European Commission

Monthly Highlights

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EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

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1. GLOBAL HIGHLIGHTS

EU / Blue Economy: On 22 May 2025, the European Commission published the 2025 edition of the **EU Blue Economy Report**. The report confirms continued growth across blue economy sectors which in 2022 generated nearly EUR 890 billion in turnover and supported 4,82 million jobs. By 2023, employment rose to 4,88 million and GVA reached an estimated EUR 263 billion. Coastal tourism remained the largest sector, while offshore wind energy saw a 42% increase in gross added value. The report also highlights the energy transition in maritime transport and fisheries, and the role of nature-based solutions in climate adaptation along EU coasts[1].

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EU / Maritime Safety: On 21 May 2025, the European Commission welcomed a provisional agreement to update the mandate of the European Maritime Safety Agency (EMSA), enhancing its support for maritime safety, environmental protection, and digitalisation. The revised regulation extends port State control and accident investigation to larger fishing vessels over 24 metres and mandates reporting of serious accidents involving smaller vessels under 15 metres. It also promotes the use of electronic certificates and digital tools through EMSA's IT systems. EMSA will play a key role in implementing the Fuel EU Maritime Regulation and the extension of the EU Emissions Trading System to maritime transport[2].

EU / Fisheries: On 22–23 May 2025, the Commissioner for Oceans and Fisheries Costas Kadis visited Cork, Ireland, to open the European Maritime Day 2025 alongside Irish Prime Minister Micheál Martin and other national and local officials. The event, co-organised by the European Commission, brought together stakeholders to discuss maritime affairs and the sustainable blue economy, with a focus on the upcoming European Ocean Pact. During his visit, Commissioner Kadis toured key initiatives supporting sustainable fisheries and aquaculture, including the National Maritime College of Ireland and MaREI. He also participated in the 20th anniversary of the European Fisheries Control Agency and visited its patrol vessel Ocean Guardian[3].

EU / UK Fisheries: On 19 May 2025, the European Commission and the United Kingdom reached political agreement on granting full reciprocal access to each other's waters for fisheries until 30 June 2038. This extension, beyond the current arrangement ending in June 2026, aims to provide long-term stability and predictability for EU and UK fishers. The agreement builds on the Trade and Cooperation Agreement which sets the framework for annual consultations on shared stocks, quota allocations and reciprocal access to waters. The political agreement is expected to be formalised within a month[4].

EU / Research & Innovation: On 29 April 2025, the European Commission published a Community Research and Development Information Service (CORDIS) -EU research Results Pack highlighting 10 EU-funded projects advancing sustainable and climate-resilient aquaculture and fisheries. Funded under Horizon 2020 and Horizon Europe, the projects focus on improving fish health and breeding, advancing low-trophic aquaculture, exploring mesopelagic resources, and developing digital tools for ecosystem-based management. They support EU policies such as the Common Fisheries Policy, the European Green Deal and Farm to Fork Strategy, contributing to food security, biodiversity conservation, and the sustainable use of aquatic ecosystems[5].

EU / Greenland: The EU and Greenland have agreed on a new six-year fisheries protocol (2025–2030), allowing EU vessels to fish species like cod, halibut, redfish and shrimp in Greenlandic waters. The EU will pay EUR 17,3 million annually, with EUR 14,1 million for access and EUR 3,2 million to support Greenland's fisheries sector, alongside vessel owner fees potentially reaching EUR 4,5 million per year. Annual fishing limits will be set based on scientific advice, aiming to protect marine life and habitats. MEPs support the deal and urge sustainable practices, noting its importance post-Brexit and for Arctic environmental protection[6].

[1] https://oceans-and-fisheries.ec.europa.eu/news/commission-publishes-2025-report-eu-blue-economy-2025-05-22_en
[2] https://ec.europa.eu/commission/presscorner/detail/en/ip_23_2919
[3] https://oceans-and-fisheries.ec.europa.eu/news/commissioner-kadis-ireland-open-european-maritime-day-2025-2025-05-21_en#:~:text=Costas%20Kadis%2C%20Commissioner%20for%20Oceans,Ireland%2C%20Timmy%20Dooley%2C%20Minister%20of
[4] https://ec.europa.eu/commission/presscorner/detail/en/qanda_25_1268
[5] https://cordis.europa.eu/article/id/457663-research-and-innovation-for-sustainable-climate-resilient-aquaculture-and-fisheries
[6] https://www.europarl.europa.eu/news/en/press-room/20250519IPR28500/new-protocol-with-greenland-approved-by-committee-on-fisheries

2. MACROECONOMIC CONTEXT

2.1. Marine fuel

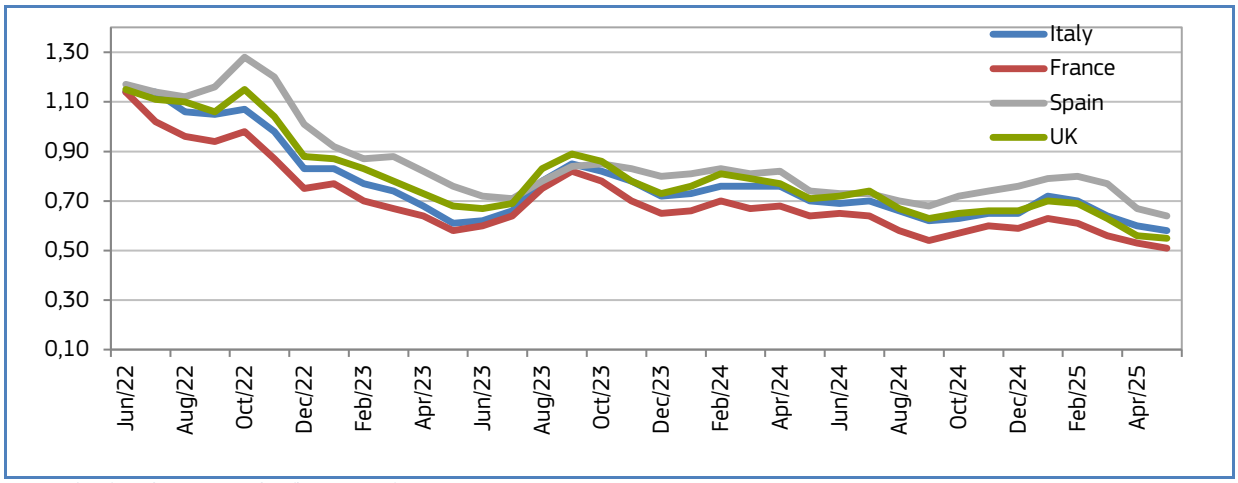
Average prices for marine fuel in **May 2025** ranged between 0,51 and 0,64 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices decreased by an average of about 3,4% compared with the previous month and decreased by an average of 18,3% compared with the same month in 2024.

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

Country	May 2025	Change from Apr 2025	Change from May 2024
France *(ports of Lorient and Boulogne)*	0,51	-4%	-20%
Italy *(ports of Ravenna and Livorno)*	0,58	-3%	-17%
Spain *(ports of A Coruña and Vigo)*	0,64	-4%	-14%
The UK *(ports of Grimsby and Aberdeen)*	0,55	-2%	-23%

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 2,4% in April 2025, down from 2,5% in March 2024. A year earlier, the rate was 2,6%.

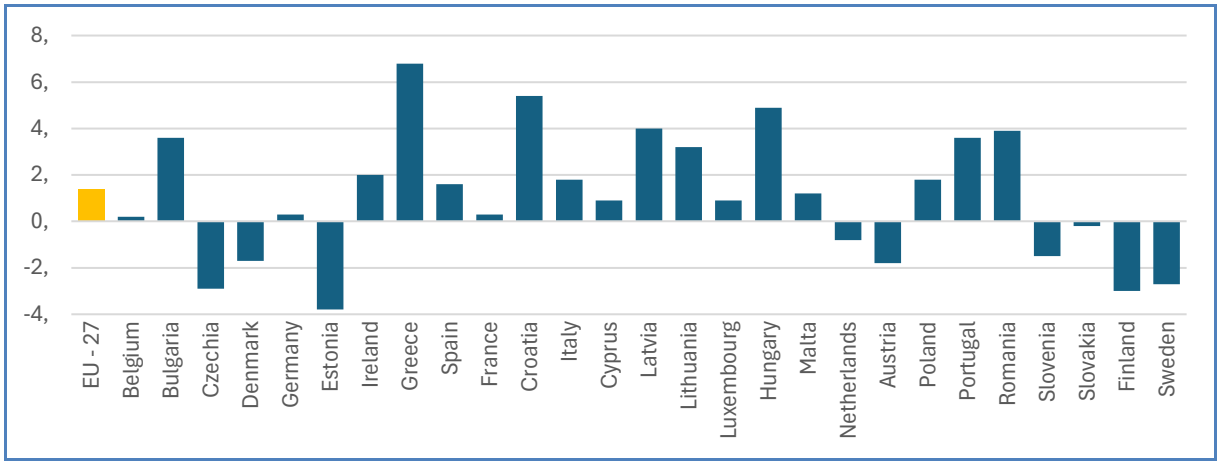
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR MARCH 2025, COMPARED WITH MARCH 2024**

Lowest inflation rates		Highest inflation rates	
France	+0,9%	Romania	+4,9%
Cyprus	+1,4%	Estonia	+4,4%
Denmark	+1,5%	Hungary	+4,2%

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 APRIL 2025 (value expressed in percentage)**



Source: Eurostat.

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

	Apr 2023	Apr 2024	Mar 2025	Apr 2025	Change from Mar 2025	Change from Apr 2024
Food and non-alcoholic beverages	140,23	142,84	147,02	147,58	0,4%	3,3%
Fish and seafood	138,90	141,65	143,76	143,61	-0,1%	1,4%
Fresh or chilled fish	132,90	135,89	138,47	138,08	-0,3%	1,6%
Frozen fish	138,26	138,42	139,47	140,49	0,7%	1,5%
Fresh or chilled seafood	127,26	129,83	132,67	132,49	-0,1%	2,0%
Frozen seafood	118,17	118,22	118,75	117,83	-0,8%	-0,3%
Dried, smoked or salted fish and seafood	137,98	139,88	145,19	143,56	-1,1%	2,6%
Other preserved or processed fish and seafood and fish and seafood preparations	132,97	137,48	138,15	138,43	0,2%	0,7%

Source: Eurostat.

2. 4. Exchange rates

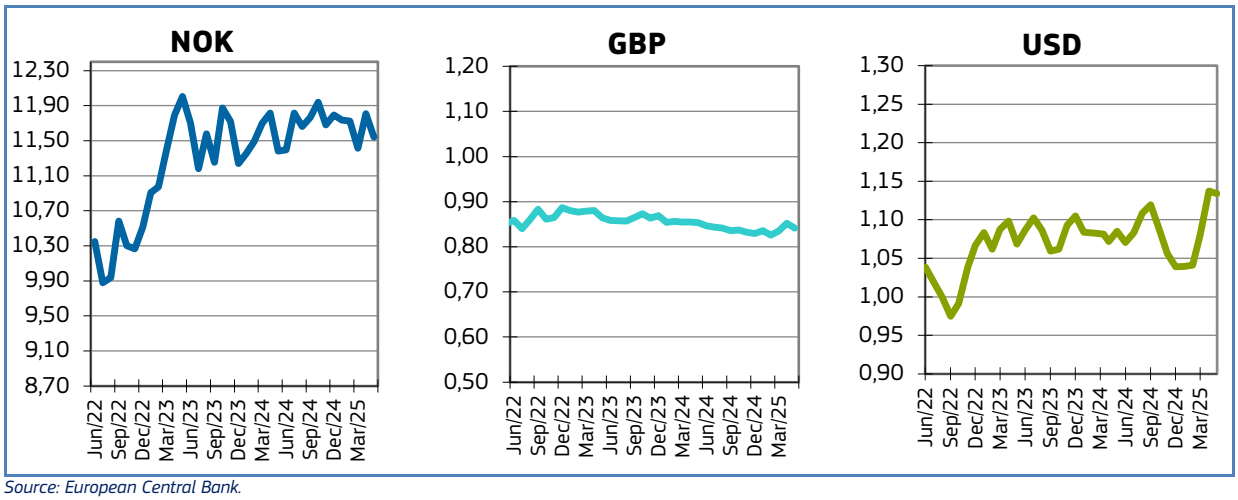
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	May 2023	May 2024	Apr 2025	May 2025
NOK	12,0045	11,3830	11,8090	11,5408
GBP	0,8641	0,8537	0,8518	0,8412
USD	1,0683	1,0852	1,1373	1,1339

Source: European Central Bank.

In May 2025, the euro depreciated against the Norwegian krone (2,3%), the British pound sterling (1,2%) and the US dollar (0,3%), relative to the previous month. For the past six months, the euro has fluctuated around 0,8366 against the British pound sterling. Compared with May 2024, the euro has appreciated 1,4% against the Norwegian krone and 4,5% against the US dollar and depreciated 1,5% against the British pound sterling.

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

Decreases in value and volume (Jan- Mar 2025 vs Jan- Mar 2024): Bulgaria, Denmark, Estonia, Germany, Greece, Italy, Lithuania, Poland and Sweden recorded decreases in first-sales value and volume. Germany stood out with the most significant drops in relative terms, due to mackerel, blue whiting and Greenland halibut.

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

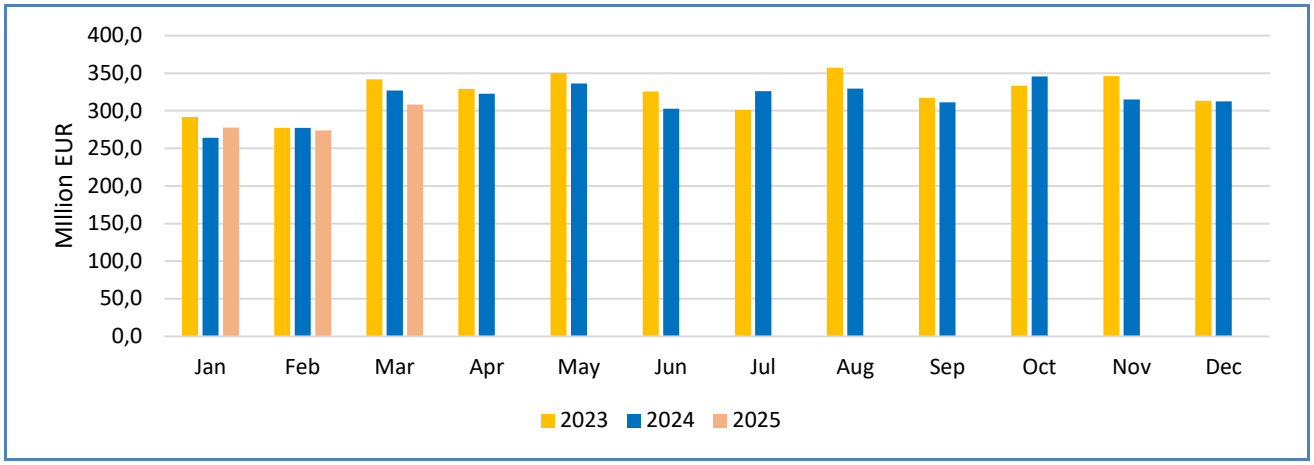
	January – March 2023		January – March 2024		January – March 2025		Change from January – March 2024	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	4.523	23,86	3.928	19,77	3.667	20,33	-7%	3%
Bulgaria	83	0,09	609	0,38	284	0,29	-53%	-26%
Cyprus	79	0,56	72	0,55	77	0,55	6%	0%
Denmark	226.543	119,84	240.067	139,57	196.108	131,49	-18%	-6%
Estonia	24.196	7,11	24.402	11,51	21.446	8,71	-12%	-24%
Finland	22.346	6,37	17.127	6,80	26.696	8,11	56%	19%
France	51.179	186,30	50.468	165,17	51.664	186,67	2%	13%
Germany	10.990	13,14	13.555	15,38	2.116	2,99	-84%	-81%
Greece	2.273	7,22	5.550	21,03	4.711	18,55	-15%	-12%
Italy	17.191	78,70	13.364	63,69	11.430	58,26	-14%	-9%
Latvia	13.752	3,83	14.863	5,25	14.339	5,85	-4%	11%
Lithuania	96	0,43	49	0,15	34	0,09	-30%	-42%
Netherlands	20.681	36,65	3.928	27,65	4.268	27,99	9%	1%
Poland	30.835	10,91	33.898	16,65	27.255	13,01	-20%	-22%
Portugal	15.535	66,03	11.972	53,77	12.103	57,03	1%	6%
Spain	95.210	321,69	80.820	291,89	77.354	301,18	-4%	3%
Sweden	59.000	27,89	44.214	28,95	24.221	18,89	-45%	-35%
Norway	1.036.785	1.063,10	1.023.609	1.032,13	873.032	1.094,97	-15%	6%
United Kingdom	104.722	173,75	108.834	191,68	111.970	217,17	3%	13%

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

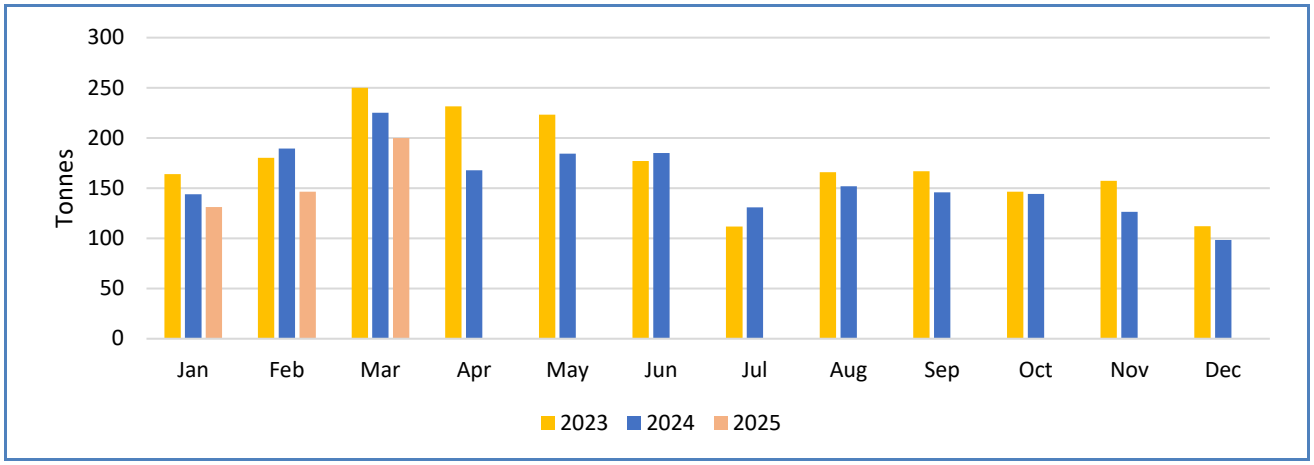
The overall value of total first sales in the period January-March in 2025 was EUR 860,0 million, a 1% decrease compared to 2024 and 6% less compared to 2023. While the overall volume was 477.771 tonnes, this was a 15% decrease compared to 2024, and a 20% decrease compared to 2023.

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



In January - March 2025, monthly first-sales value increased in the first month and decreased in the second and third compared to the same period in 2024, while it decreased in all three months compared to 2023. In the first three months of 2025 first-sales volume decreased compared to January - March in both 2024 and 2023. Between January and March 2025, first-sales value experienced a 1% decrease compared to 2024, when mainly small pelagics (-7%), were driving the decrease, and saw a 6% decrease compared to 2023 with cephalopods, flatfish and tuna and tuna-like species (-18%, -15% and -23% 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 small pelagics and groundfish mainly responsible for the decline in 2024 (-14% and -25% respectively) and 2023 (-20% and -27% respectively).

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 71,4 million, an 8% increase compared to the same period in 2024. First-sales volume came to 31.663 tonnes, an increase of 18% compared to 2024. Scallop and sea urchin were the main commercial species driving the increase in value (+13% and +18%, respectively), while scallop and other molluscs and aquatic invertebrates[10] were the main contributors to the increase in volume (+26% and +53%, respectively).

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

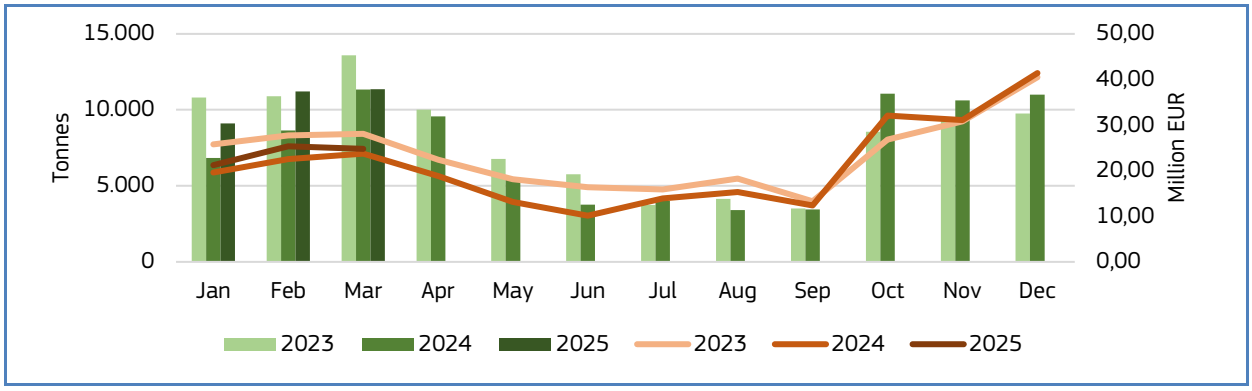


Table 6. **FIRST-SALES PRICES OF BIVALVES MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
France	Scallop	2,27 EUR/kg	2,04 EUR/kg	-10%
Spain	Clam	11,81 EUR/kg	11,34 EUR/kg	-4%
Spain	Sea urchin	11,58 EUR/kg	11,93 EUR/kg	+3%

Cephalopods

In 2025, first-sales value of "Cephalopods" totalled EUR 78,5 million, an 11% increase compared to 2024. First-sales volume came to 10.617 tonnes, a decrease of 3% compared to 2024. Octopus and squid (+22% and +7%) were the two main commercial species driving the growth in first-sales value, while cuttlefish was the main product contributing to the decrease in first-sales volume (-17%).

[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 analyzed 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

[10] Of the main commertial species other molluscs and aquatic invertebrates, whelk represents 61% of the total first sale value and 52% of the total first sale volume.

Figure 7. **FIRST-SALES VALUE AND VOLUME OF CEPHALOPODS, JAN 2023 – MAR 2025**

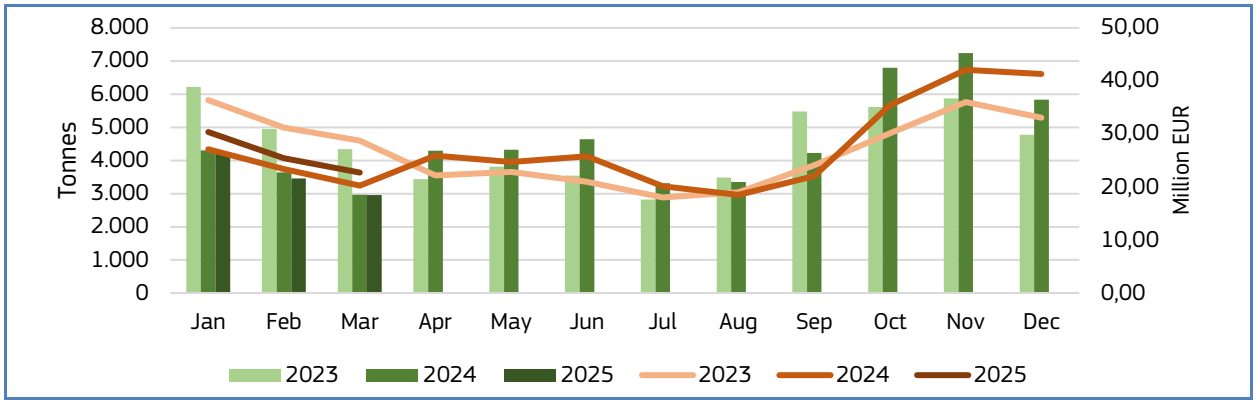


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
Portugal	Octopus	7,56 EUR/kg	8,72 EUR/kg	+15%
France	Squid	9,70 EUR/kg	9,58 EUR/kg	-1%
Spain	Octopus	7,14 EUR/kg	7,80 EUR/kg	+9%

Crustaceans

In 2025, first-sales value of "Crustaceans" totalled EUR 89,2 million, a decrease of 4% compared to 2024. First-sales volume amounted to 10.199 tonnes, an increase of 4% compared to 2024. Miscellaneous shrimps and shrimp *Crangon* spp. (-16% and -20%) were the two main products responsible for the decrease in first-sales value, while deep-water rose shrimp and Norway lobster (+28% and +23%) were mainly responsible for the increase in first-sales volume.

Figure 8. **FIRST-SALES VALUE AND VOLUME OF CRUSTACEANS, JAN 2023 – MAR 2025**

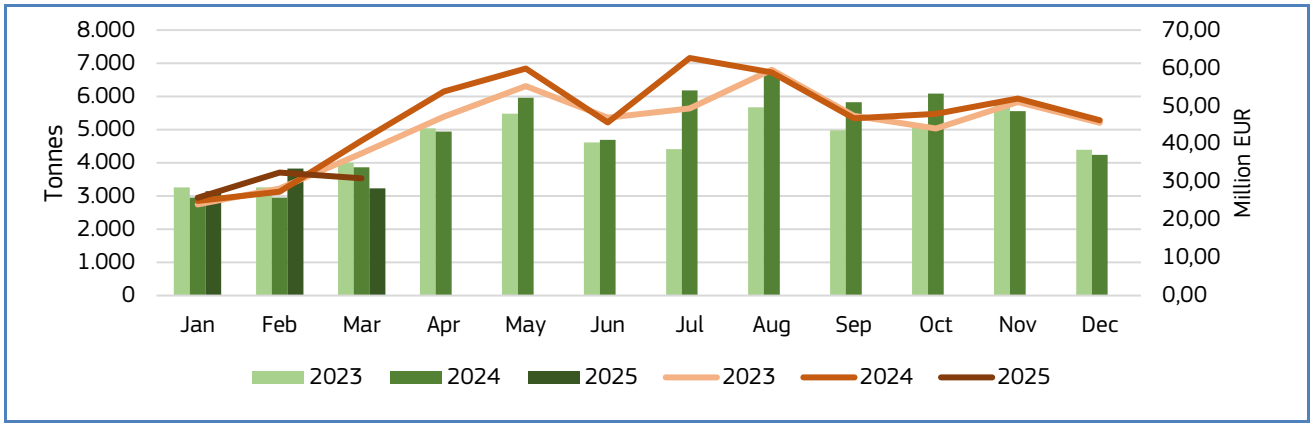


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
Spain	Miscellaneous shrimps	20,50 EUR/kg	22,74 EUR/kg	+11%
Germany	Shrimp *Crangon* spp.	11,23 EUR/kg	10,76 EUR/kg	-4%
France	Norway lobster	13,16 EUR/kg	15,45 EUR/kg	+17%

Flatfish

In 2025, first-sales value of "Flatfish" came to EUR 86,6 million, a stable value compared to 2024. First-sales volume amounted to 11.756 tonnes, a decrease of 8% compared to 2024. Common sole and megrim were the two main products contributing to first-sales value (+2% + 7%), while European flounder and Greenland halibut were the main species driving the decrease in first-sales volume (-30% and -23%).

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

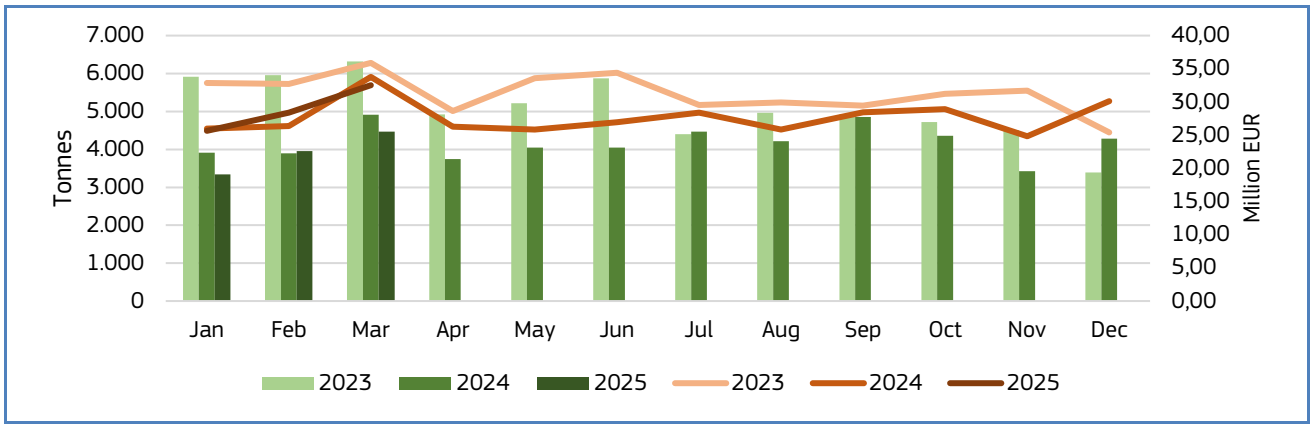


Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
France	Common sole	17,40 EUR/kg	15,96 EUR/kg	-8%
Netherlands	Common sole	17,34 EUR/kg	16,66 EUR/kg	-4%
Belgium	Common sole	18,90 EUR/kg	16,87 EUR/kg	-11%

Freshwater fish

In 2025, first-sales value of "Freshwater fish" came to EUR 13,0 million, an increase of 129% compared to 2024. First-sales volume amounted to 879 tonnes, a decrease of 6% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+193%), while pike-perch and pike were the main contributors to the decrease in first-sales volume (-23% and -57%).

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

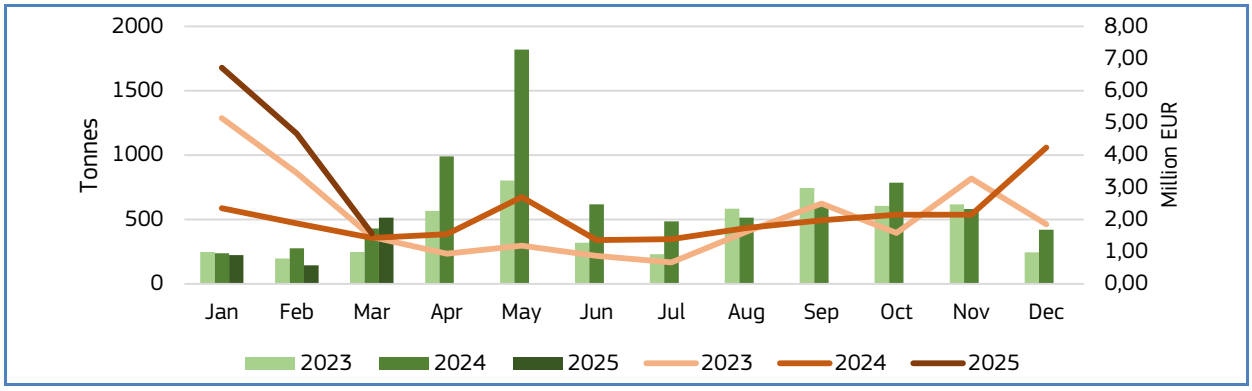


Table 10. **FIRST-SALES PRICE OF FRESHWATER FISH MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
France	Eel	66,06 EUR/kg	190,31 EUR/kg	+188%
Estonia	Other freshwater fish[11]	1,51 EUR/kg	1,44 EUR/kg	-5%
Denmark	Other freshwater fish[12]	1,15 EUR/kg	1,79 EUR/kg	+56%

Groundfish

In 2025, first-sales value of "Groundfish" totalled EUR 156,3 million, a decrease of 2% compared to 2024. First-sales volume amounted to 122.073 tonnes, a decrease of 25% compared to 2024. Blue whiting (-23% and -31%) was mainly responsible for the decrease in first-sales value and volume.

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

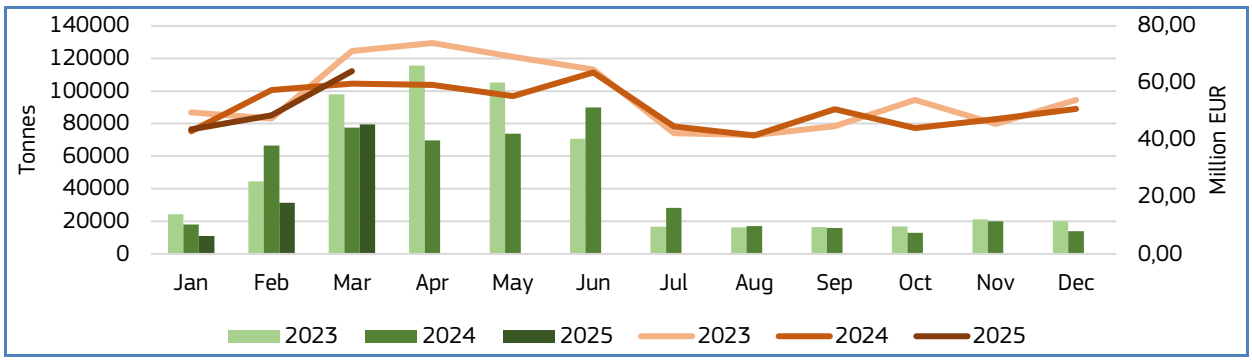


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
Denmark	Blue whiting	0,32 EUR/kg	0,35 EUR/kg	+10%
France	Cod	6,25 EUR/kg	5,52 EUR/kg	-12%
Spain	Blue whiting	1,62 EUR/kg	2,07 EUR/kg	+28%

Other marine fish[13]

In 2025, first-sales value of "Other marine fish" came to EUR 132,8 million, a decrease of 1% compared to 2024. First-sales volume amounted to 38.742 tonnes, an increase of 4% compared to 2024. Other sharks[14] (-14%) was the main commercial species contributing most to the decrease in first-sales value, while other marine fish[15] were behind the increase in first-sales volume (+31%).

[11] Twelve species belong to the MCS „Other freshwater fish" MCS in Estonia of European perch and roach represent 55% of the total volume and 86% of value.
[12] „Other freshwater fish" in Denmark comprises 2 products roach and European perch which respresent 70% and 30% respectively of the total volume.
[13] Seventeen Main Commercial Species are included in the Commmodity Group „Other Marine Fish" with monk representing more than 25% of the total value and almost 20% of total volume.
[14] Of the „Other sharks" Main Commercial Species (MCS) the blue shark represents more than half of the total first-sales volume (52%) and value (67%).
[15] Of the „Other marine fish" Main Commercial Species (MCS), boarfishes nei represents 27% of the total first-sales value and 78% of the volume.

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

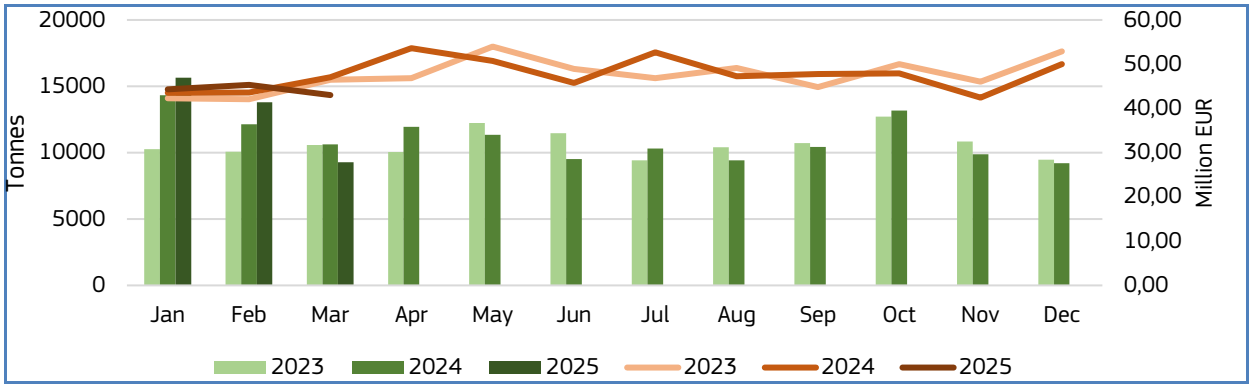


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
Spain	Other sharks[16]	3,14 EUR/kg	3,15 EUR/kg	0%
Spain	Other marine fish[17]	4,24 EUR/kg	4,64 EUR/kg	+9%
Portugal	Scabbardfish	4,49 EUR/kg	4,59 EUR/kg	+2%

Salmonids

In 2025, first-sales value of "Salmonids" came to EUR 145.932, a decrease of 13% compared to 2024, while first-sales volume amounted to 12.420 kg, a decrease of 23% compared to 2024. Other salmonid species[18] (-76% and -62%) 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 – MAR 2025**

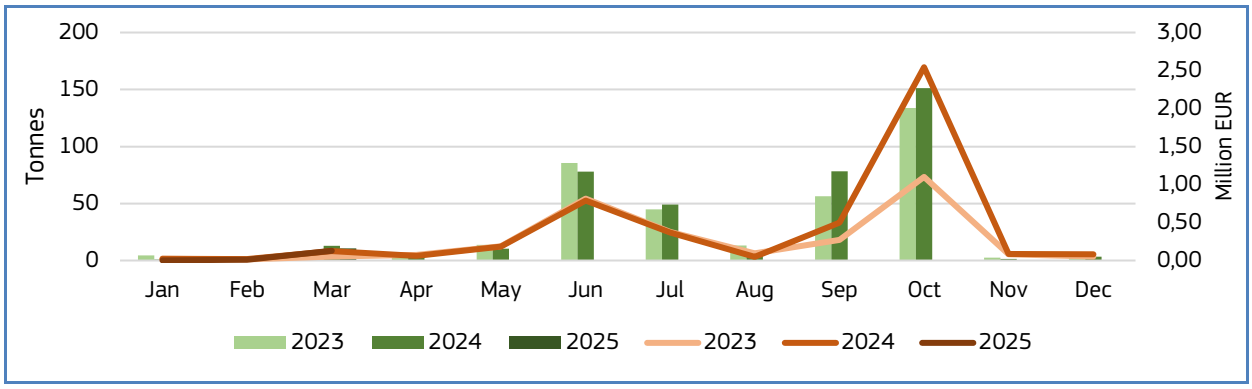


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
Denmark	Other salmonids[19]	4,87 EUR/kg	6,56 EUR/kg	+35%
Germany	Trout	8,99 EUR/kg	9,92 EUR/kg	+10%
Germany	Other salmonids[20]	3,16 EUR/kg	3,26 EUR/kg	+3%

[16] „Other sharks" MCS comprises 17 species in Spain in the period analyzed of which 84% of the total first-sales volume comprises blue shark.
[17] „Other marine fish" MCS comprises 37 species in Italy in the period analyzed of which 54% of the total volume is made up by thinlip grey mullet and shortnose greeneye.
[18] Of the „Other salmonid species" total first-sales value and volume, 99% were represented by European whitefish.
[19] „Other salmonids" MCS in Denmark include only European whitefish (100%).
[20] „Other salmonids" MCS in Germany include only European whitefish (100%).

Small pelagics

In 2025, first-sales value of "Small pelagics" amounted to EUR 182,0 million, a decrease of 7% compared to 2024. First-sales volume amounted to 238.643 tonnes, a decrease of 14% compared to 2024. Sprat was the main commercial species contributing most to the decrease in first-sales value and volume (-38% and -38%).

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

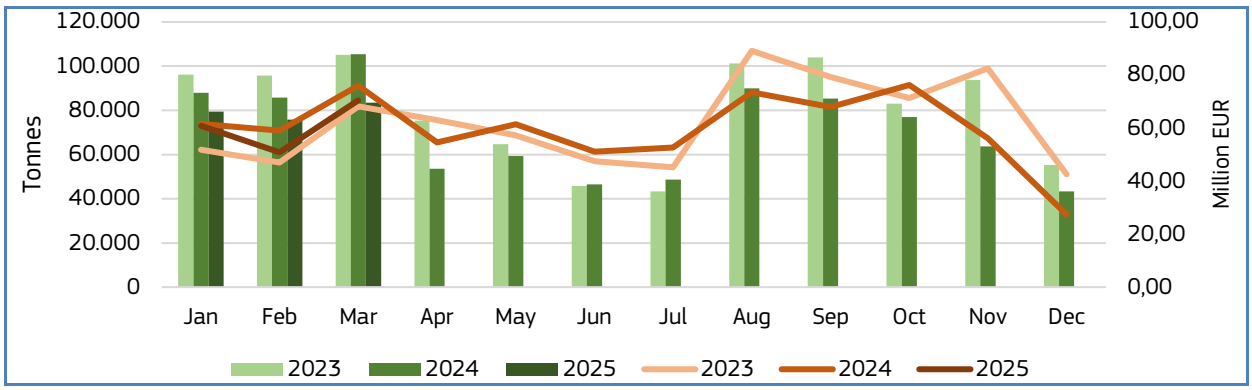


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
Denmark	Sprat	0,47 EUR/kg	0,46 EUR/kg	-1%
Sweden	Sprat	0,42 EUR/kg	0,44 EUR/kg	+7%
Poland	Sprat	0,47 EUR/kg	0,45 EUR/kg	-4%

Tuna and tuna-like species

In 2025, first-sales value of "Tuna and tuna-like species" came to EUR 50,1 million, a decrease of 9% compared to 2024. First-sales volume totalled 12.593 tonnes, a decrease of 19% compared to 2024. The three main commercial species driving the decrease in first-sales value and volume were yellowfin tuna (-19% and -19%), bigeye tuna (-47% and -50%) and skipjack tuna (-54% and -51%).

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

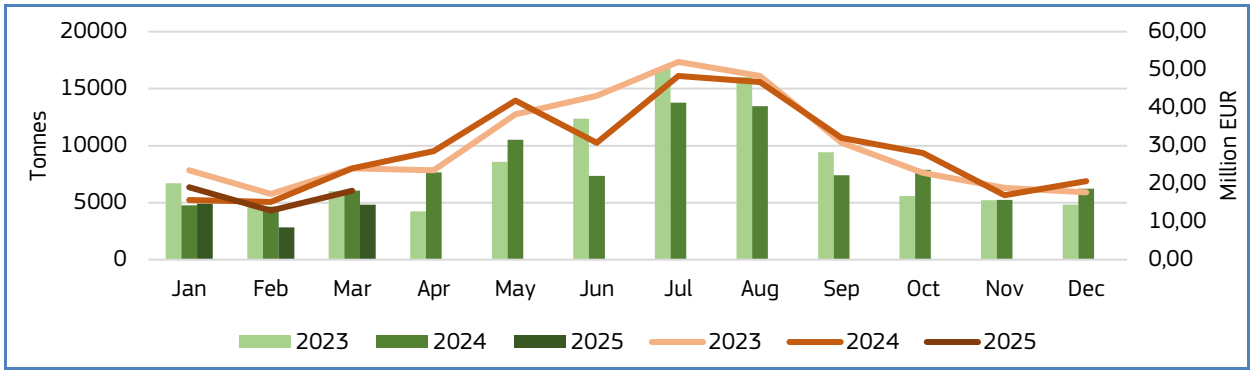


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-MAR 2024 AND JAN-MAR 2025)**

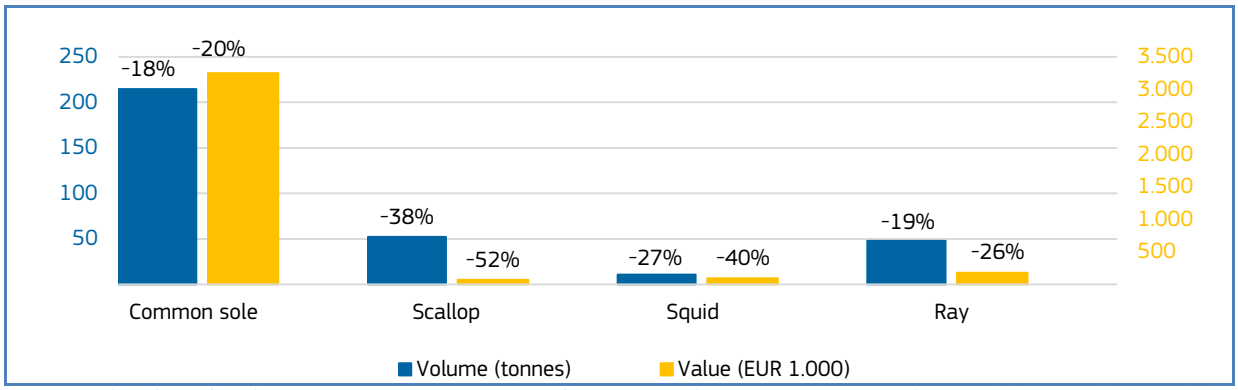
Country	Main Commercial Species	First-sales average price Jan-Mar 2024	First-sales average Price Jan-Mar 2025	Trend (Jan-Mar 2025 vs Jan-Mar 2024 %)
Spain	Yellowfin tuna	2,68 EUR/kg	2,63 EUR/kg	-2%
Spain	Skipjack tuna	1,71 EUR/kg	1,63 EUR/kg	-5%
Portugal	Bigeye tuna	4,30 EUR/kg	10,01 EUR/kg	+133%

3.3. First sales in reporting countries[21]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 20,3 million, +3%	3.667 tonnes, -7%	**Value**: cuttlefish, octopus, squid. **Volume**: cuttlefish.
Mar 2025 vs Mar 2024	EUR 6,6 million, -10%	1.000 tonnes, -18%	Common sole, scallop, squid, ray.

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



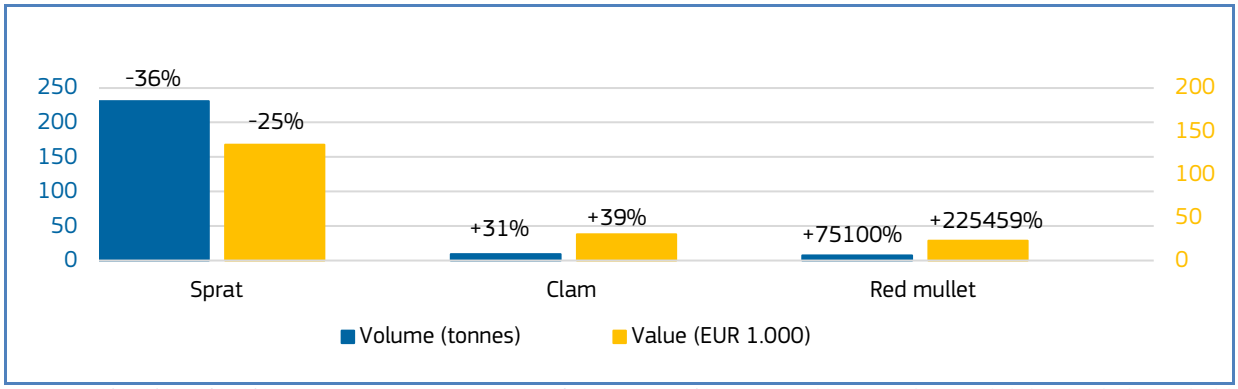
*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Mar 2025 vs Jan-Mar 2024	EUR 0,3 million, -26%	284 tonnes, -53%	Sprat, other molluscs and aquatic invertebrates*.	Increased sales of **clam** and **red mullet** reduced the overall negative trend in March 2025.
Mar 2025 vs Mar 2024	EUR 0,2 million, -7%	245 tonnes, -33%	Sprat	

[21] First-sales data updated on 20. 05. 2025. This section covers all countries for which data is available on the date of extraction and analysis.

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

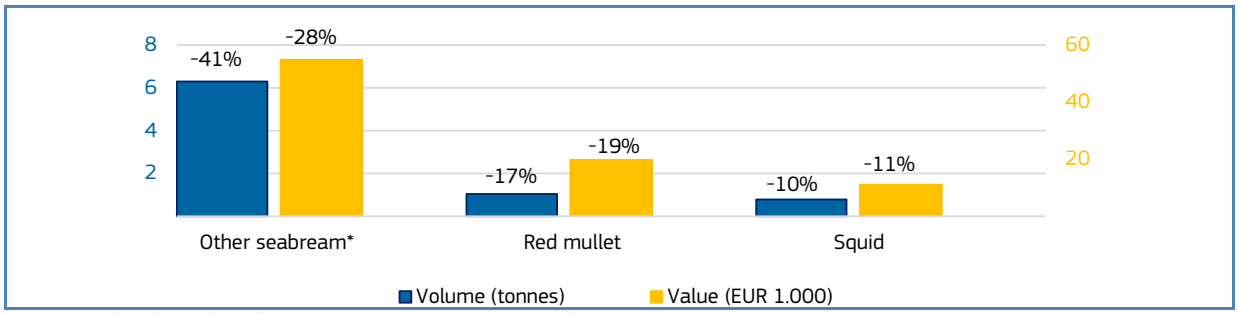


*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

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

Cyprus	**First-sales value / trend %**	**First-sales volume / trend %**	**Main contributing species**
Jan-Mar 2025 vs Jan-Mar 2024	EUR 0,5 million, 0%	77 tonnes, +6%	**Value**: other seabream*, other marine fish*, picarel **Volume**: other marine fish*, cuttlefish.
Mar 2025 vs Mar 2024	EUR 0,2 million, -3%	31 tonnes, -4%	Other seabream*, red mullet, squid.

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



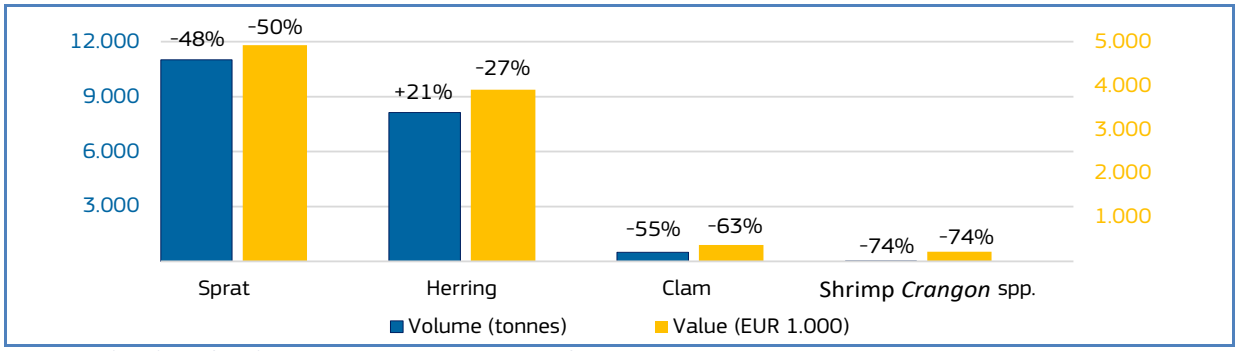
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	**First-sales value / trend %**	**First-sales volume / trend %**	**Main contributing species**
Jan-Mar 2025 vs Jan-Mar 2024	EUR 131,5 million, -6%	196.108 tonnes, -18%	Sprat, blue whiting, herring, clam.
Mar 2025 vs Mar 2024	EUR 47,1 million, -5%	92.003 tonnes, -5%	Sprat, herring, clam, shrimp *Crangon* spp.

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

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



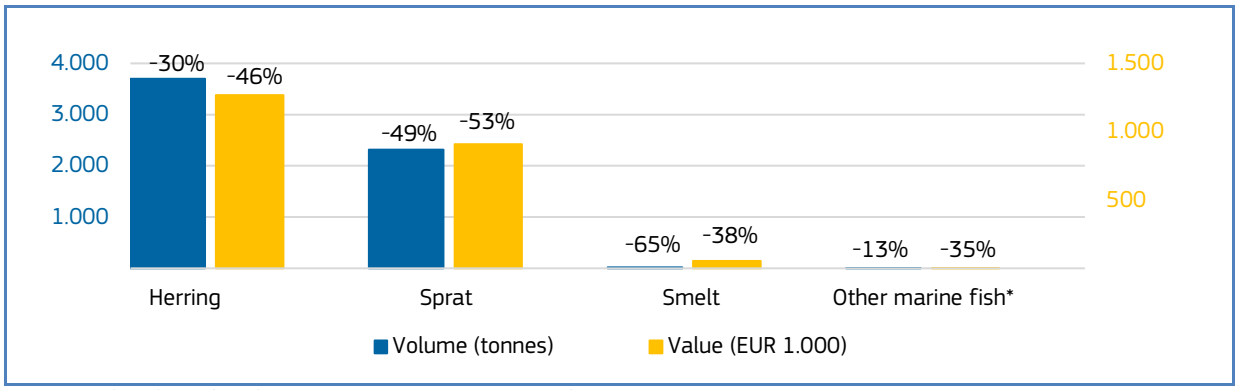
*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 8,7 million, -24%	21.445 tonnes, -12%	**Value**: sprat, pike-perch other marine fish*. **Volume**: herring, other freshwater fish*.
Mar 2025 vs Mar 2024	EUR 2,7 million, -42%	6.356 tonnes, - -37%	Herring, sprat, smelt, other marine fish*.

**EUMOFA aggregation for species*

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

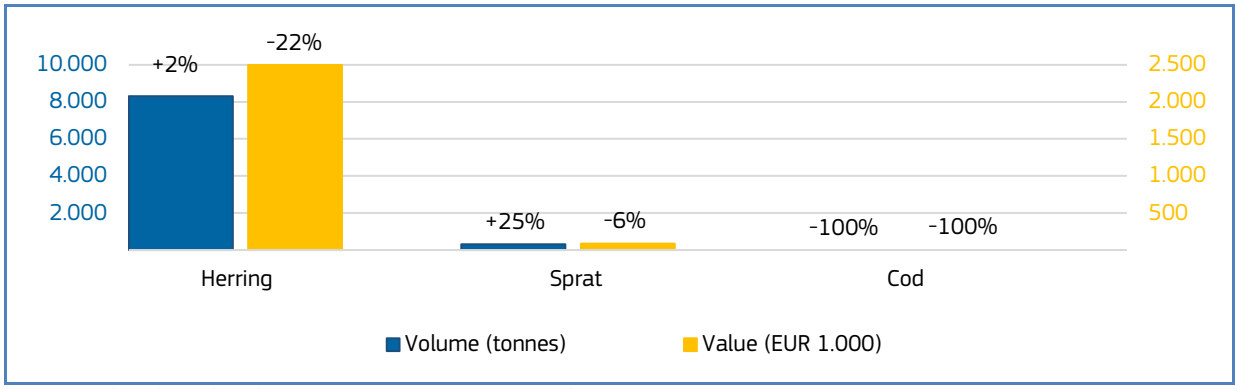


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 8,1 million, +19%	26.696 tonnes, +56%	Herring.
Mar 2025 vs Mar 2024	EUR 2,6 million, -22%	8.603 tonnes, +3%	Herring, sprat, cod.

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

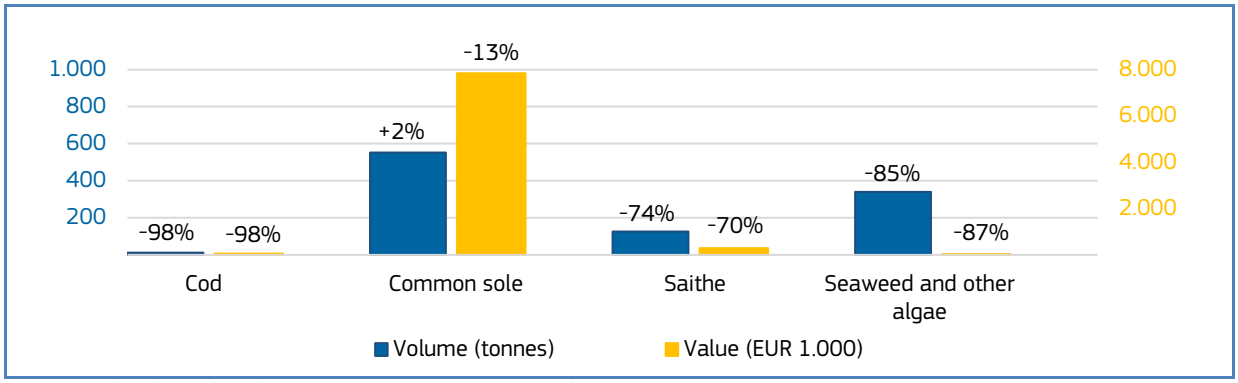


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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-Mar 2025 vs Jan-Mar 2024	EUR 184,8 million, +12%	51.043 tonnes, +1%	Eel, scallop, squid, hake.	In March 2025, there was a significant decrease in first-sales value and volume of **cod** compared to March 2024. The most significant port for cod fisheries in France is St. Malo (95% production of total French cod production in March 2024). While cod landings have generally decreased across nearly all ports, the most substantial drop between March 2024 and March 2025 was in St. Malo, where no landings were recorded in 2025. Looking at historical March data since 2019, previous declines were already evident in 2021, 2022 and 2023. St. Malo also reported zero cod landings in March during the last two years.
Mar 2025 vs Mar 2024	EUR 60,7 million, -6%	17.869 tonnes, -11%	Cod, common sole, saithe, seaweed and other algae*.	

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

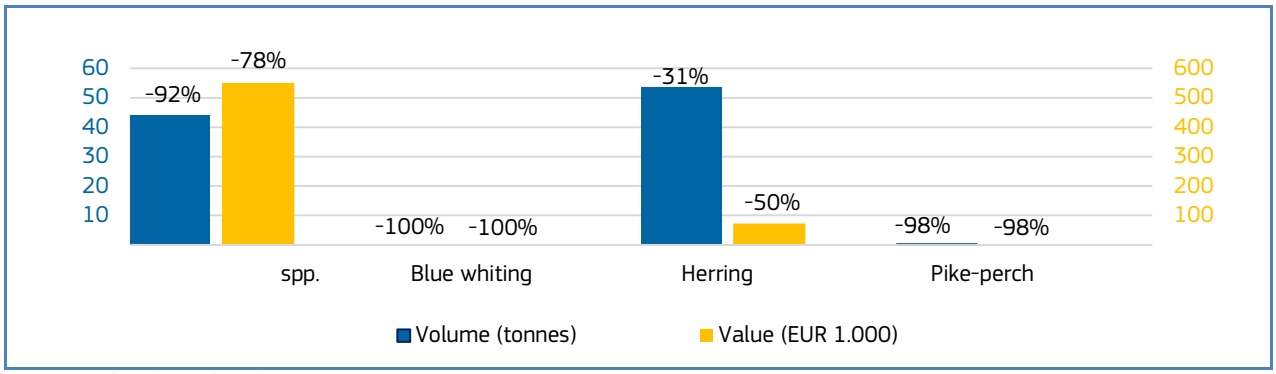


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Mar 2025 vs Jan-Mar 2024	EUR 3,0 million, -81%	2.116 tonnes, -84%	Mackerel, blue whiting, Greenland halibut, shrimp *Crangon* spp.	In March 2025 the supply of several species, including primarily **herring** and **pike-perch**, decreased compared to March 2024. Unfavourable weather conditions in March 2025 prevented an increase in fisheries activities to raise supply. The main reason behind this is the fall in blue whiting catches. Foreign fishing vessels did not sell blue whiting in Germany in March 2025, resulting in no first sales.
Mar 2025 vs Mar 2024	EUR 0,7 million, -78%	170 tonnes, -92%	Shrimp *Crangon* spp., blue whiting, herring, pike-perch.	

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

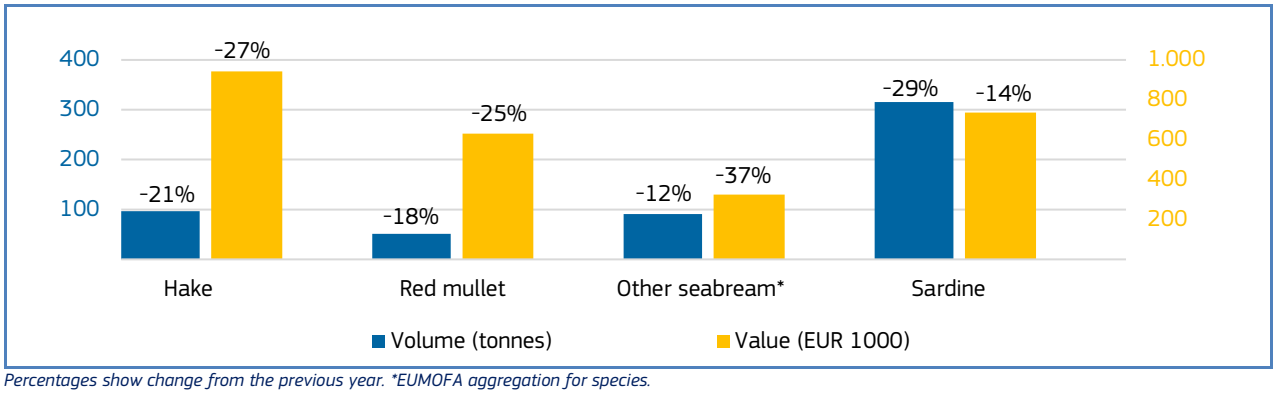


Percentages show change from the previous year.

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

Greece	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 18,5 million, -12%	4.711 tonnes, -15%	Hake, other seabream*, red mullet, anchovy.
Mar 2025 vs Mar 2024	EUR 6,3 million, -18%	1.779 tonnes, -23%	Hake, red mullet, other seabream*, sardine.

Figure 24. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE, MARCH 2025**

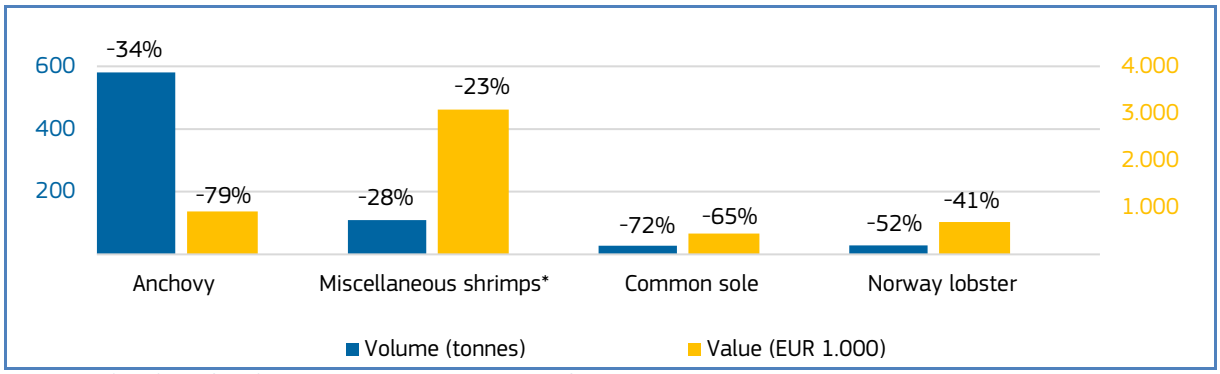


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 58,7 million, -9%	11.430 tonnes, -14%	Anchovy, common sole, Norway lobster, sardine.
Mar 2025 vs Mar 2024	EUR 17,6 million, -24%	3.371 tonnes, -21%	Anchovy, miscellaneous shrimps*, common sole, Norway lobster.

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

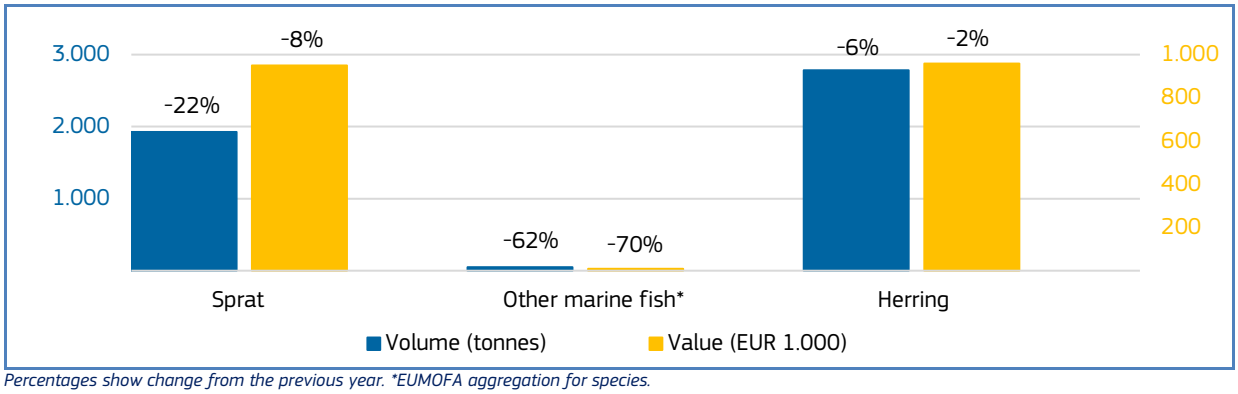


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 5,8 million, +11%	14.339 tonnes, -4%	**Value**: herring. **Volume**: sprat, other marine fish*, smelt, European founder.
Mar 2025 vs Mar 2024	EUR 1,9 million, -7%	4.784 tonnes, -15%	Sprat, other marine fish*, herring.

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

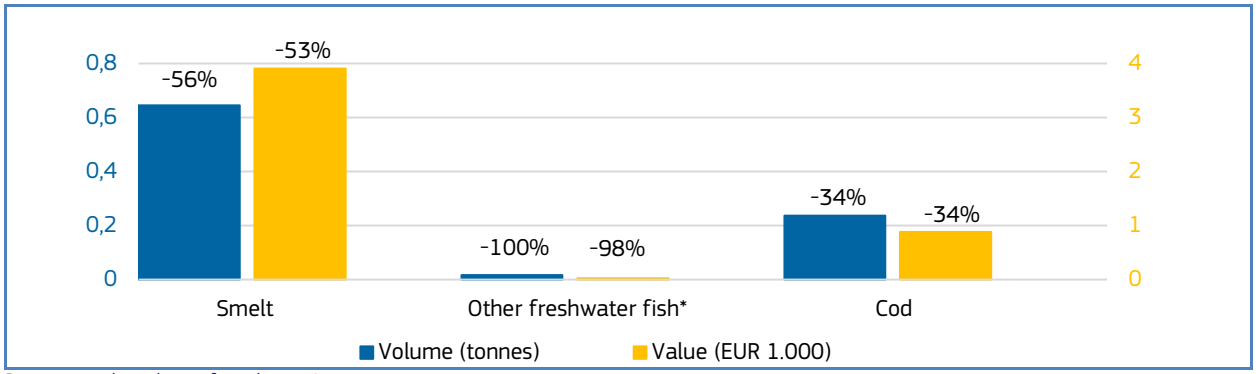


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 0,1 million, -42%	34 tonnes, -30%	Smelt, other freshwater fish*.
Mar 2025 vs Mar 2024	EUR 0,02 million, -19%	18 tonnes, -15%	Smelt, other freshwater fish*, cod.

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

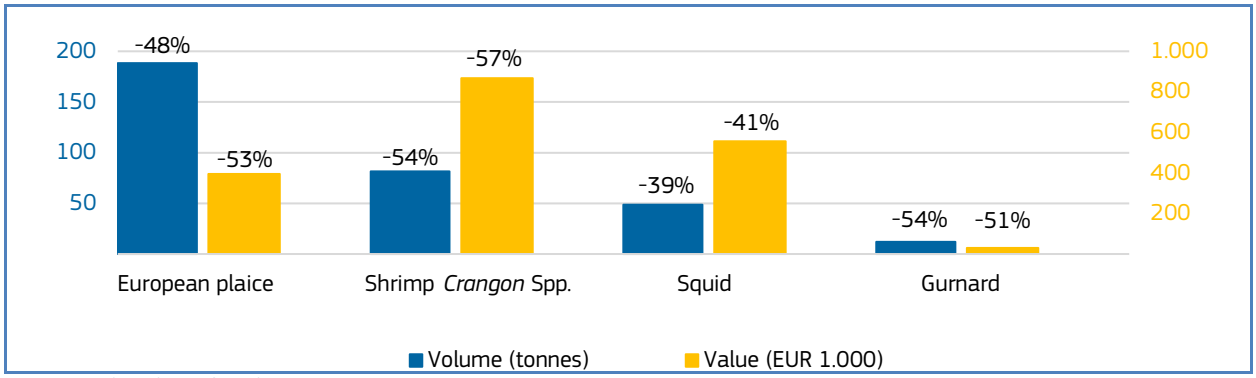


Percentages show change from the previous year.

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-Mar 2025 vs Jan-Mar 2024	EUR 27,9 million, +1%	4.268 tonnes, +9%	Common sole, brill, shrimp *Crangon* spp., turbot, European flounder.
Mar 2025 vs Mar 2024	EUR 8,3 million, -12%	1.164 tonnes, -12%	European plaice, shrimp *Crangon* spp., squid, gurnard.

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

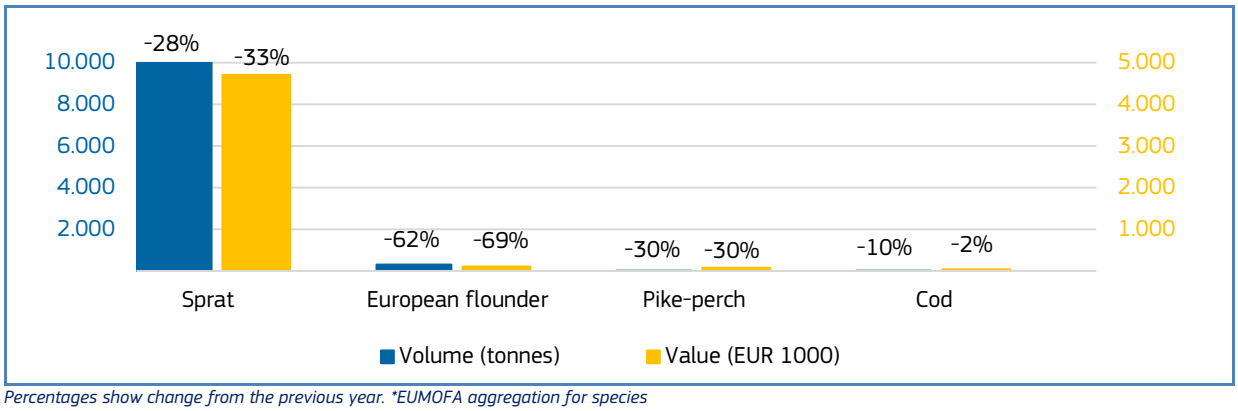


Percentages show change from the previous year.

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

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 13,0 million, -22%	27.255 tonnes, -20%	Sprat, European flounder, pike-perch, cod.
Mar 2025 vs Mar 2024	EUR 6,2 million, -27%	13.287 tonnes, -24%	Sprat, European flounder, pike-perch, cod.

Figure 29. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, MARCH 2025**

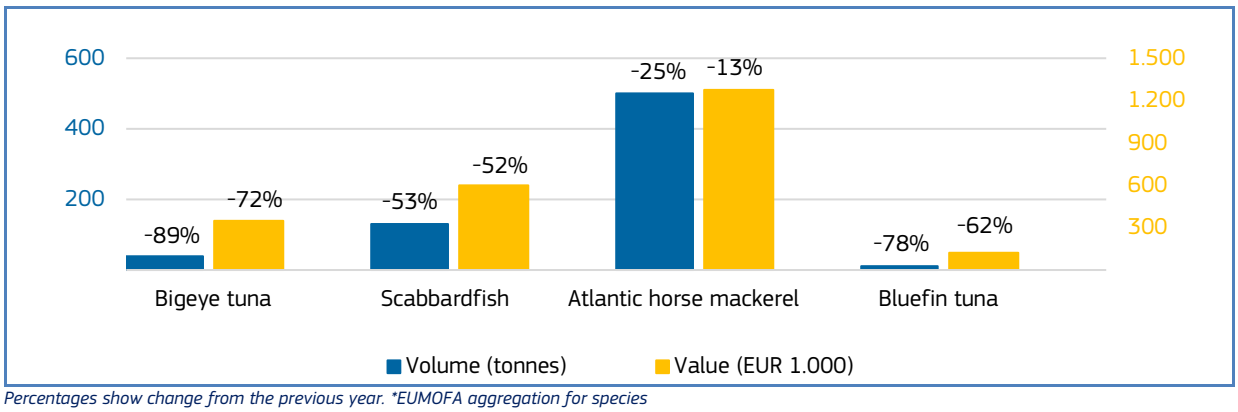


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 57,0 million, +6%	12.103 tonnes, +1%	Anchovy, octopus, blue whiting.
Mar 2025 vs Mar 2024	EUR 17,0 million, -6%	3.107 tonnes, -18%	Bigeye tuna, scabbardfish, Atlantic horse mackerel, bluefin tuna.

Figure 30. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, MARCH 2025**

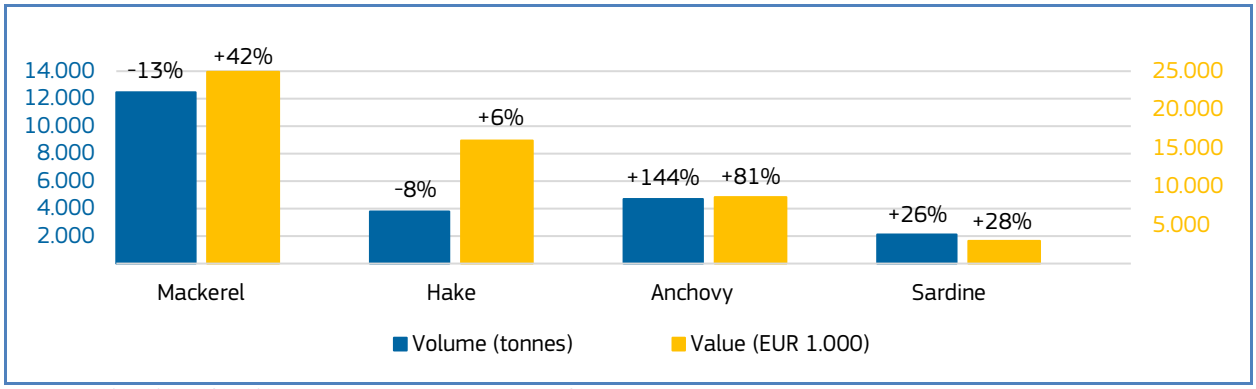


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 301,2 million, +3%	77.354 tonnes, -4%	**Value**: mackerel, deep-water rose shrimps*, Greenland halibut, cod. **Volume**: blue whiting, mackerel, skipjack tuna.
Mar 2025 vs Mar 2024	EUR 122,8 million +6%	38.284 tonnes, 0%	Mackerel, hake, anchovy, sardine.

Figure 31. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, MARCH 2025**

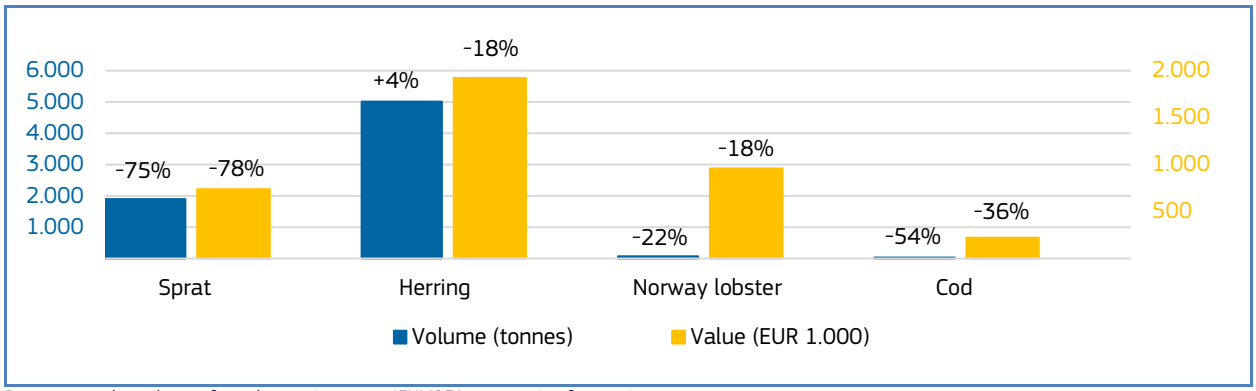


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 18,9 million, -35%	24.221 tonnes, -45%	Sprat, herring, coldwater shrimps*.
Mar 2025 vs Mar 2024	EUR 5,5 million, -38%	7.375 tonnes, -44%	Sprat, herring, Norway lobster, cod.

Figure 32. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, MARCH 2025**

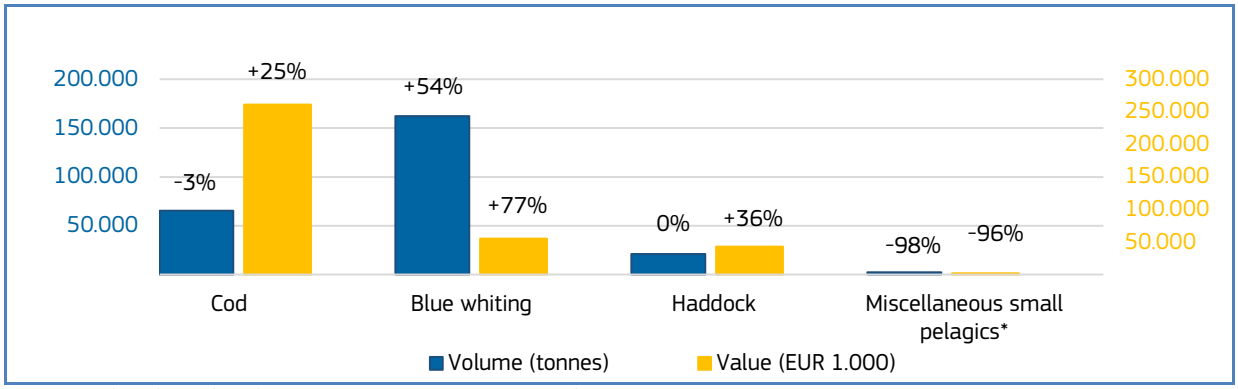


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 1,0 billion, +6%	873.032 tonnes, -15%	**Value**: mackerel, cod, herring. **Volume**: miscellaneous small pelagics*, cod, saithe.
Mar 2025 vs Mar 2024	EUR 446,3 million +8%	358.861 tonnes, -13%	**Value**: cod, blue whiting, haddock. **Volume**: miscellaneous small pelagics*.

Figure 33. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, MARCH 2025**

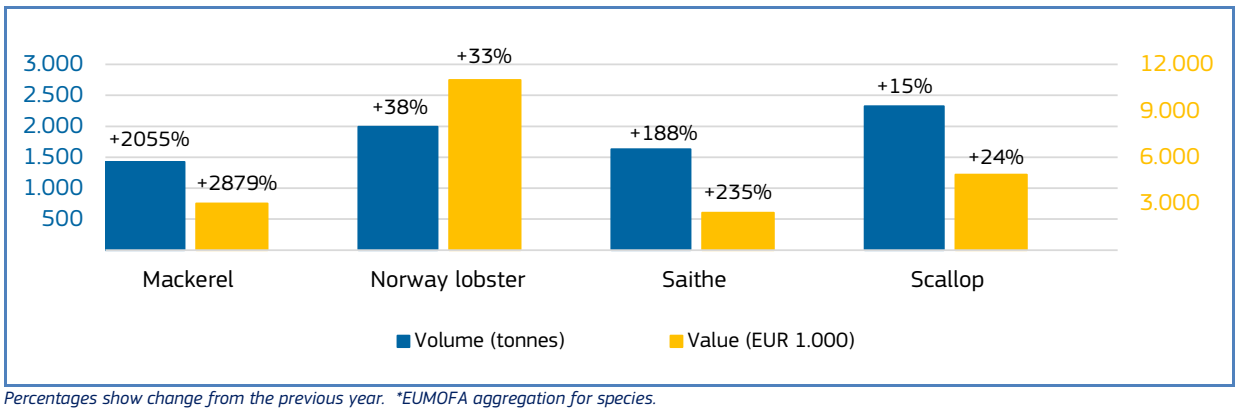


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 34. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM**

The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Mar 2025 vs Jan-Mar 2024	EUR 217,2 million, +13%	111.970 tonnes, +3%	Norway lobster, mackerel, saithe, cod.
Mar 2025 vs Mar 2024	EUR 51,6 million +37%	35.585 tonnes, +17%	Mackerel, Norway lobster, saithe, scallop.

Figure 34. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, MARCH 2025**



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

4. EXTRA-EU IMPORTS

In January 2025, extra-EU imports in the EU-27 increased in value by 16% compared to the same period in 2024, while volume increased by 15%. Those MCSs contributing most to the increase in import values were skipjack tuna (+31%) and warmwater shrimp (+21%), while skipjack tuna (+29%) and Alaska pollock (+126%) contributed most to the increase in volume.

Increases in value and volume: Belgium, Bulgaria, Croatia, Cyprus, Czechia, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Malta, 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 Malta, driven by an increase in skipjack tuna (+866% and 1.242%).

Decreases in value and volume: Austria, Lithuania, Slovakia and Sweden recorded decreases in extra-EU imports in value and volume. Slovenia experienced the most significant declines in absolute terms in value and volume, due primarily to a decrease in hake (-75% and 71%).

Table 35. **JANUARY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)**[22]

	January 2024			January 2025			Change from January 2024		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	1,26	7.191	5,73	0,88	5.755	6,52	-30%	-20%	14%
Belgium	10,02	62.520	6,24	13,37	90.069	6,74	33%	44%	8%
Bulgaria	0,92	2.340	2,54	1,29	2.887	2,25	39%	23%	-11%
Croatia	0,77	3.025	3,93	2,07	4.793	2,32	168%	58%	-41%
Cyprus	0,38	2.594	6,75	0,71	4.198	5,95	83%	62%	-12%
Czechia	1,43	5.856	4,10	2,24	10.545	4,71	57%	80%	15%
Denmark	61,74	278.343	4,51	67,89	262.782	3,87	10%	-6%	-14%
Estonia	0,66	3.152	4,79	1,16	6.088	5,23	77%	93%	9%
Finland	2,76	21.620	7,84	3,13	25.059	8,02	13%	16%	2%
France	44,11	216.456	4,91	45,17	229.889	5,09	2%	6%	4%
Germany	24,61	120.413	4,89	37,54	167.869	4,47	53%	39%	-9%
Greece	8,34	33.026	3,96	12,94	51.862	4,01	55%	57%	1%
Hungary	0,13	800	6,39	0,27	1.252	4,62	116%	56%	-28%
Ireland	6,66	15.704	2,36	12,63	21.013	1,66	90%	34%	-29%
Italy	35,75	205.217	5,74	45,11	277.479	6,15	26%	35%	7%
Latvia	2,21	5.083	2,29	3,53	8.608	2,44	59%	69%	6%
Lithuania	4,65	16.544	3,56	4,22	12.222	2,89	-9%	-26%	-19%
Luxembourg	0,00	33	87,29	0,00	45	158,00	-25%	37%	81%
Malta	0,07	366	5,49	0,35	1.176	3,40	420%	222%	-38%
Netherlands	52,64	272.586	5,18	53,77	296.940	5,52	2%	9%	7%
Poland	22,21	79.424	3,58	23,66	95.353	4,03	7%	20%	13%
Portugal	12,65	55.729	4,41	17,25	82.678	4,79	36%	48%	9%

[22] During January 2025, 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	1,81	6.825	3,77	2,51	9.911	3,94	39%	45%	5%
Slovakia	1,31	4.173	3,17	1,47	4.825	3,29	12%	16%	4%
Slovenia	0,79	2.974	3,76	0,42	1.949	4,62	-47%	-34%	23%
Spain	120,15	577.780	4,81	136,66	717.948	5,25	14%	24%	9%
Sweden	54,28	426.463	7,86	52,09	419.044	8,04	-4%	-2%	2%
EU-27	**472,31**	**2.426.237**	**5,14**	**542,33**	**2.812.238**	**5,19**	**15%**	**16%**	**1%**

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: The commodity groups bivalves, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, other marine fish and tuna and tuna-like species experienced an increase in both value and volume. Highest increases were observed in cephalopods and freshwater fish. Octopus (+51% and +27%) and squid (+34% and +27%) drove the increase in the cephalopods, and other freshwater fish (+17% and +24%) and freshwater catfish (+48% and 43%) in the freshwater fish.

Decreases in volume: Only the commodity group small pelagics experienced a decrease in extra-EU import volume. Small pelagics experienced the largest decline in volume, due primarily to reduced imports of Atlantic horse mackerel (-88%) and herring (-5%).

Table 36. **JANUARY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER CG (volume in tonnes and value in million EUR)**

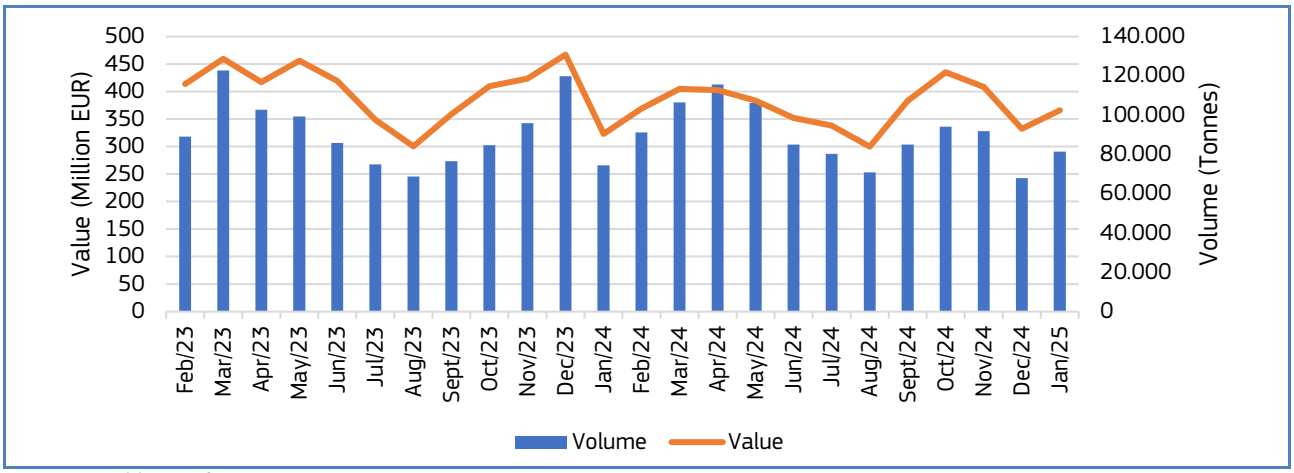
	January 2024			January 2025			Change from January 2024			
Commodity group	**Value**	**Volume**	**Price**	**Valu**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	37,6	7.971	4,71	51,7	11.153	4,63	38%	40%	-2%	Scallop, other mussel.
Cephalopods	182,1	31.729	5,74	267,8	40.379	6,63	47%	27%	16%	Octopus, squid.
Crustaceans	351,0	52.824	6,65	404,8	56.077	7,22	15%	6%	9%	Warmwater shrimp, miscellaneous shrimp.
Flatfish	29,2	5.501	5,31	32,1	6.308	5,08	10%	15%	-4%	Greenland halibut, other flatfish.
Freshwater fish	40,0	9.798	4,08	56,7	13.904	4,08	42%	42%	0%	Other freshwater fish, freshwater catfish.
Groundfish	323,3	74.368	4,35	366,2	81.474	4,50	13%	10%	3%	Cod, Alaska pollock.
Other marine fish	128,8	22.675	5,68	147,2	25.044	5,88	14%	10%	3%	Other marine fish, gilthead seabream.
Salmonids	677,5	73.198	9,26	679,6	74.761	9,09	0%	2%	-2%	Salmon, trout.
Small pelagics	107,5	49.491	2,17	116,9	47.614	2,45	9%	-4%	13%	Mackerel, anchovy.
Tuna and tuna-like species	428,1	91.989	4,65	552,3	113.590	4,86	29%	23%	4%	Skipjack tuna, yellowfin tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of groundfish in EU Member States

In January 2025, extra-EU imports of groundfish accounted for a total value of EUR 366,2 million and total volume of 81.474 tonnes. Compared to the same period in 2024 the value of groundfish increased by 13% in value and 10% in volume.

Figure 35. **EXTRA-EU IMPORT VALUE AND VOLUME OF GROUNDFISH, FEB 2023 – JAN 2025 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

Between March-April and October-December the value of extra-EU imports of groundfish recorded peaks in both value and volume.

In January 2025, Germany, the Netherlands and Spain were the main importers of groundfish in the EU and together imported from extra-EU countries about 52% of the total volume of groundfish, with Germany (21%), the Netherlands (17%) and Spain (14%) respectively.

Table 37. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR GROUNDFISH**

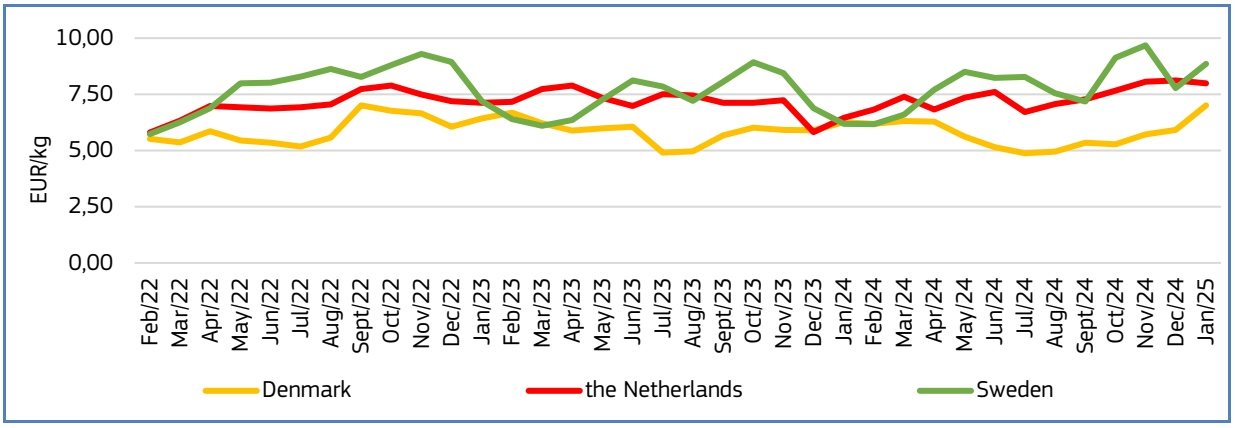
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan 2024	Jan 2025	Trend (%)	Jan 2024	Jan 2025	Trend (%)	
Germany	28,9	55,7	+93%	5.448	16.987	+212%	Alaska pollock
The Netherlands	89,0	81,7	-8%	16.487	13.673	-17%	Cod
Spain	41,9	50,3	+20%	9.536	11.621	+22%	Hake

4.2. Extra EU imports of cod in EU Member States

Cod, hake and Alaska pollock are the main commercial species of the commodity group of "groundfish" in term of value, where cod represents 43% of the total value, followed by hake which represents 19%.

In 2024, the Netherlands, Denmark and Sweden imported the highest volume of cod from extra-EU countries.

Figure 36. **EXTRA-EU IMPORT PRICE OF COD IN THE NETHERLANDS, DENMARK AND SWEDEN (FEB 2022 – JAN 2025)**



Between February 2022 and January 2025, the price of cod fluctuated and increased in the three markets analysed: Denmark (+8%), the Netherlands (+11%) and Sweden (+16%). In January 2025, the volume of cod imported from Denmark was 3.429 tonnes, 37% less compared with the same month in 2024, while price increased by 12%. In Denmark the main imports in terms of volume came from Norway (48%), followed by Greenland and Iceland.

In the same period, 7.149 tonnes of cod were imported to the Netherlands, 29% less compared to 2024, with an average price increase of 24%. In terms of volume 55% of the total imported in 2025 was from Iceland, followed by the Russian Federation and the Faroe Islands.

Sweden imported 86% of the 2.402 tonnes from Norway. In January 2025 import volumes decreased by 20% while prices increased by 43%.

In Denmark, peaks in imports seem to occur between March and April. In the Netherlands the highest peak in imports was recorded between April-June and October-December. In Sweden the highest peak in imports was recorded in March.

Figure 37. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF COD IN DENMARK, FEB 2022 – JAN 2025 (volume in tonnes, price in EUR/kg)**

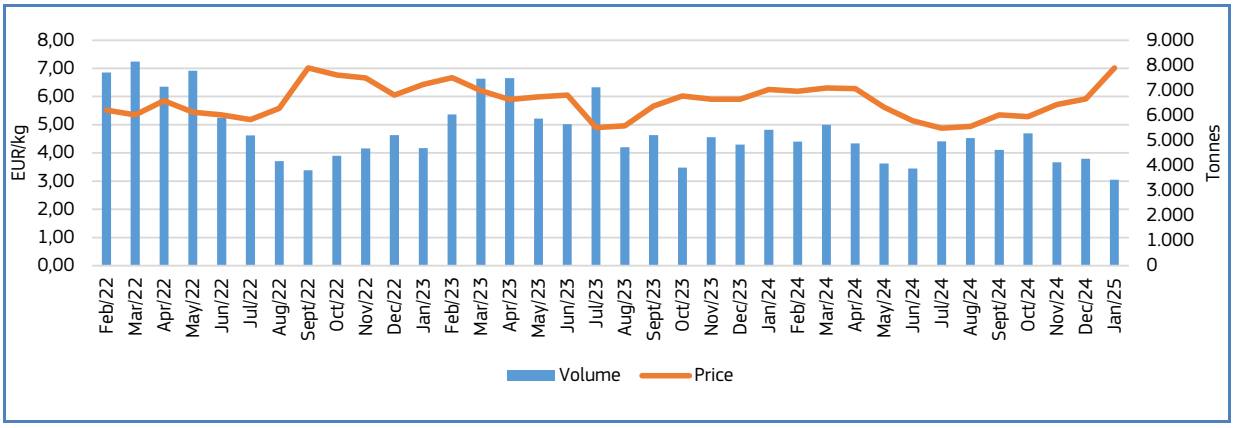


Figure 38. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF COD IN THE NETHERLANDS, FEB 2022 – JAN 2025 (volume in tonnes and price in EUR/kg)**

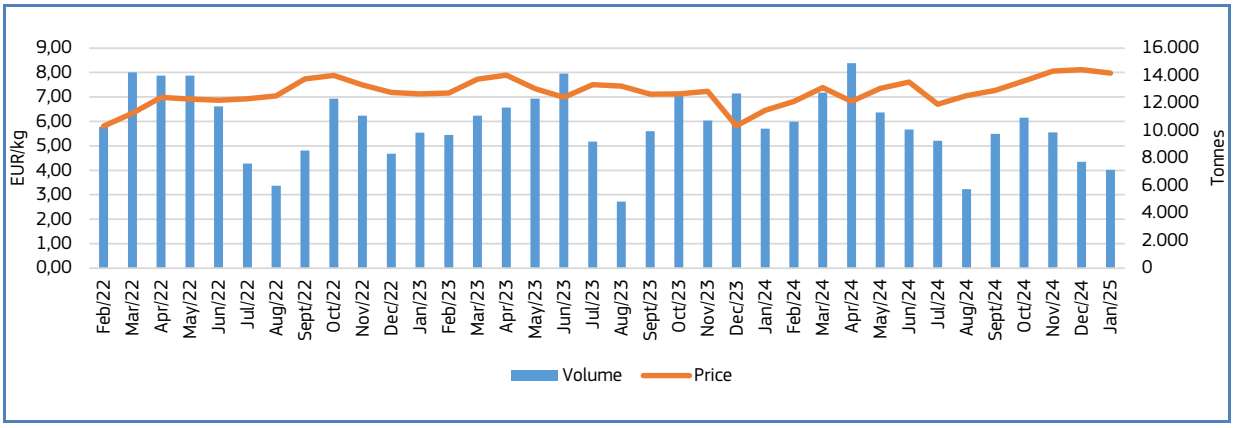
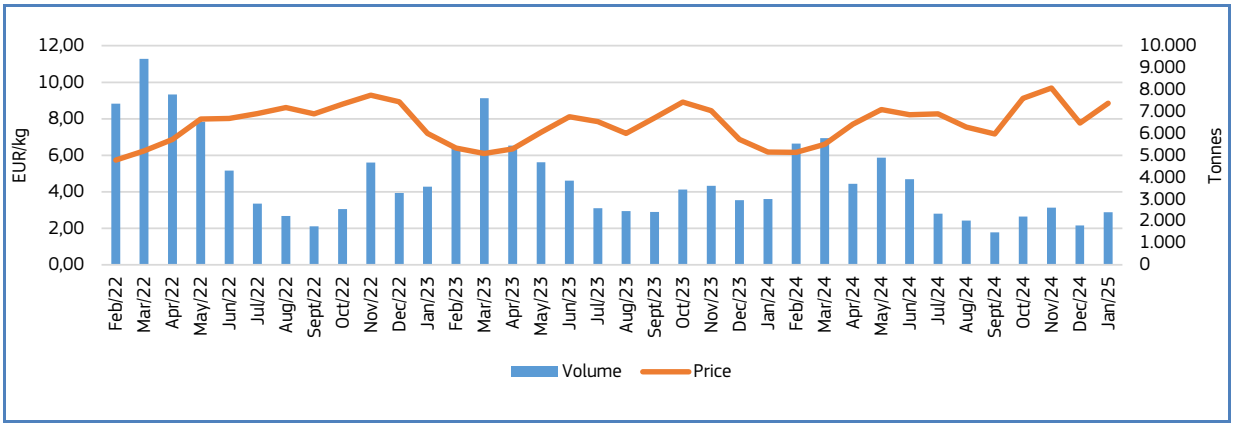


Figure 39. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF COD IN SWEDEN, FEB 2022 – JAN 2025 (volume in tonnes and price in EUR/kg)**



4.3. Extra EU imports of cod by origin

In the period between January 2024 and 2025, EU imports of cod[23] experienced a decreasing trend in volume (-20%) and value (-4%). In January 2025 the EU imported 20.037 tonnes of cod for a value of EUR 157 million. The main extra-EU countries supplying cod to the EU in 2025 were Iceland (28%), Norway (26%), the Russian Federation (17%) and China (15%). A general decrease in imports of cod from extra-EU countries (including from the Faroe Islands and Greenland on top of the main countries mentioned in

[23] 03025110 - Fresh or chilled cod "*Gadus morhua*"
03025190 - Fresh or chilled cod "*Gadus ogac, Gadus macrocephalus*"
03036310 - Frozen cod "*Gadus morhua*"
03036390 - Frozen cod "*Gadus macrocephalus*"
03044410 - Fresh or chilled fillets of cod "*Gadus morhua, Gadus ogac, Gadus macrocephalus" and of Polar cod "Boreogadus saida*"
03047110 - Frozen fillets of cod "*Gadus macrocephalus*"
03047190 - Frozen fillets of cod "*Gadus morhua, Gadus ogac*"
03049521 - Frozen meat, whether or not minced, of cod "*Gadus macrocephalus*" (excl. fillets and surimi)
03049525 - Frozen meat, whether or not minced, of cod "*Gadus morhua*" (excl. fillets and surimi)
03049529 - Frozen meat, whether or not minced, of cod "*Gadus ogac*" and Polar cod "*Boreogadus saida*" (excl. fillets and surimi)
03053211 - Fillets, dried, salted or in brine, but not smoked, of cod "*Gadus macrocephalus*"
03053219 - Fillets, dried, salted or in brine, but not smoked, of cod "*Gadus morhua, Gadus ogac*" and Polar cod "*Boreogadus saida*"
03055110 - Cod "*Gadus morhua, Gadus ogac, Gadus macrocephalus*", dried, unsalted, not smoked stockfish (excl. fillets and offal)
03055190 - Cod "*Gadus morhua, Gadus ogac, Gadus macrocephalus*", dried, salted, not smoked clipfish (excl. fillets and offal)
03055310 - Dried polar cod "*Boreogadus saida*", even salted but not smoked (excl. fillets and offal)
03056200 - Cod "*Gadus morhua, Gadus ogac, Gadus macrocephalus*", salted or in brine only (excl. fillets and offal)
03056910 - Polar cod "*Boreogadus saida*", salted or in brine only (excl. fillets and offal)
16041992 - Cod of the species *Gadus morhua, Gadus ogac, Gadus macrocephalus*, prepared or preserved, whole or in pieces (excl. finely minced and fillets, raw, merely coated with batter or breadcrumbs, whether or not pre-fried in oil, frozen)

the table below) was observed in January 2025 compared to the same period in 2024 with the exception of imports from China (+91%).

Table 38. **EXTRA-EU IMPORTS OF COD BY ORIGIN IN 2025 (value in million EUR and volume in tonnes)**

Country	Jan 2023		Jan 2024		Jan 2025		January 2025/2024	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Iceland	49	5.714	52	6.247	51	5.567	-2%	-11%
Norway	66	9.220	57	8.606	46	5.223	-18%	-39%
Russian Federation	38	5.916	21	4.063	22	3.322	5%	-18%
China	20	3.038	9	1.552	19	2.968	113%	91%
Others	18	2.889	25	4.610	19	2.957	-22%	-36%
Grand Total	**191**	**26.777**	**163**	**25.079**	**157**	**20.037**	**-4%**	**-20%**

5. CONSUMPTION

5. 1. Household consumption in the EU

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

Compared with March 2024, household consumption of fresh fishery and aquaculture products in March 2025 decreased in both volume and value in France, Germany, Hungary, the Netherlands, Portugal and Sweden. In contrast, Ireland and Italy recorded increases in both volume and value.

The most notable decline occurred in Sweden, where consumption dropped by 56% in volume and 50% in value compared to the previous year. Hungary and Germany also had significant declines in volume (28% and 20% respectively) and in value (17% and 21% respectively) followed by the Netherlands (16% decrease in volume and 17% decrease in value).

Table 39. **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	March 2023		March 2024		March 2025		Change from Mar 2024 to Mar 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	883	17,16	1.131	23,80	1.174	22,30	4%	-6%
France	32,58	15.710	214,84	15.787	220,37	14.378	213,10	-9%	-3%
Germany	12,49	5.179	94,37	6.291	116,19	5.051	91,49	-20%	-21%
Hungary	6,73	249	2,27	387	3,41	281	2,82	-28%	-17%
Ireland*	20,00	1.039	16,93	1.117	20,11	1.165	20,52	4%	2%
Italy	30,01	23.471	294,88	21.348	271,93	21.498	299,93	1%	10%
Netherlands*	18,88	2.924	59,93	2.997	64,27	2.523	53,41	-16%	-17%
Poland	13,68	4.426	38,45	4.375	49,07	4.279	49,85	-2%	2%
Portugal	54,54	4.686	35,72	4.464	37,78	4.092	36,46	-8%	-3%
Spain	41,92	43.451	415,57	37.926	383,92	36.759	385,44	-3%	0%
Sweden	22,46	483	8,10	977	14,89	433	7,47	-56%	-50%

** 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 *, where data were provided by the following National sources: Dutch Fish Marketing Board (Netherlands) and Institute of Agricultural and Food Economics - National Research Institute (Poland). The estimate for Denmark was provided by the University of Copenhagen; for Ireland it was the estimate of EUMOFA.*

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

In the household consumption data used by EUMOFA, consumption of groundfish species is monitored in nine Member States: Denmark, France, Germany, Ireland, Italy, the Netherlands, Portugal, Spain and Sweden. At species level, consumption of Alaska pollock is monitored in Germany; cod is monitored in Denmark, France, Germany, Ireland, the Netherlands, Spain and Sweden; hake is

[24] Last update: 15.06.2025.
[25] *The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the available data and may not reflect the full scope of consumption across all Member States.*

monitored in France, Ireland, Italy, Portugal and Spain; saithe is monitored in France, Germany and Ireland; and whiting is monitored in Germany.

Figure 40. **HOUSEHOLD PURCHASES (in value) OF FRESH GROUNDFISH IN DENMARK, FRANCE, GERMANY, IRELAND, ITALY, THE NETHERLANDS, PORTUGAL, SPAIN AND SWEDEN. MARCH 2022 – MARCH 2025**

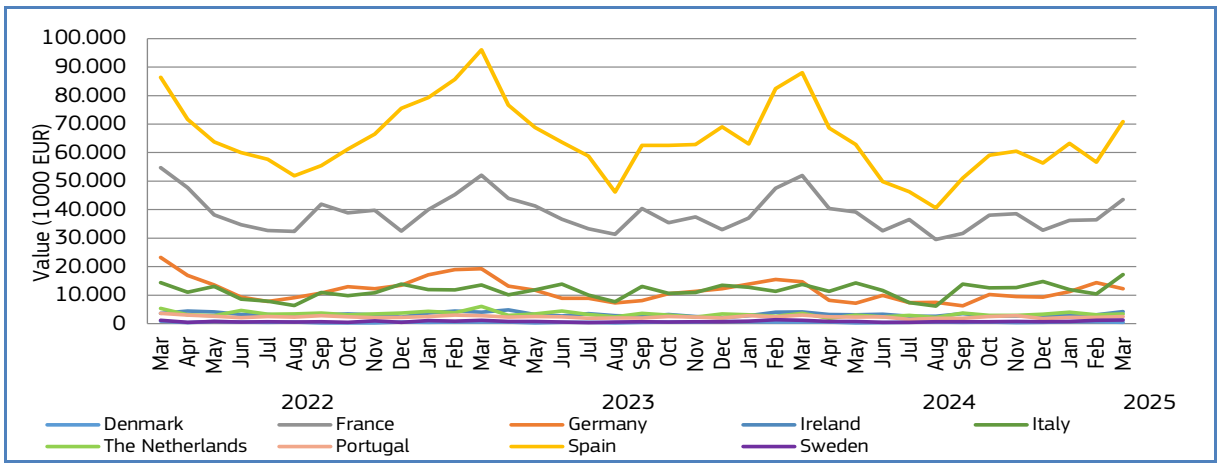
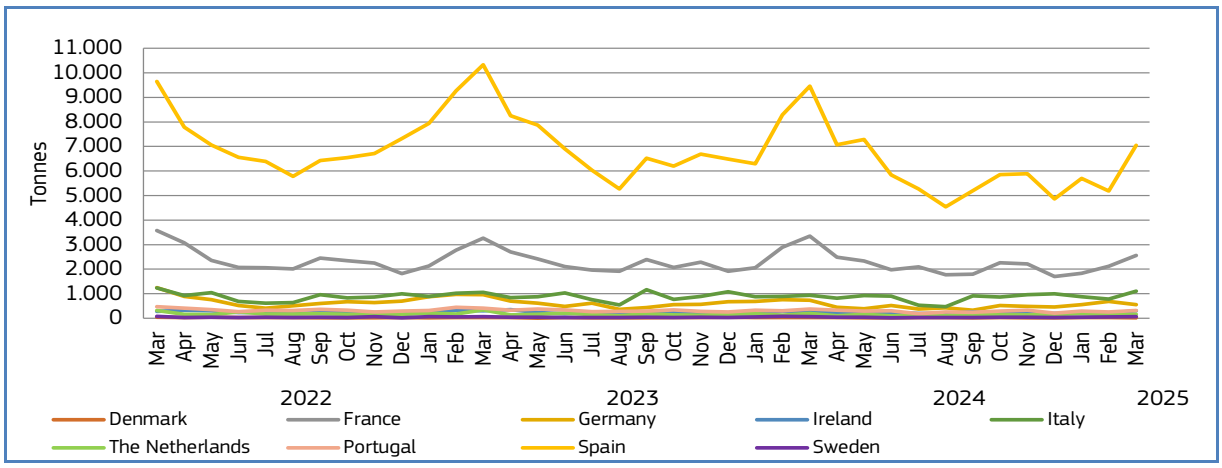


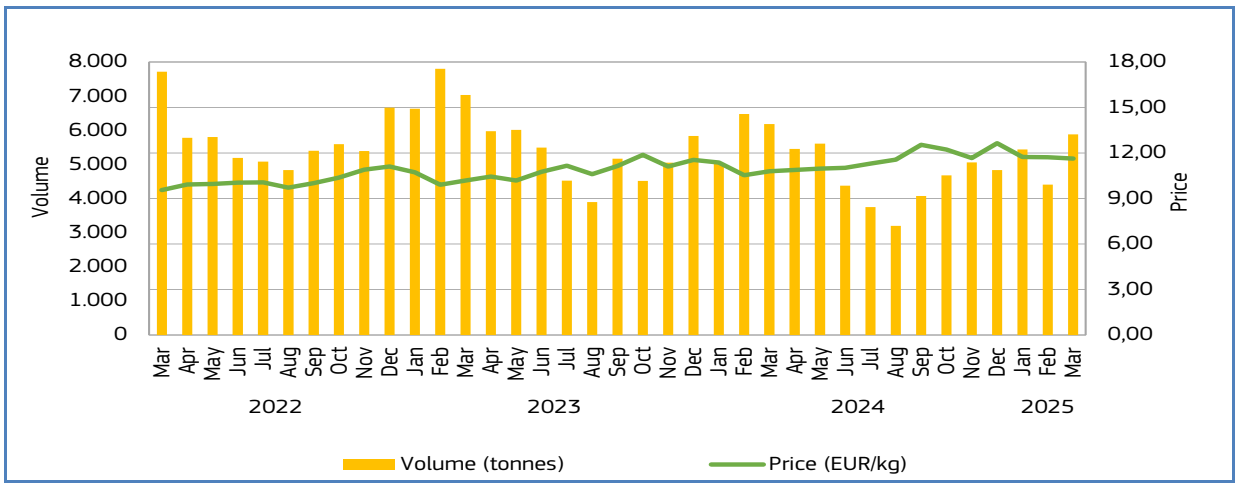
Figure 41. **HOUSEHOLD PURCHASES (in volume) OF FRESH GROUNDFISH IN DENMARK, FRANCE, GERMANY, IRELAND, ITALY, THE NETHERLANDS, PORTUGAL, SPAIN AND SWEDEN. MARCH 2022 – MARCH 2025**



5. 3. Household consumption trends of fresh hake - the main species of groundfish in reporting countries

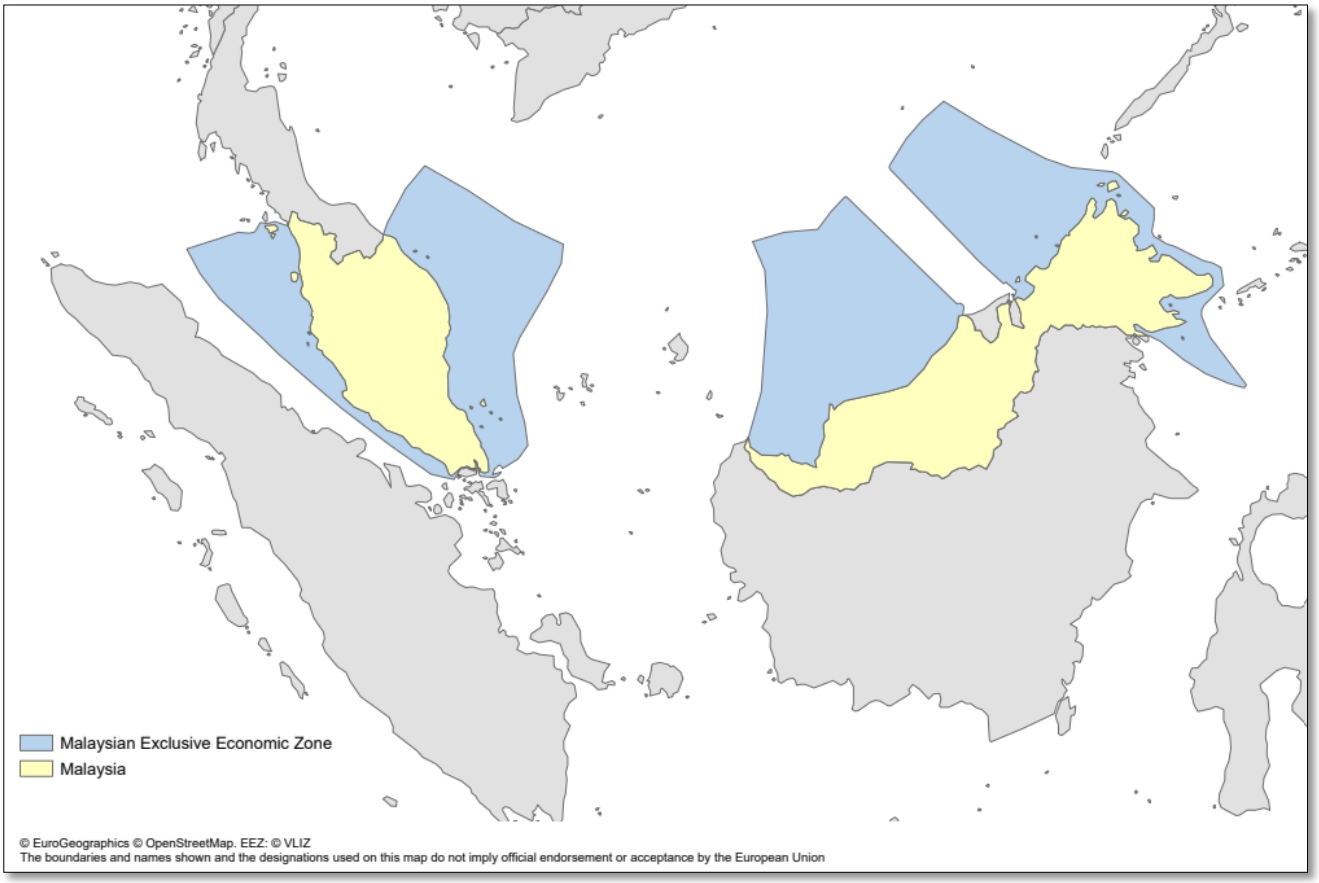
Long-term trend (March 2022 to March 2025): Downward trend in volume and slightly upward trend in price.
Yearly average price: 10,12 EUR/kg (2022), 10,81 EUR/kg (2023), 11,46 EUR/kg (2024), 11,73 (2025, January to March)
Yearly consumption: 70.826 tonnes (2022), 67.935 tonnes (2023), 58.699 tonnes (2024), 15.721 (2025, January to March)
Short-term trend (March 2024 to March 2025): Upward trend in price and slightly upward trend in volume.
Price: 11,59 EUR/kg.
Consumption: 62.928 tonnes.

Figure 42. **RETAIL PRICE AND VOLUME OF FRESH HAKE PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, MARCH 2022 – MARCH 2025**



Consumption of fresh hake shows regular seasonal fluctuations. Between March 2022 and March 2025, consumption volumes showed a downward trend, while prices followed a slightly increasing trend over the same period.

6. CASE STUDY: Fisheries and aquaculture in Malaysia



Malaysia, located in the centre of Southeast Asia, has a total land area of approximately 330.000 km² and is composed of Peninsular Malaysia and East Malaysia (on the island of Borneo). It shares land borders with Thailand to the north, and maritime boundaries with Vietnam, Indonesia, Brunei and the Philippines. Malaysia's exclusive economic zone (EEZ) covers around 334.000 km², and its coastline extends over 4.600 km, bordering the South China Sea, the Strait of Malacca, and the Sulu and Celebes Seas.

The country's rich marine and inland water resources make the fishery and aquaculture sector vital to national food security, employment and export revenue. This sector is broadly categorized into marine fisheries, inland fisheries and aquaculture. Marine fisheries are conducted in both inshore and offshore waters, while aquaculture includes freshwater and brackish water farming systems. Malaysia exports a wide variety of fishery and aquaculture products such as frozen and chilled fish, shrimp, cuttlefish and value-added seafood. Its main export destinations include regional markets and high-demand countries such as Singapore, China, the European Union and Japan.[26]

6. 1. Fisheries and aquaculture in Malaysia

In 2023, Malaysia's total edible fish production was approximately 1.8 million tonnes, with fisheries contributing around 1.3 million tonnes and aquaculture accounting for just over 500.000 tonnes. Fisheries, comprising both marine and inland sources, have shown signs of stagnation in recent years, particularly in coastal areas. This is largely due to overfishing and habitat degradation. In response, the Malaysian government has implemented various management strategies, such as marine protected areas and stricter licensing regulations to support resource recovery and long-term sustainability[27].

[26] https://www.seafdec.org/fisheries-country-profile-malaysia/
[27] https://www.fao.org/fishery/en/countrysector/naso_malaysia (FAO NASO Malaysia)

Aquaculture production has fluctuated over the past decade. In 2015, production reached approximately 507.000 tonnes, before declining to a low of 392.000 tonnes in 2018. Since then, production has gradually increased, returning to 507.000 tonnes in 2023 — matching the 2015 level. However, this figure represents a 12% decrease from 2022, when production peaked at 575.000 tonnes, the highest on record. The sector's growth has been driven by government support, private investment and favourable natural conditions, including Malaysia's tropical climate, extensive coastline and abundant freshwater resources. High-value species such as shrimp, tilapia, catfish and groupers continue to play a key role in supporting aquaculture expansion and meeting export and domestic demand[28].

The fishery and aquaculture sector provides direct employment to over 150.000 people in Malaysia, with many more involved in supporting activities such as processing, logistics and marketing. Small-scale fishers remain a vital part of the sector, especially in rural and coastal communities. However, these communities are increasingly vulnerable to climate change impacts, including rising sea temperatures, shifting monsoon patterns and coastal erosion, all of which threaten marine ecosystems and livelihoods.

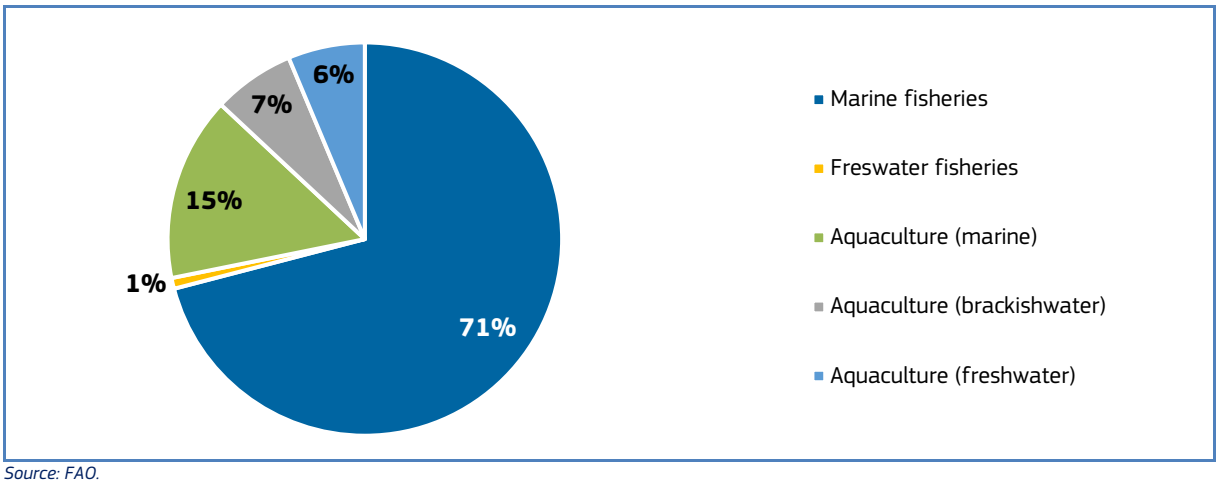
The Department of Fisheries Malaysia, under the Ministry of Agriculture and Food Security, is responsible for sector oversight and regulation. Key frameworks include the Fisheries Act 1985, the National Agrofood Policy and the Strategic Plan for Aquaculture Development. These policies are supported by initiatives such as restocking programmes, marine protected areas, and efforts to reduce illegal, unreported and unregulated (IUU) fishing[29].

Table 40. **TOTAL FISHERY AND AQUACULTURE PRODUCTION OF MALAYSIA BY VOLUME (volume in 1.000 tonnes)**

Environment/fishing area	2015	2016	2017	2018	2019	2020	2021	2022	2023
Marine fisheries	1.490	1.579	1.469	1.457	1.460	1.385	1.333	1.314	1.277
Freswater fisheries	9	11	10	11	10	7	8	12	16
Aquaculture (marine)	313	245	252	230	236	230	218	352	273
Aquaculture (brackish water)	81	59	72	61	71	73	93	106	121
Aquaculture (freshwater)	113	104	103	102	105	98	106	116	114
Total fisheries and aquaculture	**2.007**	**1.997**	**1.906**	**1.860**	**1.882**	**1.793**	**1.758**	**1.900**	**1.801**

Source: FAO.

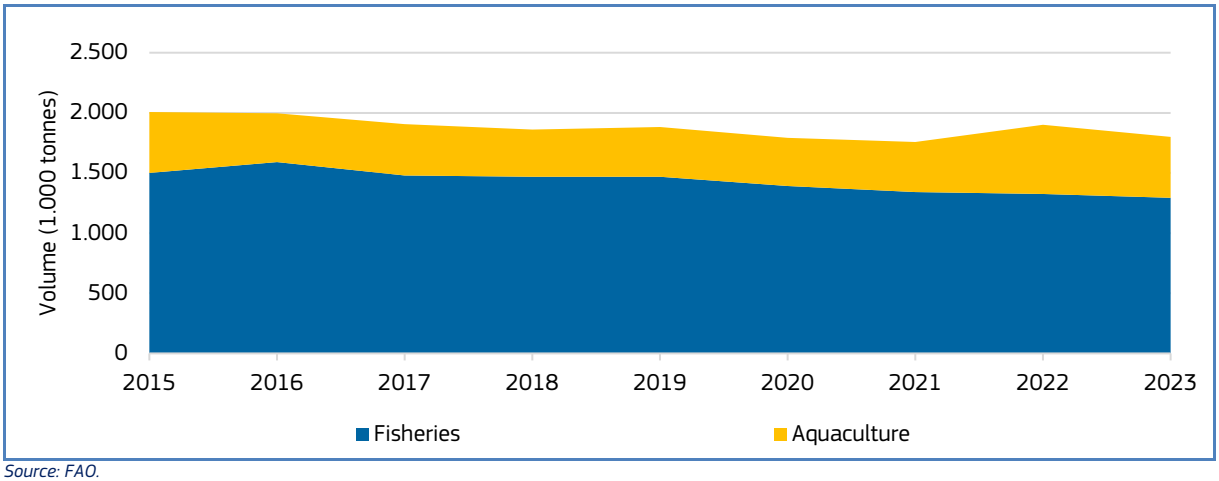
Figure 43. **TOTAL FISHERY AND AQUACULTURE PRODUCTION IN 2023 BY PRODUCTION METHOD**



Source: FAO.

[28] *Ibidem*
[29] https://www.kpkm.gov.my/en/agro-food-policy/national-agrofood-policy?utm_

Figure 44. **TOTAL FISHERY AND AQUACULTURE PRODUCTION (volume in 1.000 tonnes)**



Source: FAO.

Fisheries production

Malaysia's fisheries sector is extremely diverse, encompassing tropical marine ecosystems, mangrove estuaries and inland freshwater. The country boasts rich biodiversity, with over 300 marine fish species and more than 70 freshwater species recorded in commercial and artisanal fisheries. Fisheries production is influenced by both natural conditions and management frameworks, evolving in response to market demands, climate pressures and sustainability efforts[30].

Marine fisheries in Malaysia are categorized into inshore and offshore sectors. Inshore fisheries operate within 5 nautical miles of the coastline, utilizing small boats with engines under 40 horsepower and traditional gears such as gillnets, drift nets and hooks. Offshore fisheries operate beyond this limit, employing larger vessels and commercial gears like trawl nets, purse seines and long lines.

The most common species in marine fisheries include small pelagics such as sardines (Sardinella spp.) and mackerel (*Rastrelliger* spp.), as well as demersal species like threadfin breams (*Nemipterus* spp.) and croakers (*Johnius* spp.). Crustaceans such as white shrimp (*Penaeus merguiensis*) and mud crabs (*Scylla* spp.) are also significant, as the species besides being economically important also plays an important role in the ecosystem as feed for other species in the ocean.

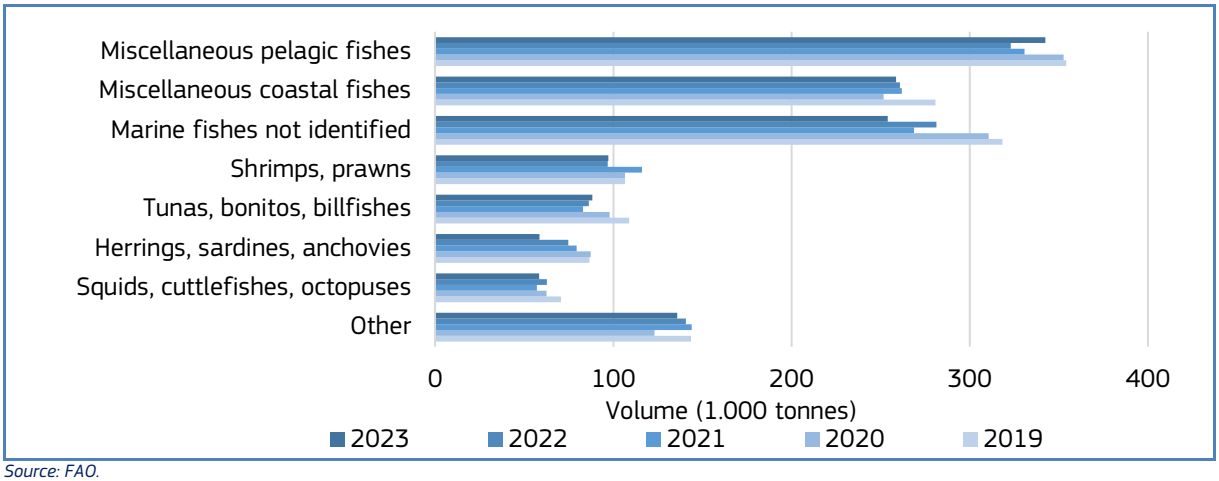
Landings vary by region, with the west coast of Peninsular Malaysia (bordering the Strait of Malacca) historically yielding the highest volumes due to its developed infrastructure and proximity to major fishing ports. However, increased fishing pressure has raised concerns about declining fish stocks and habitat degradation, particularly in overfished zones such as the inshore areas of Perak and Selangor.

Inland fisheries are primarily based in Sabah, Sarawak and parts of Peninsular Malaysia, where species like catfish (*Pangasius* spp.), snakehead (Channa spp.), and local carps are harvested. These freshwater fisheries are vital for local food security, especially in rural communities and among indigenous populations. Riverine fisheries rely heavily on seasonal cycles, with peak catches often linked to monsoon flooding.[31]

In addition, community-based fisheries management systems (CBFM) have been developed to empower coastal communities. These initiatives strive to balance exploitation with conservation, ensuring the long-term productivity of the sector.

[30] https://openknowledge.fao.org/server/api/core/bitstreams/b149e90b-f479-471c-9647-d93165ef4735/content?utm_source
[31] https://openknowledge.fao.org/server/api/core/bitstreams/b149e90b-f479-471c-9647-d93165ef4735/content?utm_source

Figure 45. **MALAYSIA FISHERIES PRODUCTION BY SPECIES GROUP BY VOLUME (2019 - 2023)**



Source: FAO.

Aquaculture production

In Malaysia, aquaculture is conducted across freshwater, brackish water and marine environments, and plays a key role in meeting domestic fish demand and supporting export markets. The sector is supported by a combination of government policy, private investment and an abundance of natural conditions suited for farming a wide range of aquatic species. Over 20 aquaculture species are farmed in Malaysia, including tilapia (*Oreochromis* spp.), catfish (*Clarias* spp.), common carp (*Cyprinus carpio*), silver carp (*Hypophthalmichthys molitrix*), grass carp (*Ctenopharyngodon idella*), giant freshwater prawn (*Macrobrachium rosenbergii*), whiteleg shrimp (*Litopenaeus vannamei*), seabass (*Lates calcarifer*) and groupers (*Epinephelus* spp.). Tilapia is among the most widely cultivated species due to its adaptability and fast growth rate.

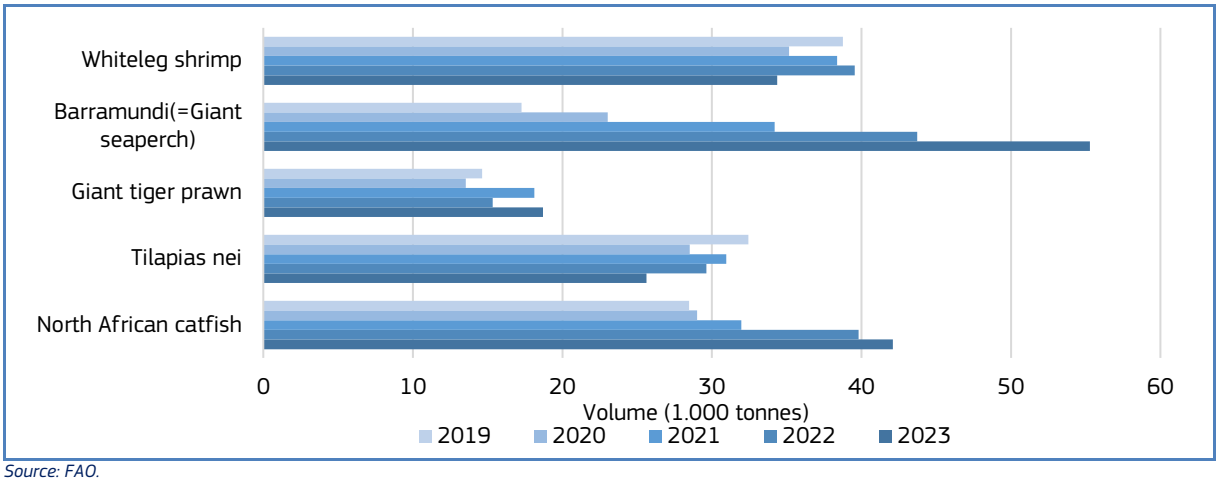
The two dominant aquaculture systems in Malaysia are freshwater pond culture and brackish water pond or cage culture. Freshwater finfish farming is typically pond-based and concentrated in states such as Perak, Johor and Kedah. Brackish water farming is practiced mainly along the west coast of Peninsular Malaysia and in Sabah, where estuarine environments support the cultivation of shrimp and marine finfish. Cage culture is widely used for high-value marine species like seabass and groupers. To support the sector's growth, Malaysia has established a network of government and private hatcheries that produce fry, fingerlings and post-larvae. These facilities ensure the availability of seed stock for both freshwater and marine species. The Department of Fisheries Malaysia manages national hatchery programmes and enforces quality control standards to improve seed quality.

The government also promotes sustainable aquaculture development through initiatives such as the Aquaculture Industrial Zone (AIZ) programme and the implementation of Good Aquaculture Practices (GAqP).

Table 41. **TOTAL AQUACULTURE PRODUCTION OF MALAYSIA BY VOLUME (volume in 1.000 tonnes)**

Species	2015	2016	2017	2018	2019	2020	2021	2022	2023
Whiteleg shrimp	48	38	36	36	39	35	38	40	34
Barramundi(=Giant seaperch)	29	15	30	21	17	23	34	44	55
Giant tiger prawn	4	6	10	10	15	14	18	15	19
Tilapias nei	31	27	27	26	32	29	31	30	26
North African catfish	51	37	35	33	28	29	32	40	42
Mangrove red snapper	10	10	9	9	7	7	6	5	7
Pangas catfish	14	17	20	18	18	18	21	21	19
Tiger-dragon grouper, hybrid	0	0	0	4	4	0	2	4	5
John's snapper	8	6	7	7	7	7	5	5	6
Milkfish	2	2	0	0	3	3	3	9	15
Other	309	251	254	227	241	236	226	362	279
Total	**507**	**408**	**428**	**392**	**412**	**401**	**417**	**574**	**507**

Figure 46. **TOP FIVE AQUACULTURE SPECIE GROUPS IN MALAYSIA BY VOLUME (2019 - 2023)**



Source: FAO.

6. 2. International trade

Export of fishery and aquaculture products from Malaysia

In 2024, Malaysia exported approximately 650.669 tonnes of fishery and aquaculture products valued at EUR 1,02 billion. This represented a slight increase of 0,9% in volume but a decrease of 9,5% in value compared to the previous year. Major export products included shrimp, tilapia, marine fish, crabs and value-added seafood, primarily in frozen or processed form.

In 2024, China became Malaysia's largest destination by volume, accounting for 115.696 tonnes, although its value fell to EUR 234 million. Singapore, which has been the biggest importer in previous years, imported 120.589 tonnes (EUR 174 million), followed by the United States, Thailand and the EU.

The European Union (EU) imported 24.000 tonnes of Malaysian fishery and aquaculture products in 2024, valued at EUR 45 million. Key exports to the EU included warmwater shrimp, surimi, other marine fish, and cephalopods such as squid and octopus. While the EU accounts for a smaller share compared to regional partners, it remains a strategic market for high-value seafood products such as frozen fillets, shrimp and processed marine fish. Exports to the EU have grown significantly since 2022, nearly doubling in both volume and value.

In early 2025, Malaysia and the EU resumed negotiations on a Free Trade Agreement (FTA), which was initially suspended in 2012. The renewed FTA aims to enhance cooperation in areas such as sustainable aquaculture, green technology and processed food exports.

Malaysia also benefits from other international trade agreements that support its seafood exports, including the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), the ASEAN Free Trade Area (AFTA), and a new Economic Partnership Agreement with the European Free Trade Association (EFTA) concluded in 2024. These agreements improve market access and reduce tariffs for key seafood exports such as shrimp, tilapia and crab.

Table 42. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM MALAYSIA 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	126.844	239	117.492	221	97.607	245	101.107	273	115.696	234
Singapore	143.524	147	176.704	196	198.401	239	165.322	220	120.589	174
United States	73.033	66	62.455	75	73.692	109	85.131	89	109.096	117
Thailand	88.363	54	86.988	52	41.669	40	50.185	45	60.212	52
EU 27	8.426	17	11.504	23	9.914	29	17.641	38	24.006	45
Turkey	4.334	5	6.628	30	11.143	58	15.757	48	14.318	40
South Korea	10.117	40	10.577	52	9.365	52	10.882	57	8.673	39

Taiwan	15.010	45	13.897	42	12.202	60	9.619	46	7.775	38
Hong Kong	7.528	31	14.398	45	18.745	54	13.627	50	8.986	37
Australia	8.619	38	9.435	41	9.972	53	8.234	40	7.669	35
Vietnam	51.412	41	39.584	31	35.638	39	37.943	44	42.751	33
Brunei Darussalam	33.514	27	32.511	25	33.252	31	31.220	27	36.707	26
Other	712.742	176	99.409	150	100.392	176	98.300	148	94.191	148
Total	**1.283.466**	**927**	**681.580**	**984**	**651.992**	**1.185**	**644.967**	**1.124**	**650.669**	**1.019**

Source: EUMOFA elaboration of Trade Data Monitor data.

Imports of fishery and aquaculture products to Malaysia

In 2024, Malaysia imported approximately 743.000 tonnes of fishery and aquaculture products, valued at EUR 1.4 million. This represented a 10,3% decrease in volume and a 13% decrease in value compared to the previous year. The decline reflects shifting regional trade dynamics and potential adjustments in domestic supply and demand, including growing national aquaculture capacity and efforts towards improved self-sufficiency efforts.

The largest supplier in 2024 was China, accounting for 202.000 tonnes (EUR 294 million), followed by Vietnam and Thailand. Together, these three countries contributed more than 60% of the total import volume and value. China remained dominant in both volume and value, exporting mainly frozen marine fish and processed seafood products.

Norway ranked sixth in terms of value, supplying high-value salmonids such as salmon and trout, amounting to 6.673 tonnes valued at EUR 49,8 million. India and Indonesia also remained significant partners, with India providing mainly shrimp and frozen fillets.

The top four products by value were frozen fish, shrimp, fishmeal and salmon. While Malaysia maintains robust regional supply relationships, imports from Europe and the Middle East, including from Norway and Oman, reflect continued demand for premium species in urban markets.

Table 43. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO MALAYSIA 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	115.743	243,4	164.592	302,0	186.817	363,4	182.890	300,0	201.648	294,0
Vietnam	125.202	168,5	123.743	168,0	156.008	252,4	173.786	246,7	133.083	196,1
Thailand	100.329	123,4	137.826	161,4	121.730	186,0	122.323	184,7	116.500	179,6
Indonesia	68.775	154,7	60.015	139,6	62.447	165,8	64.358	164,2	65.596	155,3
India	17.876	47,6	20.724	57,9	40.758	128,6	42.703	114,4	27.987	75,4
Norway	5.187	32,4	5.661	38,6	7.134	59,9	6.610	50,9	6.673	49,8
Japan	17.822	33,0	12.743	31,0	17.988	52,2	16.308	52,1	16.376	49,1
Singapore	12.071	22,3	14.788	27,1	24.900	38,2	39.429	41,2	39.635	42,7
Oman	11.488	22,7	14.555	34,0	21.442	65,1	17.288	53,3	13.216	35,2
Yemen	4.578	10,0	6.240	15,1	9.043	23,0	13.547	39,9	10.505	31,0
Other	155.439	324	176.941	348	139.874	395	149.087	349	111.630	280
Total	**634.510**	**1.182**	**737.829**	**1.322**	**788.140**	**1.730**	**828.329**	**1.597**	**742.851**	**1.389**

Source: EUMOFA elaboration of Trade Data Monitor data.

6. 3. Trade flows in the EU

EU export of fishery and aquaculture products to Malaysia

In 2024 the overall export volume from the EU to Malaysia reached 2.076 tonnes, almost unchanged from the previous year. Total value increased to EUR 8,0 million, up 13% from EUR 7.1 million in 2023. The most significant export product was fishmeal, which made up over 57% of the total volume and accounted for EUR 2,0 million in value.

Other high-value export products included sea cucumber, oysters, caviar and roes, and a few other processed fishery products. While volumes remained relatively stable across most categories, increases in export value suggest growing demand for niche and premium European seafood products in Malaysia. It is likely that these products serve Malaysia's urban food service sector and high-end consumer markets.

Table 44. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM THE EU TO MALAYSIA 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**
Fishmeal	1.356	1.998	1.290	1.951	701	1.257	836	1.620	1.186	1.967
Sea cucumber	299	1.956	176	1.734	188	2.717	200	1.015	160	1.122
Oyster	33	265	44	359	104	867	104	904	94	943
Caviar, livers and roes	36	278	1	213	20	440	47	593	55	677
Other products	99	148	195	290	85	222	185	234	178	642
Other	1.171	2.238	171	1.193	219	2.617	709	2.716	404	2.670
Total	**2.993**	**6.882**	**1.878**	**5.739**	**1.318**	**8.120**	**2.081**	**7.082**	**2.076**	**8.021**

Source: EUMOFA elaboration of Eurostat-Comext data.

EU imports from Malaysia

In 2024, the overall EU import volume from Malaysia fell significantly to 1.768 tonnes, a 48% decrease compared to 2023. Total value dropped to EUR 11,9 million, down 50% from the previous year. The decline reflects a sharp reduction in imports of other marine fish, which dropped from 2.291 tonnes in 2023 to 620 tonnes in 2024 (a 73% fall in volume and 77% in value).

Despite this decline, warmwater shrimp remained the most valuable import, totalling 442 tonnes and valued at EUR 4,2 million, representing more than one-third of the total import value. Other key products included surimi and other cephalopods, which also contributed significantly to the EU's seafood imports from Malaysia.

The overall reduction in EU imports from Malaysia may reflect market shifts, changing sourcing patterns or fluctuations in Malaysia's export capacity. Nevertheless, Malaysia remains an important supplier of high-value, processed seafood products to the EU, particularly in the frozen and prepared categories.

Table 45. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO THE EU FROM MALAYSIA 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**
Shrimp, warmwater	459	4.483	597	5.554	451	4.509	512	4.966	442	4.183
Other marine fish	1.314	7.451	1.407	7.699	2.281	14.413	2.291	14.721	620	3.425
Surimi	264	1.057	415	1.483	411	1.869	327	1.442	408	1.625
Other cephalopods	204	926	199	1.098	199	1.256	147	920	151	952
Other non-food use	12	877	19	1.026	12	909	14	835	17	854
Squid	14	72	0	0	36	316	54	408	36	278
Octopus	72	230	44	156	42	259	23	113	55	234
Shrimp, miscellaneous	14	133	28	207	11	116	33	381	18	172
Molluscs and aquatic invertebrates, other	0	9	9	126	3	71	2	46	6	86

Sardine	15	54	21	67	45	213	17	86	14	72
Other	8	46	19	103	20	122	3	19	2	12
Total	**2.376**	**15.338**	**2.758**	**17.518**	**3.512**	**24.054**	**3.423**	**23.937**	**1.768**	**11.892**

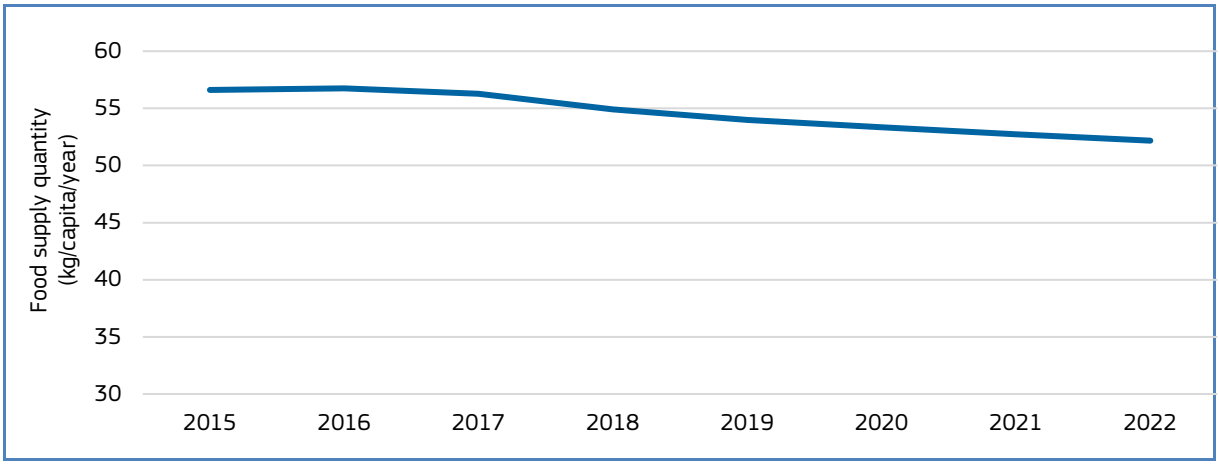
Source: EUMOFA elaboration of Eurostat-Comext data.

6. 4. Consumption of fishery and aquaculture products in Malaysia

Malaysia is one of the biggest consumers of seafood globally, with per capita consumption estimated at 52,17 kg in 2022. There has been a steady decrease from the peak of 56,73 kg in 2016. Seafood serves as a primary source of animal protein for Malaysians, especially in coastal and rural communities. The availability of diverse fish species from both capture fisheries and aquaculture ensures a steady supply to meet domestic demand. Commonly consumed species include sardines (*Sardinella spp.*), mackerel (*Rastrelliger spp.*), tilapia (*Oreochromis spp.*) and catfish (*Clarias spp.*).

While fresh fish remains the preferred choice for many consumers, there has been a noticeable increase in the consumption of processed seafood products. Products such as dried fish, fish fillets and ready-to-eat seafood meals are gaining popularity, driven by urbanization, changing lifestyles, and the convenience they offer.

Figure 47. **CONSUMPTION OF FISHERY AND AQUACULTURE PRODUCTS IN MALAYSIA, 2015 - 2022**



Source: FAO.

7. CASE STUDY: Flounder in the EU

European flounder is an important species for EU demersal coastal fisheries in the Northeast Atlantic. However, over the last years, EU catches and landings have reported very strong decreases. The drop in EU production was not offset by increased imports and this reduced supply caused increases in prices that were reported at all stages of the supply chain (first-sale, import, consumption). First-sale prices differ significantly between countries and flounder species, reaching 0,51 EUR/kg for European flounder in Poland in 2024; 6,60 EUR/kg for spotted flounder in Spain; and 3,29 EUR/kg for witch flounder in Denmark.

7. 1. Biology resource and exploitation

The name Flounder refers to several flatfish species belonging to the Pleuronectoidei suborder. The most commercially important species include the European flounder (*Platichthys flesus*), the yellow striped flounder (*Pseudopleuronectes herzensteini*), the yellowtail flounder (*Limanda ferruginea*), and the witch flounder (*Glyptocephalus cynoglossus*).

Source: *Scandinavian Fishing year Book*

European flounder (*Pleuronectes platessa)* is green-olive in colour, it has irregular reddish spots on the eye side, with the underside being pearly white[32]. Spawning period is from February to June with peaks in spring[33].

European flounder is a nocturnal species that lives mostly on sandy bottoms, although it can also be found on mud bottoms, in shallow water and at sea[34]. It is most common between depths of 10-50 m but also occurs at depths of 0-200 m. It is found most of the year in estuaries and migrates to deeper and warmer waters in winter[35]. Juvenile fish in their first year live mostly in very shallow coastal waters and estuaries and feed on plankton and larvae. They only start to move into deeper water in their second year where they feed on benthic fauna. European flounder feed on bottom-living animals, particularly small fish and shellfish such as bivalve molluscs, but also consume worms and crustaceans[36].

European flounder can be found on the continental shelf from the Bay of Biscay in the south, through the English Channel, North Sea and Irish Sea to the Baltic, and up the Norwegian coasts to the Barents Sea. It is also commonly found in European inland waters where it spends part of its life cycle and can tolerate low salinity levels[37]. The European flounder stock is currently not regulated by TACs. Quota regulations are implemented for witch flounder with TACs in Norwegian Sea and the North Sea.

European flounder is commonly fished by gillnetters in mixed fisheries targeting flatfish. Catches fluctuate over the year, with peaks in summer and autumn from June to December. European flounder catches are subject to a minimum conservation size of 23 cm in the main fishing areas, except for some regions of the Baltic where it is 21 cm and 18 cm[38].

7. 2. Production

World catches

In 2023, global catches of flounder amounted to 39.032 tonnes, 45% of which includes catches by the Republic of Korea. Catches by EU Member States ranked second, covering together 24% of the total, followed by the United States (14%) and Canada (9%).

Between 2014 and 2023, global catches of flounder have decreased by 28%, due mainly to reduced catches by the EU (-56%), Canada (-58%) and the US (-13%), while the Republic of Korea experienced a 13% increase.

[32] https://fishbase.mnhn.fr/summary/SpeciesSummary.php?ID=1341&AT=european+flounder
[33] Dias E, Barros AG, Hoffman JC, Antunes C, Morais P. Habitat use and food sources of European flounder larvae (*Platichthys flesus*, L. 1758) across the Minho River estuary salinity gradient (NW Iberian Peninsula). Reg Stud Mar Sci. 2020 Feb 27;34:10.1016/j.rsma.2020.101196. doi: 10.1016/j.rsma.2020.101196. PMID: 33426248; PMCID: PMC7787986.
[34] https://fishbase.mnhn.fr/summary/SpeciesSummary.php?ID=1341&AT=european+flounder
[35] Ibidem
[36] Ibidem
[37] **https://fish-commercial-names.ec.europa.eu/fish-names/species/platichthys-flesus_en**
[38] Ibidem

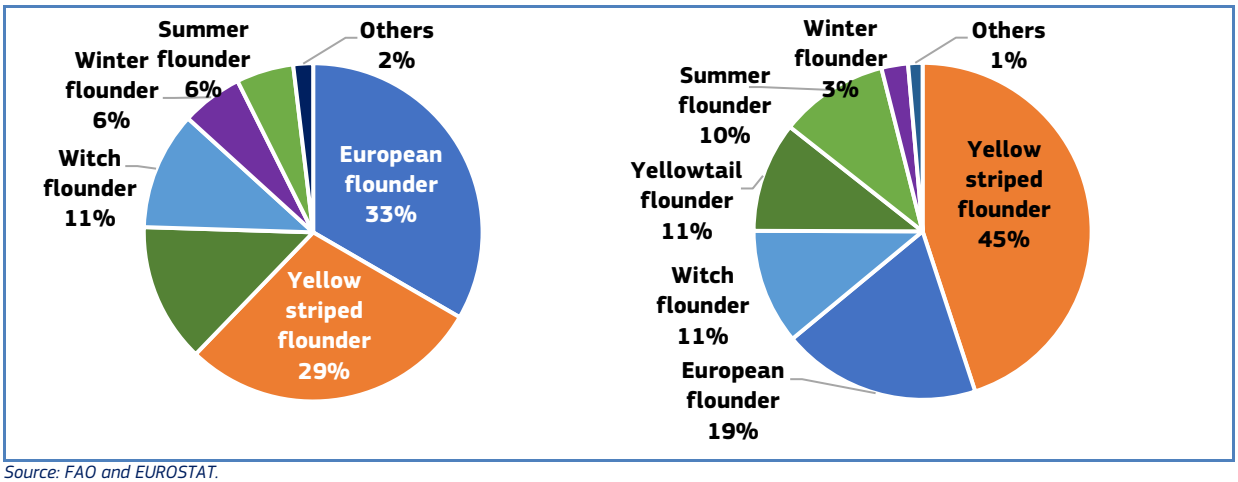
Table 46. **TOTAL WORLD CATCHES OF FLOUNDER (volume in tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2023/2014
Republic of Korea	18.905	17.753	15.044	14.082	15.301	18.171	21.921	22.694	19.324	21.310	13%
EU-27	26.103	22.411	26.528	21.654	25.320	25.938	23.979	20.519	16.464	11.598	-56%
United States	7.619	7.001	5.654	4.649	4.028	5.089	5.288	5.871	6.001	6.595	-13%
Canada	9.710	8.411	9.431	9.032	8.992	12.972	15.187	16.317	12.161	4.118	-58%
United Kingdom	993	911	1.077	1.264	1.539	1.249	1.060	1.135	1.089	1.089	10%
Others	2.252	2.459	2.230	2.520	2.470	4.633	4.034	2.999	2.379	2.686	19%
Total	**65.581**	**58.946**	**59.964**	**53.201**	**57.651**	**68.053**	**71.469**	**69.535**	**57.419**	**47.395**	**-28%**

Source: FAO and EUROSTAT.

The main species caught are the yellow striped flounder, accounting for 45% of the volume in 2023, caught exclusively in Northwest Pacific, followed by the European flounder (19%, Northeast Atlantic), the witch flounder (11%, Northeast and Northwest Atlantic), the yellowtail flounder (11%, Northeast and Northwest Atlantic), and the summer flounder (10% of the catches, Northwest Atlantic). Catches of European flounder decreased over the 2014-2023 period, from 33% of world catches in 2014 to 19% in 2023.

Figure 48. **WORLD CATCHES OF FLOUNDERS BY SPECIES IN 2014 (left) AND 2023 (right) (% volume)**



Source: FAO and EUROSTAT.

EU catches

The main EU countries in terms of global catch volume of flounder were Poland (14% of world catches, 59% of EU catches), Denmark (2% of world catches, 10% of EU catches), Spain (2% of world catches, 9% of EU catches), Germany (1% of world catches, 6% of EU catches), France (1% of world catches, 5% of EU catches) and the Netherlands (1% of world catches, 5% of EU catches) accounting together for 92% of total EU catches in 2023.

EU catches decreased by 56% between 2014 and 2023, in relation to the decrease in catches of the top 2 producers: -46% for Polish catches and -72% for Danish catches. A fall in catches is also reported for Spain, albeit at a lower rate (5% since 2014), for Germany (60%) and for the Netherlands (61%), while France is the only EU country to experience an increase (48%).

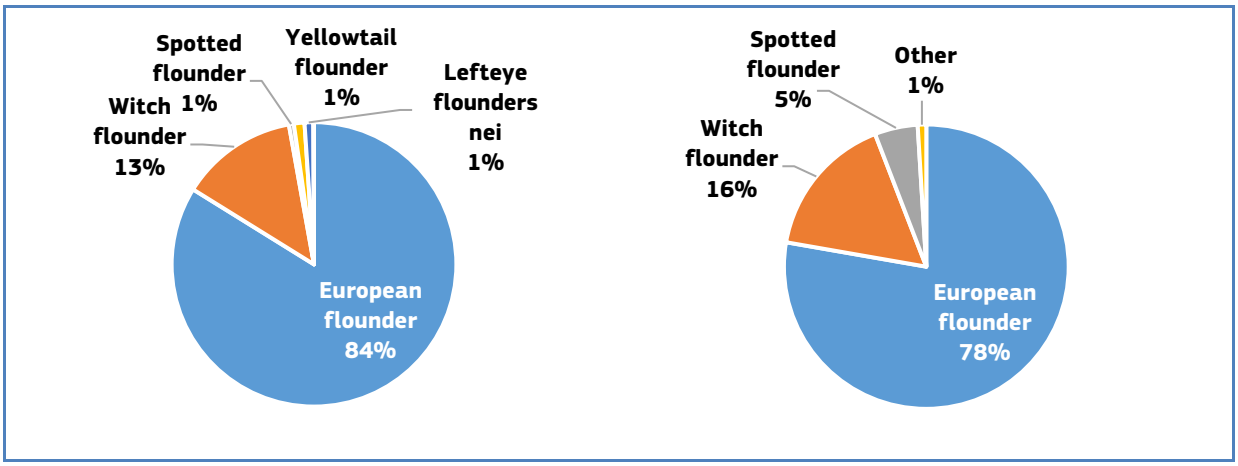
Table 47. **WORLD CATCHES OF FLOUNDER (volume in 1.000 tonnes live weight)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2014/2023
Poland	12.639	9.441	15.060	11.053	15.256	16.711	14.664	14.828	10.490	6.794	-46%
Denmark	4.065	3.621	2.434	2.520	2.825	2.735	2.459	1.684	1.435	1.133	-72%
Spain	1.069	1.320	1.149	1.285	1.361	1.422	1.230	1.244	1.080	1.013	-5%

Germany	1.599	1.510	1.539	1.272	1.275	1.224	1.335	788	649	639	-60%
France	387	337	403	453	494	591	549	566	517	574	48%
The Netherlands	1.360	1.428	1.313	1.029	1.260	1.313	1.378	23	815	533	-61%
Others	4.986	4.754	4.630	4.041	2.850	1.942	2.364	1.386	1.478	911	-82%
EU-27	**26.103**	**22.411**	**26.528**	**21.654**	**25.320**	**25.938**	**23.979**	**20.519**	**16.464**	**11.598**	**-56%**

Source: EUROSTAT.

Figure 49. **EU CATCHES OF FLOUNDER BY SPECIES IN 2014 (left) AND 2023 (right) (% volume)**



Source: EUROSTAT

Aquaculture

Global aquaculture production of flounder takes place only in China and in the Republic of Korea. Total production amounted to 61.829 tonnes in 2023, 87% of which was covered by Chinese production.

Between 2014 and 2023, global production of flounder decreased by 6% in relation to the decrease in Chinese production (-18%), not offset by the increase in Korean production (+320% between 2015 and 2023).

Lefteye flounder accounted for three quarters of Chinese aquaculture production of flounder in 2023, while Korean production consisted exclusively of righteye flounder.

Table 48. **TOTAL AQUACULTURE PRODUCTION OF FLOUNDERS (volume in tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2023/2014
China	66.004	75.534	81.409	74.392	61.882	62.146	53.461	56.853	53.573	54.100	-18%
Republic of Korea	0	1.841	1.737	2.564	3.400	3.669	3.336	6.214	7.725	7.730	n.a.
Total	**66.004**	**77.375**	**83.146**	**76.956**	**65.282**	**65.815**	**56.797**	**63.067**	**61.298**	**61.829**	**-6%**

Source: FAO.

Landings in the EU

In 2022, landings of flounder in the EU amounted to 16.501 tonnes for a value of almost EUR 18 million. Over the period 2013 to 2022, Poland was the main landing country for flounder in the EU, accounting for 56% of the total EU landing volumes in 2022 (bound to its catch volumes), followed by Denmark (10%).

From 2013 to 2022, EU landings of flounder decreased by 37% overall, but to a lesser extent than catches (-56%). Landings decreased between 2015 and 2017, before increasing to reach a peak in 2019 (27.283 tonnes). Since then, they have been continuously decreasing, reaching their lowest level over the decade in 2022. This decreasing trend was mostly attributable to the biggest landing countries (Poland, -4.300 tonnes, 32%; Denmark, -900 tonnes, 35%; Spain, -1.700 tonnes, 62%). Flounder is mostly landed live or fresh (98%), and whole or gutted (98%).

EU landings of flounder consisted mainly of European flounder, accounting for 79% of the volume (13.005 tonnes) and 33% of the value (EUR 5,9 million) in 2022.

Table 49. **LANDINGS OF FLOUNDERS IN THE EU (volume in tonnes)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Poland	13.645	13.426	10.885	15.015	10.671	13.663	14.169	13.450	14.349	9.293
Denmark	2.638	2.712	2.035	2.365	2.814	4.338	5.134	3.455	1.718	1.727
Spain	2.798	1.092	1.313	1.072	1.084	1.615	1.790	1.562	1.268	1.070
Netherlands	1.279	1.328	1.492	1.310	1.025	1.263	1.301	1.371	1.023	876
Ireland	-	-	633	861	825	631	1.090	951	1.072	780
Others	5.695	5.249	5.419	5.308	4.399	4.406	3.799	4.041	2.758	2.755
EU-27	**26.056**	**23.806**	**21.776**	**25.932**	**20.818**	**25.917**	**27.283**	**24.829**	**22.188**	**16.501**

Source: EUMOFA elaboration of Eurostat data

7. 3. Flounder: first sales in the EU

First sales of flounder in 2024 were reported to EUMOFA by 14 EU countries (Belgium, Denmark, Estonia, France, Germany, Ireland, Italy, Latvia, Lithuania, Netherlands, Poland, Portugal, Spain, Sweden). In more detail, the first sales cover 14 species of flounder, the most important in volume being the European flounder (*Platichthys flesus*, 63% of first-sales volume in 2024) and the witch flounder (*Glyptocephalus cynoglossus*, 26% of the volume). In terms of value, the witch flounder represented 44% of the first-sales value in 2024, followed by the European flounder (26%) and the spotted flounder (22% of the value for only 6% of the volume). First-sales price of spotted flounder is by far the highest, reaching 6,11 EUR/kg in 2024, followed by witch flounder (average first sale price of 3,07 EUR/kg,), while first-sales price of European flounder reached 0,74 EUR/kg, an increase of 105% since 2020. First-sales prices of witch flounder and spotted flounder also increased over the period but at lower rate (25% and 39% respectively).

First-sales prices differ significantly according to size, with large sized flounder (size 1, above 0,3 kg) reaching higher prices (0,50 EUR/kg in Poland; 1,60 EUR/kg in Germany; 1,58 EUR/kg in Denmark) than size 2 flounder (0,2-0,3 kg) (0,39 EUR/kg in Poland; 0,82 EUR/kg in Germany; 1,15 EUR/kg in Denmark).

Table 50. **FIRST- SALE PRICES OF EUROPEAN FLOUNDER BY SIZE IN 2024 (price in EUR/kg)**

Country	Size 1 (>0,3 kg)	Size 2 (0,2-0,3 kg)
Poland	0,50	0,39
Germany	1,60	0,82
Denmark	1,58	1,15

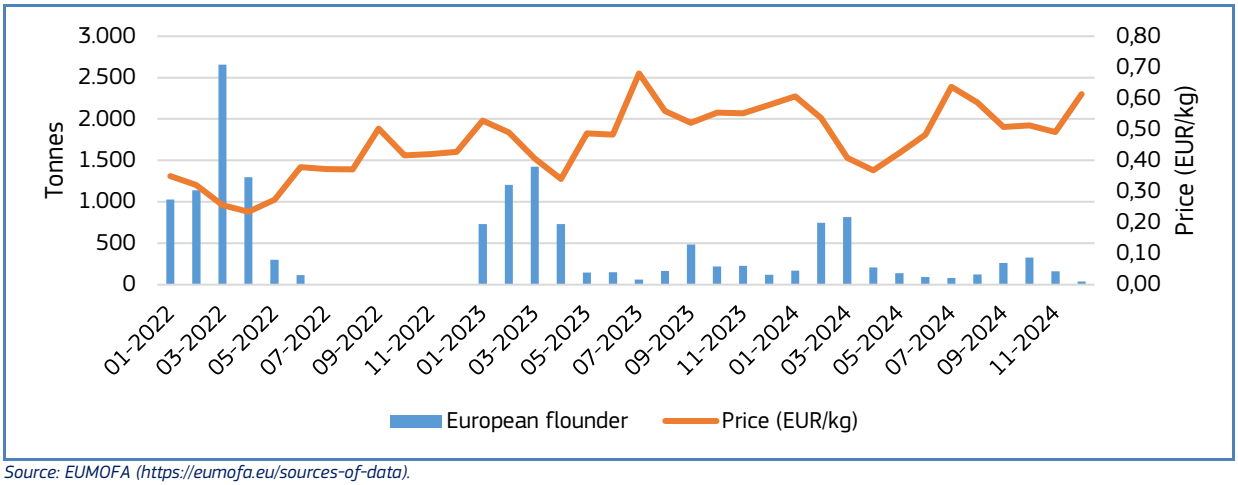
In 2024, the overall first sales of flounder in EU reporting countries amounted to 7.319 tonnes at a value of over EUR 13,4 million and an average price of 1,83 EUR/kg. In line with previous years, both volumes sold and their total value fell (65% in volume, 21% in value), while prices increased over 2020-2024 (123%).

Among the reporting countries, Poland accounted for most first-sale volumes (43%) in 2024, followed by Spain (16%) and Denmark (14%). Almost all MS reported significant diminishing volumes since 2015: 77% for Poland (between 2016 and 2024), 48% for Denmark (used to be the most important MS in terms of first sale volume in 2015), 64% for the Netherlands, 94% for Latvia (second most important in 2015, nineth in 2024). Spain is the only MS reporting increasing first sale volumes over the period (4%).

First-sales data show different seasonality patterns among reporting countries, with the majority of first sales occurring during winter and early spring for Poland and Denmark: on average, 76% of first sales in Poland take place between January and April, and 54% in Denmark, the peak often reached between February and March. In Poland, first sales consist exclusively of European flounder, while in Denmark they consist mostly of witch flounder and to a lesser extent European flounder. In Spain, seasonality is scarcer with flounder supply all year long, consisting mostly of witch flounder and spotted flounder, and to a lesser extent European flounder. However, first-sales volumes tend to peak in early spring (April-May) and again in late summer (July to September). Though not always clear, first-sales price variations were correlated with first-sales volumes (with price peaks when lowest volumes). Prices reported in Spain between January 2020 and December 2024 (4,06 EUR/kg on average) were significantly higher than prices recorded in Denmark (1,33 EUR/kg), Poland (0,46 EUR/kg), and on average in the EU (1,86 EUR/kg) over the same period.

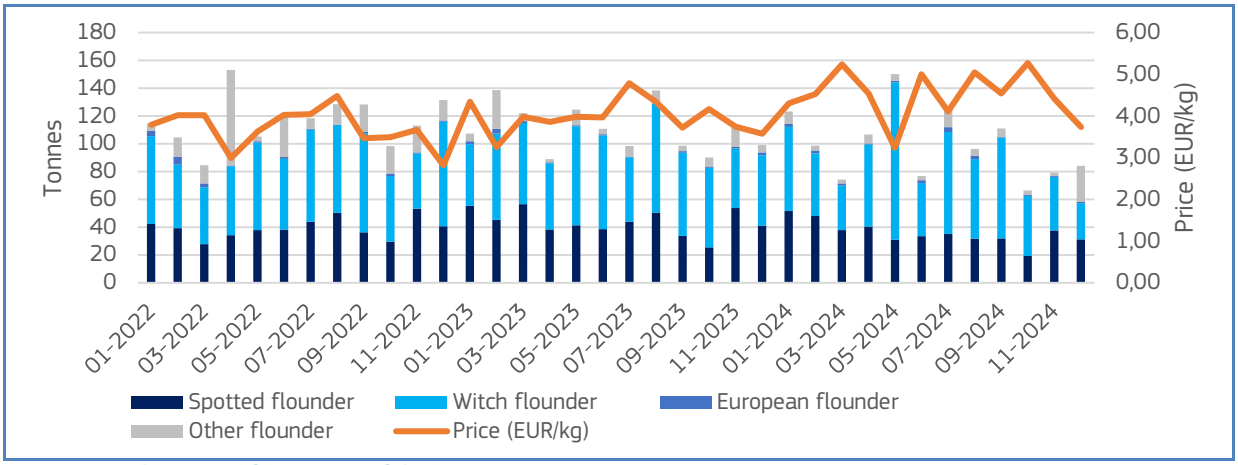
In 2024, three of the main places of sale for flounder (in volume terms) were in Poland, one in Spain and one in the Netherlands. Places of sale in Denmark were not reported due to confidentiality rules. Among main reporting places of sale, the top two - Kolobrzeg (22% of first sales in volume in EU) and Mrzezyno (9%) - are in Poland, followed by Vigo in Spain (8%). In the Netherlands, Ijmuiden/Velsen (2%) is ranked 6th; in Germany, Sassnitz is ranked 8th, while other countries were not included in the top ten.

Figure 50. **FIRST SALES: FLOUNDER IN POLAND (tonnes, EUR/kg)**



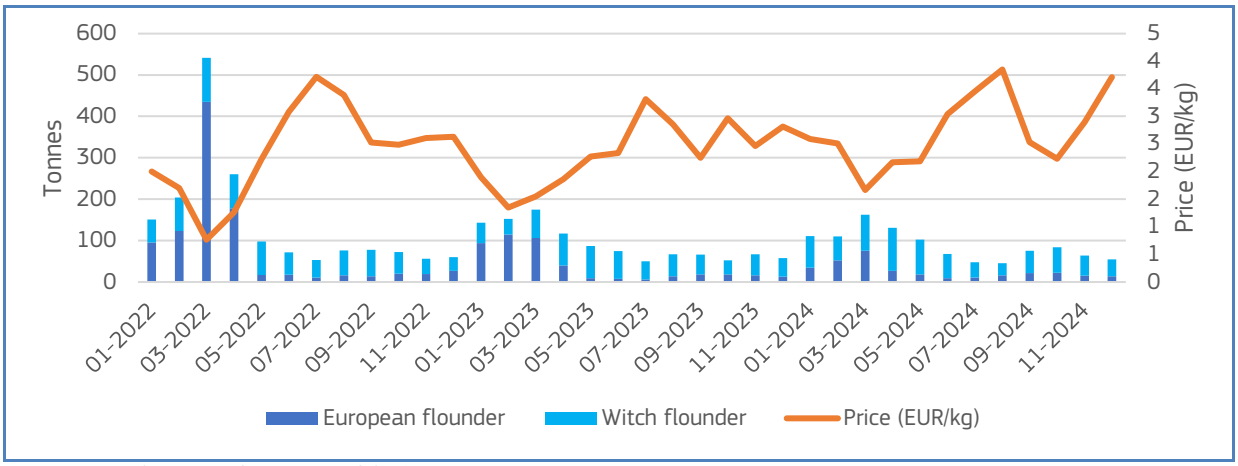
Source: EUMOFA (https://eumofa.eu/sources-of-data).

Figure 51. **FIRST SALES: FLOUNDER IN SPAIN (tonnes, EUR/kg)**



Source: EUMOFA (https://eumofa.eu/sources-of-data).

Figure 52. **FIRST SALES: FLOUNDER IN DENMARK (tonnes, EUR/kg)**



Source: EUMOFA (https://eumofa.eu/sources-of-data).

7. 4. International trade

In the Combined Nomenclature (CN)[39] used for registering EU import-export data, flounder is specifically reported as frozen whole or filleted[40].

Between 2020 and 2024, EU imports of flounder from third countries were almost zero, amounting to EUR 0,16 million in 2024 and originating mostly from Iceland and the Faroe Islands (respectively 46% and 26% of the total EU imported value).

In 2024, EU exports to third countries amounted to 504 tonnes at a value of EUR 0,81 million. Frozen whole flounder accounted for 69% of the total extra-EU export value and 90% of the volume, whereas frozen filleted flounder accounted for 31% of the total export value and 10% of the volume. In 2024, all exports to third countries consisted of European flounder. The main destination in value terms was the United States, accounting for EUR 359.000 (44% of the total extra-EU export value in 2024), followed by Ukraine (27%), and the United Kingdom (20%).

Over the 2020-2024 period, exported volumes of flounder (exclusively European flounder) fluctuated, amounting to 401 tonnes in 2020 and reaching a peak in 2022 with 966 tonnes exported. Overall, exports of European flounder to third countries increased by 26% in volume and by 5% in value since 2020. Export prices of European flounder decreased by 16% from 1,92 EUR/kg in 2020 to 1,61 EUR/kg in 2024.

In 2024, intra-EU exports of flounder products amounted to 2.064 tonnes at a value of EUR 4 million. The intra-EU trade consisted exclusively of frozen flounder, whole or filleted, accounting respectively for 53% and 47% of the trade value. The Netherlands is a hub for the intra-EU trade of flounder, accounting for 39% of the export trade value in 2024. Portugal (29% of the trade value) and Italy (13%) were the other main destinations for the intra-EU exports. Along with the Netherlands, the main exporters for intra-EU trade were Poland and Spain, representing 29% and 28% of the value trade.

Export prices were highest in the Netherlands, reaching 4,99 EUR/kg in 2024; they increased by 53% since 2020, in relation to the 50% decrease in volume exported and the decrease at a lower rate of the exported value (24%). Parallel to the volume and the value exported, Spanish prices increased by 15% over the same period, reaching 3,36 EUR/kg in 2024. Polish exports decreased in price since 2020 (20%), reaching 0,83 EUR/kg, while the volume and the value exported increased by 262% and 190% respectively.

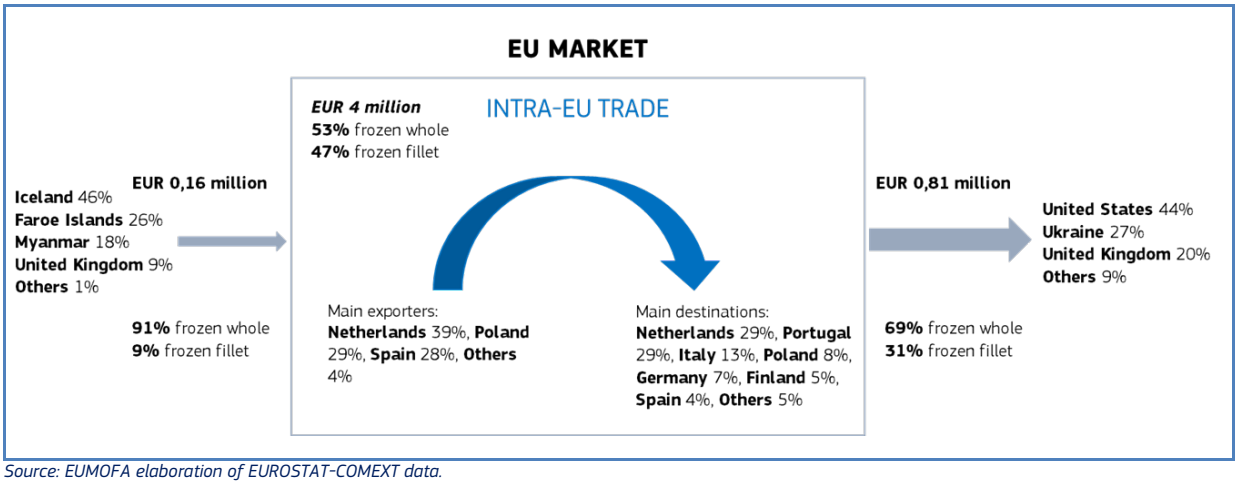
Table 51. **INTRA-EU EXPORT PRICES OF FLOUNDERS (price in EUR/kg)**

Export country	2020	2021	2022	2023	2024
Netherlands	3,26	3,11	3,99	4,69	4,99
Poland	1,04	1,37	0,60	0,85	0,83
Spain	2,92	2,83	2,96	3,30	3,36

Source: EUMOFA elaboration of Eurostat-COMEXT data.

[39] The Combined Nomenclaure (CN) is the EU's eight-digit coding system, comprising the Harmonised System (HS) codes with further EU subdisions. It serves the EU's common customs tariff and provides statistics for trade within the EU and between the EU and the rest of the world.
[40] 03033910 - Frozen flounder "*Platichthys flesus*";
03033930 - Frozen fish of the genus *Rhombosolea*;
03048330 - Frozen fillets of flounder "*Platichthys flesus*".

Figure 53. **THE FLOUNDER EU-TRADE MARKET IN 2024, IN VALUE**



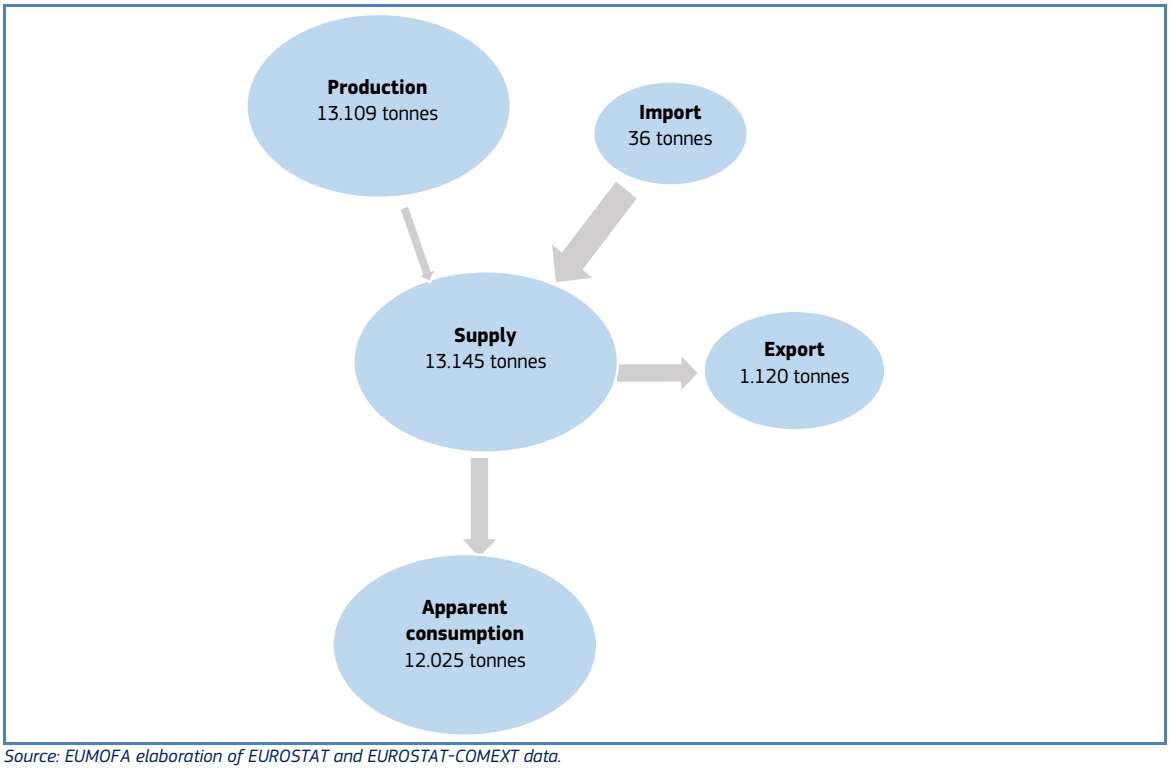
Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

7. 5. Apparent consumption

Apparent consumption of European flounder at EU level was estimated at 12.026 tonnes LWE in 2022), equivalent to 0,03 kg/per capita. Supply reached 13.019 tonnes LWE, originating almost exclusively from EU fisheries. Exports represented 8,5% of overall supply, so apparent consumption accounted for 91,5% in 2022. Apparent consumption of other flounder species was estimated at 3.309 tonnes in 2022 (0,01 kg/per capita).

At MS level, Poland was by far the main consumption market for European flounder, with consumption estimated at 7.395 tonnes LWE in 2022 (0,2 kg/per capita). Other important MS for European flounder consumption were Denmark (apparent consumption of 1.818 tonnes LWE equivalent to 0,31 kg/per capita) and Germany (780 tonnes LWE, 0,01 kg/per capita). Spain was the main consumption market for other flounder species, with a consumption estimated at 1.108 tonnes LWE in 2022 (0,02 kg/per capita), followed by Denmark (771 tonnes LWE, 0,13 kg/per capita), and France (520 tonnes LWE, 0,007 kg/per capita).

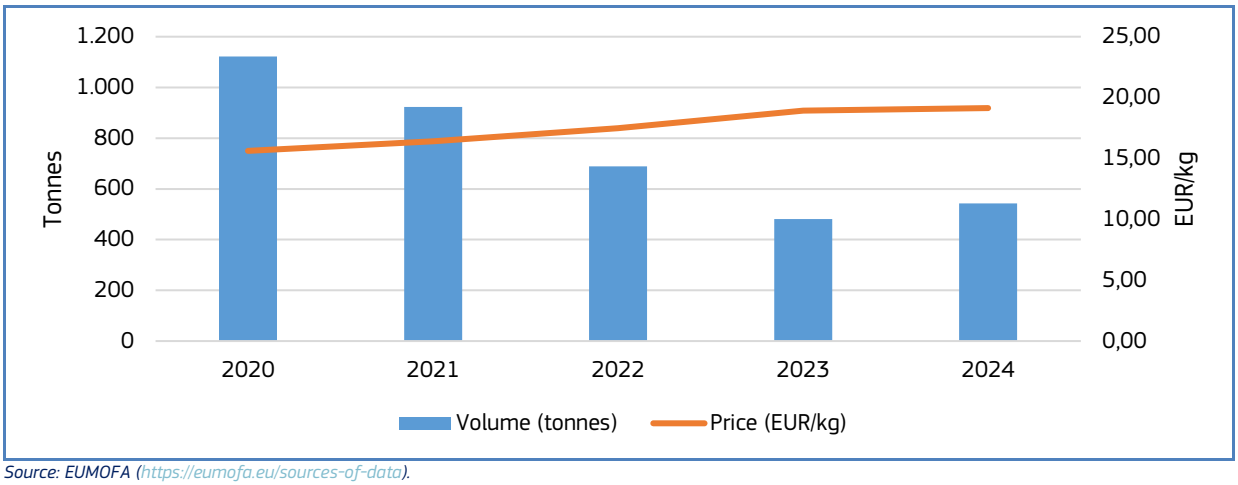
Figure 54. **APPARENT CONSUMPTION OF EUROPEAN FLOUNDER IN 2022 (tonnes, LWE)**



Source: EUMOFA elaboration of EUROSTAT and EUROSTAT-COMEXT data.

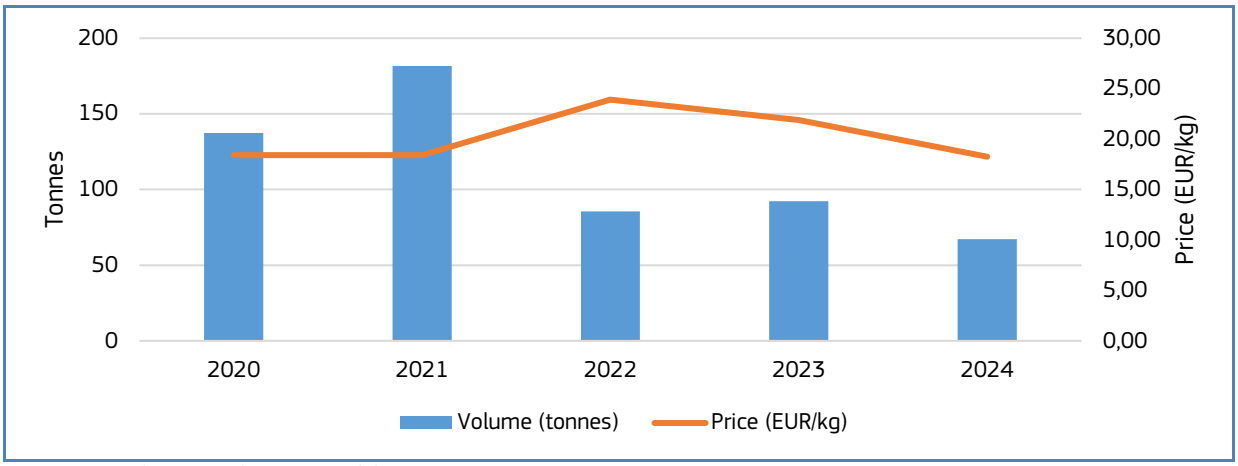
Flounder is mostly consumed as fresh and frozen fillets. Europanel data cover the volumes and values of household consumption of fresh flounder in Denmark and in Sweden. Over the 2020-2024 period, decreasing trends were observed in both countries in terms of volume, linked directly with the reduction in supply at EU level: 52% in Denmark and 51% in Sweden. Consequently, average prices increased significantly over the period in Denmark (23%), while they remained stable in Sweden.

Figure 55. **HOUSEHOLD CONSUMPTION: FLOUNDER (other than European) IN DENMARK ***



Source: EUMOFA (https://eumofa.eu/sources-of-data).

Figure 56. **HOUSEHOLD CONSUMPTION: FLOUNDER (other than European) IN SWEDEN***



Source: EUMOFA (https://eumofa.eu/sources-of-data).
**household consumption data only available for these two MS*

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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:

Case studies: SEAFDEC, FAO, Ministry of Agriculture and Food Security of Malaysia, FAOSTAT, Eurostat COMEXT, FishBase, ResearchGate, European Commission.

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

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

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

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

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

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