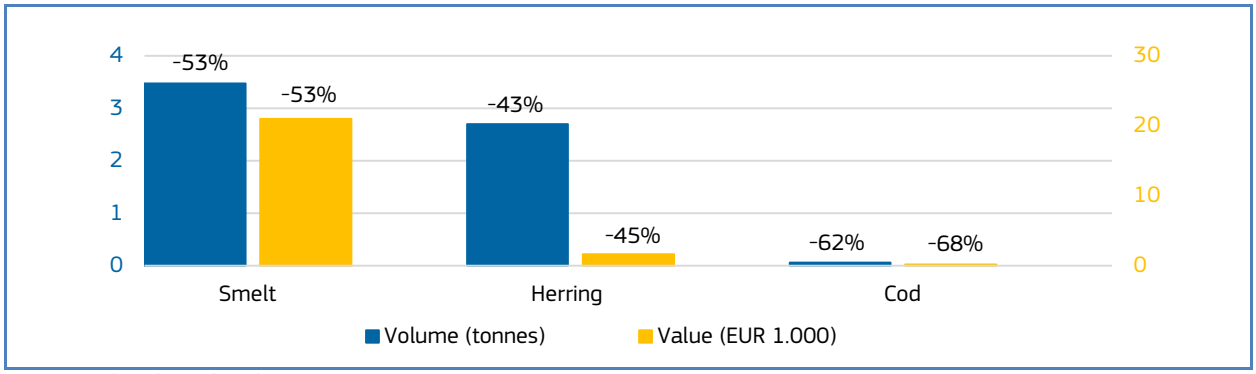


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 0,1 million, -45%	16 tonnes, -42%	Smelt, herring.
Feb 2025 vs Feb 2024	EUR 0,02 million, -53%	6 tonnes, -50%	Smelt, herring, cod.

Figure 27. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, FEBRUARY 2025**

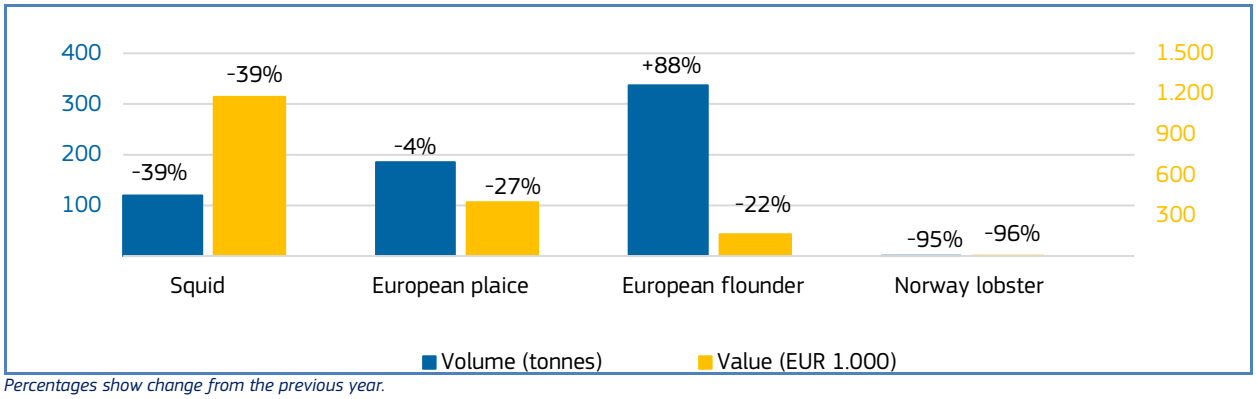


Percentages show change from the previous year.

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

The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 19,7 million, +8%	3.104 tonnes, +19%	Shrimp *Crangon* spp., common sole, turbot, European flounder.
Feb 2025 vs Feb 2024	EUR 8,9 million, -5%	1.420 tonnes, +10%	Squid, European plaice, European flounder, Norway lobster.

Figure 28. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, FEBRUARY 2025**

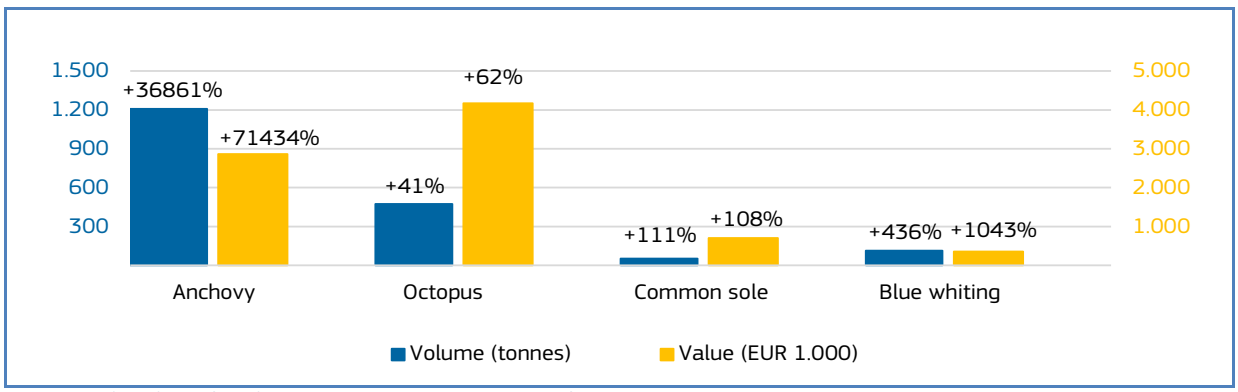


Percentages show change from the previous year.

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

Portugal	**First-sales value / trend %**	**First-sales volume / trend %**	**Main contributing species**	**Notes**
Jan-Feb 2025 vs Jan-Feb 2024	EUR 40 million, +12%	8.996 tonnes, +10%	Anchovy, octopus, blue whiting, clam.	In February 2025, first sales of **anchovy** increased compared to February 2024. The trend of anchovy sales in Portugal from 2011 to 2025 has shown significant variability. In February 2024, there was a sharp decline, with first-sales value falling to 3.999 EUR and volume to 3.269 kg, representing decreases of 99% and 97%, respectively compared to February 2023. The average price also dropped from 3,68 EUR/kg in February 2023 to 1,22 EUR/kg in 2024. By February 2025, both the monthly value and volume returned to levels similar to those seen during the peak years of commercial activity in the historical series. For 2025, ICES recommended a catch limit of 7.266 tonnes for the anchovy stock in the southern part of Division 9a, a substantial increase from the 969 tonnes recommended the previous year. This indicates that in February 2024, catches were limited due to quota restrictions.
Feb 2025 vs Feb 2024	EUR 23,3 million, +33%	5.427 tonnes, +40%	Anchovy, octopus, common sole, blue whiting.	

Figure 29. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, FEBRUARY 2025**

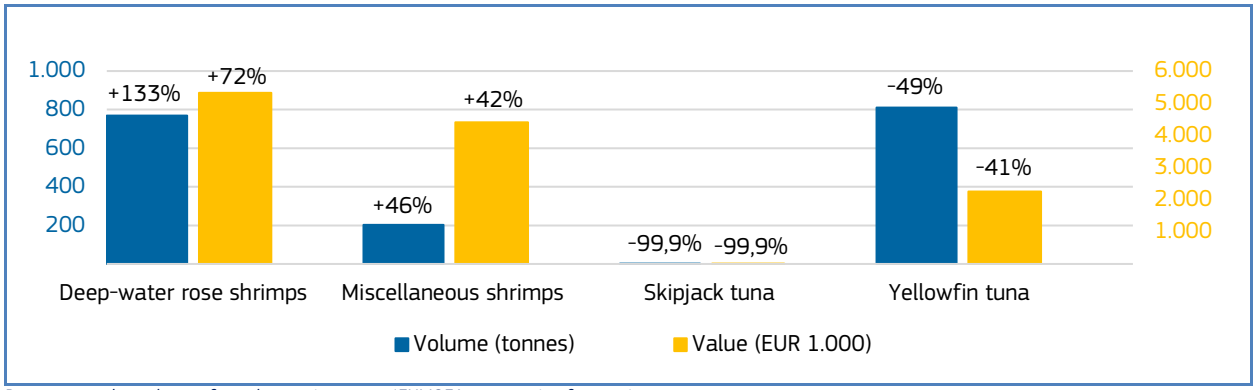


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 178,4 million, +2%	39.070 tonnes, -8%	**Value**: swordfish, deep-water rose shrimps, cod. **Volume**: blue whiting, skipjack tuna, bigeye tuna.
Feb 2025 vs Feb 2024	EUR 88,1 million +4%	19.449 tonnes, -8%	**Value**: deep-water rose shrimps, miscellaneous shrimps*. **Volume**: skipjack tuna, yellowfish tuna.

Figure 30. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, FEBRUARY 2025**

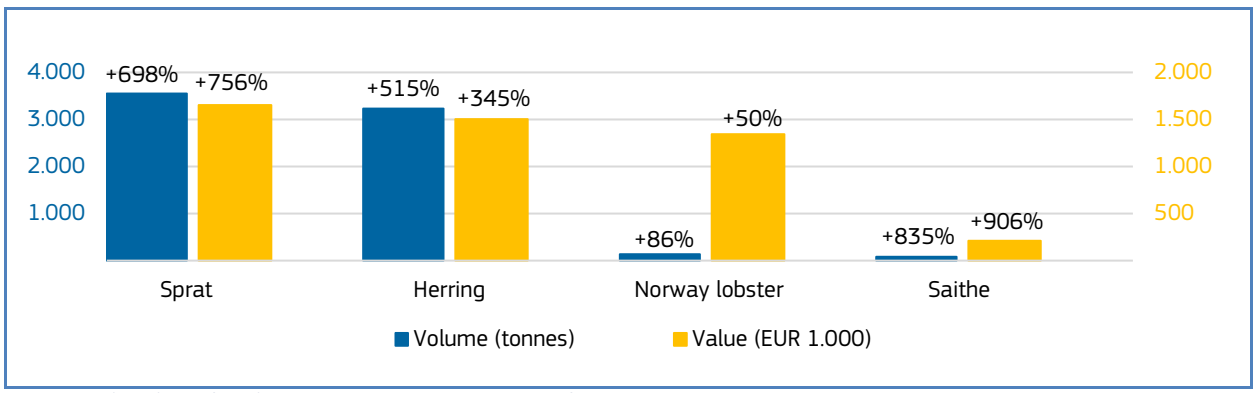


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 13,4 million, +13%	16.846 tonnes, 0%	Herring, Norway lobster, cod, saithe.
Feb 2025 vs Feb 2024	EUR 6,4 million, +126%	7.242 tonnes, +486%	Sprat, herring, Norway lobster, saithe.

Figure 31. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, FEBRUARY 2025**

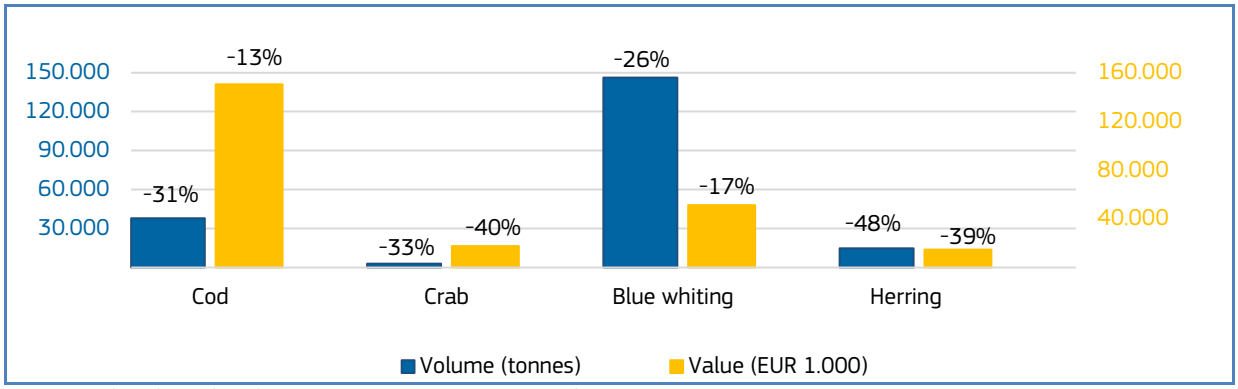


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 625,2 million, +1%	512.261 tonnes, -16%	**Value**: mackerel, herring, saithe. **Volume**: blue whiting, cod, other crustaceans*.
Feb 2025 vs Feb 2024	EUR 316,6 million -16%	295.914 tonnes, -23%	Cod, crab, blue whiting, herring.

Figure 32. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, FEBRUARY 2025**



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

4. EXTRA-EU IMPORTS

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

Increases in value and volume: Austria, Bulgaria, France, Greece, Ireland, Italy, Latvia, Lithuania, Luxembourg, the Netherlands, Poland, 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 (+144% and +93%) and hake (+73% and +85%).

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 (-69% and 0%), mackerel (-50% and -53%), sardine (-76% and -79%) and herring (-72% and -80%).

Table 33. **JANUARY-DECEMBER OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)**[26]

	January – December 2023			January – December 2024			Change from January – December 2023		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	10,99	73.677	6,70	11,62	74.236	6,39	6%	1%	-5%
Belgium	146,93	921.652	6,27	138,81	877.690	6,32	-6%	-5%	1%
Bulgaria	13,44	34.872	2,60	14,22	37.409	2,63	6%	7%	1%
Croatia	9,93	35.669	3,59	8,27	37.199	4,50	-17%	4%	25%
Cyprus	6,78	44.247	6,53	6,69	42.228	6,31	-1%	-5%	-3%
Czechia	15,71	69.886	4,45	14,92	67.046	4,49	-5%	-4%	1%
Denmark	911,79	3.681.807	4,04	840,35	3.309.346	3,94	-8%	-10%	-2%
Estonia	10,03	58.036	5,79	9,66	52.170	5,40	-4%	-10%	-7%
Finland	45,39	323.008	7,12	49,04	322.242	6,57	8%	0%	-8%
France	576,40	3.212.036	5,57	590,48	3.230.769	5,47	2%	1%	-2%
Germany	409,40	1.845.162	4,51	337,97	1.588.097	4,70	-17%	-14%	4%
Greece	132,49	467.294	3,53	133,24	520.043	3,90	1%	11%	11%
Hungary	2,69	10.852	4,04	2,54	10.178	4,00	-5%	-6%	-1%
Ireland	124,52	212.611	1,71	165,23	224.574	1,36	33%	6%	-20%
Italy	426,04	2.566.564	6,02	465,35	2.731.473	5,87	9%	6%	-3%
Latvia	23,00	52.345	2,28	25,29	59.957	2,37	10%	15%	4%
Lithuania	49,92	178.974	3,58	52,57	183.192	3,48	5%	2%	-3%
Luxembourg	0,01	681	61,47	0,02	693	38,24	63%	2%	-38%
Malta	34,08	100.870	2,96	19,50	42.568	2,18	-43%	-58%	-26%
Netherlands	648,65	3.432.308	5,29	682,40	3.538.457	5,19	5%	3%	-2%
Poland	262,35	1.118.253	4,26	264,80	1.131.327	4,27	1%	1%	0%
Portugal	153,83	673.617	4,38	171,34	773.500	4,51	11%	15%	3%

[26] During January–December 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.

Romania	19,12	76.730	4,01	19,77	87.723	4,44	3%	14%	11%
Slovakia	6,04	20.024	3,32	5,34	16.797	3,15	-12%	-16%	-5%
Slovenia	5,76	22.964	3,99	7,70	30.034	3,90	34%	31%	-2%
Spain	1.128,95	5.377.998	4,76	1.195,37	5.601.703	4,69	6%	4%	-2%
Sweden	750,84	5.560.128	7,41	706,93	5.248.582	7,42	-6%	-6%	0%
EU-27	**5.925,08**	**30.172.264**	**5,09**	**5.939,41**	**29.839.231**	**5,02**	**0%**	**-1%**	**-1%**

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 commodity groups Other marine fish and Tuna and tuna-like species. Gilthead seabream (+26% and +3%) and European seabass (+28% and 35%) drove the increase in the first CG and skipjack tuna (+16% and +23%) and yellowfin tuna (+3% and +17%) in the second.

Decreases in value and volume: The commodity groups flatfish and groundfish were the only ones to experience a decrease in both extra-EU import value and volume. Flatfish experienced the largest decline, due primarily to reduced imports of Greenland halibut (-7% and -10%). For Groundfish the decline was mainly driven by Alaska pollock (-33% and -17%) and cod /-7% and -10%).

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

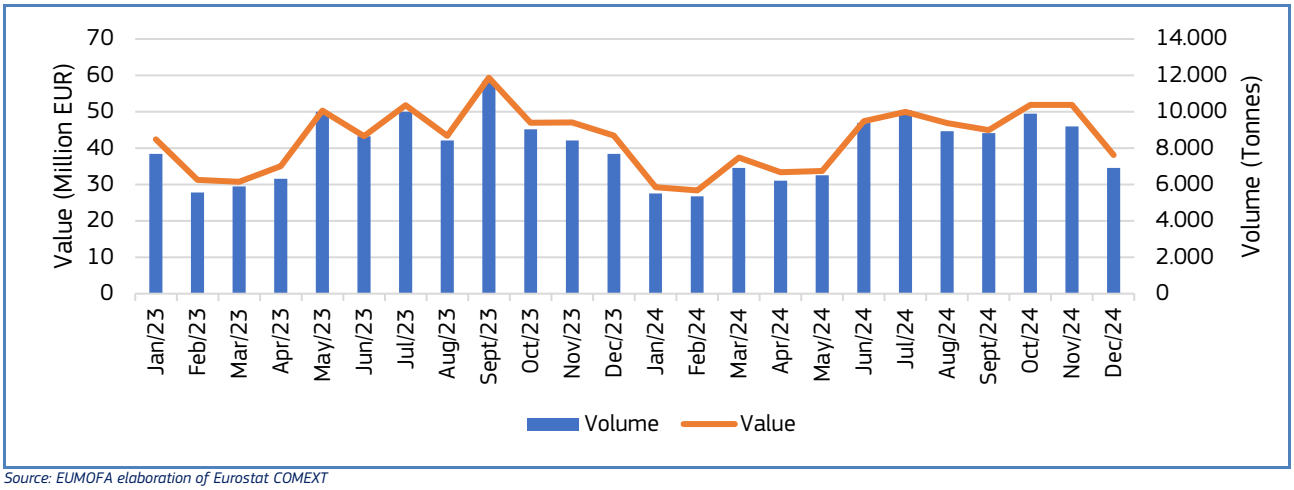
	January – December 2023			January – December 2024			Change from January – December 2023			
Commodity group	**Value**	**Volume**	**Price**	**Valu**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	666	129.371	5,15	667	137.065	4,87	0%	6%	-5%	Scallop, other mussel.
Cephalopods	2.810	500.829	5,61	2.883	514.334	5,61	3%	3%	0%	Squid, octopus.
Crustaceans	4.588	646.797	7,09	4.540	664.707	6,83	-1%	3%	-4%	Coldwater shrimp, warmwater shrimp.
Flatfish	525	99.346	5,28	493	93.665	5,26	-6%	-6%	0%	Greenland halibut, other flatfish.
Freshwater fish	538	132.772	4,05	565	140.891	4,01	5%	6%	-1%	Nile perch, tilapia.
Groundfish	4.899	1.105.612	4,43	4.430	1.068.095	4,15	-10%	-3%	-6%	Alaska pollock, cod.
Other marine fish	1.605	290.324	5,53	1.755	313.314	5,60	9%	8%	1%	Other marine fish, gilthead seabream.
Salmonids	8.607	1.025.671	8,39	8.614	1.075.294	8,01	0%	5%	-5%	Salmon, trout.
Small pelagics	1.039	499.390	2,08	1.040	427.586	2,43	0%	-14%	17%	Herring, sardine.
Tuna and tuna-like species	2.958	572.615	5,16	3.155	673.226	4,69	7%	18%	-9%	Skipjack tuna, yellowfin tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of flatfish in EU Member States

In the period January - December 2024, extra-EU imports of flatfish accounted for a total value of EUR 534,9 million and total volume of 99.346 tonnes. Compared to the same period in 2023 the value of flatfish decreased by 6% both in terms of value and volume.

Figure 33. **EXTRA-EU IMPORT VALUE AND VOLUME OF FLATFISH, 2023 – 2024 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

The value of extra-EU imports of flatfish recorded peaks in both value and volume between May and October.

In the period January-December 2024, Denmark, the Netherlands and France were the main importers of flatfish in the EU and together imported from extra-EU countries about 75% of the total volume of flat fish, with Denmark (42%), the Netherlands (22%) and France (11%) respectively.

Table 35. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR FLATFISH**

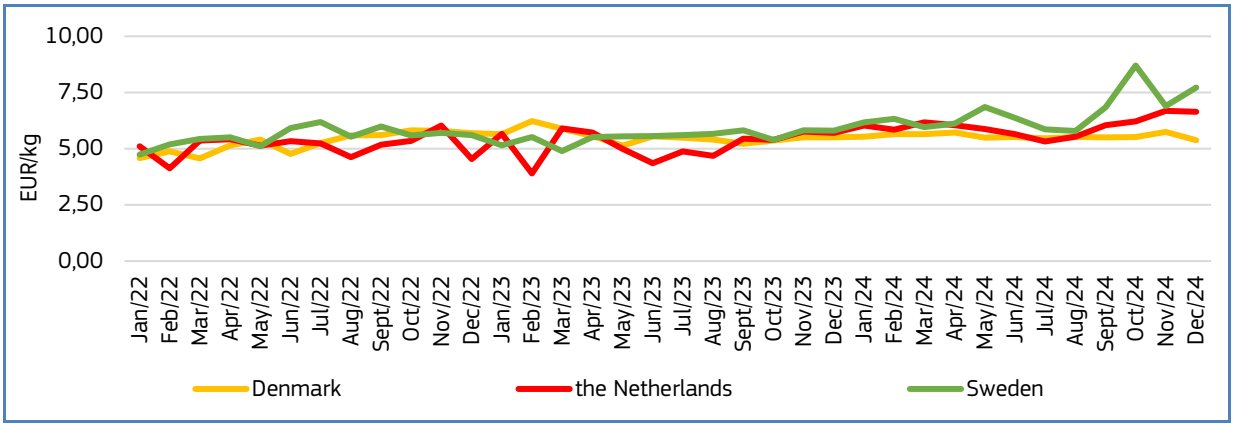
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan-Dec 2023	Jan-Dec 2024	Trend (%)	Jan-Dec 2023	Jan-Dec 2024	Trend (%)	
Denmark	242,3	231,8	-4%	42.706	39.513	-7%	Greenland halibut
The Netherlands	88,2	83,0	-6%	21.503	20.412	-5%	European plaice
France	72,0	72,0	0%	10.282	10.326	0%	Common sole

4.2. Extra EU imports of Greenland halibut in EU Member States

Greenland halibut, other marine fish and European plaice are the main commercial species of the commodity group of "flatfish" in term of value, where Greenland halibut represents 40% of the total value, followed by other marine fish which represents 34%.

Denmark, the Netherlands and Sweden imported the highest volume of Greenland halibut from extra-EU countries in 2024.

Figure 34. **EXTRA-EU IMPORT PRICE OF GREENLAND HALIBUT IN DENMARK, THE NETHERLANDS AND SWEDEN (JAN 2022 – DEC 2024)**



Between January 2022 and December 2024, the price of Greenland halibut fluctuated and increased in the three markets analysed: Denmark (+6%), the Netherlands (+7%) and Sweden (+18%). Between January and December 2024, the volume of Greenland halibut imported from Denmark was 33.044 tonnes, 10% less compared with the same period in 2023, while price increased by 2%. In Denmark the main imports in terms of volume came from Greenland (86%), followed by Canada and the Faroe Islands.

In the same period, 836 tonnes of Greenland halibut were imported to the Netherlands, 57% more compared to 2023, with an average price increase of 13%. In terms of volume 30% of the total imported in 2024 was from the Faroe Islands, followed by Iceland and Norway.

Sweden imported 100% of the 518 tonnes from Norway. Between January and December 2024 import volumes decreased by 38% while prices increased by 17%.

In Denmark, peaks in imports seem to occur between September and November. In Sweden in 2023 and 2024 the highest peak in imports was recorded in June. In the Netherlands no specific trend was recorded.

Figure 35. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GREENLAND HALIBUT IN DENMARK, 2022 – 2024 (volume in tonnes, price in EUR/kg)**

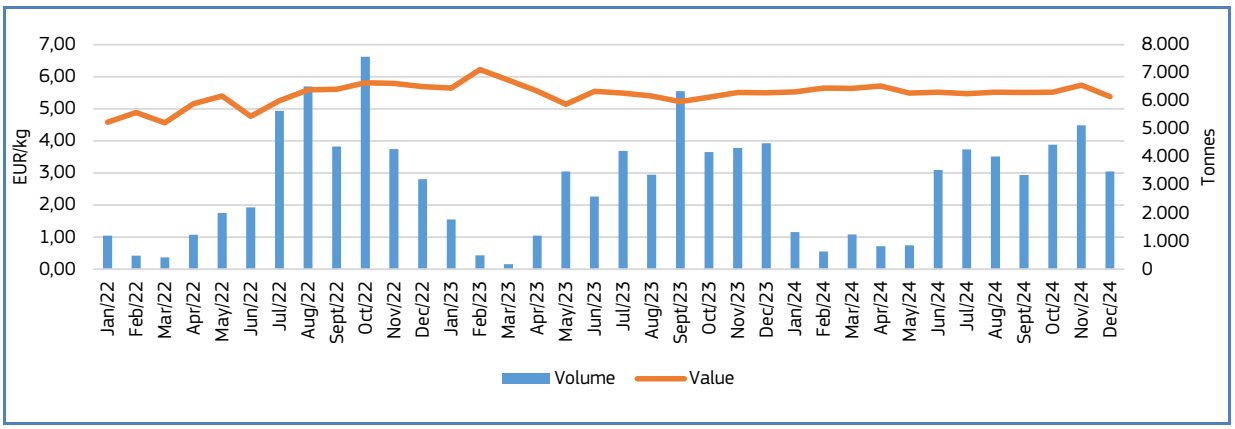


Figure 36. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GREENLAND HALIBUT IN THE NETHERLANDS, JAN 2022 – DEC 2024 (volume in tonnes and price in EUR/kg)**

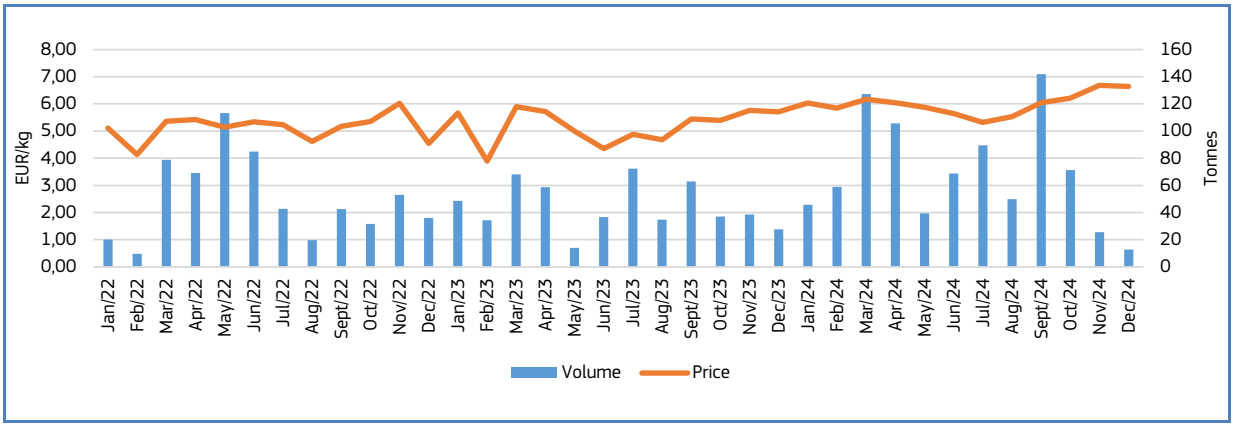
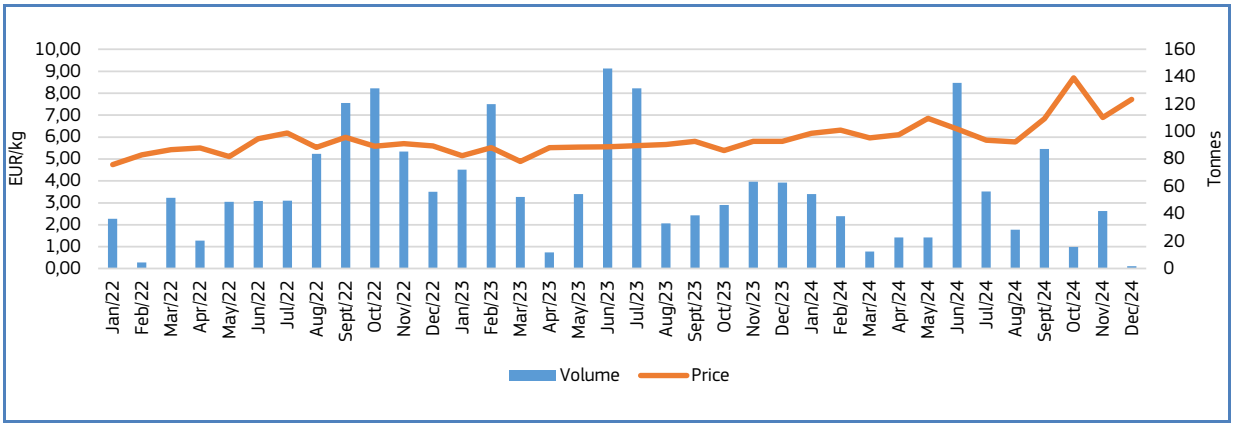


Figure 37. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GREENLAND HALIBUT IN SWEDEN, JAN 2022 – DEC 2024 (volume in tonnes and price in EUR/kg)**



4.3. Extra EU imports of Greenland halibut by origin

In the period January-December between 2024 and 2023, EU imports of Greenland halibut[27] experienced a decreasing trend in terms of volume (-10%) and value (-7%). From January to December 2024 the EU imported 35.385 tonnes of Greenland halibut for a value of EUR 197,1 million. The main extra-EU countries supplying Greenland halibut to the EU in 2024 were Greenland (80%), Canada (6%), Norway (5%) and the Faroe Islands (4%). An increase in imports of Greenland halibut from the Faroe Islands (+5%) and Iceland (+8%) was observed between January and December 2024 compared to the same period in 2023.

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

Country	Jan-Dec 2022		Jan-Dec 2023		Jan-Dec 2024		January-December 2024/2023	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Greenland	163	30.469	169	31.728	154	28.407	-9%	-10%
Canada	42	6.851	14	2.327	14	2.275	2%	-2%
Norway	14	2.552	13	2.248	10	1.664	-18%	-26%
Faroe Islands	5	946	8	1.424	9	1.499	12%	5%
Others	5	1.021	9	1.518	9	1.539	8%	1%
Grand Total	**229**	**41.839**	**213**	**39.244**	**197**	**35.385**	**-7%**	**-10%**

[27] 03022110 - Fresh or chilled lesser or Greenland halibut "*Reinhardtius hippoglossoides*"
03033110 - Frozen lesser or Greenland halibut "*Reinhardtius hippoglossoides*"
03053950 - Fillets of lesser or Greenland halibut "*Reinhardtius hippoglossoides*", salted or in brine, but not smoked
03054910 - Smoked lesser or Greenland halibut "*Reinhardtius hippoglossoides*", incl. fillets (excl. offal)

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[28].

Compared with February 2024, household consumption of fresh fishery and aquaculture products in February 2025 decreased in both volume and value in France, Ireland, Spain and Sweden. In contrast, Denmark, Germany, Hungary, Italy and the Netherlands recorded increases in both volume and value. Both Poland and Portugal recorded a decrease in consumption but no variation in value.

The highest increase was observed in Hungary, where the consumption of Miscellaneous aquatic products increased in volume by 15% and in value by 26%. Sweden experienced a 20% decrease in volume and an 18% decrease in value over the same period.

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	February 2023		February 2024		February 2025		Change from Feb 2024 to Feb 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	820	15,49	920	17,47	971	18,90	6%	8%
France	32,58	14.102	195,80	14.243	203,97	13.093	186,93	-8%	-8%
Germany	12,49	5.374	89,72	4.628	81,46	4.989	85,79	8%	5%
Hungary	6,73	229	2,00	248	2,33	285	2,94	15%	26%
Ireland*	20,00	1.074	17,21	1.028	18,36	891	16,25	-13%	-11%
Italy	30,01	18.920	230,79	16.955	216,86	16.087	222,97	-5%	3%
Netherlands*	18,88	2.613	51,09	2.047	41,86	2.070	44,07	1%	5%
Poland	13,68	3.495	28,02	3.674	36,95	3.132	37,04	-15%	0%
Portugal	54,54	4.439	34,68	4.241	34,58	3.896	34,67	-8%	0%
Spain	41,92	38.581	377,22	35.807	371,02	32.969	348,60	-8%	-6%
Sweden	22,46	362	5,90	504	8,15	405	6,70	-20%	-18%

** 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[29] for Flatfish consumed in the EU

In the household consumption data used by EUMOFA, consumption of flatfish species is monitored in five Member States: Denmark, Germany, the Netherlands, Spain and Sweden. At species level, consumption of dab (*Limanda limanda*), European flounder (*Platichthys*

[28] Last update: 15.04.2025.
[29] *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.*

flesus), and Greenland halibut (*Reinhardtius hippoglossoides*) is monitored in Denmark; plaice (*Pleuronectes platessa*) is monitored in both Germany and the Netherlands; common sole (*Solea solea*) in Spain; and flounder and halibut in Sweden.

Figure 38. **HOUSEHOLD PURCHASES (in value) OF FLATFISH IN DENMARK, GERMANY, THE NETHERLANDS, SPAIN AND SWEDEN, FEBRUARY 2022 – FEBRUARY 2025**

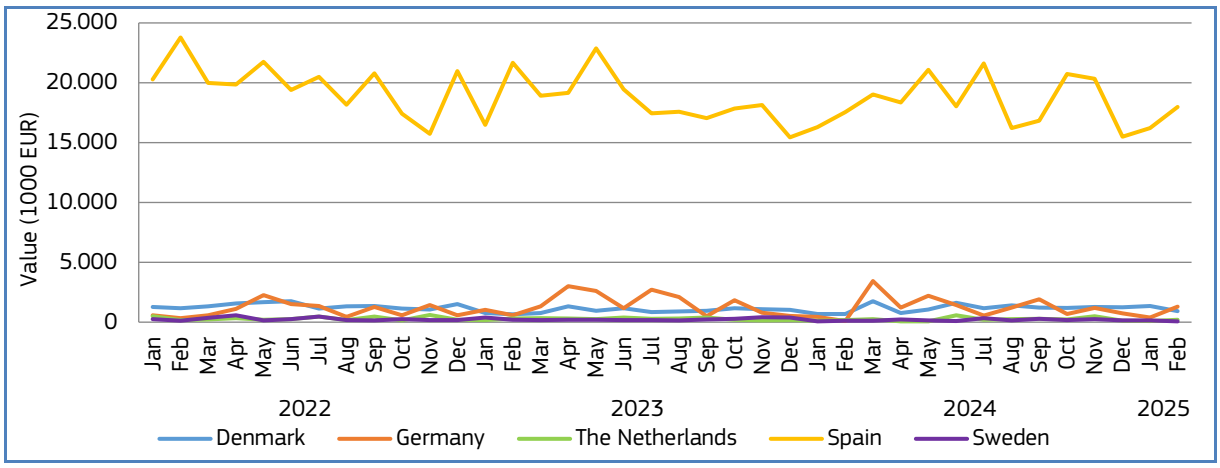
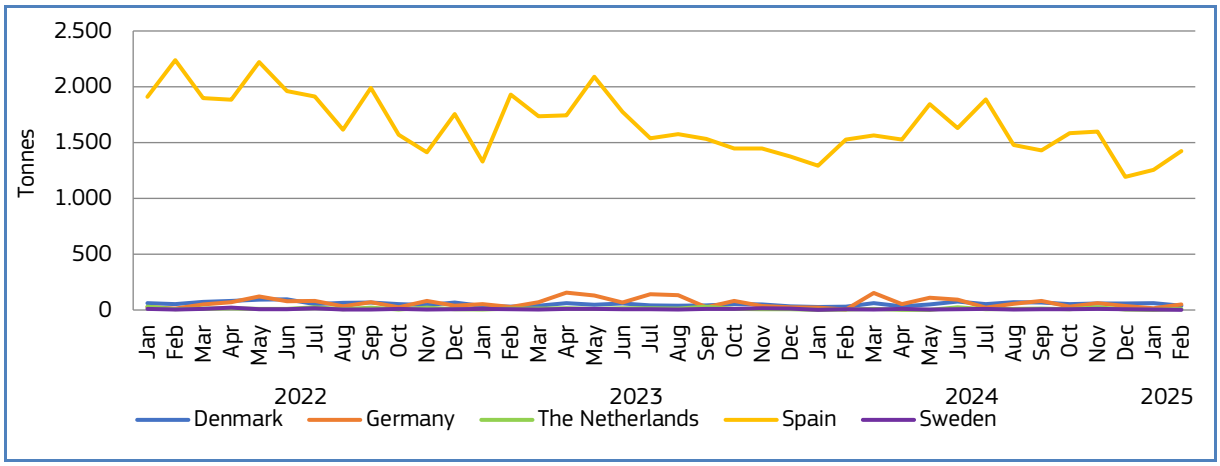


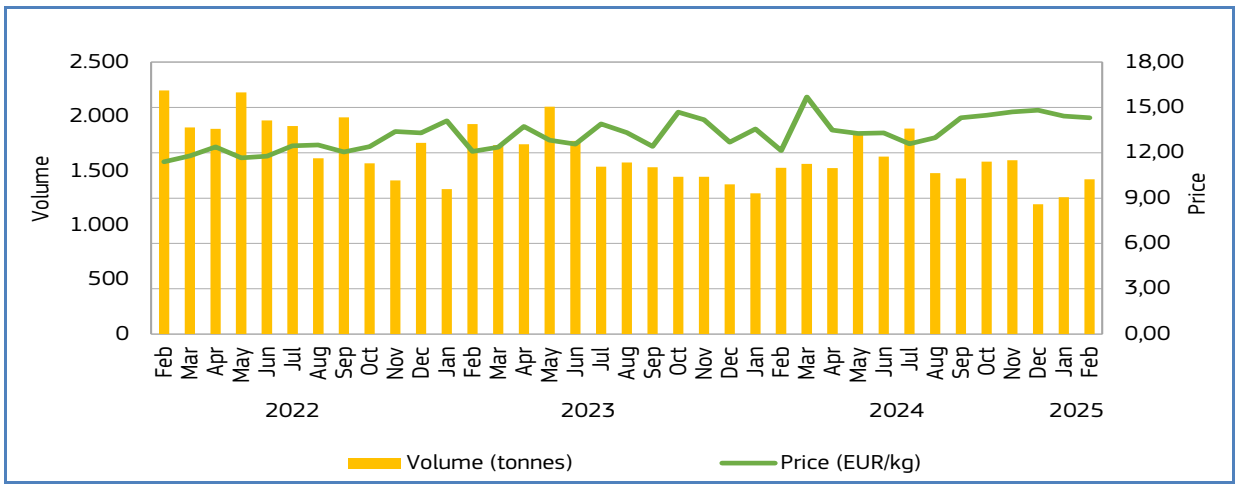
Figure 39. **HOUSEHOLD PURCHASES (in volume) OF FLATFISH IN DENMARK, GERMANY, THE NETHERLANDS, SPAIN AND SWEDEN, FEBRUARY 2022 – FEBRUARY 2025**



5. 3. Household consumption trends of common sole (*Solea solea*) - the main species of flatfish in reporting countries

Long-term trend (February 2022 to February 2025): Downward trend in volume and slightly upward trend in price.
Yearly average price: 12,26 EUR/kg (2022), 13,25 EUR/kg (2023), 13,78 EUR/kg (2024), 14,43 (2025)
Yearly consumption: 22.380 tonnes (2022), 19.528 tonnes (2023), 18.564 tonnes (2024), 2680 (2025, January and February)
Short-term trend (February 2024 to February 2025): Slightly upward trend in price and downward trend in volume.
Price: 13,89 EUR/kg.
Consumption: 19.950 tonnes.

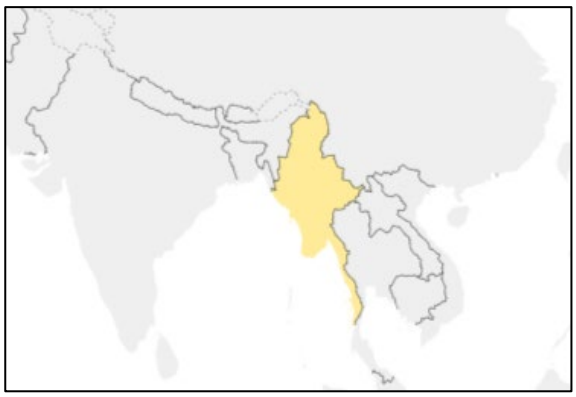
Figure 40. **RETAIL PRICE AND VOLUME OF SOLE (SOLEA SOLEA) PURCHASED BY HOUSEHOLDS IN SPAIN, FEBRUARY 2022 – FEBRUARY 2025**



Consumption of common sole shows annual variability. Over the period observed, February 2022 and February 2025, consumption showed a downward trend. Price has shown a slightly upward trend in the same period.

6. CASE STUDY: Fisheries and aquaculture in Myanmar

Myanmar, the largest country in Southeast Asia, spans a total land area of 676.580 km^2. It shares borders with Bangladesh and India to the northwest, China to the northeast, Lao People's Democratic Republic to the east, and Thailand to the southeast. The country's exclusive economic zone (EEZ) covers 486.000 km^2, and its 2.138 km coastline stretches along the Indian Ocean, Bay of Bengal, and Andaman Sea.



Source: IMAGE.

The abundance of aquatic resources in Myanmar makes the fisheries sector crucial to the national economy and food security. This sector is divided into marine and freshwater fisheries sub-sectors. Marine fisheries encompass both inshore and offshore areas, while freshwater fisheries include aquaculture, leasable and open fisheries. Myanmar exports a diverse range of seafood products, such as live, fresh and frozen fish, fish fillets, dried and sa export markets for Myanmar's aquatic food are neighbouring countri

6. 1. Fisheries and aquaculture in Myanmar

In 2023, Myanmar ranked 14th largest fishing nation globally and 12th largest in terms of aquaculture production. Combined, the supply from the two sectors exceeded 2,8 million tonnes, marking a 3% decrease from 2022. The fishery sector, which includes both marine and freshwater fisheries, produced 1,62 million tonnes in 2023, accounting for 58% of the total. This represents a 5% decrease compared to 2022. From 2015 to 2023, the supply from fisheries (both marine and freshwater) decreased by 18% due to a significant 35% fall in supply of marine fisheries[30].

The aquaculture sector in Myanmar is growing, following trends in other Asian countries. The country benefits from abundant freshwater and brackish water resources, thanks to its extensive river systems running north to south, and the vast network of rivers in the Ayeyarwady Delta. From 2022 to 2023 production remained stable at nearly 1,2 million tonnes. However, compared to 2015, there was a 20% growth in aquaculture production, with the largest volumes coming from freshwater species. Aquaculture contributes around 42% of annual fish production, but climate change is impacting the sector through changes in water temperature, river erosion and storm surges[31].The fisheries sector employs around 3,2 million people. The Department of Fisheries, under the Ministry of Agriculture, Livestock and Irrigation is responsible for ensuring food security, food safety, and the sustainable development of the fisheries sector by conserving fisheries resources in accordance with fisheries laws[32]. The Government of Myanmar has enacted four relevant fisheries laws to manage the industry and protect resources more efficiently: the law related to the fishing rights of foreign fishing vessels (1989), the aquaculture law (1989), the Myanmar marine fisheries law (1990) and the freshwater fisheries law (1991)[33].

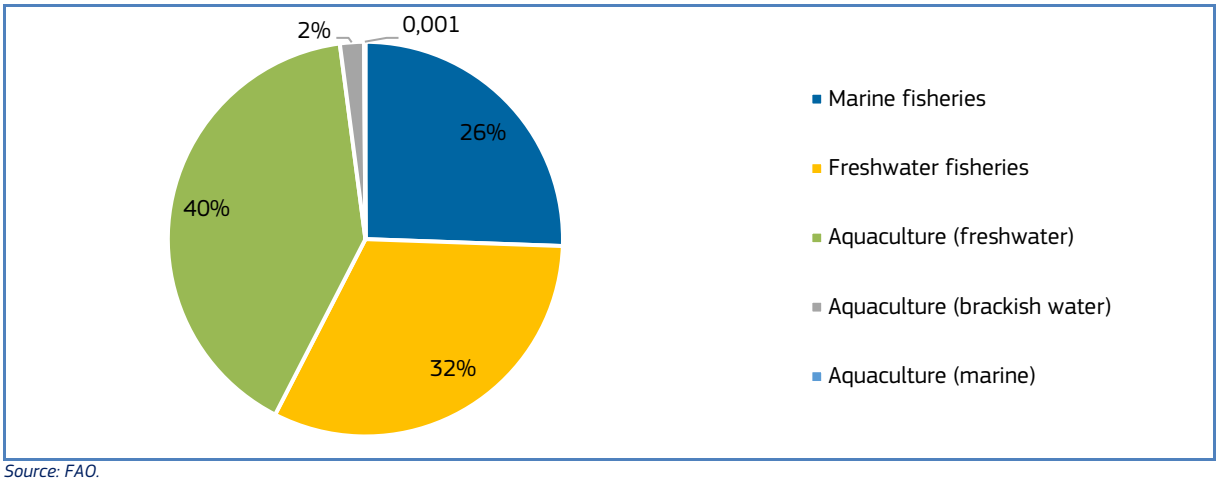
Table 38. **FISHERY AND AQUACULTURE PRODUCTION OF MYANMAR IN VOLUME (volume in 1000 tonnes)**

Environment/fishing area	2015	2016	2017	2018	2019	2020	2021	2022	2023
Marine fisheries	1.107	1.186	1.268	1.063	1.087	880	756	815	721
Freshwater fisheries	863	887	887	887	891	891	786	899	902
Aquaculture (freshwater)	944	960	990	1.107	1.029	1.081	1.111	1.139	1.139
Aquaculture (brackish water)	53	57	58	22	53	63	54	55	55
Aquaculture (marine)	3	1	1	3	0	1	2	3	3
Total fisheries and aquaculture	**2.970**	**3.090**	**3.204**	**3.082**	**3.060**	**2.915**	**2.710**	**2.911**	**2.820**

Source: FAO

[30] **FishStat - Fisheries and Aquaculture**
[31] Myanmar | WorldFish
[32] Fisheries Country Profile: Myanmar – SEAFDEC
[33] 56. Fishery Statistic 2019 Orgina(last)(16-9-2020).pdf

Figure 41. **TOTAL FISHERY PRODUCTION IN 2023 BY ENVIRONMENT/FISHING AREA**



Source: FAO.

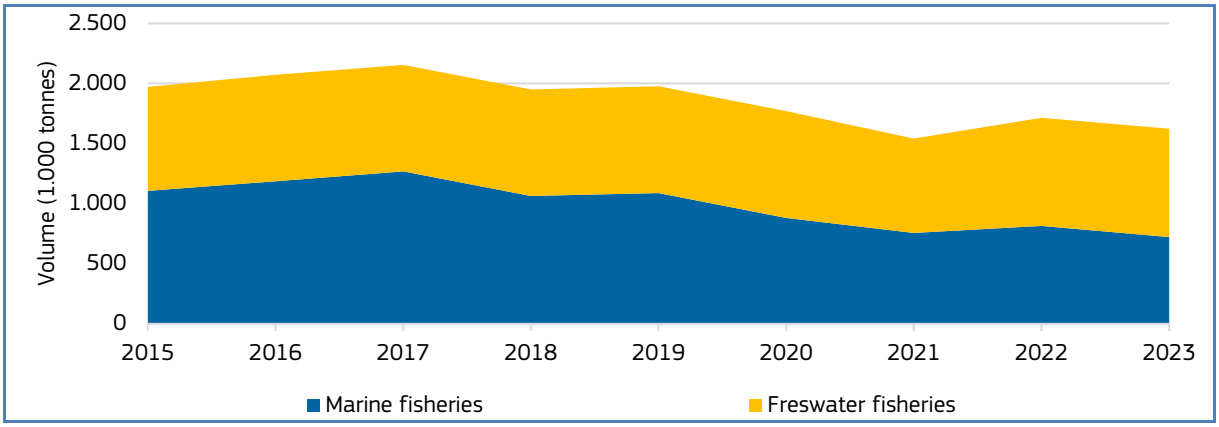
Fisheries production

Until 2020, species from marine fisheries were the most important in Myanmar. However, by 2023, species from freshwater fisheries had become the largest, with marine fisheries producing 695.000 tonnes and freshwater fisheries yielding 902.000 tonnes.

Marine fisheries are divided into inshore and offshore categories. Inshore fisheries involve fishing boats operating within 10 nautical miles from the shoreline. These boats are traditionally built, measuring no more than 40 feet (1 foot is 0,3048 metre) in length and using engines below 50 HP. The fishing gears used in this area include driftnets, gillnets and long lines. Offshore fisheries, on the other hand, involve fishing vessels operating beyond the outer limit of the inshore fishing zone, extending to the EEZ. These fishing vessels are over 40 feet (1 foot is 0,3048 metre) long and use engines over 50 HP. The commercial fishing gears used in offshore areas include trawl nets, purse seines, and long lines[34].

According to the FAO, fisheries in Myanmar primarily consist of two groups: miscellaneous freshwater fishes and marine fishes not identified[35]. The main inland fish species consumed in Myanmar include climbing perch, mola carplet, pool barb, spotted snakehead, striped dwarf catfish, bronze featherback, walking catfish, stinging catfish, striped snakehead, tilapia and rohu[36]. Important species in marine fisheries include surgeonfish, eels, scads, sardinella, godsilk seabream and jobfish[37].

Figure 42. **TOTAL LANDINGS BY MARINE AND FRESHWATER FISHERIES IN MYANMAR (2015-2023)**



[34] Fishery Statistics | Department of Fisheries

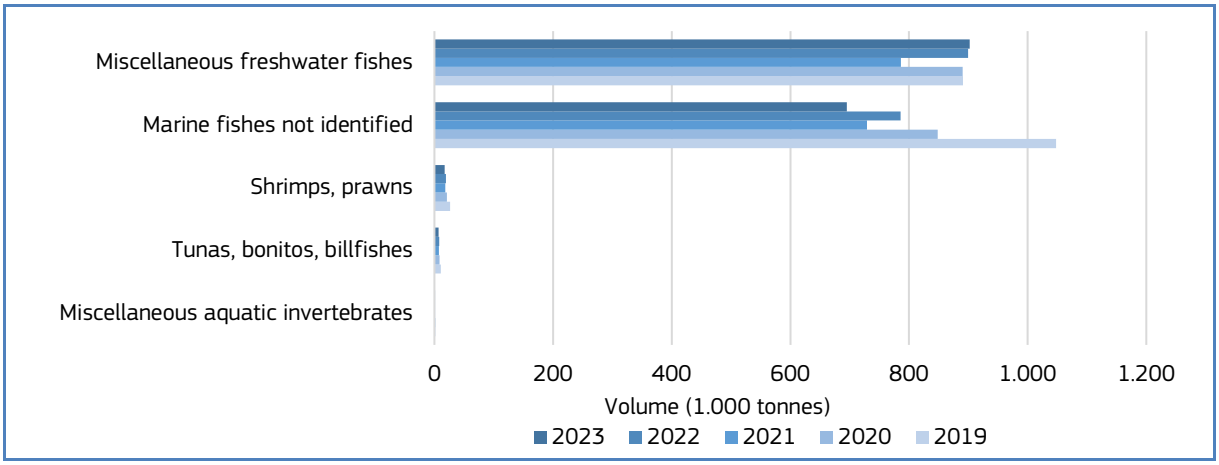
[35] In Myanmar, "marine fishes not identified" refers to fish species caught in marine environments that haven't been classified into specific species categories. Myanmar's waters are home to a vast number of fish species, making it challenging to identify every single one. There might be a lack of resources or expertise to identify all species accurately. This practice helps in managing and reporting fishery statistics, even when precise species identification isn't possible.

[36] mn209-myanmar-web_0.pdf

[37] List of Marine Fishes reported from Myanmar

Source: FAO.

Figure 43. **MYANMAR FISHERIES BY SPECIES GROUP BY VOLUME (2019-2023)**



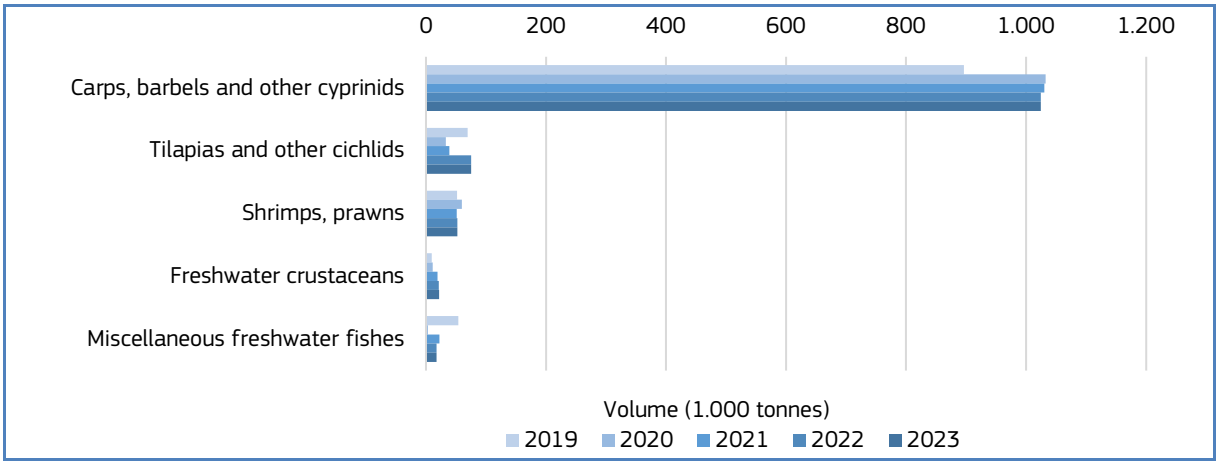
Source: FAO.

Aquaculture production

Currently, over 20 species of freshwater fish are being farmed in Myanmar, including common carp, Indian major carp, Chinese major carp, tilapia, pangasius, walking catfish and pacu. Rohu (*Labeo rohita*) is the dominant species in freshwater aquaculture, highly valued for its taste and market demand. Another major carp species, catla (*Catla catla*), is often farmed alongside rohu in polyculture systems. Tilapia (*Oreochromis spp.*) is popular due to its fast growth rate and adaptability to various farming conditions. Common carp (*Cyprinus carpio*) is widely farmed for its resilience and high yield. In coastal areas, Asian seabass (*Lates calcarifer*) is a significant species in brackish water aquaculture, while groupers (*Epinephelus spp.*) are also farmed in marine and brackish water environments, valued for their high market price[38]. These species are chosen for their economic value, growth rates, and adaptability to local farming conditions.

The two major aquaculture systems in Myanmar are freshwater pond culture and brackish water pond culture. Freshwater finfish farming is primarily conducted using a pond-based culture system. In addition to pond-based aquaculture, soft-shelled crab and seaweed farming are operated in coastal areas. There are over 27 government hatcheries managed by the Department of Fisheries and over 43 private hatcheries producing fish and shrimp/prawn post-larvae in Myanmar[39].

Figure 44. **TOTAL PRODUCTION BY MARINE AND FRESHWATER FISHERIES IN MYANMAR (2015-2023)**



Source: FAO.

[38] Aquaculture Division (English).pdf
[39] Fishery Statistics | Department of Fisheries

6. 2. International trade

Export of fishery and aquaculture products from Myanmar

In 2024, Myanmar exported 442.000 tonnes of fishery and aquaculture products valued at EUR 669 million. This represented a 10% increase in volume but a 0,4% decrease in value compared to the previous year. Thailand was the largest destination country in terms of both volume and value, accounting for 41% of the volume and 40% of the value. Exports to Thailand increased by 31% in volume and by 25% in value compared to 2023. The main export product to Thailand was other marine fish, which made up around 40% of the products in that category. This category includes a diverse range of species such as hilsa, rohu, catfish and seabass[40], most of which are exported frozen and fresh.

Other significant export destinations for Myanmar included China, Saudi Arabia and the United Arab Emirates. The largest export product from Myanmar, both in volume and value, was other marine fish, amounting to 300.000 tonnes in 2024, valued at EUR 402 million. This was a notable increase from 2023, when exports totalled 231.000 tonnes valued at EUR 342 million. Besides Thailand (40% of the total), the main destination markets in terms of volume were China (12%), Saudi Arabia (11%), the United Arab Emirates (8%), and India (3%).

The second largest export product was fishmeal, with 69.000 tonnes exported in 2024, valued at EUR 65 million. This represented an 18% increase in volume and a 20% increase in value compared to 2023. The major destinations for fishmeal were Thailand, China and Bangladesh, which together accounted for 96% of the volumes and values.

Crab was the third largest export product, with 11.500 tonnes valued at EUR 50 million in 2024. This was a decrease of 36% in volume and 37% in value compared to the previous year. The largest destination markets for crab were China, Thailand, and the US, which together accounted for 84% of the volumes and 79% of the values.

Table 39. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM MYANMAR BY TRADE PARTNER (volume in tonnes, value in million EUR)**

	2020		2021		2022		2023		2024	
Trade partner	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Thailand	350.246	282	154.331	251	151.411	273	139.778	212	182.677	265
China	164.305	216	86.634	170	90.391	211	99.721	208	84.096	154
Saudi Arabia	14.084	26	28.216	39	33.891	30	38.140	33	33.981	35
United Arab Emirates	16.476	16	11.641	11	14.980	16	15.429	14	25.679	25
Japan	6.346	30	5.510	25	7.250	37	7.087	30	5.312	22
Bangladesh	8.807	8	9.394	13	10.074	20	13.377	18	16.668	22
United States	6.459	24	5.510	21	5.773	19	6.603	18	8.174	19
Singapore	10.239	18	16.415	20	22.632	26	20.825	26	17.143	18
India	3.919	10	4.069	12	3.535	14	4.014	12	7.952	18
United Kingdom	8.751	16	7.390	15	5.139	12	7.680	14	8.761	15
EU 27	4.622	8	5.548	10	5.569	12	6.757	12	8.562	14
Other	55.962	82	37.235	68	42.352	81	43.216	73	43.159	62
Total	**650.217**	**735**	**371.893**	**656**	**392.997**	**750**	**402.627**	**672**	**442.163**	**669**

Source: EUMOFA elaboration of Trade Data Monitor data.

[40] Myanmar's fish exports surpass US$420M in FY2024-2025 - Global New Light of Myanmar

Imports of fishery and aquaculture products to Myanmar

In 2024, Myanmar imported nearly 19.000 tonnes of fishery and aquaculture products valued at EUR 28 million. This represented a 72% decrease in volume and a 65% decrease in value compared to the previous year. Myanmar faced economic difficulties, including currency depreciation and inflation, which affected its purchasing power and import capabilities[41]. Changes in trade policies and regulations aimed at boosting local production and reducing dependency on imports also played a role[42]. Additionally, global supply chain issues, possibly due to geopolitical tensions or natural disasters, impacted the availability and cost of seafood imports[43]. These factors combined to create a challenging environment for seafood imports in Myanmar during 2024.

The most important commercial species imported, besides non-food use products[44] and fishmeal, were the relatively high-priced salmon and trout. The four largest commercial species accounted for 93% of the volumes and values in 2024. China was the largest supplying country in terms of both volume and value, providing 26% of the volume and 20% of the value. The main import products from China were other non-food use products, which accounted for nearly 100% of the imports from China.

Thailand was the second largest supplier in terms of value, supplying nearly 3.500 tonnes of fishery and aquaculture products valued at EUR 4,5 million in 2024. The largest product category was other non-food use products, followed by shrimp and mackerel. Norway was the third largest supplier in terms of value and the eighth largest in terms of volume, supplying 436 tonnes valued at EUR 3 million. The main products from Norway were the high-priced salmon and trout.

Table 40. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO MYANMAR BY TRADE PARTNER (volume in tonnes, value in million EUR)**

Trade partner	2020		2021		2022		2023		2024	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
China	11.626	7,4	10.286	11,3	12.945	16,1	14.935	14,4	4.931	5,4
Thailand	8.918	16,3	43.693	35,8	15.644	26,4	7.551	18,3	3.463	4,5
Norway	695	3,9	483	2,3	1.377	9,0	698	5,7	436	3,0
EU 27	30.467	16,2	22.682	11,4	21.815	11,9	14.918	8,9	2.441	2,5
USA	108.750	39,8	8.626	4,3	3.293	2,7	5.449	3,5	1.015	1,4
Chile	52	0,3	69	0,1	10	0,1	232	1,6	233	1,3
Vietnam	18.356	9,4	3.056	2,9	1.182	1,8	2.443	3,7	710	1,1
Iceland	0	0,0	0	0,0	52	0,4	164	1,2	117	1,0
Solomon Islands	0	0,0	600	0,5	0	0,0	0	0,0	980	0,9
Singapore	1.257	2,9	1.878	4,3	1.105	3,4	1.097	2,7	301	0,8
Other	81.958	33	7.361	9	13.931	14	20.023	19	4.140	6
Total	**262.078**	**129**	**98.735**	**82**	**71.354**	**86**	**67.509**	**79**	**18.768**	**28**

Source: EUMOFA elaboration of Trade Data Monitor data.

6. 3. Trade flows with the EU

EU export of fishery and aquaculture products to Myanmar

The overall export volume from the EU to Myanmar reached 2.506 tonnes in 2024, a 65% decrease compared to 2023. The total value was EUR 0,4 million in 2024, down from EUR 1,2 million in 2023, representing a 73% decline. Salmon was the main export species, accounting for 95% of the volumes and 90% of the values in 2024.

[41] TRADE SITUATION OF MYANMAR IN 2024-2025 FISCAL YEAR COMPARED TO THE SAME PERIOD OF 2023-2024 FISCAL YEAR | Commerce
[42] Myanmar's foreign trade exceeds $15.4B as of 25 Oct | Ministry of Information
[43] Myanmar aims to achieve US$16.7B in exports, US$16.3B in imports for 2024- 2025FY | Ministry of Information.
[44] Fish or marine mammal solubles.

Poland was the largest exporter of fishery and aquaculture products to Myanmar, contributing 95% of the volume and 90% of the value. Ireland and Germany were the second and third largest exporters, respectively. The largest product exported was frozen salmon fillets, with 100% of this product coming from Poland.

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

	2020		2021		2022		2023		2024	
MCS	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Salmon	2.775	498	2.691	504	7.487	1.096	6.226	735	2.374	289
Other sharks	0	0	0	0	0	0	0	0	91	25
Other non-food use	47	6	118	15	0	0	62	6	22	5
Seaweed and other algae	0	0	16	1	29	1	0	0	17	1
Anchovy	7	0	2	0	3	0	0	0	2	0
Other	165	11	53	1	3	0	810	451	0	0
Total	**2.994**	**516**	**2.879**	**521**	**7.523**	**1.097**	**7.099**	**1.192**	**2.506**	**319**

Source: EUMOFA elaboration of Eurostat-Comext data.

EU imports from Myanmar

The overall EU import volume from Myanmar reached 7.931 tonnes in 2024, a 31% increase compared to 2023. The total value was EUR 26 million in 2024, a 27% increase from 2023. Italy was the largest importer of fishery and aquaculture products from Myanmar, accounting for 49% of the volume and 46% of the value. Belgium and France were second and third largest importers.

In 2023, carp accounted for the largest volume among EU imports from Myanmar, with 4.703 tonnes, an increase from 2023 when the volume was at 3.375 tonnes. Italy was the largest importer with 2.255 tonnes, followed by Belgium with 1.507 tonnes. Other freshwater fish was the second largest imported product, with a volume of 1.883 tonnes, a 37% increase from 2023. Italy, Belgium and Ireland were the three largest importers in 2024, together accounting for 87% of the volumes and 90% of the values. Shrimp was the third largest import product in terms of value, with a volume of 273 tonnes. France and Sweden were the largest importers in 2024.

Table 42. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO THE EU FROM MYANMAR BY MAIN COMMERCIAL SPECIES (volume in tonnes, value in million EUR)**

	2020		2021		2022		2023		2024	
MCS	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Carp	2767	5	2421	5	2544	6	3375	8	4703	11
Other freshwater fish	1.197	4	1.253	4	1.469	6	1.377	5	1.883	9
Shrimp, miscellaneous	86	1	131	1	250	2	267	2	273	2
Other marine fish	111	0	147	0	149	1	265	1	226	1
Freshwater catfish	127	0	169	0	238	0	304	1	488	1
Surimi	135	0	174	1	316	1	216	1	216	1
Crab	13	0	13	0	131	2	116	2	34	1
Tuna, miscellaneous	1	0	0	0	58	0	95	0	49	0
Other cephalopods	5	0	12	0	29	0	11	0	20	0
Tilapia	0	0	0	0	180	0	11	0	27	0
Other	72	1	68	1	31	0	11	0	11	0
Total	**4.515**	**12**	**4.387**	**12**	**5.395**	**19**	**6.046**	**20**	**7.931**	**26**

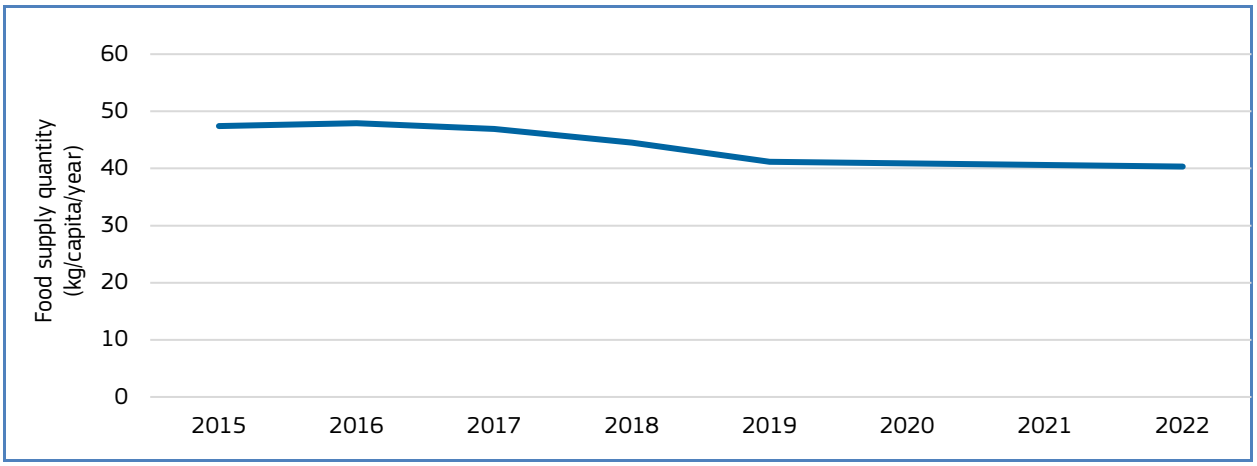
Source: EUMOFA elaboration of Eurostat-Comext data.

6. 4. Seafood consumption in Myanmar

As a major producing country, Myanmar has a high per capita fish consumption. According to the FAO, fish consumption per capita reached 40,3 kg of live weight equivalent in 2022, which was about 1% less than the previous year and 15% lower than in 2015. Fish provides more than 60% of animal-source food for the people of Myanmar. Despite this, around 50% of the population lives in poverty, particularly in rural areas where nearly half the population relies on farming for employment, producing crops, livestock and aquaculture[45].

People in Myanmar prefer to consume freshwater species, even in coastal areas. Processed fish, including dried and fermented fish, is a staple component of the daily diet for most people, accounting for 34% of fish consumed. Processed fish is particularly important during the dry season when the availability of fresh fish is limited[46].

Figure 45. **CONSUMPTION OF FISHERY AND AQUACULTURE PRODUCTS IN MYANMAR, 2015-2022 (live weight equivalent)**



Source: FAO.

[45] Myanmar | WorldFish
[46] Myanmar inland fisheries and aquaculture – A decade in review – Australian Govenment

7. CASE STUDY: Tilapia

Production of tilapia reached 7,5 million tonnes in 2023, of which 90% was from aquaculture and 10% from catches, representing 2% of the global production of fishery and aquaculture products. It is mainly farmed in China (27% of the global aquaculture production in 2023), Indonesia (21%) and Egypt (14%). Egypt has also the largest fisheries catches of tilapia (23% of the global catches in 2023), along with Uganda (13%) and Indonesia (10%), with most of the catches occurring in African inland waters. EU production was zero in 2023. At the beginning of the period analysed (2014-2023), Poland and Germany were the main EU producers, but production was less than 1.000 tonnes annually. The EU market relies almost exclusively on imports of frozen tilapia (whole or in fillet), mostly from China. Spain, Germany, Poland and France are the main consumption markets for tilapia, whereas the Netherlands functions primarily as a hub for extra-EU imports and re-exports of tilapia. The EU supply is almost entirely consumed, with only a few tonnes exported to Switzerland (113 tonnes, 30% of EU exports), Norway (84 tonnes, 22%) and the United Kingdom (24 tonnes, 6%). The main exporters are the Netherlands and Spain.

7. 1. Biology exploitation and management

Source: Scandinavian Fishing year Book

Tilapia is a common name referring to a hundred species from several genera within the *Cichlidae* family, including *Tilapia*, *Coelotilapia*, *Coptodon*, *Heterotilapia*, *Oreochromis* and *Pelmatolapia*. These species were formely grouped as '*Tilapinii*' before being reclassified into different genera, following phylogenetic studies conducted at the beginning of the 20th century[47]. Since the removal of numerous species, the *Tilapia* genus refers to four species: *Tilapia baloni*, *tilapia guinasana*, *tilapia ruweti*, and *tilapia sparrmanii*. The most commercially important species referred as tilapia are the Nile tilapia *Oreochromis niloticus*), the Blue tilapia (*Oreochromis aureus*), and the Mozambique tilapia (*Oreochromis mossambicus*), belonging to the *Oreochromis* genus. The Nile Tilapia, also commonly known as mango fish, is native to tropical West Africa, and has been introduced to other parts of Africa as well as Asia, North and South America. Blue tilapia is native to Northern and Western Africa, while Mozambique tilapia is native to southeastern Africa, both are now commonly found in several tropical and subtropical areas worldwide. The Nile tilapia accounted for 77% of global aquaculture production of tilapia, and 45% of wild tilapia catches in 2023.

The Nile tilapia, *Oreochromis niloticus*[48], is a freshwater fish commonly found in rivers, streams, canals, lakes and pounds, at depths between 0 and 20 metres. It can also occur in brackish water but cannot survive in salt water. It is typically found in water temperatures above 13,5°C, supporting a minimum of 8°C and a maximum of 40°C depending on the population[49]. Nile tilapia forms large schools with social hierarchies giving priority for food and mating to the dominant males[50]. It feeds during the daytime, suggesting a behavioural response to light. Adults are herbivorous, feeding mainly on phytoplankton and algae, while young fish can adopt an omnivorous diet[51].

Nile tilapia is greyish or brownish overall, with males being bluish pink when breeding[52]. Nile tilapia is commonly confused with Blue tilapia (*Oreochromis aureus*), but the former displays regular vertical stripes throughout the caudal fin, while the latter has a red edge to the dorsal fin making it possible to distinguish it[53]. Nile tilapia can reach up to 60 cm and its weight can exceed 5 kg, males are usually larger and grow faster than females. Sexual maturity is reached between 3 to 6 months depending on the water temperature, corresponding to a length of 14 cm for males and 11 cm for females[54]. It reproduces through mass spawning, with males fertilizing the eggs of more than one female. Spawning occurs when the water temperature exceeds 20°C, with multiple spawning cycles occurring annually, approximately every 30 days. Females incubate up to 200 eggs in their mouth for a week (mouthbrooding)[55].

[47] https://doi.org/10.1006/mpev.2001.0979
[48] https://fish-commercial-names.ec.europa.eu/fish-names/species/oreochromis-niloticus_en
[49] https://www.fishbase.se/summary/2
[50] Castro, A.L.S.; Gonçalves-de-Freitas, E.; Volpato, G.L.; Oliveira, C. (1 April 2009). "Visual communication stimulates reproduction in Nile tilapia, Oreochromis niloticus (L.)". Brazilian Journal of Medical and Biological Research. 42 (4): 368–374. doi:10.1590/S0100-879X2009000400009
[51] https://www.fishbase.se/summary/2
[52] Ibidem
[53] https://fishbase.se/summary/Oreochromis-aureus.html
[54] https://www.fishbase.se/summary/2
[55] Ibidem

Nile tilapia was reported as an invasive species with several countries reporting adverse ecological impacts after its introduction, threatening native ecosystems and species[56].

Tilapia have become one of the most farmed fish worldwide due to their ease and profitability of production. They are omnivorous, can tolerate high stocking densities and poor environmental conditions, and are known for their high reproduction rate and rapid growth. However, their dark flesh is often considered undesirable for customers, so aquaculture farms often produce hybrid stock of Nile tilapia and Blue tilapia. Hybridization also allows the selection of specific characteristics, such as producing predominantly male tilapia that grow faster and bigger. Tilapia are farmed in ponds and tanks and take 6 to 7 months to reach harvest size[57].

7. 2. Production

In 2023 global production of tilapia reached 7,5 million tonnes. Production comes mostly from aquaculture production, which accounts for 90% of global production, while wild catches represent the remaining 10%.

Aquaculture

Aquaculture production of tilapia species reached 6,8 million tonnes in 2023, making tilapia the second most farmed fish after carp. Tilapia species were almost exclusively produced in freshwater (97% of the production), and to a lesser extent in brackish water (3%).

China and Indonesia were by far the main producers of tilapia in 2023, reaching 1,8 and 1,4 million tonnes respectively (27% and 21% of the aquaculture production). Other important producers are Egypt (14% of the aquaculture production), Brazil (7%), Bangladesh (6%), Thailand (4%) and Philippines (4%). The main produced species were Nile tilapia (77% of the total), hybrid Blue-Nile tilapia (7%), and Mozambique tilapia (1%). Production of tilapias nei accounted for 15% of the global aquaculture production.

Over the last decade (2014-2023), global tilapia production from aquaculture increased by 31%, despite a decline in 2020 linked to the COVID pandemic. This overall growth was mostly due to the increased production of the top producers China (+18%) and Indonesia (+36%).

EU production reached 970 tonnes in 2014, produced mostly by Poland and Germany. Production declined over the period (2014-2023) and was zero in 2023.

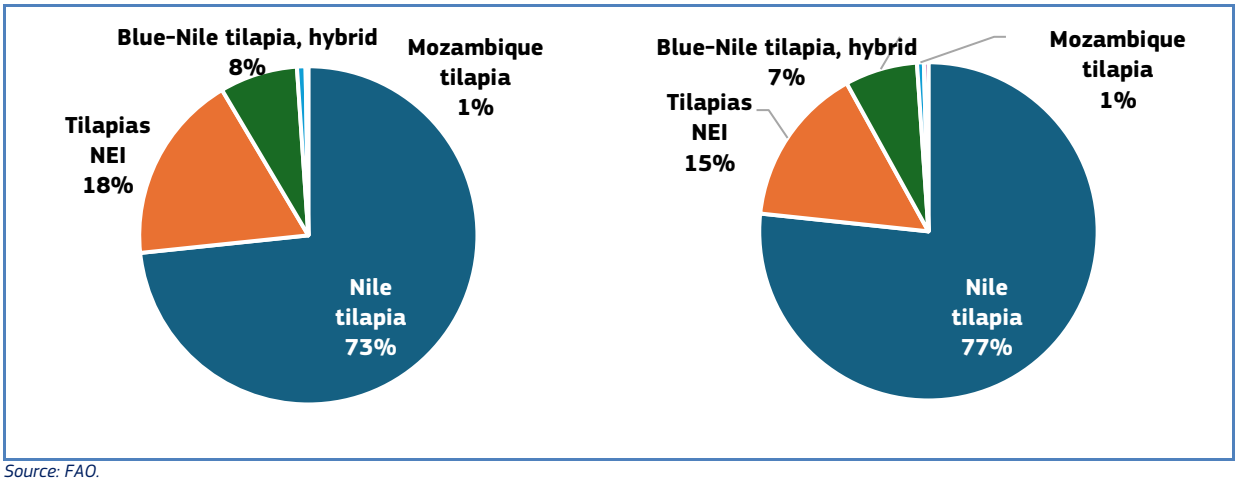
Table 43. **WORLD AQUACULTURE PRODUCTION OF TILAPIA (volume in 1.000 tonnes live weight)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
China	1.541	1.615	1.560	1.585	1.625	1.642	1.655	1.663	1.739	1.817
Indonesia	1.041	1.120	1.155	1.358	1.223	1.386	1.228	1.356	1.407	1.411
Egypt	760	876	940	967	1.051	1.081	954	964	964	964
Brazil	200	219	241	281	313	324	344	361	408	442
Bangladesh	284	324	343	335	345	350	328	348	362	374
Thailand	190	203	208	218	217	229	247	254	270	267
Philippines	259	261	259	268	277	279	264	281	252	254
Vietnam	244	219	220	235	260	288	191	187	196	207
Colombia	59	61	65	70	78	96	101	109	116	115
Others	597	579	617	626	663	739	756	774	846	925
World	**5.174**	**5.477**	**5.609**	**5.943**	**6.051**	**6.414**	**6.068**	**6.297**	**6.560**	**6.776**

Source: FAO.

[56] Ibidem
[57] https://web.archive.org/web/20121109170026/http://www.gaalliance.org/newsroom/aquasolutions-detail.php?Prison-Aquaculture-Program-11

Figure 46. **WORLD AQUACULTURE PRODUCTION OF TILAPIA BY SPECIES IN 2014 (left) AND 2023 (right) (% volume)**



Source: FAO.

Capture

Global catches

Global catches of tilapia reached 729.540 tonnes in 2023. It was mostly caught in African inland waters (73%) and to a lesser extent, in Asian inland waters (23%), America inland waters (3%) and Oceanian inland waters (<1%). The main caught species was Nile tilapia (45% of the total). Tilapias nei accounted for 51% of the catches, Mozambique tilapia for 2% and Tilapia shiranus for 1%. The main producers were Egypt (23%), Uganda (13%), Indonesia (10%), and Nigeria (9%). Other important countries were Philippines, Ethiopia, Mali and Sri Lanka.

Over the last decade (2014-2023), global catches of tilapia increased by 14% overall, related to the increase of Egyptian catches (+58%), and despite the decline in 2020.

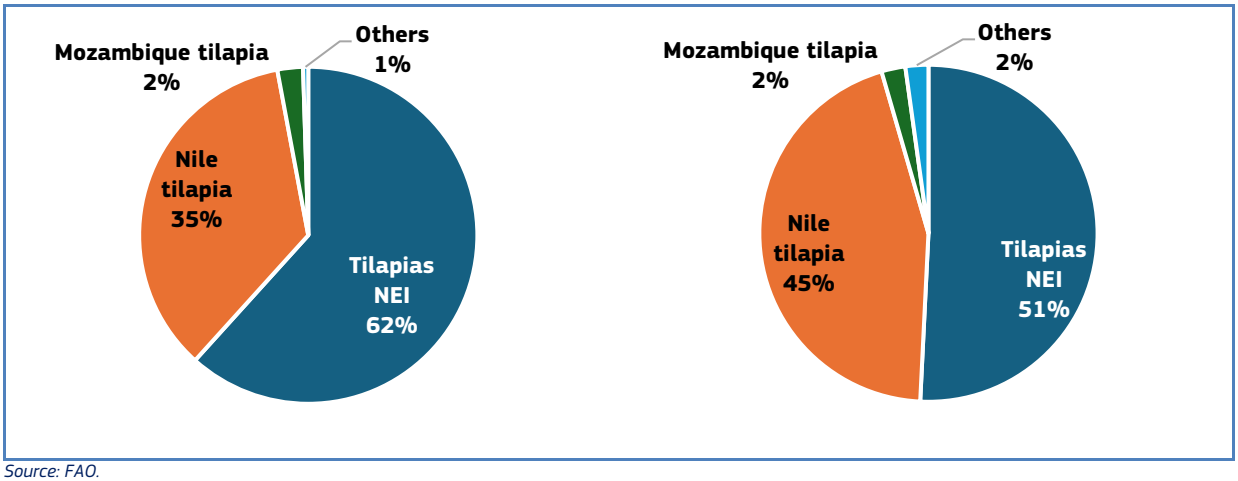
There were no catches of tilapia reported in the EU over the last decade.

Table 44. **WORLD CATCHES OF TILAPIA (volume in 1.000 tonnes live weight)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Egypt	108	114	108	115	121	141	160	170	167	171
Uganda	44	49	50	51	47	49	53	65	79	94
Indonesia	42	46	49	78	102	141	80	64	65	70
Nigeria	69	57	68	73	70	66	62	64	62	64
Philippines	54	50	42	43	44	42	40	59	52	54
Ethiopia	24	26	24	27	30	18	23	25	33	42
Mali	22	25	27	28	29	33	36	32	34	34
Sri Lanka	27	24	28	35	37	37	36	30	31	26
Sudan	18	18	19	20	25	25	23	25	27	25
Tanzania	37	29	26	15	14	28	16	18	17	19
Burkina Faso	12	12	12	17	19	19	19	20	21	18
Malawi	4	5	5	10	9	7	8	8	9	18
Thailand	20	20	21	20	20	17	16	16	17	18
Others	161	154	190	164	204	87	89	128	106	79
World	**641**	**630**	**669**	**697**	**771**	**709**	**660**	**725**	**721**	**730**

Source: FAO.

Figure 47. **WORLD CATCHES OF TILAPIA BY SPECIES IN 2014 (left) AND 2023 (right) (% volume)**



Source: FAO.

7. 3. Import – Export

In the Combined Nomenclature used for registering EU import-export data, tilapia is specifically reported whole live/fresh, whole frozen, filleted fresh or filleted frozen[58].

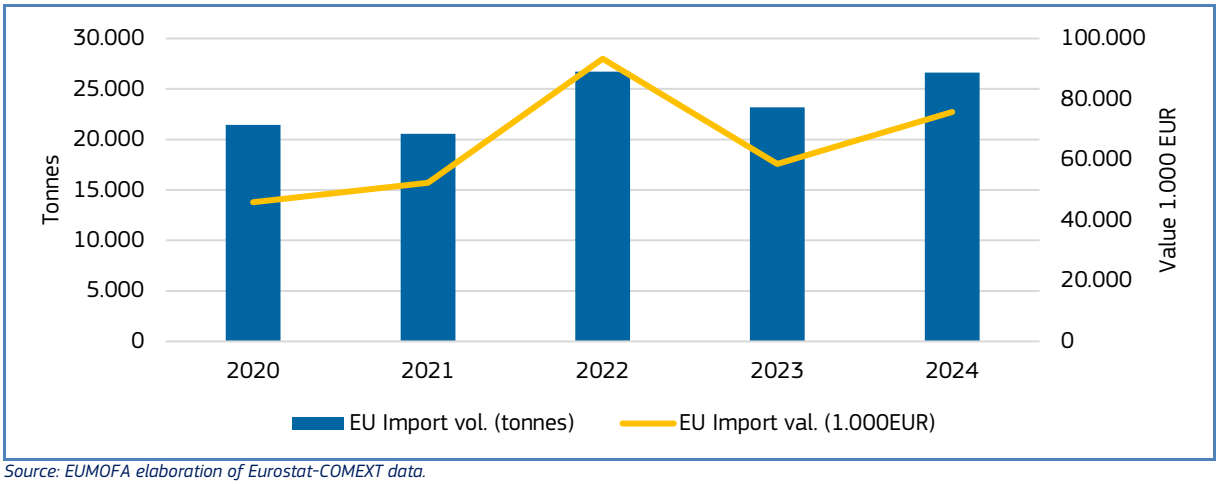
In 2024, the EU-27 imported 26.632 tonnes of tilapia valued at EUR 75,8 million. Frozen whole tilapia accounted for 54% of the imported volume, while frozen fillets of tilapia accounted for 45%. China was the main EU supplier (88% of the imported volume of tilapia), accounting for 83% of the extra-EU total import value, and to a lesser extent by Vietnam (6% of the volume, 5% of the value) and Indonesia (4% of the volume, 8% of the value).

France, Belgium and the Netherlands were the main entry point in the EU market, together handling 54% of the volume, and 48% of the import value. France was the first importer of frozen whole tilapia (38% of the volume and 39% of imported value), followed by Belgium (23% of the volume, 24% of the value), the Netherlands (21% of the volume, 19% of the value), and Italy (7% of both volume and value). Since 2020, imports of frozen whole tilapia increased by 24% while prices increased by 52% over the same period, reaching 2,11 EUR/kg in 2024.

Frozen fillets of tilapia were imported by Poland (28% of volume, 21% of value) and Spain (22% of the volume, 21% of the value), followed by the Netherlands (16% of the volume, 19% of the value) and Germany (11% of the volume, 14% of the value). Over the last five years, imports of frozen fillets from China increased by 48% in volume, with prices increasing by 47%, from 2,26 EUR/kg in 2020 to 3,34 EUR/kg in 2024.

[58] 03027100 - Fresh or chilled tilapia "*Oreochromis* spp."
03032300 - Frozen tilapia "*Oreochromis* spp."
03043100 - Fresh or chilled fillets of tilapia "Oreochromis spp."
03046100 - Frozen fillets of tilapia "*Oreochromis* spp."

Figure 48. **EU IMPORTS OF TILAPIA (volume in tonnes, value in 1.000 EUR)**



Source: EUMOFA elaboration of Eurostat-COMEXT data.

in 2024, EU exports to third countries were much lower and amounted to 382 tonnes at a value of EUR 1,95 million. Frozen products accounted for 87% of the total extra-EU export value. Frozen fillets of tilapia were the main product exported, accounting for 51% of exports in volume, followed by frozen whole tilapia (35% of the exported volume). Fresh or chilled products accounted for 13% of the total extra-EU export value in 2024. The main destination for tilapia in value terms was Switzerland (38% of the value), followed by Norway (15%) and United Kingdom (11%). The Netherlands was the main EU exporter of tilapia to third countries (61% of the exported value), together with Spain (18%).

Intra-EU trade consists exclusively in re-exports of tilapia products originally imported from China, Vietnam and Indonesia. In 2024, intra-EU exports of tilapia amounted to 10.939 tonnes at a value of EUR 41,4 million. The intra-EU trade was dominated by frozen products, which accounted for 91% of the export value (frozen fillet tilapia accounted for 52% of the total intra-EU export value, and frozen whole tilapia for 39%), whereas live/fresh products accounted for 8% of the total export value. The main exporting countries within the EU were the Netherlands (62% of the intra-EU export value), followed by Belgium (12%), and Germany (8%). The main destinations of intra-EU exports were Germany (25% of intra-EU export value), France (14%), the Netherlands (10%) and Belgium (10%). Export prices of frozen whole tilapia from the Netherlands reached 2,81 EUR/kg in 2023 (+43% since 2020) while re-export prices of frozen fillets reached 5,38 EUR/kg (+16%).

Table 45. **DUTCH IMPORT AND EXPORT PRICES OF TILAPIA PRODUCTS WITH THE MAIN PARTNERS (EUR/kg)**

Price (EUR/kg)	2020	2021	2022	2023	2024	Evol 2020/24
Frozen whole tilapia imported from China	1,32	1,86	2,39	1,58	1,92	45%
Frozen whole tilapia imported from Belgium	1,32	1,71	2,44	2,24	2,30	74%
Frozen whole tilapia exported to Germany	2,15	2,46	3,18	2,80	2,99	39%
Frozen whole tilapia exported to France	1,92	2,33	2,87	2,37	2,74	43%
Frozen whole tilapia exported to Belgium	1,94	2,25	2,83	2,42	2,74	41%
Frozen fillets imported from China	2,71	3,27	4,19	3,19	3,59	32%
Frozen fillets exported to Germany	5,51	5,42	5,81	5,60	5,54	1%

Source: EUMOFA elaboration of Eurostat-COMEXT data.

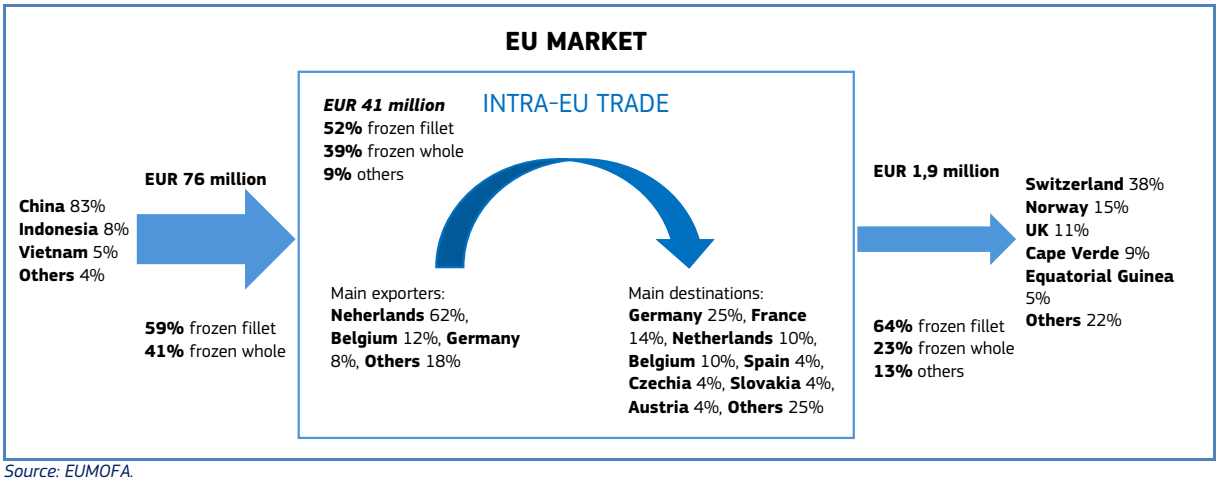
Import prices of tilapia are lower than those of other groundfish that it can substitute. In 2024, EU import prices of frozen fillet tilapia reached 3,68 EUR/kg, while the average price of frozen fillet saithe reached 4,60 EUR/kg, frozen fillet haddock 5,36 EUR/kg, and cod frozen fillets 6,60 EUR/kg.

Table 46. **EU IMPORT PRICES OF TILAPIA AND OTHER GROUNDFISH (EUR/kg)**

Price (EUR/kg)	2020	2021	2022	2023	2024	Price difference
Frozen fillets tilapia	2,98	3,26	4,26	3,28	3,68	-
Frozen fillets cod	5,95	5,51	6,93	7,32	6,60	+2,92
Frozen fillets haddock	5,63	5,77	6,67	6,54	5,36	+1,68
Frozen fillets saithe	3,48	3,60	5,46	5,46	4,60	+0,92

Source: EUMOFA elaboration of Eurostat-COMEXT data.

Figure 49. **TILAPIA TRADE MARKET IN 2024, IN VALUE**



Source: EUMOFA.

7. 4. Consumption

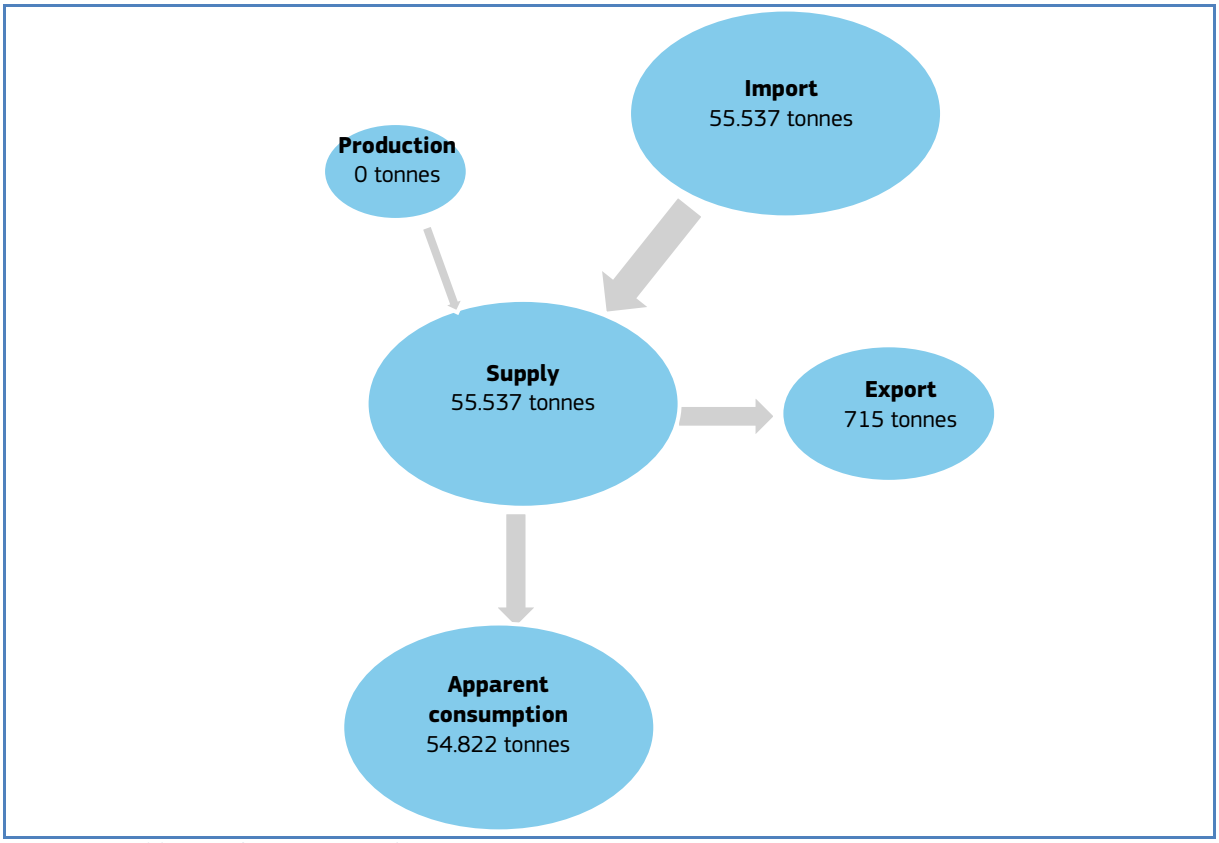
Tilapia is traditionally consumed in Africa, where it is native, and it is very popular in Asia, where it was introduced in the middle of the 20th century. Tilapia is mostly consumed because of its affordable price, high protein content, and high ratios of omega-6 and omega-3 fatty acids. Tilapia is widely consumed in the USA, with products available in supermarkets and commonly used in HORECA[59]. In the EU, consumption of tilapia is popular in ethnic communities, and it is gaining wider interest as a substitute for whitefish species[60]. Currently, tilapia and pangasius are competing on the EU market; pangasius has so far been more popular than tilapia (60.939 tonnes of pangasius imported in 2024 against 26.632 tonnes for tilapia). While EU imports of tilapia and pangasius combined reached around 90.000 tonnes in 2024, the United States imported 270.000 tonnes of the same species in 2024. Most of the imports to the USA originated from Asia/Africa (90% of the volume in 2024), and the remaining 10% from American countries. The US market is far bigger than Europe for these species, but it is worth noting that the majority of the volumes currently imported may have to find new markets given current changes and instability in tariff rates and policy.

Apparent consumption of tilapia at EU level was estimated at 54.822 tonnes LWE in 2022 (last year available on EUMOFA), equivalent to 0,12 kg/per capita. Supply reached 55.537 tonnes, originating exclusively from imports. Exports represented 1,3% of the overall supply, so apparent consumption accounted for 98,7% in 2022.

At MS level, Spain and Germany were the main consumption markets of tilapia, with consumption estimated at 8.280 tonnes and 6.010 tonnes respectively in 2023. Other important Member States for tilapia consumption are Poland (apparent consumption of 5.570 tonnes), France (5.497 tonnes), Italy (3.076 tonnes), Belgium (2.445 tonnes), and Czechia (2.084 tonnes).

[59] https://www.infopesca.org/sites/default/files/complemento/proyectos/194/World%20Market%20of%20Tilapia2.pdf
[60] Ibidem

Figure 50. **APPARENT CONSUMPTION OF TILAPIA IN EU IN 2022 (live weight equivalent)**



Source: EUMOFA elaboration of Eurostat-COMEXT data.

7. 5. Other uses

Tilapia is gaining interest beyond food consumption. It has been found to be a more effective, faster and less painful treatment for burn injuries compared to topical medicines currently in use[61]. Tilapia skin, a by-product of aquaculture production, is particularly valuable for its high content of type I collagen. This makes it a promising biomaterial in regenerative medicine for its skin-regeneration properties[62].

Tilapia species are also commonly used as biological control. Their ability to thrive in polluted and degraded environments makes them suitable to control undesirable aquatic plants and algae, enabling a reduction in the use of toxic chemicals alternatively applied as plant-controls[63]. Tilapia have also been used in tropical areas to control mosquito populations that cause malaria [64].

[61] https://doi.org/10.1016/j.bcab.2024.103254
[62] https://doi.org/10.1155/2014/630757
[63] https://web.archive.org/web/20120921081544/http://www.mobot.org/jwcross/duckweed/weed_control.htm
[64] https://www.fao.org/4/X7580E/X7580E03.htm#ch3.2.1

Manuscript completed in May 2025

Luxembourg: Publications Office of the European Union, 2025

PDF ISSN 2314-9671 KL-01-25-020-EN-N

ISBN: 978-92-68-24102-8 DOI: 10.2771/3292873

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, The Fishing Daily, GFCM, Statistics Iceland.

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

First sales: Eur-lex, ICES, The Fishing Daily.

Case studies: SEAFDEC, WorldFish, Fishery Statistics of Myanmar, ACIAR, Aquaculture Division of Myanmar, The Global New Light of Myanmar, Ministry of Commerce, Ministry of Information, FAOSTAT, Eurostat COMEXT, ScienceDirect, European Commission, FishBase, Brazilian Journal of Medical and Biological Research, Global Aquaculture Alliance, Infopesca, Wiley, Mobot, FAO.

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.

EUMOFA **Privacy Policy**

Publications Office of the European Union