European Commission

# Monthly Highlights

No. 7 / 2025

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

eumofa.eu @EU_MARE #EUMOFA

## Contents




Maritime Affairs and Fisheries

# 1. GLOBAL HIGHLIGHTS

*© Eurofish International Organisation*

**EU / Fisheries & Environment:** On 5 June 2025, the Polish EU Presidency hosted a conference on managing the increasing impact of great cormorant predation on fisheries and aquaculture. With the population exceeding 2 million birds, stakeholders discussed a draft European management plan by the European Inland Fisheries and Aquaculture Advisory Commission (EIFAAC) to balance conservation and fish stock protection. While the European Commission ruled out changes to the Birds Directive, it highlighted existing derogations allowing the use of control measures[1].

**EU / Fisheries:** On 6 June 2025, the European Union and Côte d'Ivoire signed a new four-year protocol under their sustainable fisheries partnership agreement, resuming cooperation after a year-long pause. The protocol grants EU vessels access to Ivorian waters for tuna and migratory species (6.100 tonnes/year) and includes a EUR 2,97 billion EU contribution, with EUR 1,74 million earmarked for sustainable fisheries development. It also supports monitoring and control, combats illegal, unreported and unregulated (IUU) fishing, and promotes decent labour conditions in line with the International Labour Organization (ILO) and the International Maritime Organisation (IMO) standards. The protocol will apply provisionally from 6 June 2025 and awaits full ratification[2].

**EU / Oceans:** On 11 June 2025, during the UN Ocean Conference in Nice, the EU Commissioner for Fisheries and Oceans Costas Kadis reaffirmed Europe's leadership in global ocean governance. Highlighting the newly launched *European Ocean Pact*, Kadis emphasized the need for coordinated and coherent policies to address biodiversity loss, overfishing, and climate impacts on marine ecosystems. He underscored the EU's commitment to the High Seas Treaty, welcoming the 65 ratifications to date and pledging EUR 40 million through the Global Ocean Programme to support its implementation. Commissioner Kadis also called for strengthened international alliances and a level playing field in fisheries, notably with China, while insisting that the EU remains committed to both environmental goals and economic competitiveness under the Green Deal[3].

**EU / Fisheries:** On 16 June 2025, the European Commission published an independent study evaluating the performance of the landing obligation, five years after its full implementation. The study finds that the policy has yet to fulfil its full potential in eliminating discards and promoting selective fishing practices. Key challenges include limited compliance incentives, ineffective monitoring tools, economic trade-offs, and difficulties in improving gear selectivity. A wide range of exemptions also complicates impact assessment. The findings will feed into the ongoing evaluation of the Common Fisheries Policy, with stakeholder discussions scheduled for 8 July 2025[4].

**EU / UK / Fisheries:** On 20 June 2025, the EU and the UK formalised their political agreement on reciprocal access to waters until 30 June 2038, through a decision adopted by the Specialised Committee on Fisheries. This long-term arrangement ensures continued full access for EU and UK vessels to each other's Exclusive Economic Zones and territorial waters, covering both quota and non-quota species. The agreement strengthens legal certainty, stability for fishers, and trust between both parties, reinforcing their shared commitment to the sustainable management of marine resources[5].

**Iceland / Fisheries:** The Icelandic catch amounted to 68.000 tonnes in May 2025, which is 22% less than in May 2024. The demersal catch was 42.000 tonnes, a 7% decrease between years. During the twelve-month period from June 2024 to May 2025, the total catch was 954.000 tonnes compared with 1,088 million tonnes one year earlier and is a 12% decrease[6].

[1] https://www.fao.org/europe/news/detail/new-european-plan-aims-to-curb-cormorant-impacts-on-fisheries/en
[2] https://oceans-and-fisheries.ec.europa.eu/news/european-union-and-cote-divoire-renew-their-sustainable-fisheries-partnership-2025-06-06_en
[3] https://geopolitique.eu/en/2025/06/11/a-conversation-with-costas-kadis-european-commissionner-for-fisheries-and-oceans/
[4] https://oceans-and-fisheries.ec.europa.eu/news/independent-study-highlights-some-challenges-implementing-landing-obligation-across-eu-fisheries-2025-06-16_en
[5] https://oceans-and-fisheries.ec.europa.eu/news/eu-and-uk-formalise-agreement-full-reciprocal-access-waters-until-2038-2025-06-20_en
[6] https://statice.is/publications/news-archive/fisheries/fish-catch-in-may-2025/

# 2. MACROECONOMIC CONTEXT

## 2.1. Marine fuel

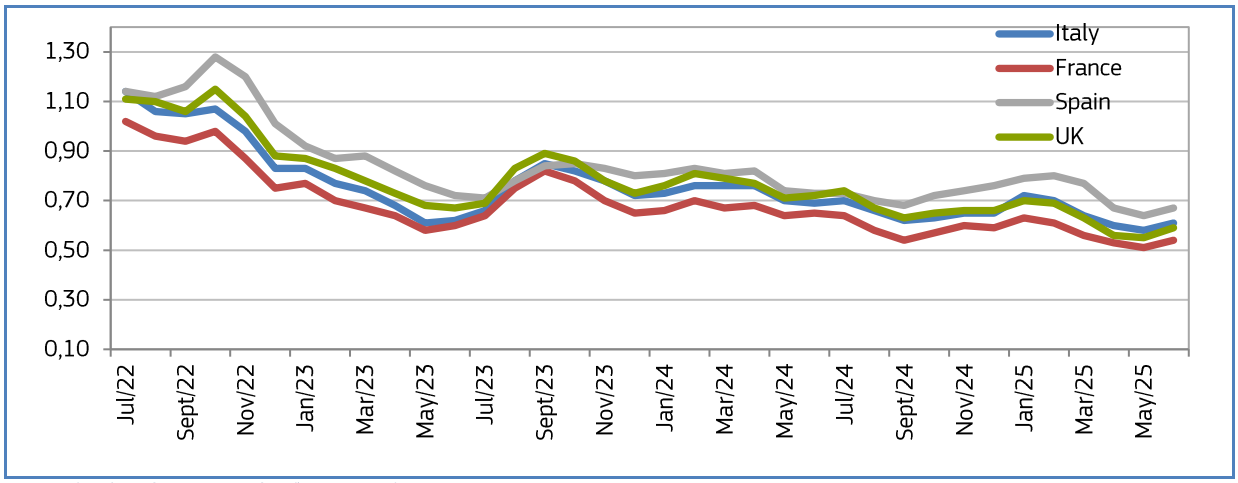
Average prices for marine fuel in **June 2025** ranged between 0,54 and 0,67 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 5,7% compared with the previous month and decreased by an average of 13,6% compared with the same month in 2024.

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

| Country | Jun 2025 | Change from May 2025 | Change from Jun 2024 |
|---|---|---|---|
| France *(ports of Lorient and Boulogne)* | 0,54 | 6% | -17% |
| Italy *(ports of Ravenna and Livorno)* | 0,61 | 5% | -12% |
| Spain *(ports of A Coruña and Vigo)* | 0,67 | 5% | -8% |
| The UK *(ports of Grimsby and Aberdeen)* | 0,59 | 7% | -18% |

*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 2,2% in May 2025, down from 2,4% in April 2025. A year earlier, the rate was 2,7%.

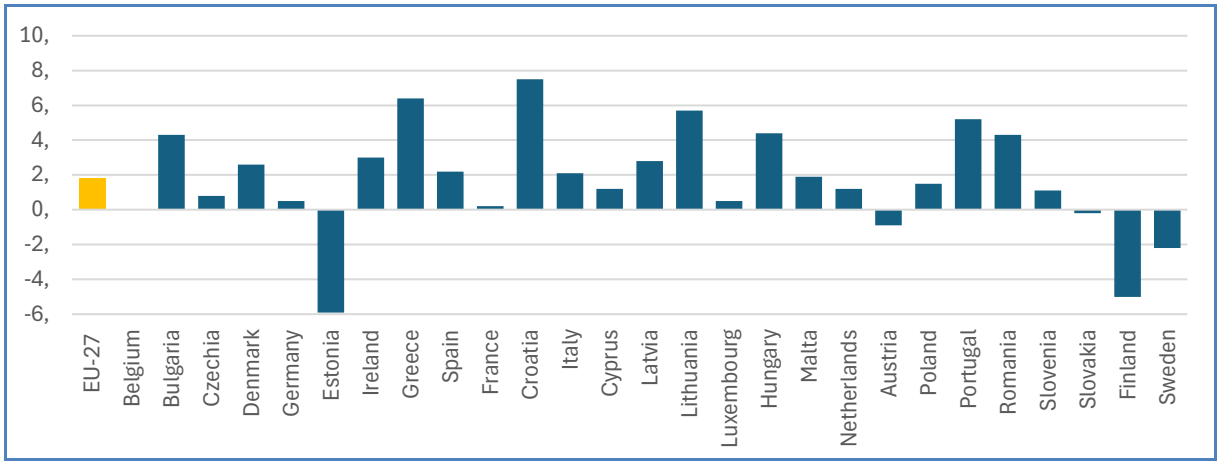
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR MAY 2025, COMPARED WITH MAY 2024**

| Lowest inflation rates | | Highest inflation rates | |
|---|---|---|---|
| Cyprus | +0,4% | Romania | +5,4% |
| France | +0,6% | Estonia | +4,6% |
| Ireland | +1,4% | Hungary | +4,5% |

*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 MAY 2025 (value expressed in percentage)**




*Source: Eurostat.*

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

| | May 2023 | May 2024 | Apr 2025 | May 2025 | Change from Apr 2025 | Change from May 2024 |
|---|---|---|---|---|---|---|
| Food and non-alcoholic beverages | 140,78 | 143,08 | 147,58 | 148,23 | 0,4% | 3,6% |
| Fish and seafood | 138,99 | 141,87 | 143,61 | 144,44 | 0,6% | 1,8% |
| Fresh or chilled fish | 131,35 | 135,70 | 138,08 | 138,24 | 0,1% | 1,9% |
| Frozen fish | 138,95 | 138,64 | 140,49 | 141,64 | 0,8% | 2,2% |
| Fresh or chilled seafood | 127,38 | 130,65 | 132,49 | 134,38 | 1,4% | 2,9% |
| Frozen seafood | 119,47 | 118,42 | 117,83 | 119,35 | 1,3% | 0,8% |
| Dried, smoked or salted fish and seafood | 139,08 | 141,86 | 143,56 | 145,43 | 1,3% | 2,5% |
| Other preserved or processed fish and seafood and fish and seafood preparations | 134,27 | 137,37 | 138,43 | 138,94 | 0,4% | 1,1% |

*Source: Eurostat.*

## 2. 4. Exchange rates

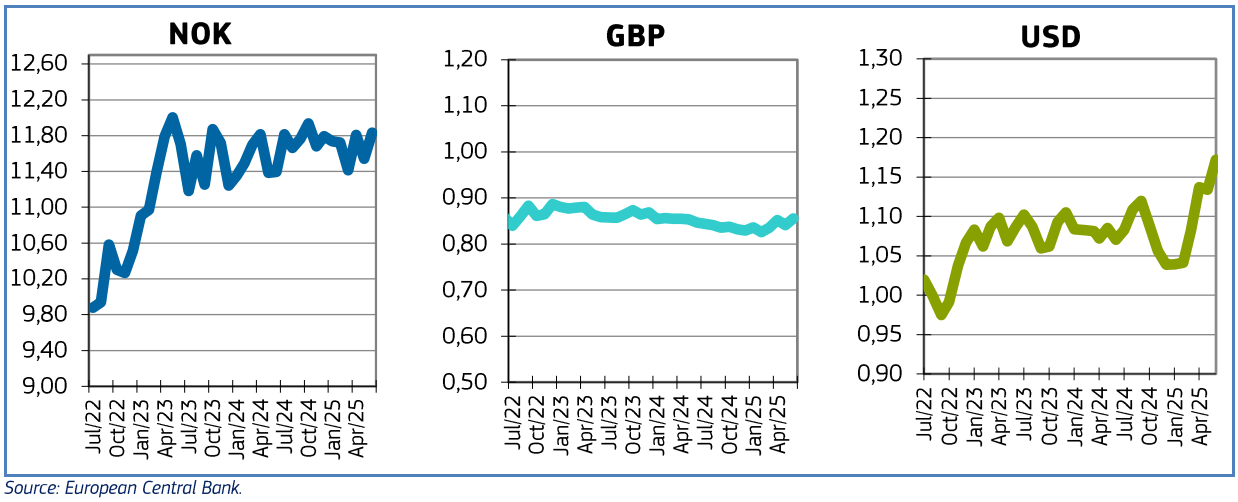
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

| Currency | Jun 2023 | Jun 2024 | May 2025 | Jun 2025 |
|---|---|---|---|---|
| NOK | 11,7040 | 11,3965 | 11,5408 | 11,8345 |
| GBP | 0,8583 | 0,8464 | 0,8412 | 0,8555 |
| USD | 1,0866 | 1,0705 | 1,1339 | 1,1720 |

*Source: European Central Bank.*

In June 2025, the euro appreciated against the Norwegian krone (2,5%), the British pound sterling (1,7%), and the US dollar (3,4%), relative to the previous month. For the past six months, the euro has fluctuated around 11,6765 against the Norwegian krone. Compared with June 2024, the euro has appreciated 3,8% against the Norwegian krone, 9,5% against the US dollar and 1,1% 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-Apr 2025 vs Jan- Apr 2024): Finland, France, Ireland and the United Kingdom recorded an increase in both first-sales value and volume. Increases in Finland were mainly due to herring and in Ireland due to mackerel.

**Decreases in value and volume** (Jan- Apr 2025 vs Jan- Apr 2024): Cyprus, Estonia, Germany, 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 the shrimp *Crangon* spp., mackerel and cod.

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

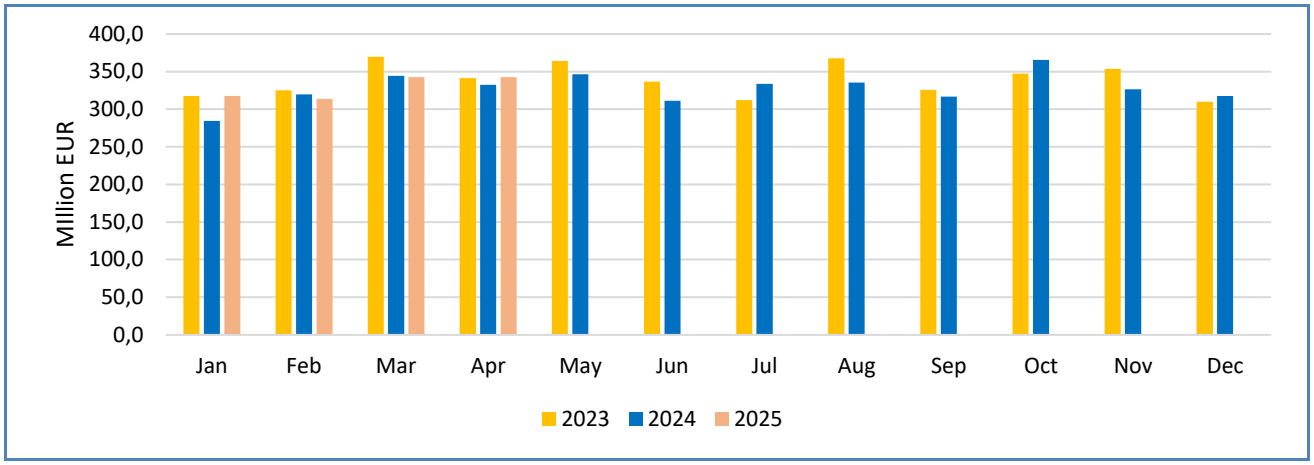
| | January – April 2023 | | January – April 2024 | | January – April 2025 | | Change from January – April2024 | |
|---|---|---|---|---|---|---|---|---|
| Country | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Belgium | 5.682 | 31,80 | 4.726 | 25,73 | 4.684 | 27,12 | -1% | 5% |
| Bulgaria | 377 | 0,22 | 892 | 0,52 | 724 | 0,54 | -19% | 3% |
| Cyprus | 111 | 0,79 | 108 | 0,81 | 101 | 0,71 | -7% | -12% |
| Denmark | 319.879 | 163,82 | 308.298 | 173,56 | 283.595 | 175,37 | -8% | 1% |
| Estonia | 32.216 | 10,07 | 30.804 | 14,89 | 25.404 | 11,17 | -18% | -25% |
| Finland | 28.678 | 8,07 | 25.584 | 9,79 | 33.697 | 10,20 | 32% | 4% |
| France | 67.619 | 241,43 | 66.502 | 223,67 | 69.839 | 250,12 | 5% | 12% |
| Germany | 16.776 | 20,17 | 15.044 | 22,82 | 2.303 | 5,14 | -85% | -77% |
| Ireland | 130.266 | 129,08 | 129.783 | 117,88 | 147.390 | 152,44 | 14% | 29% |
| Italy | 22.890 | 107,48 | 17.611 | 82,03 | 15.506 | 78,95 | -12% | -4% |
| Latvia | 19.748 | 5,42 | 18.386 | 6,38 | 18.261 | 7,39 | -1% | 16% |
| Lithuania | 134 | 0,45 | 83 | 0,17 | 62 | 0,11 | -25% | -37% |
| Netherlands | 37.481 | 51,04 | 4.980 | 36,66 | 5.549 | 35,76 | 11% | -2% |
| Poland | 44.238 | 15,39 | 35.315 | 17,60 | 35.110 | 16,57 | -1% | -6% |
| Portugal | 21.564 | 88,00 | 18.469 | 77,10 | 17.863 | 79,14 | -3% | 3% |
| Spain | 134.525 | 447,06 | 126.942 | 438,24 | 113.183 | 441,38 | -11% | 1% |
| Sweden | 69.297 | 34,30 | 47.561 | 32,94 | 33.084 | 24,80 | -30% | -25% |
| Norway | 1.299.545 | 1.333,37 | 1.249.036 | 1.247,96 | 1.037.339 | 1.311,48 | -17% | 5% |
| United Kingdom | 126.048 | 212,46 | 131.566 | 229,87 | 134.102 | 261,17 | 2% | 14% |

*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–April 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.

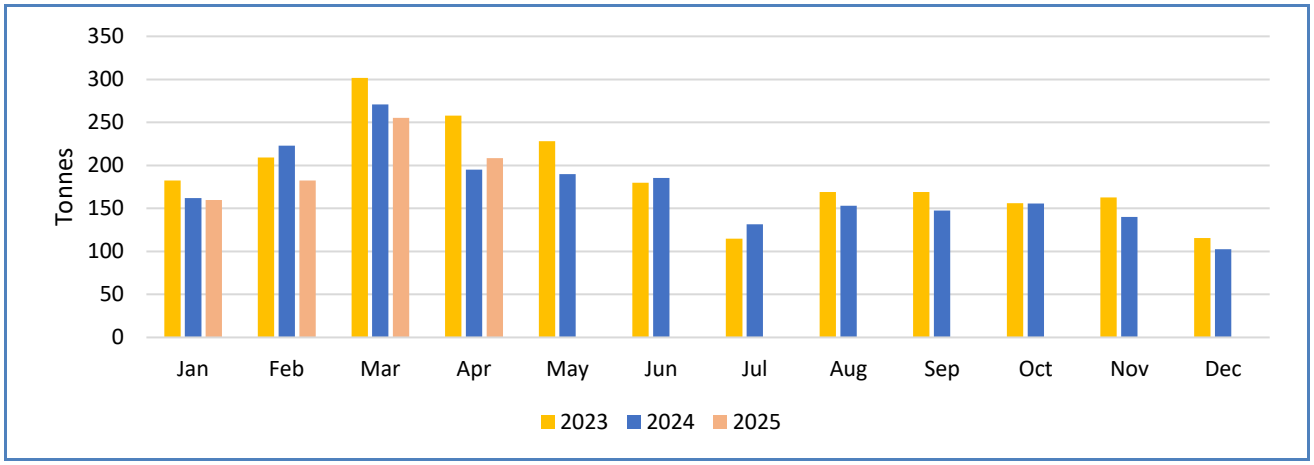
Overall value of first sales in the period January-April in 2025 was EUR 1.316,9 million, a 3% increase compared to 2024 and 3% less compared to 2023. Overall volume was 806.355 tonnes, a 5% decrease compared to 2024, and a 15% decrease compared to 2023.

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




In the first four months of 2025, monthly first-sales value increased in January and April and decreased in the two intervening months compared to the same period in 2024 and 2023. Between January and April 2025 first-sales volume decreased compared to the same period in both 2024 and 2023, except for April 2025 when volumes were higher than April 2024. Between January and April 2025, first-sales value experienced a 3% increase compared to 2024 when mainly small pelagics (+6%) and bivalves and other molluscs and aquatic invertebrates (+12%), were driving the increase, and saw a 6% decrease compared to 2023 with groundfish, tuna and tuna-like species and flatfish (-7%, -21% and -12% 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 (-8% and -17% respectively) and 2023 (-3% and -16% 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 101,5 million, a 12% increase compared to the same period in 2024. First-sales volume came to 43.341 tonnes, an increase of 13% compared to 2024. Scallop and clam were the main commercial species driving the increase in value of the commodity group (+18% and +10%, respectively), while scallop and other molluscs and aquatic invertebrates[10] were the main contributors to the increase in volume (+28% and +24%, respectively).

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

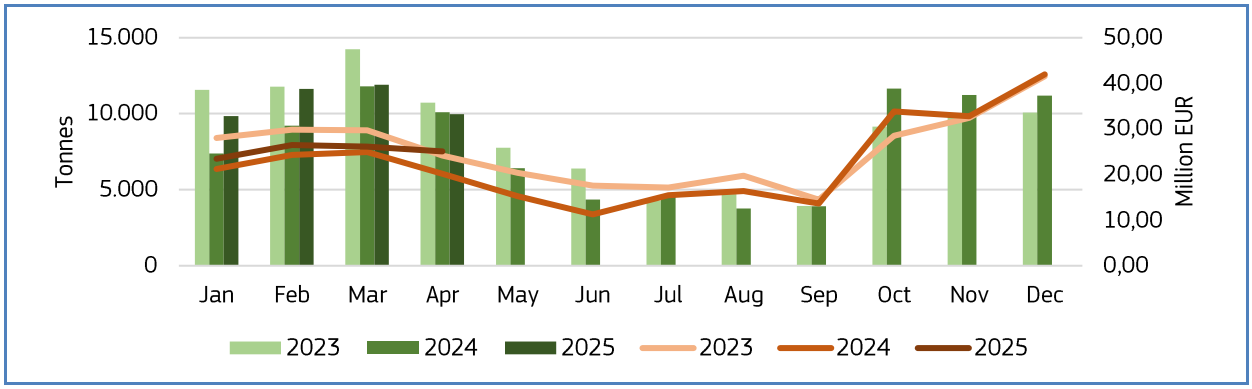



Table 6. **FIRST SALES PRICES OF BIVALVES MCS (JAN-APR 2024 AND JAN-APR 2025)**

| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **France** | Scallop | 2,26 EUR/kg | 2,07 EUR/kg | -8% |
| **Italy** | Clam | 2,54 EUR/kg | 2,85 EUR/kg | +12% |
| **Spain** | Clam | 10,61 EUR/kg | 11,97 EUR/kg | +13% |

### Cephalopods

In 2025, first-sales value of "Cephalopods" totalled EUR 102,9 million, a 9% increase compared to 2024. First-sales volume came to 14.224 tonnes, a decrease of 4% compared to 2024. Octopus (+21% and +8%) and squid (+9% and +6%) were the two main commercial species driving the growth in first-sales value and volume.

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

[9] The data analysis in this section (figures and tables) is downloaded 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 commercial species other molluscs and aquatic invertebrates, whelk represents 70% of total first-sales value and 63% of the total first-sales volume.

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

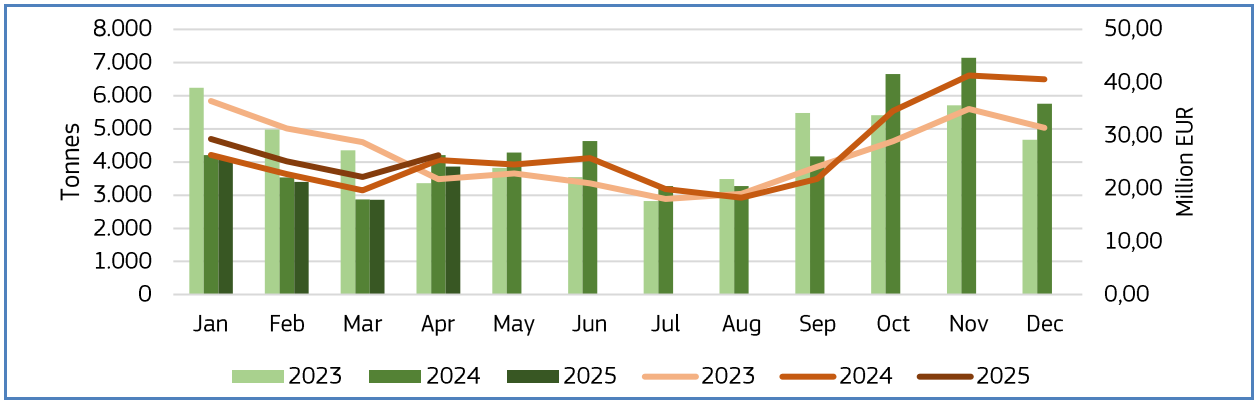



Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN-APR 2024 AND JAN-APR 2025)**

| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **France** | Octopus | 6,92 EUR/kg | 7,75 EUR/kg | +12% |
| **Portugal** | Octopus | 7,65 EUR/kg | 8,83 EUR/kg | +15% |
| **France** | Squid | 9,75 EUR/kg | 9,56 EUR/kg | -2% |

## Crustaceans

In 2025, first-sales value of "Crustaceans" totalled EUR 157,7 million, a decrease of 3% compared to 2024. First-sales volume amounted to 16.175 tonnes, an increase of 2% compared to 2024. Miscellaneous shrimps and shrimp *Crangon* spp. (-42% and -38%) were the two main products responsible for the decrease in first-sales value while deep-water rose shrimp and Norway lobster (+38% and +10%) were mainly responsible for the increase in first-sales volume.

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

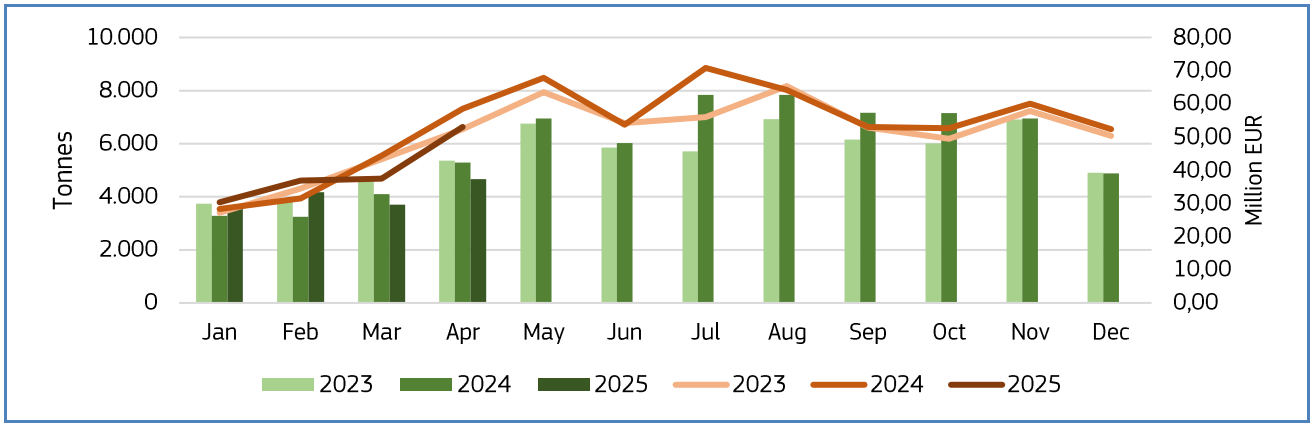



Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-APR 2024 AND JAN-APR 2025)**

| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **Germany** | Shrimp *Crangon* spp. | 11,96 EUR/kg | 12,43 EUR/kg | +4% |
| **Netherlands** | Shrimp *Crangon* spp. | 10,65 EUR/kg | 9,44 EUR/kg | -4% |
| **France** | Norway lobster | 12,39 EUR/kg | 15,42 EUR/kg | +24% |

## Flatfish

In 2025, first-sales value of "Flatfish" came to EUR 117,6 million, a 3% increase compared to 2024. First-sales volume amounted to 16.037 tonnes, a decrease of 5% compared to 2024. Common sole was the main product contributing to first-sales value (+8%), while European flounder and Greenland halibut were the main species driving the decrease in first-sales volume (-31% and -33%).

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

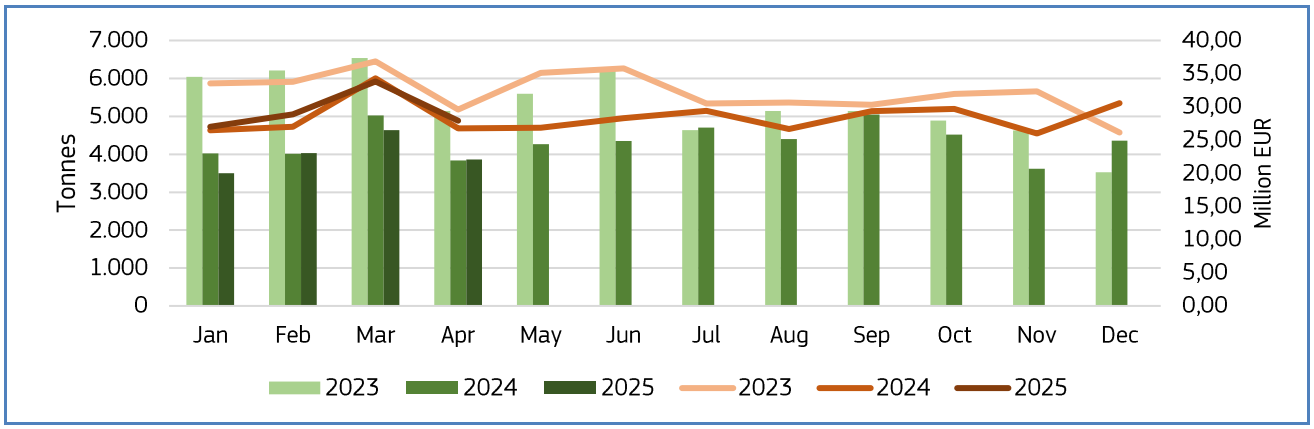


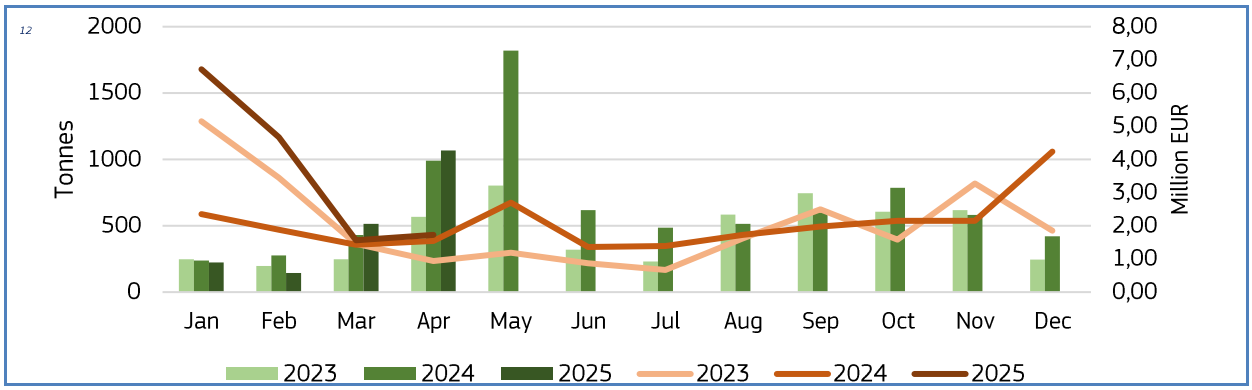

Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN-APR 2024 AND JAN-APR 2025)**

| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **Netherlands** | Common sole | 17,42 EUR/kg | 16,46 EUR/kg | -6% |
| **France** | Common sole | 17,94 EUR/kg | 16,56 EUR/kg | -8% |
| **Spain** | Greenland halibut | 5,79 EUR/kg | 6,52 EUR/kg | +13% |

## Freshwater fish

In 2025, first-sales value of "Freshwater fish" came to EUR 14,7 million, an increase of 104% compared to 2024. First-sales volume amounted to 1.946 tonnes, an increase of 1% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+176%), while other freshwater fish[11] was the main contributor to the increase in first-sales volume (+8%).

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




[11] „Other freshwater fish" comprises 24 products of whose freshwater bream, rock goby, rudd and freshwater breams nei represent 93% of first-sales value and 84% of first-sales volume.

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

| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **France** | Eel[13] | 47,12 EUR/kg | 144,41 EUR/kg | +206% |
| **Estonia** | Other freshwater fish[14] | 1,38 EUR/kg | 1,28 EUR/kg | -7% |
| **Estonia** | Pike-perch | 4,31 EUR/kg | 4,52 EUR/kg | +5% |

## Groundfish

In 2025, first-sales value of "Groundfish" totalled EUR 249,5 million, a decrease of 3% compared to 2024. First-sales volume amounted to 295.885 tonnes, a decrease of 4% compared to 2024. Other groundfish[15] (+28%) was mainly responsible for the increase in first-sales value, and blue whiting (-7%) for the decrease in first-sales value and volume.

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

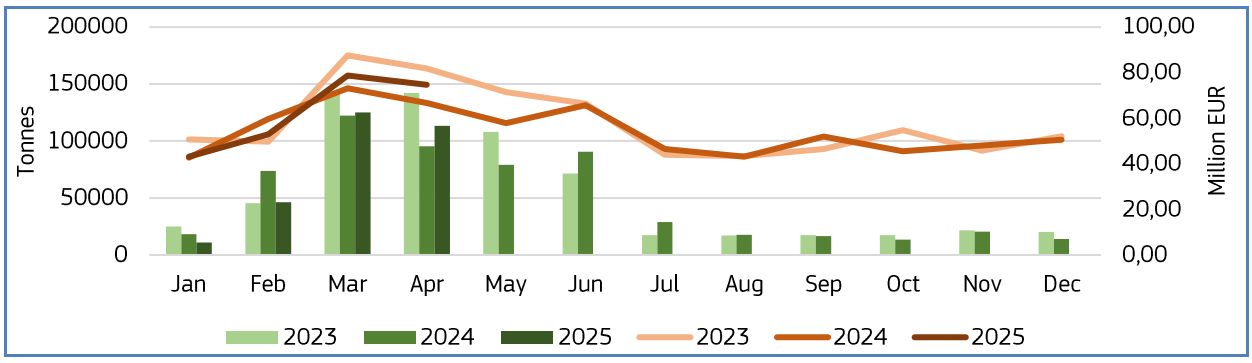



Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-APR 2024 AND JAN-APR 2025)**

| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **Denmark** | Other groundfish | 0,34 EUR/kg | 0,34 EUR/kg | 0% |
| **Denmark** | Saithe | 1,82 EUR/kg | 2,29 EUR/kg | +26% |
| **Ireland** | Blue whiting | 0,29 EUR/kg | 0,31 EUR/kg | +7% |

## Other marine fish[16]

In 2025, first-sales value of "Other marine fish" came to EUR 185,5 million, a stable value compared to 2024. First-sales volume amounted to 61.649 tonnes, an increase of 6% compared to 2024. Monk (+3%) was the main commercial species contributing most to the decrease in first-sales value while other marine fish[17] was behind the increase in first-sales volume (+25%).

[13] Average price of different products: glass eel (up to 419 EUR/kg), yellow eel (up to 21 EUR/kg) and silver eel (up to 17 EUR/kg).
[14] Thirteen species belong to the MCS „Other freshwater fish" MCS in Estonia of which European perch represents 60% of the total value and 25% of volume.
[15] „Other goundfis" comprised 46 species of which Sandeel nei and European conger accounted together for 57% of the total fist sale value.
[16] Seventeen Main Commertial 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.
[17] Of the „Other marine fish" Main Commercial Species (MCS), boarfish and boarfishes nei represents 84% of the total first sales value and 32% of the volume.

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

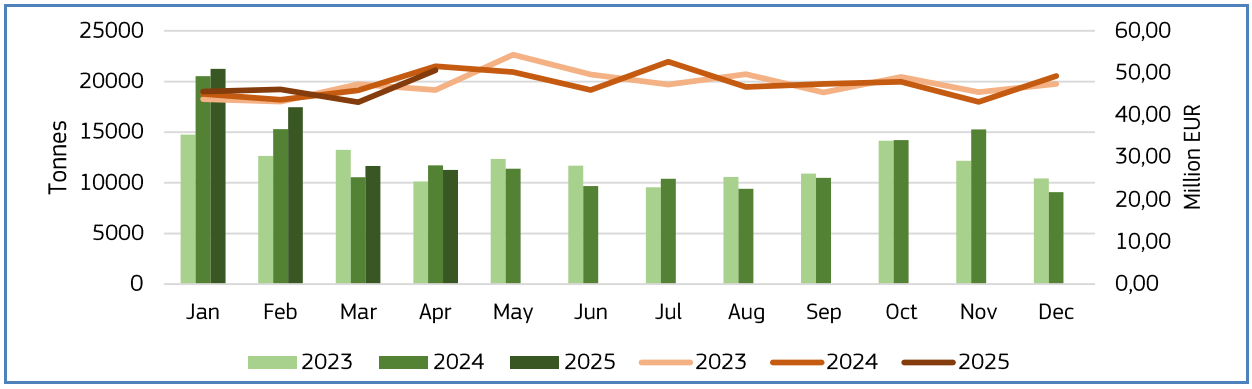



Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-APR 2024 AND JAN-APR 2025)**

| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **Denmark** | Other marine fish[18] | 0,48 EUR/kg | 0,41 EUR/kg | -14% |
| **Spain** | Red mullet | 7,52 EUR/kg | 8,50 EUR/kg | +13% |
| **Ireland** | Other marine fish[19] | 0,35 EUR/kg | 0,34EUR/kg | -3% |

## Salmonids

In 2025, first-sales value of "Salmonids" came to EUR 241.962, an increase of 5% compared to 2024, while first-sale volume amounted to 21.659 kg, an increase of 3% compared to 2024. Trout (+85% and +64%) was the main species responsible for the increase in both first-sales value and volume of salmonids.

Figure 13. **FIRST SALES VALUE AND VOLUME OF SALMONIDS, JAN 2023 – APR 2025**

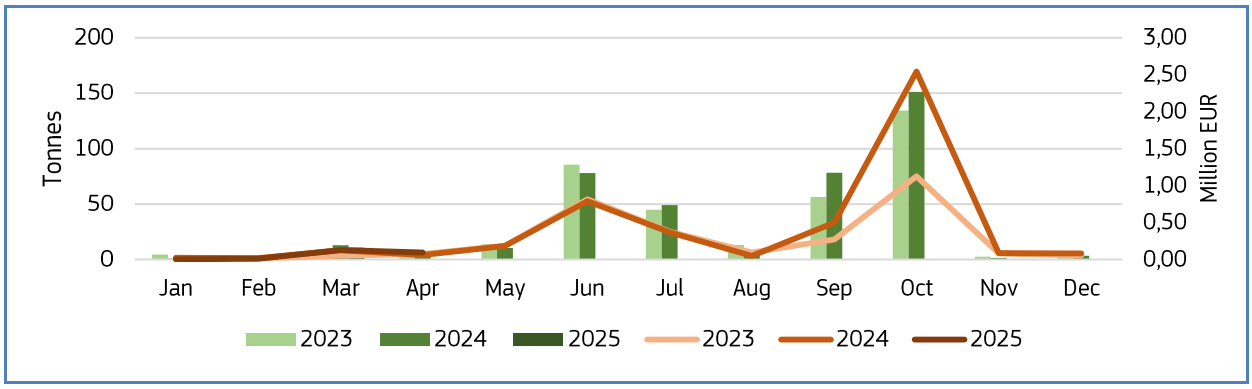



Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-APR 2024 AND JAN-APR 2025)**

| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **Poland** | Trout | 12,76 EUR/kg | 13,47 EUR/kg | +6% |
| **Estonia** | Other salmonids[20] | 4,59 EUR/kg | 7,16 EUR/kg | +56% |
| **Denmark** | Other salmonids[21] | 5,15 EUR/kg | 8,19 EUR/kg | +59% |

[18] „Other marine fish" MCS in Denmark comprises 13 species in the period analysed of which boarfish nei represented 97% of the total value and 98% of volume.
[19] „Other marine fish" MCS comprises 5 species in Ireland in the period analysed of which 96% of the total volume and 97% of value is provided by boarfish.
[20] „Other salmonids" MCS in Estonia includes only European whitefish (100%).
[21] „Other salmonids" MCS in Denmark includes only European whitefish (100%).

## Small pelagics

In 2025, first-sales value of "Small pelagics" amounted to EUR 318 million, an increase of 6% compared to 2024. First-sales volume amounted to 338.433 tonnes, a decrease of 8% compared to 2024. Mackerel (+22%) was the commercial species contributing most to the increase in first-sale value while sprat (-30%) contributed most to the decrease in first-sales volume.

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

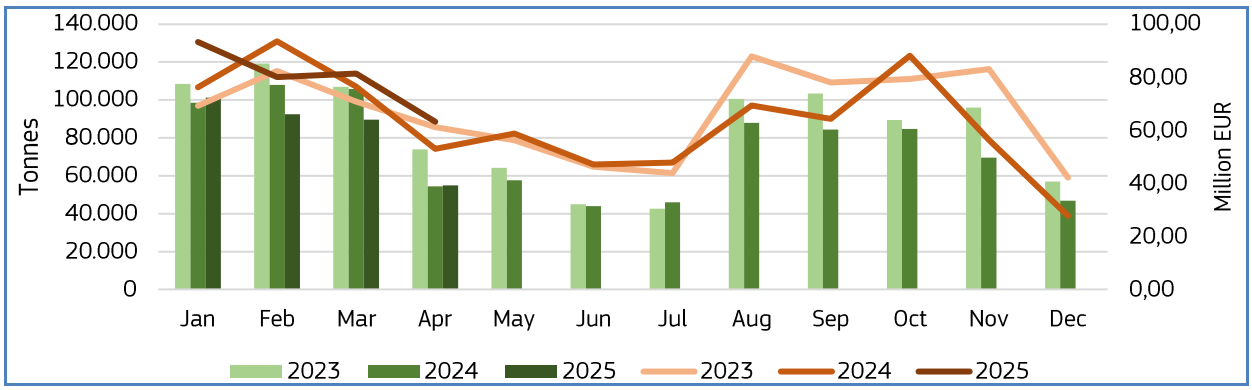



Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-APR 2024 AND JAN-APR 2025)**

| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **Ireland** | Mackerel | 1,61 EUR/kg | 2,15 EUR/kg | +34% |
| **Ireland** | Atlantic horse mackerel | 1,17 EUR/kg | 1,18 EUR/kg | +1% |
| **Spain** | Mackerel | 1,35 EUR/kg | 2,09 EUR/kg | +54% |

## Tuna and tuna-like species

In 2025, first-sales value of "Tuna and tuna-like species" came to EUR 69,6 million, a decrease of 16% compared to 2024. First-sales volume totalled 16.493 tonnes, a decrease of 29% compared to 2024. Yellowfin tuna (-30% and -30%), bigeye tuna (-48% and -61%) and skipjack tuna (-59% and -57%) were the three main commercial species driving the decrease in first-sales value and volume.

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

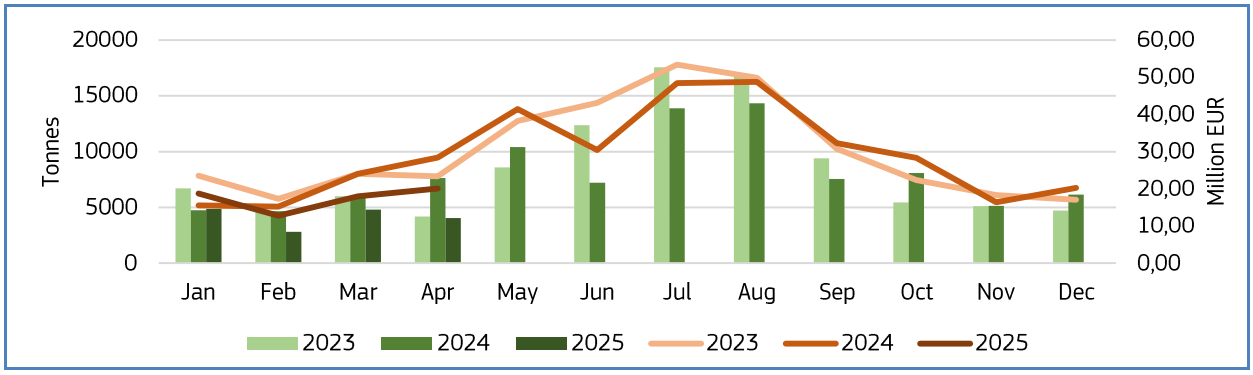



Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-APR 2024 AND JAN-APR 2025)**

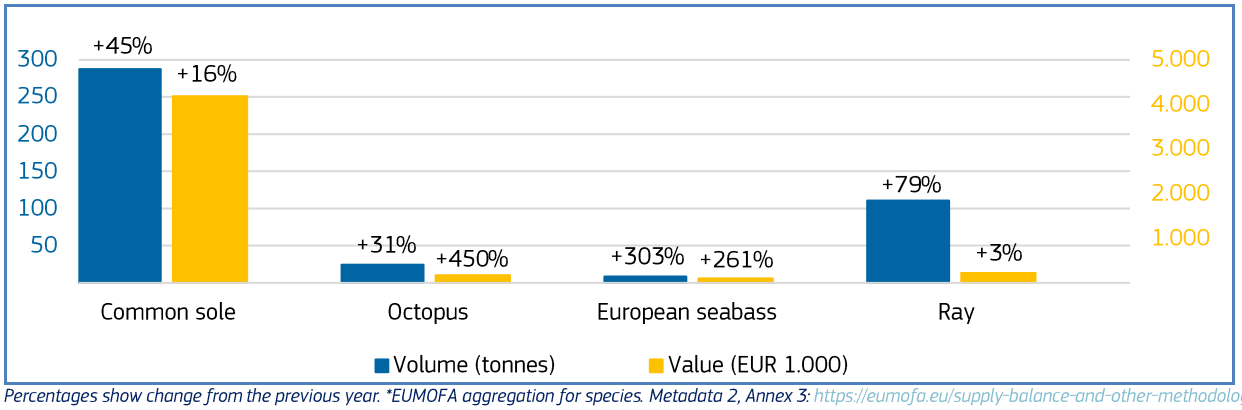
| Country | Main Commercial Species | First-sales average price Jan-Apr 2024 | First-sales average Price Jan-Apr 2025 | Trend (Jan-Apr 2025 vs Jan-Apr 2024 %) |
|---|---|---|---|---|
| **Spain** | Yellowfin tuna | 2,68 EUR/kg | 2,63 EUR/kg | -2% |
| **Spain** | Skipjack tuna | 1,69 EUR/kg | 1,59 EUR/kg | -6% |
| **Spain** | Bigeye tuna | 2,26 EUR/kg | 2,40 EUR/kg | +4% |

## 3.3. First sales in reporting countries[22]

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

| Belgium | First-sales value / trend % | First-sales volume / trend % | Main contributing species | Notes |
|---|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 27,1 million, +5% | 4.684 tonnes, -1% | **Value**: octopus, cuttlefish, squid. **Volume**: cuttlefish, gurnard, whiting. | In April 2025, **octopus** recorded significant growth in first-sales value (+450%) and first-sales volume (+31%) compared to April 2024. Belgium has been reporting more octopus landings in the English Channel area since 2019. Such an evolution is primarily explained by a change in migratory patterns, with the octopus population moving North due to climate change.[23] Furthermore, the fish auction explains that significantly more octopus is being landed – particularly larger specimens (*Octopus vulgaris*) – which fetch a higher market price. This also explains why the increase in value is disproportionately higher than the increase in volume. |
| **Apr 2025 vs Apr 2024** | EUR 6,8 million, +14% | 1.017 tonnes, +28% | Common sole, octopus, European seabass, ray. | |

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



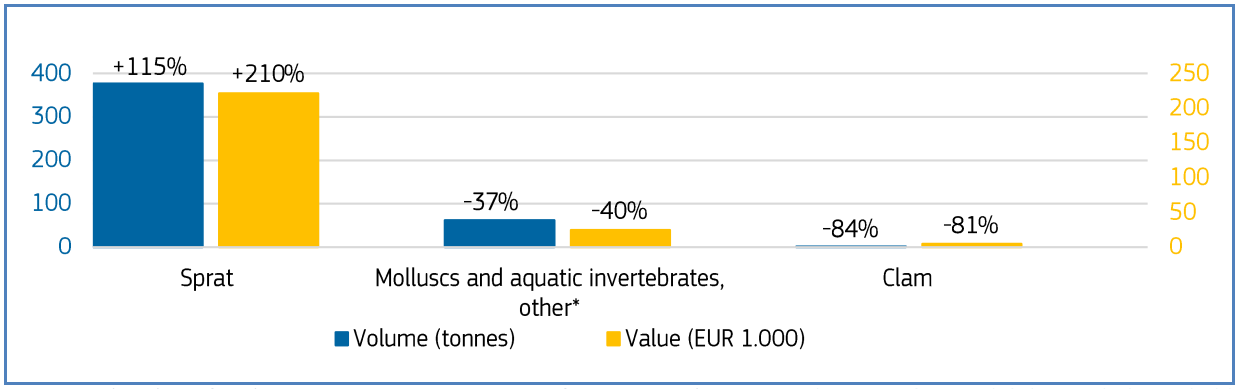

*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3:* https://eumofa.eu/supply-balance-and-other-methodologies

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

| Bulgaria | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 0,5 million, +3% | 724 tonnes, -19% | **Value**: clam, red mullet **Volume**: sprat, Other molluscs and aquatic invertebrates*. |
| **Apr 2025 vs Apr 2024** | EUR 0,3 million, +81% | 440 tonnes, +55% | Sprat, Other molluscs and aquatic invertebrates*, clam. |

[22] First-sales data updated on 18. 06. 2025. This section covers all countries for which data is available on the date of extraction and analysis.
[23] ICES. 2024. Working Group on Cephalopod Fisheries and Life History (WGCEPH - outputs from 2023 meeting).
ICES Scientific Reports. 6:62. 69 pp. https://doi.org/10.17895/ices.pub.26048101

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

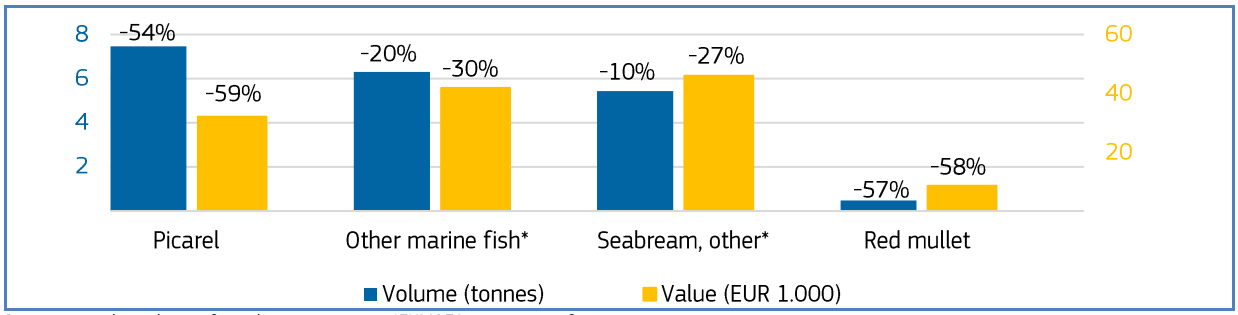



*Percentages show change from the previous year. *EUMOFA aggregation for species. Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies*

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

| Cyprus | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 0,7 million, -12% | 101 tonnes, -7% | Other seabream*, red mullet, picarel, squid. |
| **Apr 2025 vs Apr 2024** | EUR 0,2 million, -36% | 24 tonnes, -32% | Picarel, Other marine fish*, Other seabream*, red mullet. |

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



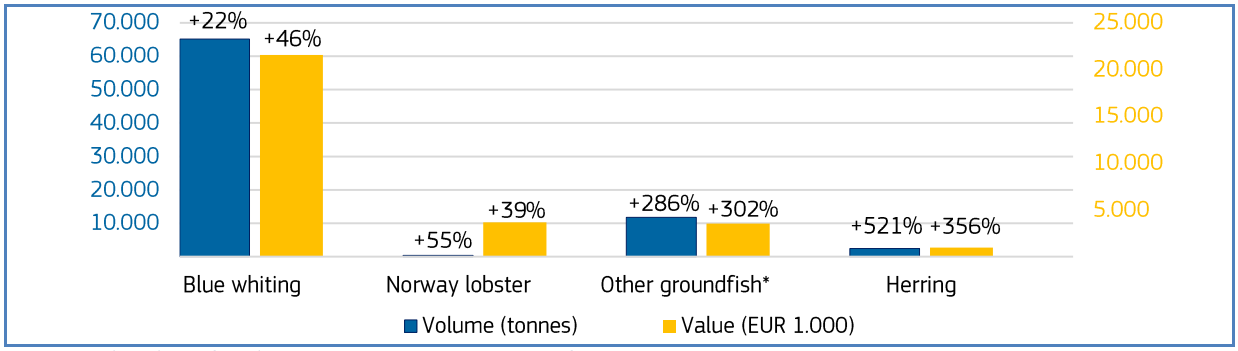

*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

| Denmark | First-sales value / trend % | First-sales volume / trend % | Main contributing species | Notes |
|---|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 175,4 million, +1% | 283.595 tonnes, -8% | **Value**: Norway lobster, saithe, other groundfish*. **Volume**: sprat, blue whiting, mussel *Mytilus* spp. | In April 2025, grouping of species "Other groundish" recorded a remarkable increase in terms of first-sales value (+302%) and volume (+286%) compared to April 2024. The increase of other groundfish production mostly involved sandeel, which represents around 99% of the other groundfish species volume. While the increase is important in absolute terms, it is not that significant in relative terms and can be explained by the decision of the UK to ban sandeel fishing as of April 2024 in the British waters, in order to protect seabirds and marine mammals. This pushed the Danish fleet to adapt its usual fishing patterns. |
| **Apr 2025 vs Apr 2024** | EUR 43,9 million, +29% | 87.487 tonnes, +28% | Blue whiting, Norway lobster, Other groundfish*, herring. | |

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

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



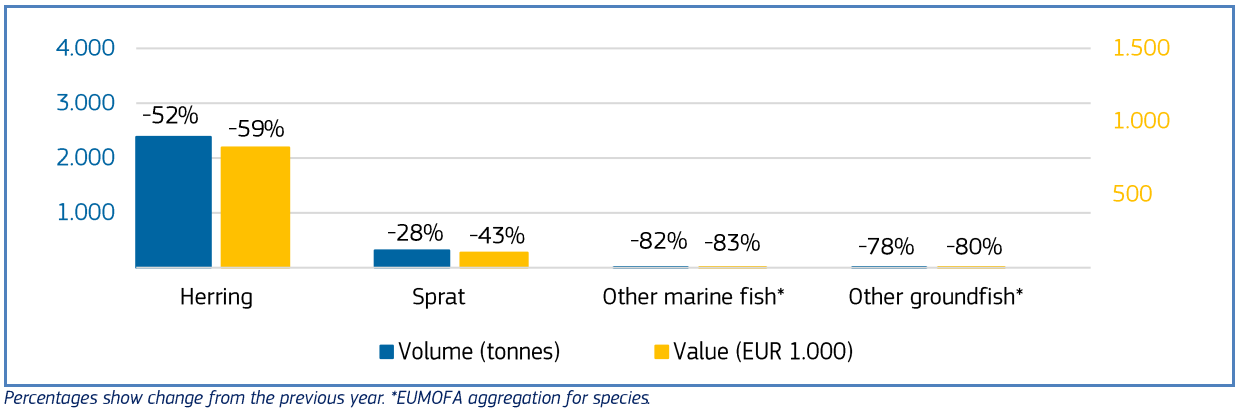

*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

| Estonia | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 11,2 million, -25% | 25.404 tonnes, -18% | Sprat, herring, Other marine fish*. |
| **Apr 2025 vs Apr 2024** | EUR 2,5 million, -27% | 3.958 tonnes, -38% | Herring, sprat, smelt, Other marine fish*, Other groundfish. |

**EUMOFA aggregation for species*

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

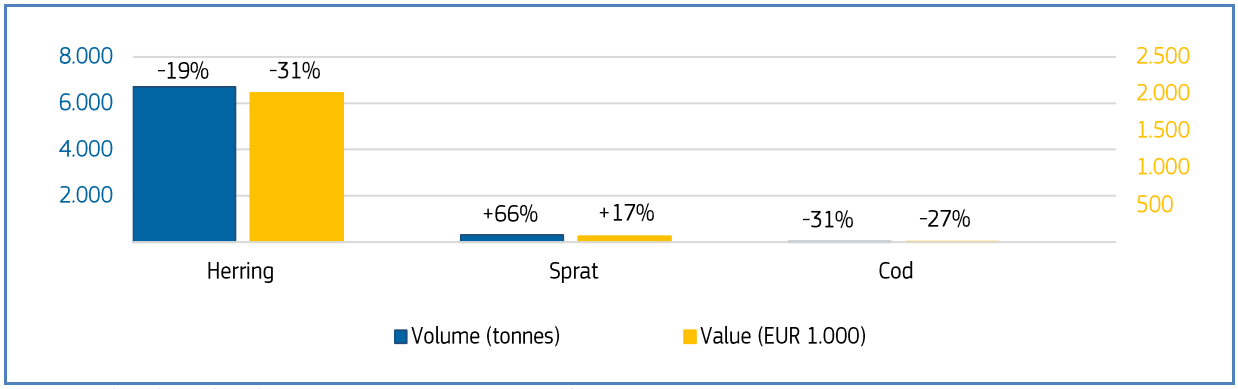



*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

| Finland | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 10,2 million, +4% | 33.967 tonnes, +32% | Herring. |
| **Apr 2025 vs Apr 2024** | EUR 2,0 million, -30% | 7.001 tonnes, -17% | Herring, sprat, cod. |

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

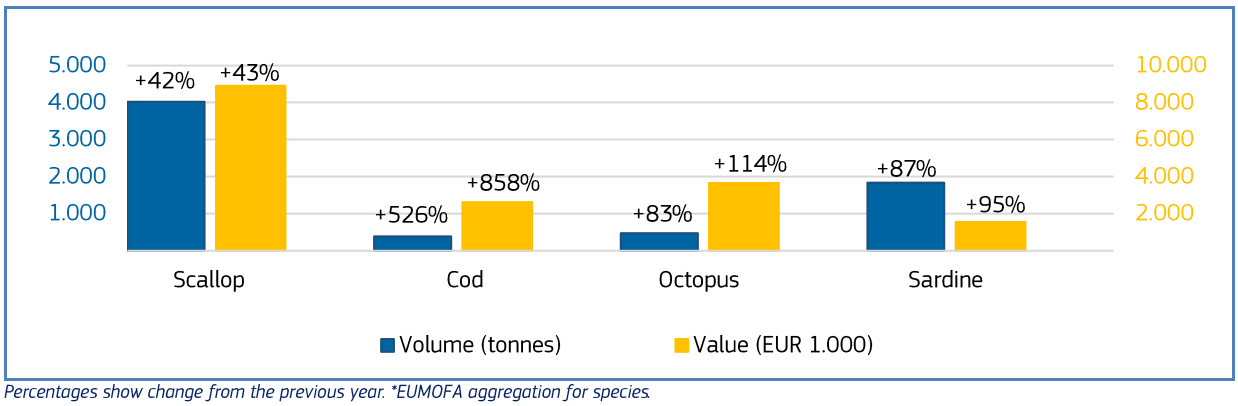



*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

| France | First-sales value / trend % | First-sales volume / trend % | Main contributing species | Notes |
|---|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 250,1 million, +12% | 69.839 tonnes, +5% | Eel, scallop, octopus, sardine. | In April 2025, there was a significant increase in **cod** first sales value compared to April 2024. In France, the bulk of cod production is made by large trawlers, therefore the change is result of a production strategy.[24] |
| **Apr 2025 vs Apr 2024** | EUR 63,4 million, +8% | 18.175 tonnes, +13% | Scallop, cod, octopus, sardine. | |

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




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

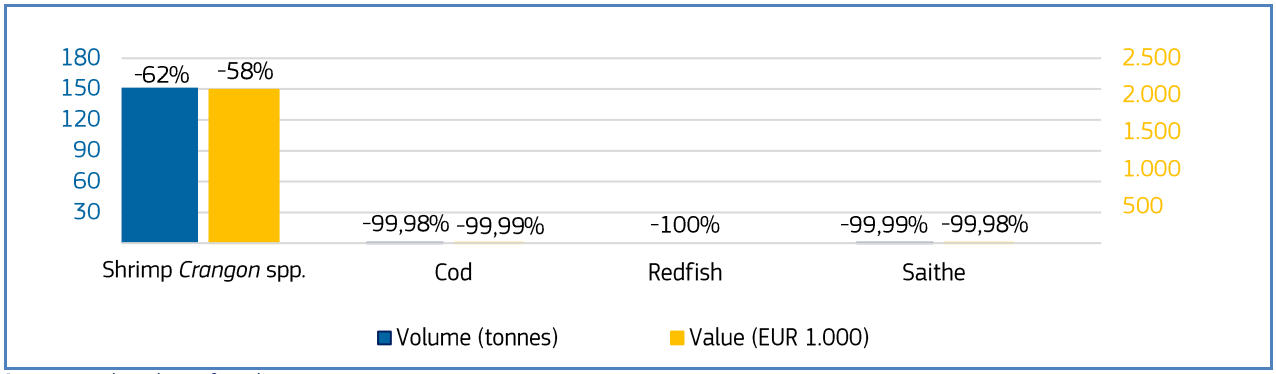
Table 23. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY**

| Germany | First-sales value / trend % | First-sales volume / trend % | Main contributing species | Notes |
|---|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 5,1 million, -77% | 2.303 tonnes, -85% | Shrimp *Crangon* spp., mackerel, cod, blue whiting. | In April 2025, the **cod** fishery recorded almost no first sales in terms of value and volume due to the absence of fishing activity by the German fleet during the first four months of the year. Structurally, the |
| **Apr 2025 vs Apr 2024** | EUR 2,1 million, -71% | 187 tonnes, -87% | Shrimp *Crangon* spp., cod, redfish, saithe. | |

[24] ICES. 2024. Cod (Gadus morhua) in Subarea 4, divisions 6.a and 7.d, and Subdivision 20 (North Sea, West of Scotland, eastern English Channel and Skagerrak). Replacing advice provided in June 2024. In Report of the ICES Advisory Committee, 2024. ICES Advice 2024, cod.27.46a7d20, https://doi.org/10.17895/ices.advice.27441678

| | | | | |
|---|---|---|---|---|
| | | | | German cod fishery is affected by several factors, particularly the decline in cod stocks across the Baltic Sea. **Redfish** followed a very similar trend, due to the closure of fishing activities in Greenland waters, which limited the operations of German demersal trawlers.[25] |

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

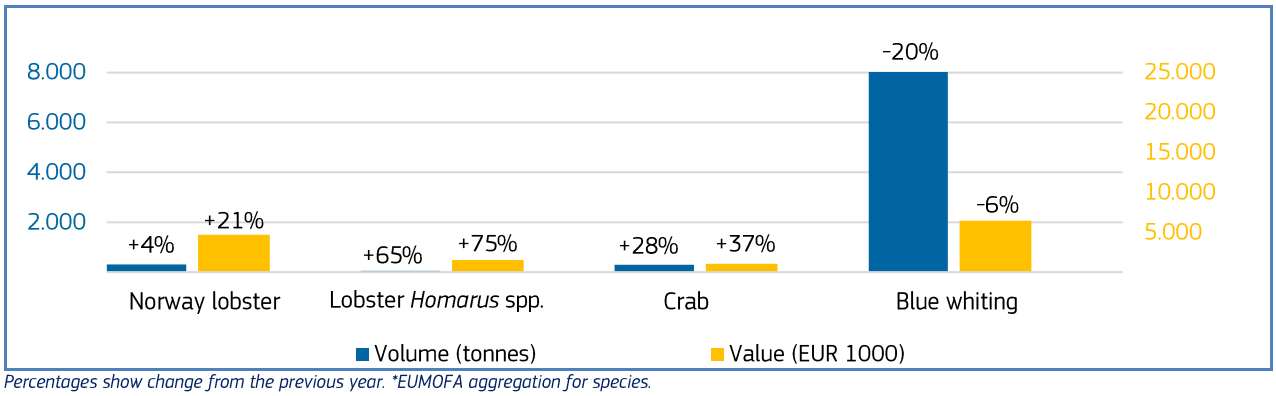



*Percentages show change from the previous year.*

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

| Ireland | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 152,4 million, +29% | 147.390 tonnes, +14% | Mackerel, Atlantic horse mackerel, blue whiting, sprat. |
| **Apr 2025 vs Apr 2024** | EUR 19,4 million, +17% | 22.828 tonnes, -16% | **Value**: Norway lobster, lobster *Homarus* spp., crab. **Volume**: blue whiting. |

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



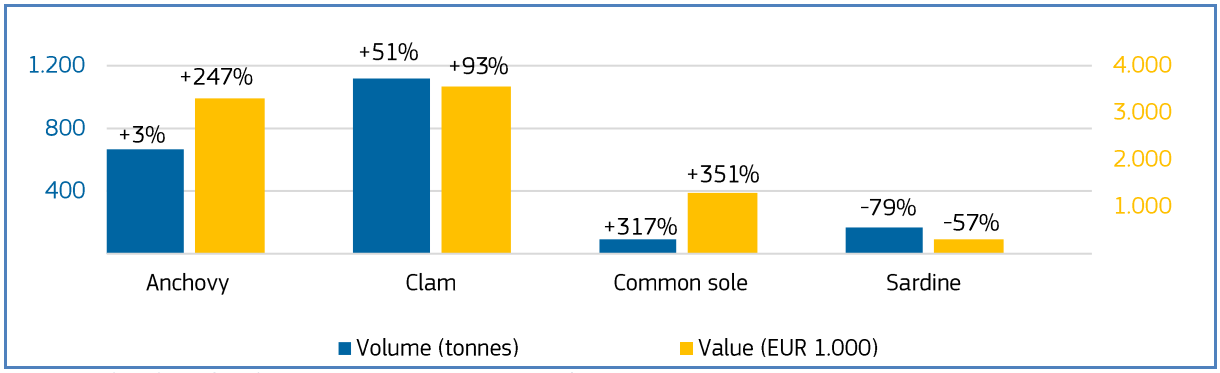

*Percentages show change from the previous year. *EUMOFA aggregation for species.*

[25] Thünen Institute of Sea Fisheries. 2024. Explanations on the ICES advice for 2025 https://www.thuenen.de/media/ti-themenfelder/Fischerei/Daten_fuer_Europa/Ices-Fangempfehlungen/Erlaeuterungen_zum_Download_Rotbarsch_Groenland-Irmingersee_2025_EN.pdf

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

| Italy | First-sales value / trend % | First-sales volume / trend % | Main contributing species | Notes |
|---|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 78,9 million, -4% | 15.506 tonnes, -12% | Anchovy, miscellaneous shrimps*, sardine, anchovy. | The significant increase in first-sales value and volume of common sole in April 2025 compared to April 2024 was because the largest portion of common sole catches are landed in the Northern Adriatic, an area where fishing is primarily carried out by the Italian *rapido* trawl fleet. However, while the increase in value (+351%) and in volume (+317%) over a one-year period may be partially attributable to improved stock status and biological conditions, it is also likely that reduced fishing activity in April 2024 led to lower landings that year, exaggerating the growth observed in April 2025. |
| **Apr 2025 vs Apr 2024** | EUR 21,0 million, +14% | 3.900 tonnes, -8% | **Value**: anchovy, clam, common sole. **Volume**: sardine | |

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

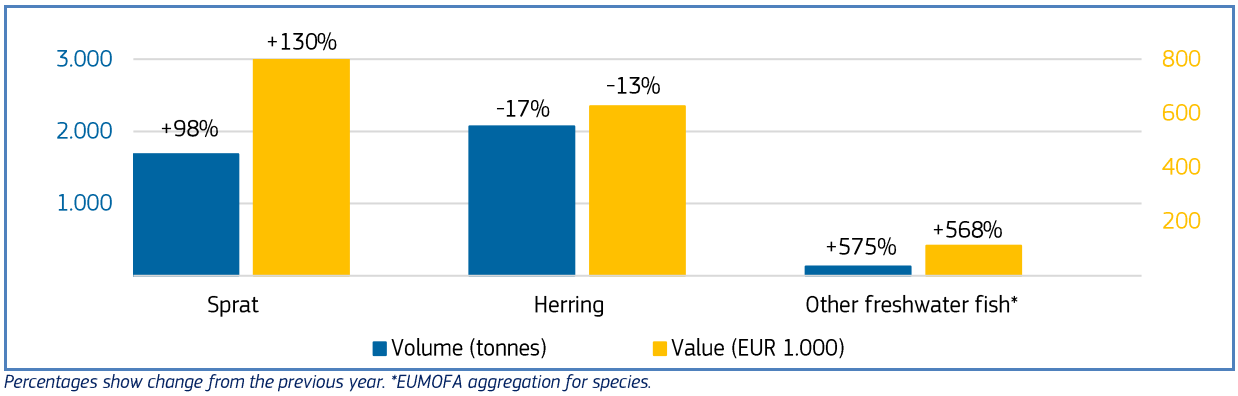



*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

| Latvia | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 7,4 million, +16% | 18.261 tonnes, -1% | **Value**: herring. **Volume**: sprat, other marine fish*, smelt, European founder. |
| **Apr 2025 vs Apr 2024** | EUR 1,5 million, +37% | 3.922 tonnes, +11% | Sprat, herring, other marine fish*. |

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

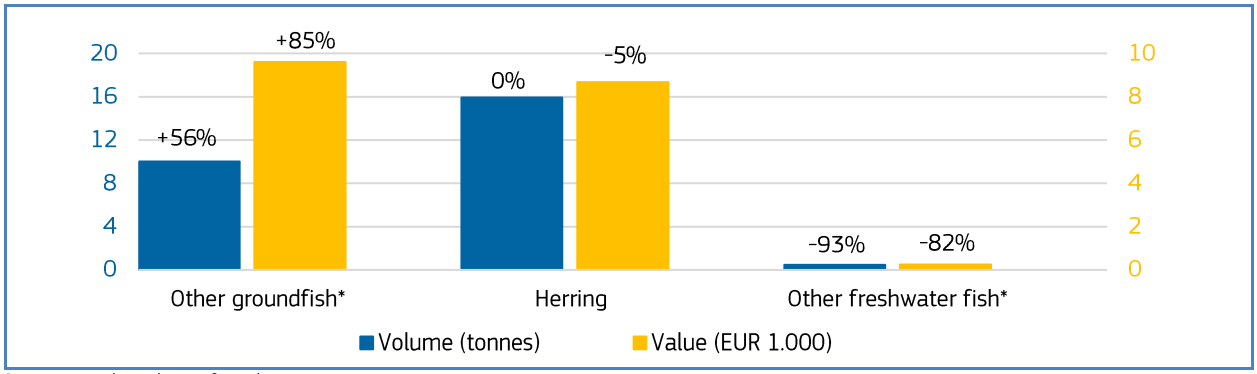



*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

| Lithuania | First-sales value / trend % | First-sales volume/ trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 0,1 million, -37% | 62 tonnes, -25% | Smelt, miscellaneous small pelagics*, other freshwater fish*. |
| **Apr 2025 vs Apr 2024** | EUR 0,02 million, 0% | 28 tonnes, -18% | **Value**: other groundfish*, herring, other freshwater fish*. **Volume**: other freshwater fish*, miscellaneous small pelagics*. |

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

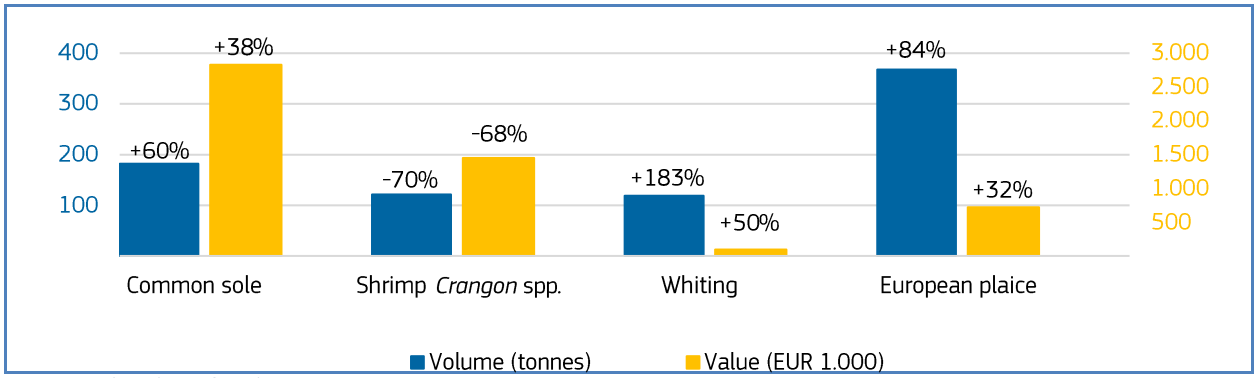



*Percentages show change from the previous year.*

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-Apr 2025 vs Jan-Apr 2024** | EUR 35,8 million, -2% | 5.549 tonnes, +11% | **Value**: shrimp *Crangon* spp., squid, European plaice. **Volume**: European flounder, common sole, whiting. |
| **Apr 2025 vs Apr 2024** | EUR 7,8 million, -14% | 1.281 tonnes, +22% | **Value**: shrimp *Crangon* spp. **Volume**: European plaice, whiting, common sole. |

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

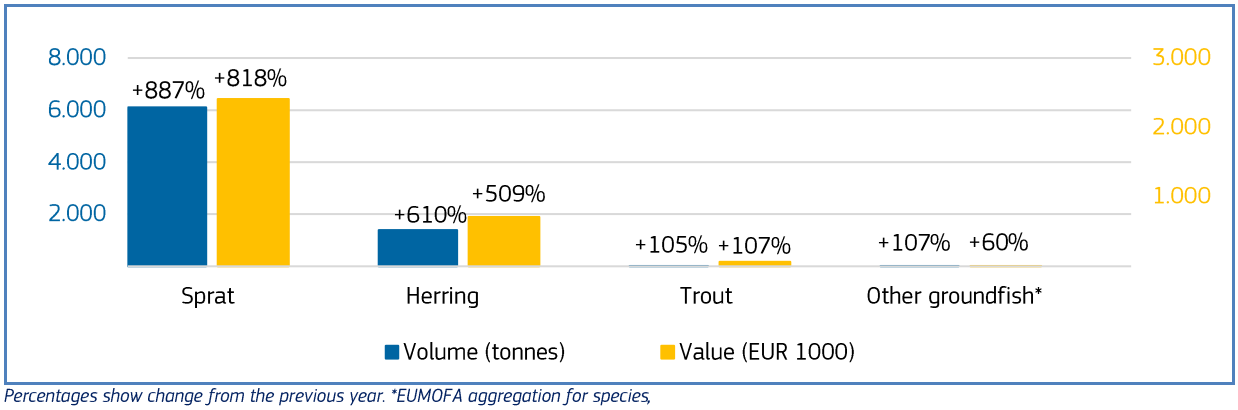



*Percentages show change from the previous year.*

Figure 29. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, APRIL 2025**

| Poland | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 16,6 million, -6% | 35.110 tonnes, -1% | Sprat, European flounder, other freshwater fish*, pike-perch. |
| **Apr 2025 vs Apr 2024** | EUR 3,6 million, +276% | 7.856 tonnes, +454% | Sprat, herring, trout, other groundfish*. |

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

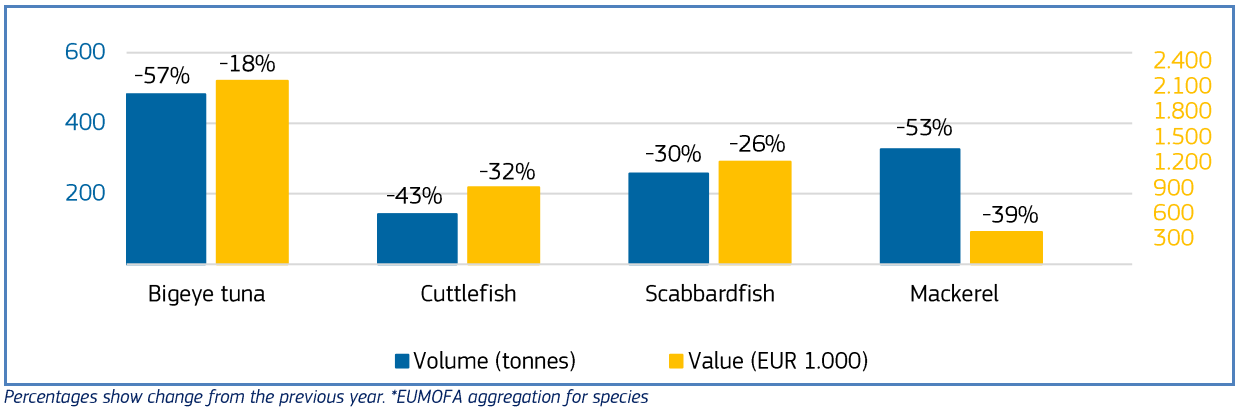



*Percentages show change from the previous year. *EUMOFA aggregation for species,*

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

| Portugal | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 79,1 million, +3% | 17.863 tonnes, -3% | **Value**: Anchovy, octopus, sardine. **Volume**: mackerel, bigeye tuna |
| **Apr 2025 vs Apr 2024** | EUR 22,1 million, -5% | 5.759 tonnes, -11% | Bigeye tuna, cuttlefish, scabbardfish, mackerel. |

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

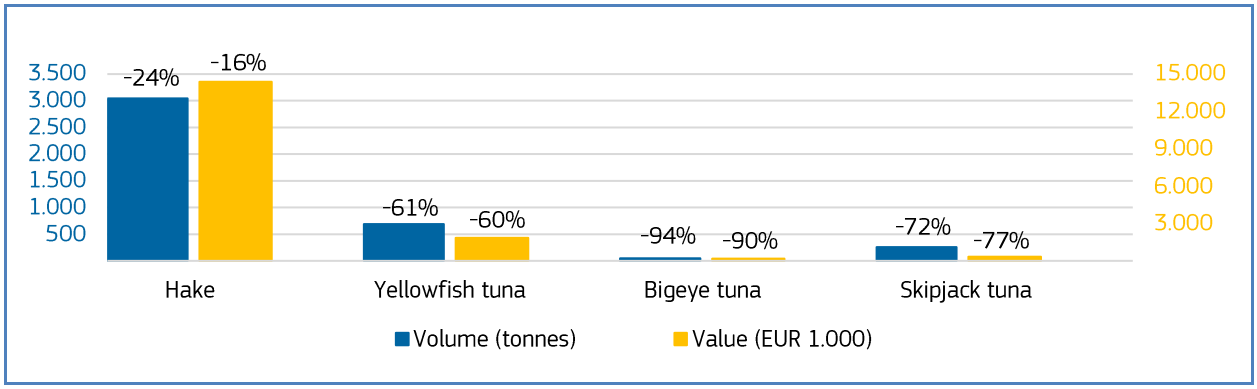



*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

| Spain | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 441,379 mil, +1% | 113.183 tonnes, -11% | **Value**: mackerel, anchovy, deep-water rose shrimps*. **Volume**: mackerel, yellowfish tuna, blue whiting. |
| **Apr 2025 vs Apr 2024** | EUR 140,2 million -4% | 35.829 tonnes, -22% | Hake, yellowfish tuna, bigeye tuna, skipjack tuna, anchovy (in volume only). |

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

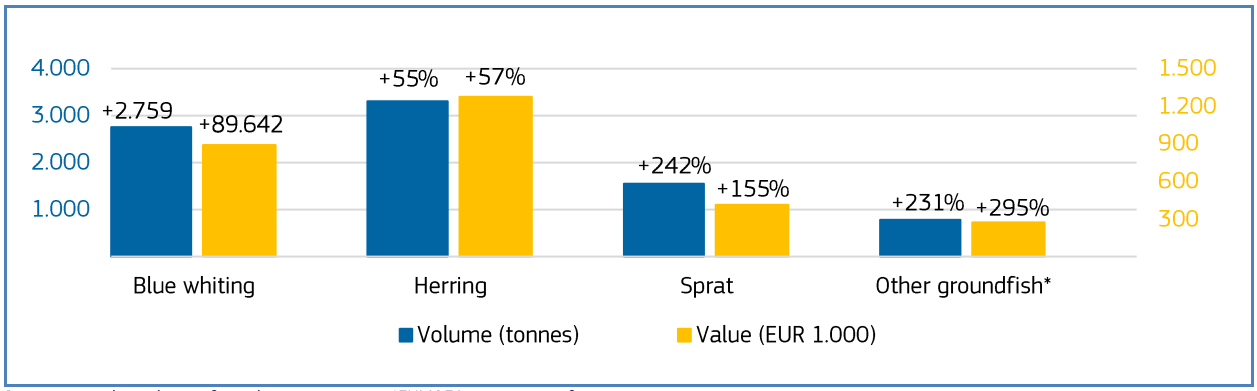



*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

| Sweden | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 24,8 million, -25% | 33.084 tonnes, -30% | Sprat, herring, coldwater shrimps*. |
| **Apr 2025 vs Apr 2024** | EUR 5,9 million, +48% | 8.863 tonnes, +165% | Blue whiting, herring, sprat, other groundfish*. |

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

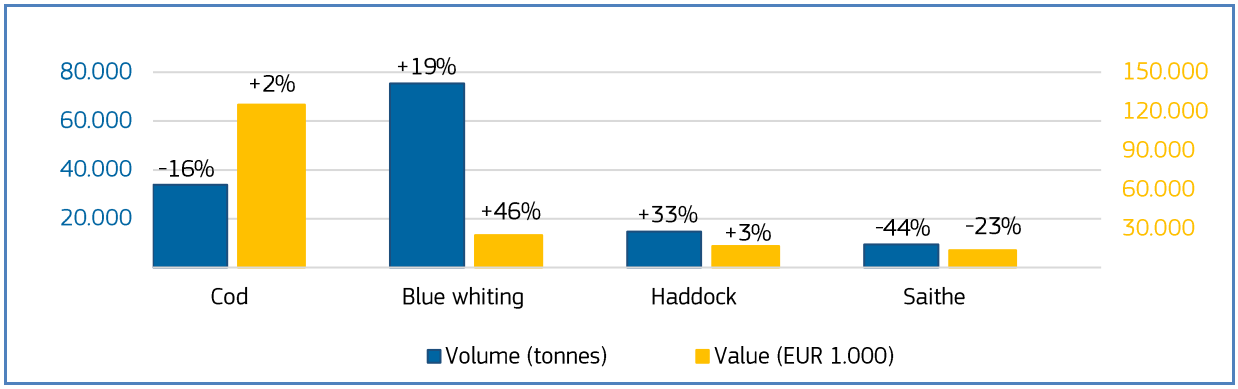



*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

| Norway | First-sales value / trend % | First-sales volume / trend % | Main contributing species |
|---|---|---|---|
| **Jan-Apr 2025 vs Jan-Apr 2024** | EUR 1,3 billion, +5% | 1.037.339 tonnes, -17% | **Value**: cod, mackerel, blue whiting. **Volume**: miscellaneous small pelagics*, other crustaceans*, cod. |
| **Apr 2025 vs Apr 2024** | EUR 216,5 million 0% | 164.307 tonnes, -27% | **Value**: cod, blue whiting, haddock. **Volume**: other crustaceans*, saithe, cod. |

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

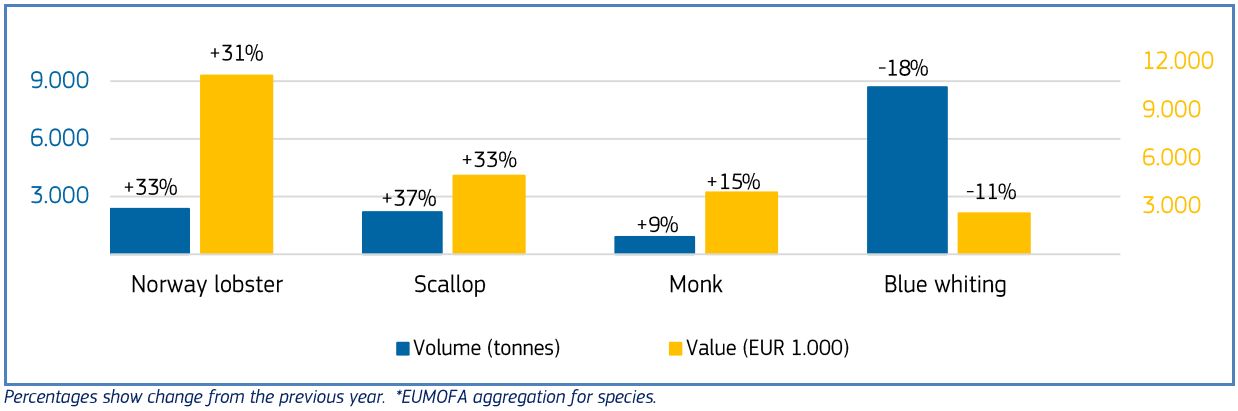



*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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-Apr 2025 vs Jan-Apr 2024** | EUR 261,2 million, +14% | 134.102 tonnes, +2% | Norway lobster, scallop, mackerel, saithe. |
| **Apr 2025 vs Apr 2024** | EUR 44,0 million +15% | 22.131 tonnes, -3% | **Value**: Norway lobster, scallop, monk **Volume**: blue whiting, haddock. |

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




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

# 4. EXTRA-EU IMPORTS

In January and February 2025, extra-EU imports in the EU-27 increased in value by 11% compared to the same period in 2024, while volume increased by 10%. Those MCSs contributing most to the increase in import values were skipjack tuna (+28%) and warmwater shrimps (+21), while Alaska pollock (+76%) and skipjack tuna (+29%) 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, Luxembourg, Malta, Poland, Portugal, Romania, Slovakia and Spain recorded an increase in extra-EU imports in both value and volume. The most significant increases in absolute terms were recorded in Luxembourg, driven by an increase in caviar, livers and roes (+142% and 261%).

**Decreases in value and volume**: Austria, Denmark, Lithuania, Slovenia 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 (-72% and -64%).

Table 35. **JANUARY -FEBRUARY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)[26]**

| | January - February 2024 | | | January - February 2025 | | | Change from January - February 2024 | | |
|---|---|---|---|---|---|---|---|---|---|
| **Country** | **Volume** | **Value** | **Price** | **Volume** | **Value** | **Price** | **Volume** | **Value** | **Price** |
| Austria | 2,13 | 12.666 | 5,95 | 1,57 | 10.391 | 6,62 | -26% | -18% | 11% |
| Belgium | 20,03 | 125.657 | 6,27 | 25,65 | 171.802 | 6,70 | 28% | 37% | 7% |
| Bulgaria | 1,90 | 4.734 | 2,49 | 2,54 | 6.672 | 2,63 | 34% | 41% | 5% |
| Croatia | 1,44 | 6.296 | 4,38 | 2,76 | 7.623 | 2,76 | 92% | 21% | -37% |
| Cyprus | 1,11 | 6.954 | 6,28 | 1,46 | 9.306 | 6,38 | 32% | 34% | 2% |
| Czechia | 2,46 | 10.762 | 4,37 | 3,90 | 17.418 | 4,47 | 58% | 62% | 2% |
| Denmark | 131,37 | 529.514 | 4,03 | 121,26 | 476.442 | 3,93 | -8% | -10% | -3% |
| Estonia | 1,41 | 7.709 | 5,46 | 2,00 | 11.165 | 5,57 | 42% | 45% | 2% |
| Finland | 5,89 | 45.739 | 7,77 | 6,18 | 46.641 | 7,55 | 5% | 2% | -3% |
| France | 81,97 | 430.105 | 5,25 | 86,88 | 465.282 | 5,36 | 6% | 8% | 2% |
| Germany | 53,81 | 262.950 | 4,89 | 71,17 | 316.674 | 4,45 | 32% | 20% | -9% |
| Greece | 17,15 | 72.052 | 4,20 | 22,52 | 98.354 | 4,37 | 31% | 37% | 4% |
| Hungary | 0,38 | 1.663 | 4,39 | 0,56 | 2.315 | 4,17 | 47% | 39% | -5% |
| Ireland | 39,63 | 39.091 | 0,99 | 73,18 | 48.997 | 0,67 | 85% | 25% | -32% |
| Italy | 68,31 | 392.511 | 5,75 | 80,08 | 490.585 | 6,13 | 17% | 25% | 7% |
| Latvia | 6,37 | 12.767 | 2,00 | 5,41 | 14.058 | 2,60 | -15% | 10% | 30% |
| Lithuania | 9,37 | 31.314 | 3,34 | 7,63 | 22.491 | 2,95 | -19% | -28% | -12% |
| Luxembourg | 0,001 | 74 | 56,98 | 0,003 | 109 | 38,06 | 120% | 47% | -33% |
| Malta | 0,22 | 1.304 | 5,83 | 0,49 | 1.793 | 3,68 | 118% | 38% | -37% |
| Netherlands | 113,47 | 557.303 | 4,91 | 108,80 | 605.498 | 5,57 | -4% | 9% | 13% |
| Poland | 42,91 | 159.331 | 3,71 | 43,55 | 179.195 | 4,11 | 2% | 12% | 11% |
| Portugal | 26,19 | 105.671 | 4,04 | 34,59 | 152.241 | 4,40 | 32% | 44% | 9% |

[26] During January 2025, 27 EU Member States (MS), reported Extra-EU import 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 | 3,33 | 14.180 | 4,26 | 4,25 | 18.837 | 4,43 | 28% | 33% | 4% |
| Slovakia | 1,50 | 4.659 | 3,11 | 1,72 | 5.714 | 3,32 | 15% | 23% | 7% |
| Slovenia | 1,14 | 4.451 | 3,90 | 0,80 | 3.624 | 4,54 | -30% | -19% | 16% |
| Spain | 200,22 | 963.120 | 4,81 | 219,84 | 1.168.705 | 5,32 | 10% | 21% | 11% |
| Sweden | 105,57 | 837.543 | 7,93 | 102,65 | 807.044 | 7,86 | -3% | -4% | -1% |
| **EU-27** | **939,29** | **4.640.121** | **4,94** | **1.031,44** | **5.158.976** | **5,00** | **10%** | **11%** | **1%** |

*Source: EUMOFA elaboration of Eurostat COMEXT*

**Increases in value and volume**: Bivalves, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, other marine fish and tuna and tuna-like species were the commodity groups experiencing an increase in both value and volume. Highest increases were observed in the commodity groups of bivalves, with other mussels (+68% and +37%) and clam (+57% and +51%) driving the increase.

**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 mackerel (-16%) and herring (-7%).

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

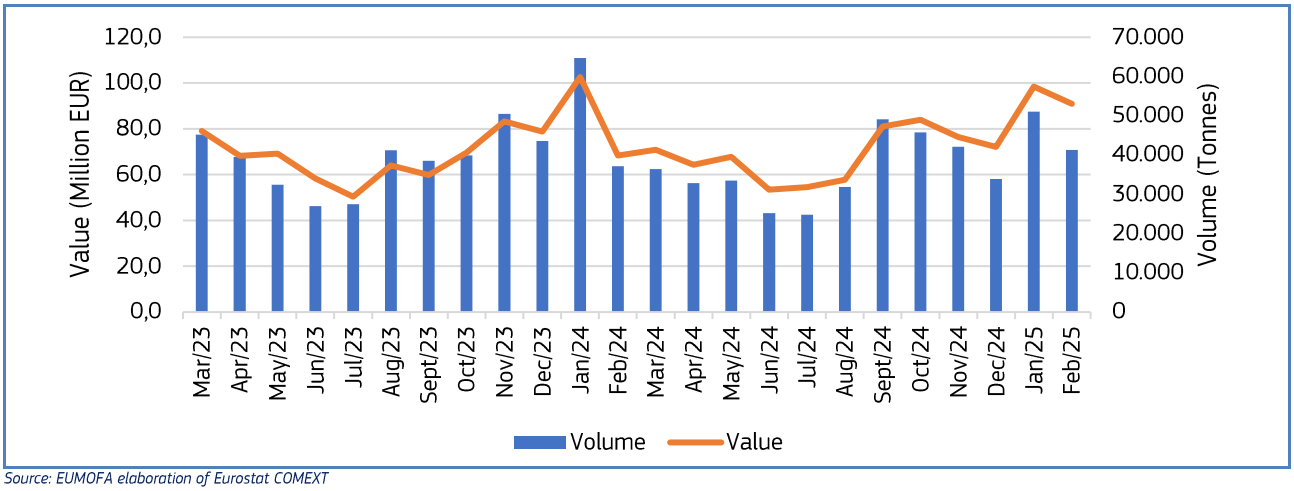
| | January - February 2024 | | | January - February 2025 | | | Change from January - February 2024 | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Commodity group** | **Value** | **Volume** | **Price** | **Value** | **Volume** | **Price** | **Value** | **Volume** | **Price** | **MCS** |
| Bivalves | 77,5 | 16.238 | 4,77 | 104,7 | 23.730 | 4,41 | 35% | 46% | -7% | Other mussel, clam. |
| Cephalopods | 417,2 | 71.048 | 5,87 | 560,6 | 83.248 | 6,73 | 34% | 17% | 15% | Octopus, other cephalopods. |
| Crustaceans | 650,0 | 97.134 | 6,69 | 734,2 | 100.911 | 7,28 | 13% | 4% | 9% | Warmwater shrimp, miscellaneous shrimp. |
| Flatfish | 57,6 | 10.865 | 5,30 | 65,1 | 12.535 | 5,19 | 13% | 15% | -2% | Greenland halibut, other flatfish. |
| Freshwater fish | 86,1 | 21.762 | 3,95 | 107,7 | 26.233 | 4,11 | 25% | 21% | 4% | Tilapia, freshwater catfish. |
| Groundfish | 692,1 | 165.587 | 4,18 | 767,6 | 182.376 | 4,21 | 11% | 10% | 1% | Alaska pollock, hake. |
| Other marine fish | 263,7 | 46.985 | 5,61 | 294,1 | 48.570 | 6,06 | 12% | 3% | 8% | Other marine fish, cusk eel. |
| Salmonids | 1.334,3 | 142.619 | 9,36 | 1.280,2 | 146.681 | 8,73 | -4% | 3% | -7% | Salmon, trout. |
| Small pelagics | 204,5 | 90.620 | 2,26 | 214,7 | 81.858 | 2,62 | 5% | -10% | 16% | Herring, anchovy. |
| Tuna and tuna-like species | 604,0 | 129.443 | 4,67 | 784,4 | 163.628 | 4,79 | 30% | 26% | 3% | Skipjack tuna, yellowfin tuna. |

*Source: EUMOFA elaboration of Eurostat COMEXT*

## 4.1. Extra EU imports of small pelagics in EU Member States

In January – February 2025, extra-EU imports of small pelagics accounted for a total value of EUR 189,4 million and total volume of 92.362 tonnes. Compared to the same period in 2024 the value of small pelagics increased by 11% in value and decreased by 9% in volume.

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




*Source: EUMOFA elaboration of Eurostat COMEXT*

The value of extra-EU imports of small pelagics recorded peaks in both value and volume in January and between September and November.

In the period between January and February 2025 the Netherlands, Denmark and Estonia were the main importers of small pelagics in the EU and together imported from extra-EU countries about 69% of the total volume of small pelagics, with the Netherlands (43%), Denmark (19%) and Estonia (8%) respectively.

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

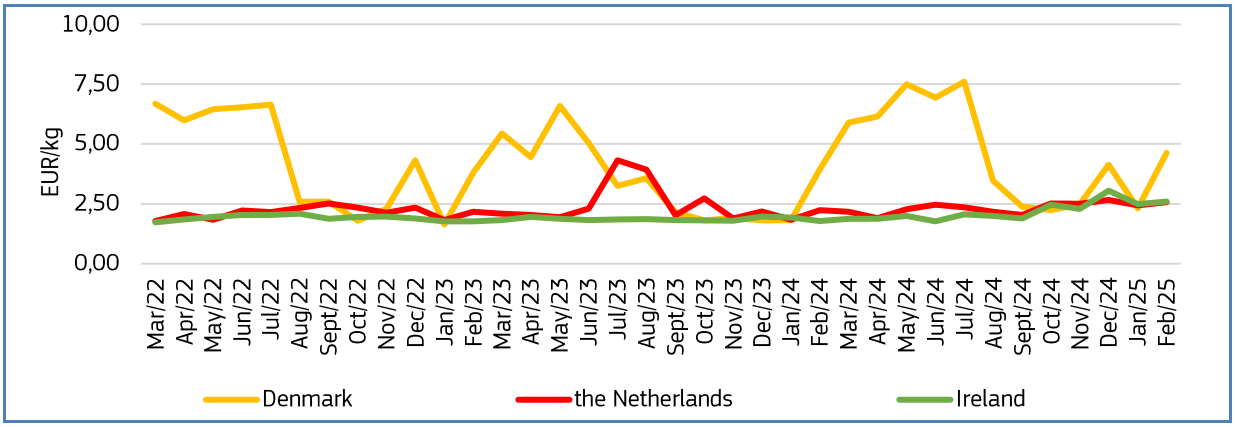
| EU MS | Value (million EUR) | | | Volume (tonnes) | | | Main commercial species |
|---|---|---|---|---|---|---|---|
| | Jan–Feb 2024 | Jan–Feb 2025 | Trend (%) | Jan–Feb 2024 | Jan–Feb 2025 | Trend (%) | |
| The Netherlands | 36,5 | 57,6 | 58% | 30.109 | 39.399 | 31% | Herring |
| Denmark | 51,8 | 35,0 | -32% | 32.892 | 17.179 | -48% | Mackerel |
| Estonia | 6,2 | 6,3 | 2% | 8.021 | 7.485 | -7% | Herring |

## 4.2. Extra EU imports of mackerel in EU Member States

In terms of value mackerel and herring are the main commercial species of the commodity group "small pelagics", where mackerel represents 38% of the total value, followed by herring which represents 28%.

The Netherlands, Denmark and Ireland imported the highest volume of mackerel from extra-EU countries between January and February 2025.

Figure 36. **EXTRA-EU IMPORT PRICE OF MACKEREL IN DENMARK, THE NETHERLANDS AND IRELAND (MAR 2022 – FEB 2025)**




Between March 2022 and February 2025, the price of mackerel fluctuated and increased in the Netherlands (+13%) and Ireland (+15%), while it decreased in Denmark (-12%). Between January and February 2025, the volume of mackerel imported by Denmark from extra-EU countries was 12.192 tonnes, 48% less compared with the same month in 2024, while price increased by 29%. In Denmark the main imports in terms of volume came from Norway (50%), followed by the Faroe Islands.

In the same period, 7.748 tonnes of mackerel were imported to the Netherlands, 17% more compared to 2024, with an average price increase of 21%. In terms of volume 35% of the total imported in 2025 was from Vietnam, followed by the Republic of Korea and Nigeria.

Ireland imported 5.104 tonnes, of which 26% came from the United Kingdom. In 2025 import volumes decreased by 46% while prices increased by 41%.

In Denmark, peaks in imports seem to occur in January. In the Netherlands the highest peak in imports was recorded between January and February and in December. In Ireland the highest peak in imports was recorded between February-March and May-June.

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

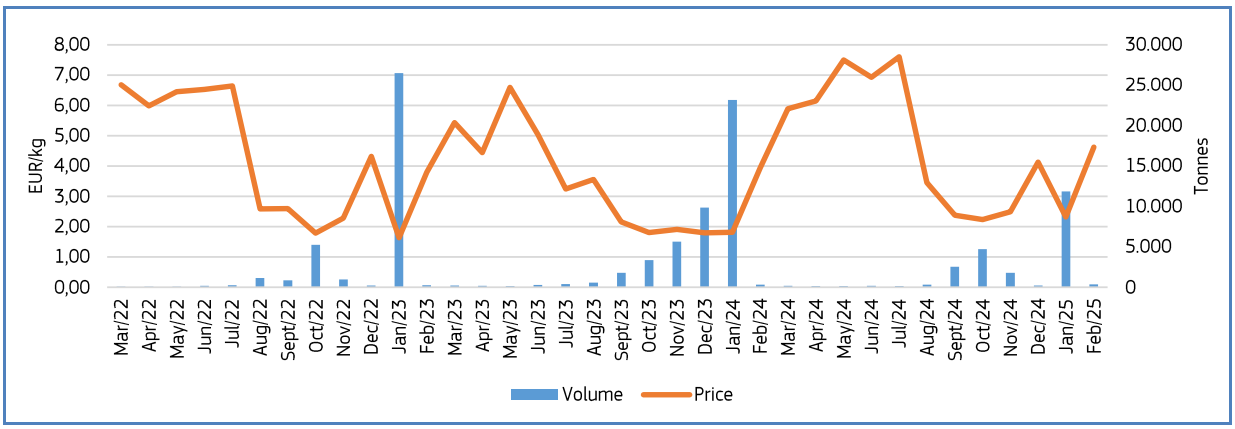


Figure 38. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF MACKEREL IN THE NETHERLANDS, MAR 2022 – FEB 2025 (volume in tonnes and price in EUR/kg)**

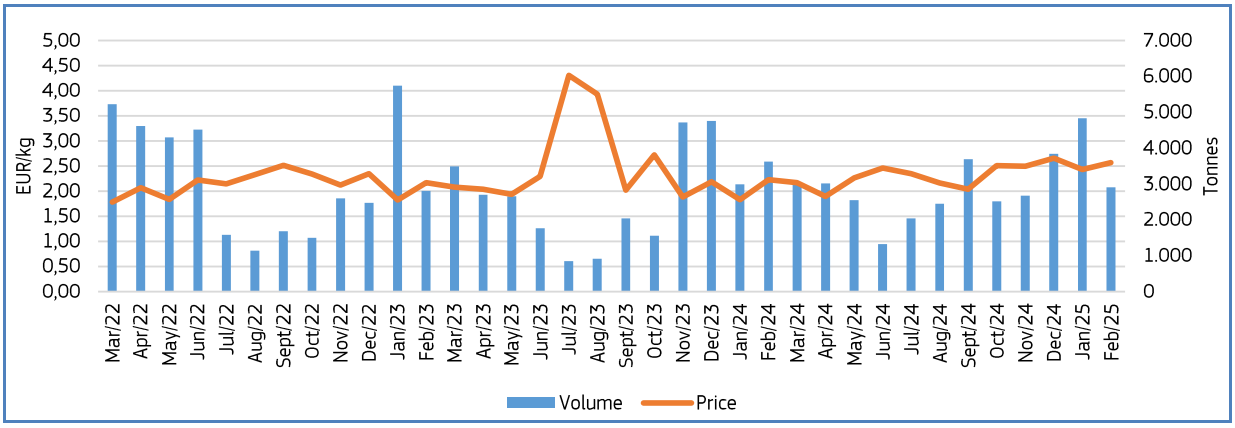
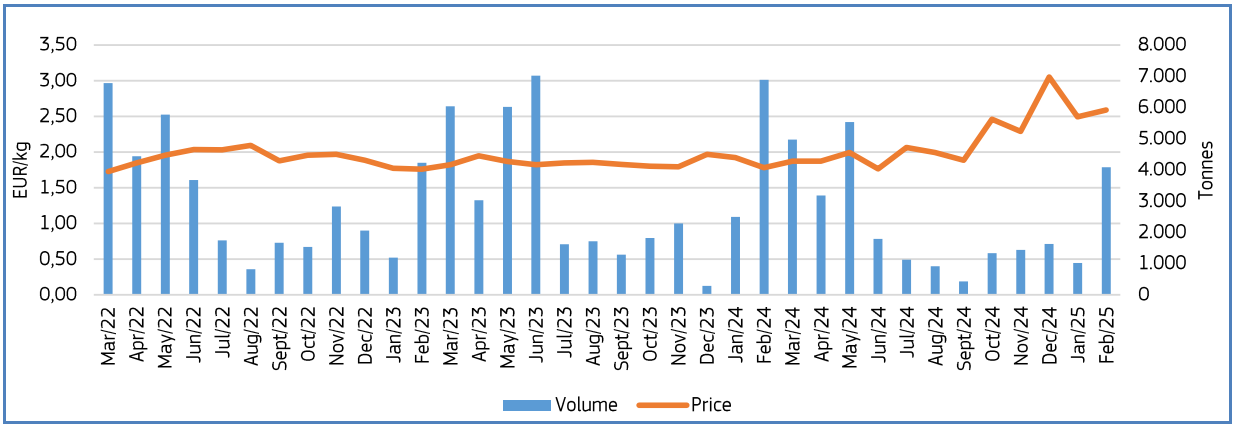



Figure 39. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF MACKEREL IN IRELAND, MAR 2022 – FEB 2025 (volume in tonnes and price in EUR/kg)**



## 4.3. Extra EU imports of mackerel by origin

In the period January -February between 2025 and 2024, EU imports of mackerel[27] experienced a decreasing trend in volume (-35%) and value (-14%). In 2025 the EU imported 26.865 tonnes of mackerel for a value of EUR 71,4 million. The main extra-EU countries supplying mackerel to the EU in 2025 were Norway (24%), the Faroe Islands (21%) and Vietnam[28] (10%). A decrease in imports of mackerel from extra-EU countries (including the Faroe Islands and United Kingdom mentioned in the table below) was observed in 2025 compared to the same period in 2024, while imports from Norway (+1538%) and Vietnam increased (+537%).

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

| Country | Jan – Feb 2023 | | Jan - Feb 2024 | | Jan - Feb 2025 | | Jan- Feb 2025/2024 | |
|---|---|---|---|---|---|---|---|---|
| | Value | Volume | Value | Volume | Value | Volume | Value | Volume |
| Norway | 7,8 | 3.557 | 2,3 | 390 | 15,5 | 6.381 | 587% | 1538% |
| Faroe Islands | 37,9 | 23.348 | 40,6 | 22.763 | 12,7 | 5.510 | -69% | -76% |
| United Kingdom | 10,5 | 3.581 | 9,9 | 3.294 | 11,0 | 2.461 | 11% | -25% |
| Vietnam | 0,1 | 50 | 0,8 | 428 | 5,9 | 2.725 | 653% | 537% |
| Others | 26,3 | 13.781 | 29,7 | 14.680 | 26,2 | 9.788 | -12% | -33% |
| **Total** | **82,6** | **44.316** | **83,3** | **41.555** | **71,4** | **26.865** | **-14%** | **-35%** |

[27] 03024400 - Fresh or chilled mackerel "*Scomber scombrus, Scomber australasicus, Scomber japonicus*"
03035410 - Frozen mackerel "*Scomber scombrus, Scomber japonicus*"
03035490 - Frozen mackerel "*Scomber australasicus*"
03048941 - Frozen fillets of mackerel "*Scomber australasicus*"
03048949 - Frozen fillets of mackerel "*Scomber scombrus, Scomber japonicus*" and fish of the species Orcynopsis unicolor
03054930 - Smoked mackerel "*Scomber scombrus, Scomber australasicus, Scomber japonicus*", incl. fillets (excl. offal)
16041511 - Fillets of mackerel of the species "*Scomber scombrus* and *Scomber japonicus*", prepared or preserved
16041519 - Mackerel of the species *Scomber scombrus* and *Scomber japonicus*, prepared or preserved, whole or in pieces (excl. minced mackerel and fillets of mackerel)
16041590 - Prepared or preserved mackerel of species *Scomber australasicus*, whole or in pieces (excl. minced)
[28] 100% of imports from Vietnam comprise frozen mackerel of the species "*Scomber scombrus, Scomber japonicus*"

# 5. CONSUMPTION

## 5. 1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[29].

Compared with April 2024, household consumption of fresh fishery and aquaculture products in April 2025 increased in both volume and value in Denmark, France, Germany, Hungary, Ireland, Italy, the Netherlands, Poland and Sweden. In contrast, Portugal and Spain recorded decreases in volume (11% and 6% respectively).

The most notable increase was in Sweden, where consumption increased by 77% in volume and 82% in value compared to the previous year. Denmark and Germany also had significant increases in volume (31% and 38% respectively) and in value (45% and 38% respectively), followed by Poland (23% increase in volume and 34% increase 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 | April 2023 | | April 2024 | | April 2025 | | Change from April 2024 to April 2025 | |
|---|---|---|---|---|---|---|---|---|---|
| | | Volume | Value | Volume | Value | Volume | Value | Volume | Value |
| Denmark* | 20,00-25,00 | 989 | 21,52 | 884 | 16,96 | 1.156 | 24,51 | 31% | 45% |
| France | 32,58 | 15.043 | 205,77 | 13.245 | 190,52 | 14.119 | 206,42 | 7% | 8% |
| Germany | 12,49 | 5.163 | 98,45 | 4.009 | 71,86 | 5.535 | 99,24 | 38% | 38% |
| Hungary | 6,73 | 185 | 1,72 | 242 | 2,01 | 252 | 2,28 | 4% | 13% |
| Ireland* | 20,00 | 1.162 | 20,62 | 853 | 15,53 | 930 | 16,50 | 9% | 6% |
| Italy | 30,01 | 18.090 | 222,57 | 16.478 | 210,03 | 17.059 | 229,04 | 4% | 9% |
| Netherlands* | 18,88 | 2.461 | 53,03 | 2.151 | 43,96 | 2.297 | 51,49 | 7% | 17% |
| Poland | 13,68 | 3.671 | 34,71 | 3.079 | 34,55 | 3.784 | 46,19 | 23% | 34% |
| Portugal | 54,54 | 4.749 | 37,66 | 4.353 | 34,47 | 3.874 | 34,42 | -11% | 0% |
| Spain | 41,92 | 38.937 | 371,83 | 37.287 | 374,52 | 34.937 | 372,77 | -6% | 0% |
| Sweden | 22,46 | 467 | 8,11 | 542 | 8,39 | 960 | 15,29 | 77% | 82% |

** Estimating apparent consumption at EU and Member State levels are different, the first based on data and estimates as described in the Methodological background, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes. Where EUMOFA estimations on per capita apparent consumption continued to show high annual volatility even with these adjustments, national contact points were contacted to confirm these estimates or to provide their own figures. These are marked with a *, where data were provided by the following National sources: Dutch Fish Marketing Board (Netherlands) and Institute of Agricultural and Food Economics – National Research Institute (Poland). The estimate for Denmark was provided by the University of Copenhagen; for Ireland it was the estimate of EUMOFA.*

## 5. 2. Overview of household consumption[30] of fresh small pelagic consumed in the EU

In the household consumption data used by EUMOFA, consumption of small pelagic species is monitored in ten Member States: Denmark, France, Germany, Ireland, Italy, the Netherlands, Poland, Portugal, Spain and Sweden. At species level, consumption of

[29] Last update: 15.06.2025.
[30] *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.*

anchovy is monitored in Italy, herring is monitored in Germany, the Netherlands and Sweden, mackerel is monitored in Denmark, France, Ireland, the Netherlands, Poland, Portugal and Spain, and sardine is monitored in France, Portugal and Spain.

Figure 40. **HOUSEHOLD PURCHASES (in value) OF SMALL PELAGIC SPECIES IN DENMARK, FRANCE, GERMANY, IRELAND, ITALY, THE NETHERLANDS, POLAND, PORTUGAL, SPAIN AND SWEDEN. APRIL 2022 – APRIL 2025**

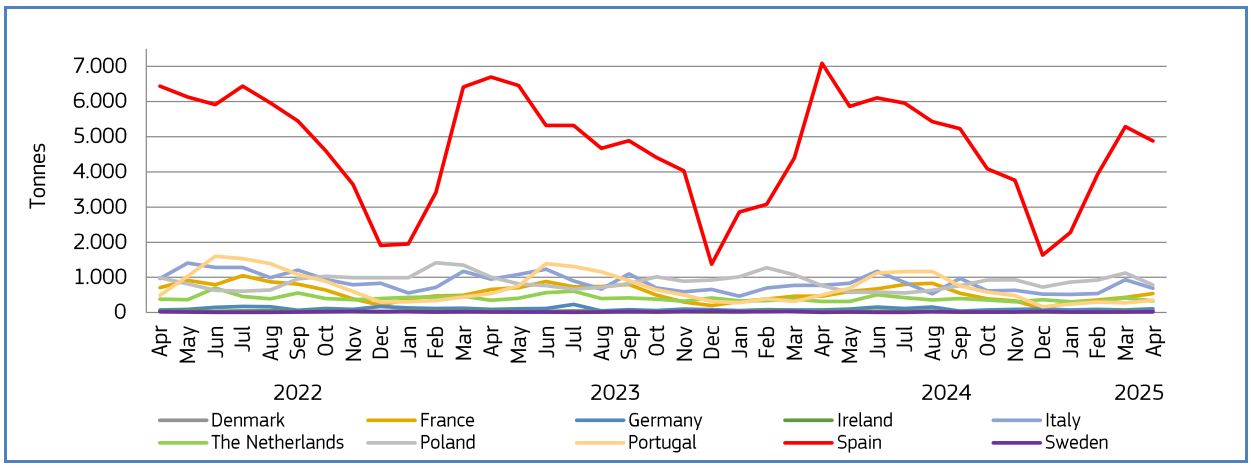
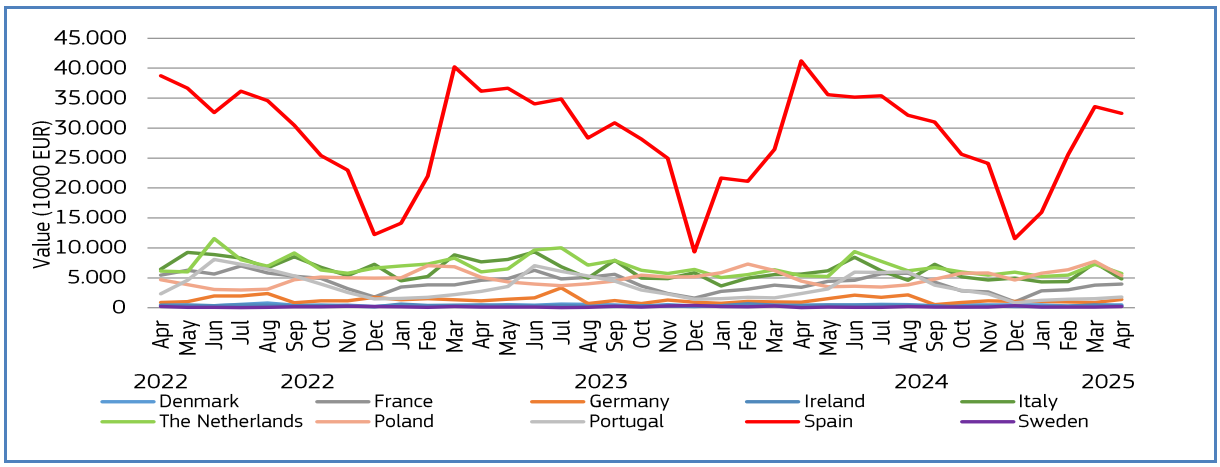


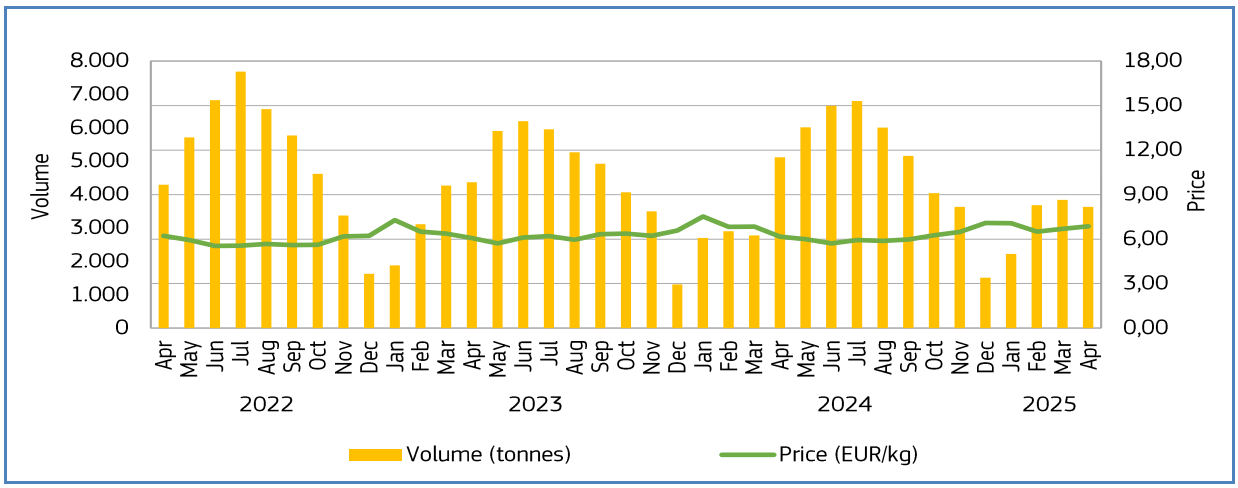

Figure 41. **HOUSEHOLD PURCHASES (in volume) OF SMALL PELAGIC SPECIES IN DENMARK, FRANCE, GERMANY, IRELAND, ITALY, THE NETHERLANDS, POLAND, PORTUGAL, SPAIN AND SWEDEN. APRIL 2022 – APRIL 2025**



## 5. 3. Household consumption trends of sardine - the main species of small pelagic species in reporting countries

**Long-term trend (April 2022 to April 2025)**: Downward trend in volume and slightly upward trend in price.
**Yearly average price**: 5,94 EUR/kg (2022), 6,30 EUR/kg (2023), 6,39 EUR/kg (2024), 6,78 (2025, January to April)
**Yearly consumption**: 55.687 tonnes (2022), 50.761 tonnes (2023), 53.327 tonnes (2024), 13.376 tonnes (2025, January to April)
**Short-term trend (April 2024 to April 2025)**: Slightly upward trend in price and abrupt downward trend in volume.
**Price (April 2024 to April 2025)**: 6,35 EUR/kg.
**Consumption (April 2024 to April 2025)**: 58.326,82tonnes.

Figure 42. **RETAIL PRICE AND VOLUME OF SARDINE PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, APRIL 2022 – APRIL 2025**




Consumption of sardine 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: Development of the trade flows of fishery and aquaculture products between the EU and the Andean community

The EU is a major world market for fishery and aquaculture products. The internal demand is mostly covered by imports from large other fishing nations and aquaculture producers. The trade between EU member states is also of vital importance to covering the seafood demand in the different markets within the EU.

The EU has several trade agreements with third countries throughout the world. The trade agreements are based on mutual commitments between the parties and aim to improve trade opportunities through lower or removed tariffs, better market access and less bureaucracy.


*Source: European Commission, Eurostat/Gisco, © EuroGeographics for the administrative boundaries.*

## 6. 1. Andean community and trade agreements with the EU

The Andean community (Communidad Andina de Naciones, CAN) is an international regional group of south American nations consisting of Bolivia, Colombia, Ecuador and Peru. It was founded in 1969. In 2005, the group signed an agreement with MERCOSUR[31] and thereby gained the associated members, Argentina, Brazil, Paraguay and Uruguay[32].

The EU, Colombia and Peru signed a free trade agreement in June 2012. The trade agreement has been applied with Peru since March 2013 and with Colombia since August 2013. Ecuador joined the trade agreement in January 2017. Bolivia, also a member of the Andean community, can also seek accession to the trade agreement.

The EU is the third largest trade partner with the Andean community, behind China and the USA[33]. In 2024, exports from the Andean community to the EU reached EUR 18,6 billion and exports from EU to the Andean community reached EUR 14,2 billion[34].

In 2024, 13% of the exports from Andean countries to the EU were fishery and aquaculture products. The rest was mainly agricultural and mining products.[35]

## 6. 2. Trade development

In terms of value, **Ecuador** is by far the largest supplier of fishery and aquaculture products from the Andean countries to the EU amounting to 383.000 tonnes valued at EUR 1,6 billion. Import values have grown steadily since the trade agreement was applied in 2017 reaching EUR 1,87 billion in 2024, which represented a 10% growth from the previous year, and a 20% growth compared to 2017. An increase in the volumes of warmwater shrimps and tuna is the main reason for this growth in value.

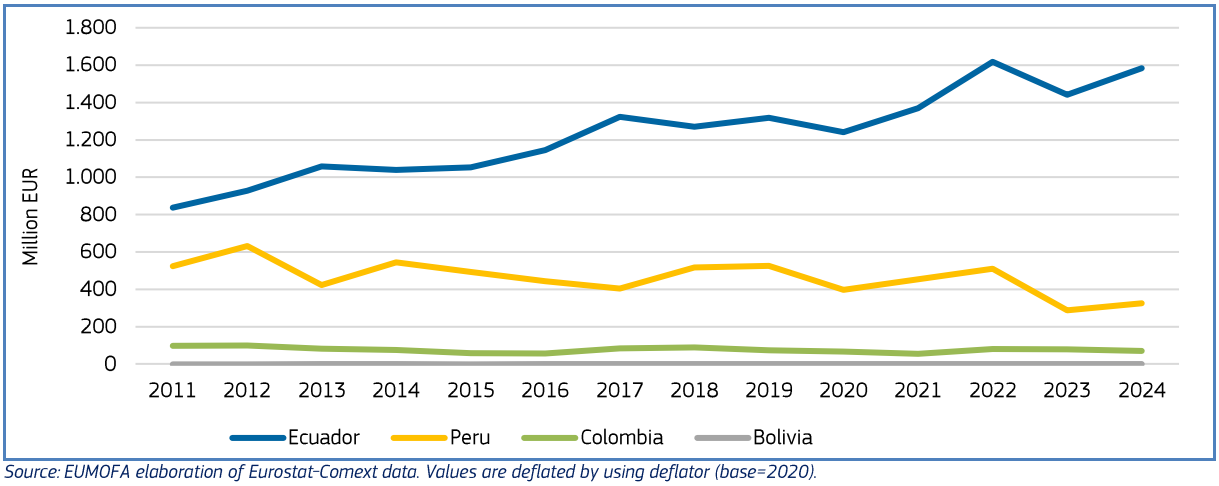
[31] MERCOSUR; Mercado Común del Sur
[32] Andean Community (Comunidad Andina), Notas de prensa, 'Comunidad Andina otorga condición de Miembro Asociado a países del Mercosur', 07.07.2025, https://www.comunidadandina.org/notas-de-prensa/comunidad-andina-otorga-condicion-de-miembro-asociado-a-paises-del-mercosur/
[33] Comunidad Andina, 'Normativa Andina', 'Estadisticas de Comercio Exterior de Bienes – 2024, 23/04/2025
[34] European Commission, Trade and Economic Security, Andean Community; https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/andean-community_en
[35] European Commission, Trade and Economic Security, Andean Community; https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/andean-community_en

During the past two years, imports from **Peru** have been decreasing, due to decreased imports of fishmeal and fish oil from 2022 to 2023 and decreased imports of cephalopods from 2023 to 2024. In 2024, the total import value reached EUR 325 million, marking a 13% increase from 2023 and a 36% decrease from 2022. Compared to 2013, import values decreased by 23%.

During the period from 2013 to 2024, EU import values of fishery and aquaculture products from **Colombia** reached a peak in 2018 at EUR 90 million. In 2024, import values dropped by 11% to EUR 71 million.

EU imports of fisheries and aquaculture products from **Bolivia** are minor.

Figure 43. **EU IMPORTS FROM THE ANDEAN COMMUNITY (million EUR)**



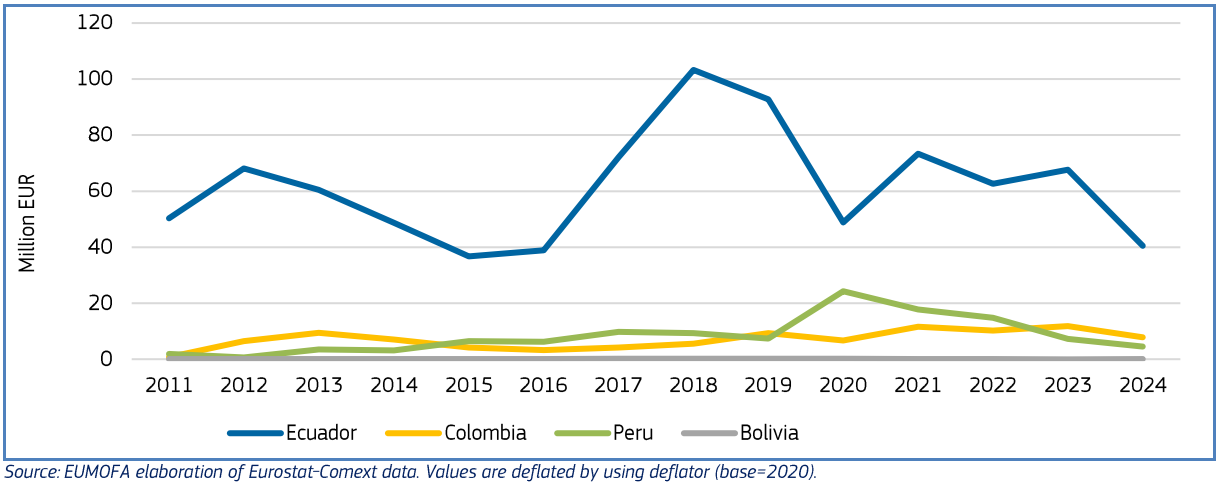

*Source: EUMOFA elaboration of Eurostat-Comext data. Values are deflated by using deflator (base=2020).*

EU exports of fishery and aquaculture products to the Andean countries are mainly destined for Ecuador. Export values have fluctuated throughout the past decade showing strong growth after the EU-Ecuador trade agreement was signed reaching a peak in 2018 with EUR 103 million. In 2024, export value decreased by 40% from 2023 to EUR 48 million. A decrease in volume of 25% caused by decreased export of frozen skipjack tuna from Spain contributed to this decrease in value. The main products exported from the EU to Ecuador are frozen skipjack, yellowfin and bigeye tuna. The main exporting countries are Spain, Belgium and France. A share of this export could be linked with landings in Ecuador by the Spanish fleet operating in the Eastern Pacific. The tuna is processed in Manta, Ecuador and re-exported to the EU market and the USA[36].

EU exports of fishery and aquaculture products to Colombia and Peru are of lesser importance but not insignificant. In 2024, the EU export value to Colombia amounted to EUR 8 million, a 34% decrease from the year before. EU exports to Peru amounted to EUR 4,5 million a 37% decrease from 2023. A large share of the export volumes to both Colombia and Peru is tuna species and some volumes in the category other non-food use. Main exporting countries to Colombia is Spain, France and Denmark and main exporting countries to Peru is Spain, Italy and Denmark. Exports to Bolivia amounted to 7 tonnes in 2024 valued at EUR 0,07 million, of which most where sardines, other non-food use and other products.

[36] Tri Marine, 'Tri Marine Attains MSC Certification for Skipjack Tuna in the Eastern Pacific for its Spanish and Ecuadorian Fleet', https://trimarinegroup.com/2024/05/01/msc-certification-skipjack-tuna-in-eastern-pacific-for-spanish-ecuadorian-fleet/

Figure 44. **EU EXPORTS TO THE ANDEAN COMMUNITY (million EUR)**




*Source: EUMOFA elaboration of Eurostat-Comext data. Values are deflated by using deflator (base=2020).*

## 6. 3. Ecuador

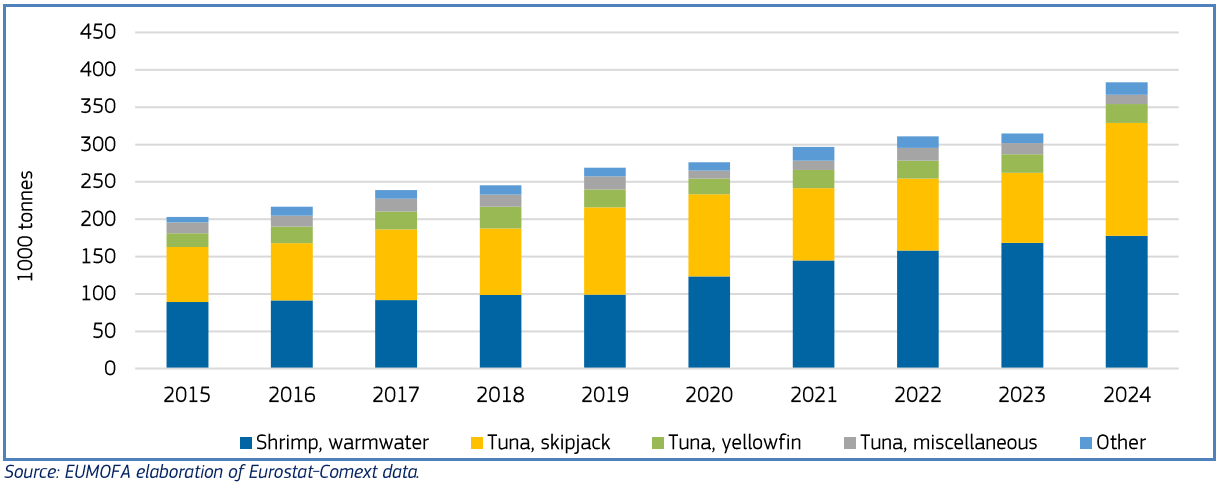
Ecuador joined the free trade agreement with Peru and Colombia in January 2017, granting it the same liberalizations regarding tariffs. Tariffs on industrial and fisheries products were fully eliminated on both sides. Before the agreement was implemented, Ecuador had tariffs of 22% for products that were not for the industrial manufacture and 24-25% for processed products.

There are mainly three species accounting for 88-92% of the import volumes from Ecuador. The largest in terms of both volume and value, the **warmwater shrimp**, amounted to 178.000 tonnes valued at EUR 915 million in 2024 making it the largest supplier of warmwater shrimp to the EU market, followed by India, Venezuela and Vietnam. From 2023 to 2024, warmwater shrimp imports recorded a 6% growth in terms of volume and a 2% growth in terms of value. Warmwater shrimp imports have grown steadily since the trade agreement entered into force. Since Ecuador joined the agreement in 2017, volumes and values grew by 94% and 19%, respectively. The import volumes of warmwater shrimp consist solely of frozen shrimp products. The main markets in the EU are Spain, France and Italy.

**Skipjack tuna** rank as the second major species imported from Ecuador amounting to 151.000 tonnes in 2024 valued at EUR 687 million. making it the largest supplier of skipjack tuna to the EU market before China and the Philippines. From 2023 to 2024, there was a 60% growth in terms of volume and a 47% growth in terms of value. The imports of skipjack tuna have remained steady with some ups and downs in the years after the trade agreement entered into force, but showed a strong growth as mentioned between 2023 and 2024. Close to 100% of the skipjack tuna import is prepared or preserved fillet products. The main markets in the EU are Spain, Netherlands and Germany.

**Yellowfin tuna** is the third main species imported from Ecuador amounting to 25.000 tonnes in 2024 valued at EUR 134 million, a 3% increase in terms of volume and 8% decrease in terms of value from 2023. In the period from 2017 to 2024, imports of yellowfin did not show any significant change in terms of volume varying from 21.000 tonnes at its lowest (2020) to 29.000 tonnes at its highest (2018). In terms of value, imports decreased by 13% in the period. Around 85% of the yellowfin tuna import is processed fillet products, the rest is whole frozen. The main markets in the EU are Spain, Italy and Portugal.

Figure 45. **EU IMPORTS OF FISHERY AND AQUACULTURE PRODUCTS FROM ECUADOR BY MCS (1.000 tonnes)**



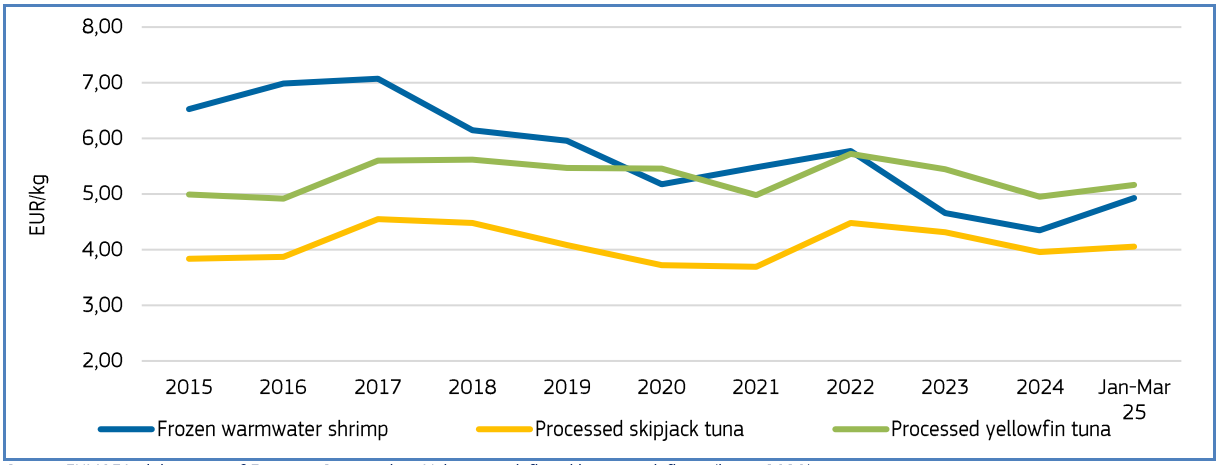

*Source: EUMOFA elaboration of Eurostat-Comext data.*

EU import prices of frozen **warmwater shrimp** from Ecuador shows fluctuations in import prices in recent years, while import volumes shows steady growth. In 2024 EU import price was on average 4,35 EUR/kg a 39% decrease from the peak in 2017 and a 7% decrease compared to 2023. The decrease is probably caused by reduced demand in the Chinese and US market[37]. During the first quarter in 2025 import prices increased by 13% to 4,93 EUR/kg compared to the average price in 2024.

EU import of processed **skipjack tuna** shows some fluctuations in prices the past years but in general decreased price level since 2017. In 2024, EU import price was on average 4,06 EUR/kg, which represented a 13% decrease from 2017, and an 8% decrease compared to 2023. During the first quarter in 2025 import prices rose by 3% to 4,06 EUR/kg compared to average price in 2024.

EU import of processed **yellowfin tuna** shows a decreasing price trend level since 2017. In 2024, EU import price averaged 4,95 EUR/kg, a 12% decrease from 2017, and a 9% decrease compared to 2023. Of note, during the first quarter in 2025, import prices increased by 4% to 5,16 EUR/kg compared to average the import price in 2024.

Figure 46. **EU IMPORT PRICES FROM ECUADOR (EUR/kg)**




*Source: EUMOFA elaboration of Eurostat-Comext data Values are deflated by using deflator (base=2020).*

## 6. 4. Peru

Peru joined the free trade agreement with the Andean countries in January 2013, giving it the same liberalizations regarding tariffs. Before the free trade agreement, Peru had tariffs of 22% for products that were not destined for the industrial manufacture of products and 24% for processed products.

[37] FAO, 'Quarterly Shrimp Analysis – May 2025', https://openknowledge.fao.org/server/api/core/bitstreams/e99a304b-8d6c-4169-87ed-cc1b82b00eb3/content

In 2024, EU import of fishery and aquaculture products from Peru amounted to 96.000 tonnes valued at EUR 385 million. Compared to 2023, this represented a 18% decrease in terms of volume and a 17% increase in terms of value. Compared to 2015, import volumes decreased by 56% and values decreased by 16%.

In terms of volume, there were five species accounting for 89% of the import volumes from Peru. The largest in terms of volume were species in the category **other cephalopods**. The category consists mainly of frozen cuttlefish and squid and some minor volumes of processed squid and cuttlefish. In 2024, EU imports of other cephalopods amounted to 41.500 tonnes valued at EUR 121 million. Compared with 2023, import volumes dropped by 48% and value dropped by 36%. The imports of other cephalopods to the EU showed significant volumes starting from 2017 (62.000 tonnes) and has continued relatively stable - with some ups and downs since then. The highest volumes were seen in 2023 (80.000 tonnes) and the lowest in 2024 (41.000 tonnes). The main EU import markets are Spain, Italy and Portugal.

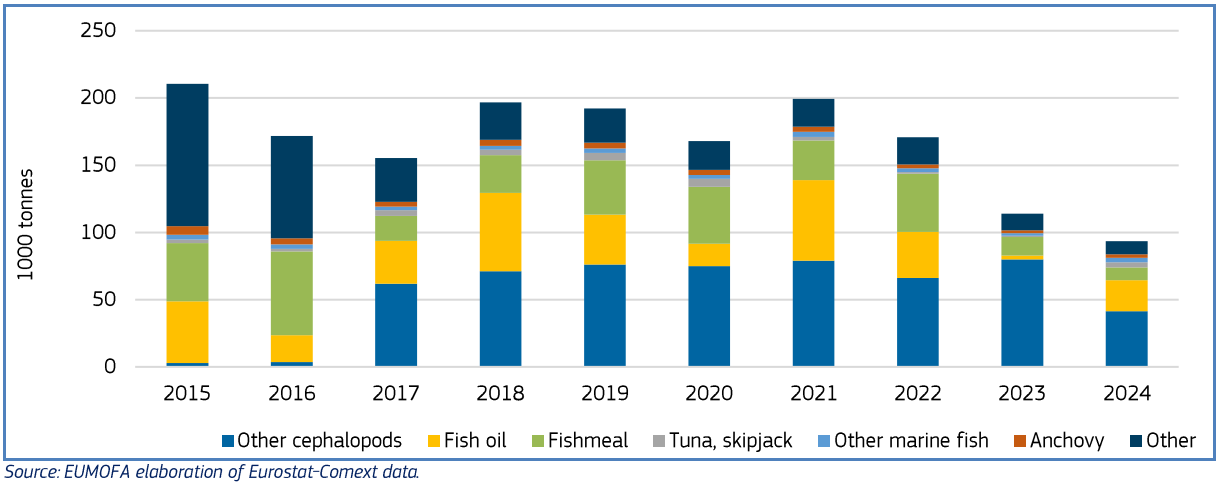
**Fishmeal and fishoil** usually make up between 35- 45% of the EU import from Peru, which corresponds to 60.000 to 90.000 tonnes each year. In 2023, fishmeal and fishoil imports fell sharply, to 15% or 17.000 tonnes. The main reason for the fall was low production in Peru that year, followed by low volumes available for exports. Despite an increase in import volumes in 2024, total import volumes fell notable over the past two years. The main EU importers of fishmeal and oil are Denmark, Belgium, France and the Netherlands[38].

**Skipjack tuna** was the fourth largest in terms of volume amounting to 3.700 tonnes in 2024 valued at EUR 19 million. From 2023 to 2024, there was a 271% growth in terms of volume and a 147% growth in terms of value.

Imports of **other marine fish** from Peru increased by 79% in terms of volume and by 72% in terms of value from 2023 to 2024. Other marine fish is unspecified frozen fish and fillets. The main markets are France, Spain and Italy. Most products in this group are frozen unspecified fish of the CN8 item 03038990, frozen unspecified fish fillet of the CN8 item 03048990 and fish fillets salted or in brine but not smoked of the CN8 item 03053990.

Imports of **anchovy** from Peru increased by 25% in terms of volume and by 43% in terms of value from 2023 to 2024. The Anchovy imported from Peru comes as processed products with a high unit value for human consumption. It is mainly prepared or preserved, whole or in pieces of the in the CN8 item 16041600. The main EU markets are Spain, Germany and Italy.

Figure 47. **EU IMPORTS OF FISHERY AND AQUACULTURE PRODUCTS FROM PERU BY MCS (1000 tonnes)**




*Source: EUMOFA elaboration of Eurostat-Comext data.*

EU import prices of **fishoil** from Peru reflects the global prices showing an increase throughout 2023 and 2024 due to a tight supply situation in Peru and in the global markets. In 2024, EU import price was on average 4,86 EUR/kg, a 11% decrease from the peak in 2023. During the first quarter of this year, import prices decreased by 49% to 2,49 EUR/kg compared to average price recorded in 2024.

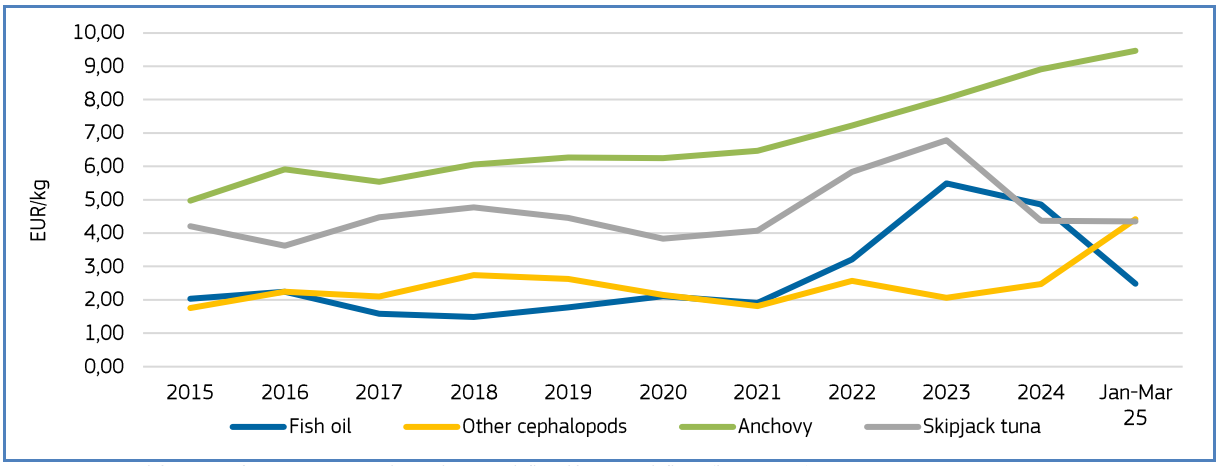
**Other cephalopod** prices varied between 1,75 EUR/kg to 2,74 EUR/kg the past 10 years. It's been a 20% growth in EU import prices from 2023 to 2024, and the price growth continued throughout the first quarter of 2025 reaching on average 4,42 EUR/kg in March. This represented a 79% price increase compared to 2024 average.

[38] Please note that EU import data does not necessarily reflect the end market for the fishery and aquaculture product imported – as EU import data are reported/recorded as the first point of entry into the EU.

**Anchovies** import to EU is not of the largest in volumes but achieve a high price and the price has grown steady the past 10 years. In 2024, average import price reached 8.91 EUR/kg, a 11% growth from 2023. During the first quarter of 2025, prices continued up reaching 9,47 EUR/kg in March.

EU import of processed **skipjack tuna** shows some fluctuations in prices the past years with strong increase in 2022 and 2023 reaching on average 6,78 EUR/kg in 2023. During 2024 prices decreased ending at 4,37 EUR/kg a 36% decrease from the previous year. During the first quarter of this year, import prices remained stable compared to 2024 prices ending at 4,35 EUR/kg.

Figure 48. **EU IMPORT PRICES FROM PERU (EUR/kg)**




*Source: EUMOFA elaboration of Eurostat-Comext data values are deflated by using deflator (base=2020).*

## 6. 4. Colombia

Colombia joined the free trade agreement with the Andean countries in January 2013, granting it the same liberalizations regarding tariffs.

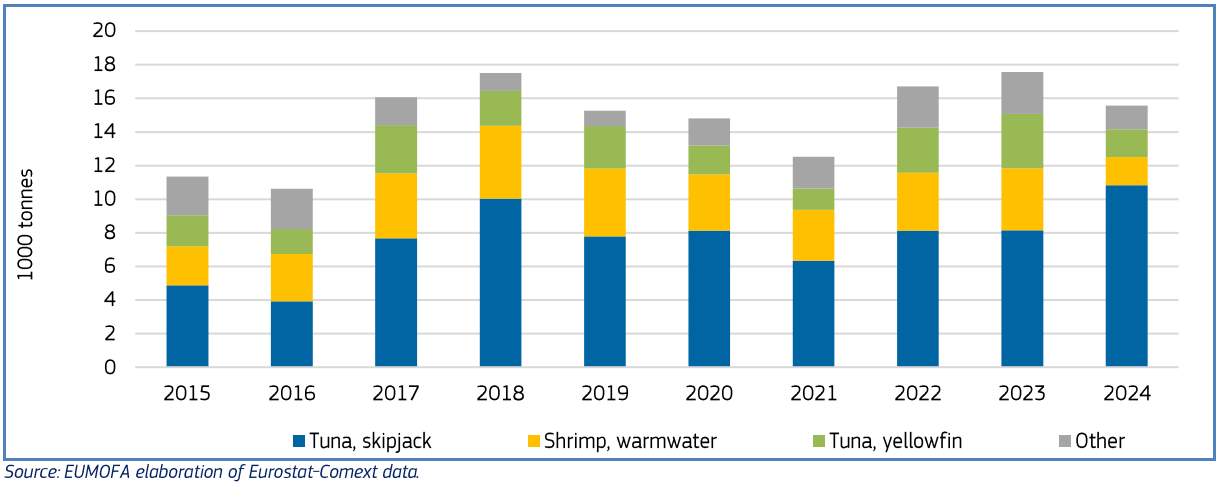
In 2024, EU import of fishery and aquaculture products from Colombia amounted to 15.700 tonnes valued at EUR 84 million. Compared to 2023, this represented a 11% decrease in terms of volume and a 8% decrease in terms of value.

In terms of volume, there were three species accounting for 91% of the EU import volumes from Colombia. The largest is **skipjack tuna** amounting to 10.800 tonnes, valued at EUR 60 million, accounting for 70% of the volumes and 71% of the values in 2024. The main EU importing MS are Italy, Spain and Denmark.

**Warmwater shrimp** is the second largest species in terms of import volume, amounting to 1.680 tonnes in 2024 valued at EUR 7,3 million. From 2023 to 2024, the import volume dropped by 54% while the value fell by 58%. Main EU importers are Spain and France.

The third most important species in terms of volume imported from Colombia in 2024 was **yellowfin tuna** amounting to 1.660 tonnes valued at EUR 10 million. From 2023 to 2024, imports dropped by 49% in terms of volume and 48% in terms of value. The main EU importers were Italy and Spain.

Figure 49. **EU IMPORTS OF FISHERY AND AQUACULTURE PRODUCTS FROM COLOMBIA BY MCS (1000 tonnes)**




*Source: EUMOFA elaboration of Eurostat-Comext data.*

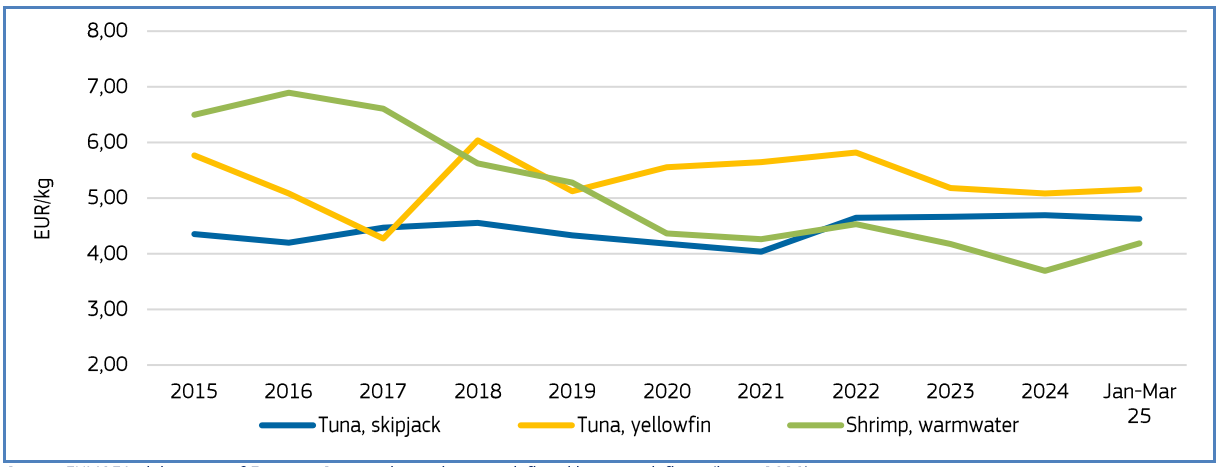
## 6. 4. Conclusion

EU import prices for **skipjack tuna** from Colombia increased steadily from 2021 to 2023. In 2024, EU import price averaged 4,69 EUR/kg, which represented a decline of 1% from 2023. During the first quarter of this year, import prices were down by 1% (to 4,63 EUR/kg) compared to 2024 average price.

Processed **yellowfin tuna** EU import prices hit the bottom in 2017 at 4,27 EUR/kg. Since then, import prices have trended between 5 and 6 EUR/kg in real values. In 2024, EU import price averaged 5,08 EUR/kg, a 2% decrease from 2023. During the first quarter of this year, import prices increased by 1% to 5,15 EUR/kg compared to average import price in 2024.

EU import prices of frozen **warmwater shrimp** from Colombia show a decreasing trend since 2016. In 2024, the EU import price was on average 3,69 EUR/kg a 12% decrease from 2023 and a 46% decrease from the peak in 2016 (in real values). During the first quarter of this year, import prices increased by 13% to 4,18/ EUR/kg compared to the average price in 2024.

Figure 50. **EU IMPORT PRICES FROM COLOMBIA (EUR/kg)**




*Source: EUMOFA elaboration of Eurostat-Comext data values are deflated by using deflator (base=2020).*

Since the free trade agreement between EU and the Andean countries entered into force, EU **imports** from Ecuador have grown significantly in terms of both volume and value while imports from Colombia have shown a fluctuating trend. Overall, imports from Peru have decreased due to decreasing imports of fishmeal and fish oil, but the imports of cephalopods have increased. The **export** from EU to Andean countries shows no significant change in trade after the free trade agreement entered into force, where Ecuador is the main market, but a decrease in volume and value was noticed in 2024 caused by decreased exports of tuna.

# 7. CASE STUDY: Clams in the EU

Clams are important species for EU coastal fisheries in the Northeast Atlantic and Mediterranean Sea. The main species from a market point of view are the Japanese carpet shell, the Atlantic surf clam, the striped venus clam, and the common edible cockle. Over the last ten years, EU catches reported significant increases, in parallel with the fall in EU imports from third countries. Overall, EU supply and apparent consumption have remained stable over the last ten years. First sale prices differ significantly between countries and clam species, reaching 2,47 EUR/kg for striped venus in Italy in 2024 against 4,36 EUR/kg in Spain, 2,26 EUR/kg for common edible cockle in Portugal, and 14,01 EUR/kg for Japanese carpet shell in Spain.

## 7. 1. Biology resource and exploitation

The name clam refers to several species of bivalve mollusc belonging to the *Venerida*, *Cardiida* and *Arcida* orders. The most commercially important species include the Japanese carpet shell (*Ruditapes philippinarum*), the Atlantic surf clam (*Spisula solidissima*), the common cockle (*Cerastoderma edule*), the ocean quahog (*Arctica islandica*) and the striped venus clam (*Chamelea striatula*).

*Source*: *Scandinavian Fishing Year Book*

Clams consist of two shells usually of equal size, connected by a ligament[39]. These two valves can open upon ligament contraction or close upon adductor contraction. Many clam species are morphologically similar, with shell colours ranging from white, grey to brown purple or gold, usually with a pearly shade on the inside.

Clams live in both freshwater and marine environments, usually buried in sand in tidal flats in bays and estuaries. Some species can also be found offshore, in the low intertidal and surf zones at depths up to 50 metres[40]. Depending on the species, clams range between 2 cm and 6 cm. Some species such as the Atlantic surf clam can reach between 20 cm and 23 cm[41]. Maturity is reached after 3 to 18 months depending on the species. Clam reproduction occurs by external fertilization usually annually or semiannually. Clams can produce up to 570 larvae per day per individual during the spawning period, and up to 68.000 larvae/year per individual[42]. Spawning is closely related to water temperatures with some species spawning in summer when water temperatures are warmer (e.g. Atlantic surf clam and surf clam)[43]. Some species like the Asian clam are hermaphrodite with the same individual producing both eggs and sperm. Clams are filter feeders relying primarily on phytoplankton. They may also feed on organic matter found in sandy or muddy bottoms[44].

Clam species can be found worldwide. The Atlantic surf clam is commonly found in the Western Atlantic[45], the Japanese hard clam is found in Western Pacific in Japanese and South Korean waters[46], the Northern quahog is usually found in Western Atlantic, while the Asian clam is native to Eastern Asia freshwaters and has been introduced in America and Europe[47]. There is no stock regulation of clam species at EU level, but national policies can be implemented for the regulation of certain species (e.g. prohibition of *Lithophaga lithophaga* harvest and sale in Italy after it was declared an endangered species). Some clams are harvested offshore by dredgers. Species found below the surface of tidal sand flats are harvested by hand, while other species are cultured (e.g. hard clam, grooved carpet shell). At EU level, the grooved carpet shell is subject to a minimum conservation size of 40 mm in all fishing areas[48]. Member States can implement further constraints, for example in France, the minimum conservation size for solid surf clam is 25 mm for a maximum of 100 individuals per recreational fisher per day[49].

[39] https://naturalhistory.museumwales.ac.uk/britishbivalves/morphology.php
[40] https://doris.ffessm.fr/Especes/Spisula-solida-Mactre-epaisse-2066/(rOffset)/9
[41] https://animalia.bio/fr/atlantic-surf-clam
[42] McMahon, R.F. (1999) Invasive Characteristics of the Freshwater Bivalve Corbicula fluminea. In R. Claudi & J.H. Leach (Eds.), Nonindigenous Freshwater Organisms: Vectors, Biology, and Impacts (pp. 315-343).
[43] Jones, Douglas S. (1981). "REPRODUCTIVE CYCLES OF THE ATLANTIC SURF CLAM SPISULA SOLIDISSIMA, AND THE OCEAN QUAHOG ARCTICA ISLANDICA OFF NEW JERSEY". Journal of Shellfish Research. 1 (1): 23–32 – via Biodiversity Heritage Library.
[44] Crespo, Daniel; Dolbeth, Marina; Leston, Sara; Sousa, Ronaldo; Pardal, Miguel Ângelo (July 2015). "Distribution of Corbicula fluminea (Müller, 1774) in the invaded range: a geographic approach with notes on species traits variability". Biological Invasions. 17 (7): 2087–2101.
[45] https://doris.ffessm.fr/Especes/Spisula-solida-Mactre-epaisse-2066/(rOffset)/9
[46] Hsiao, Sheng-Tai; Chuang, Shih-Chang (2023). "Meretrix taiwanica (Bivalvia: Veneridae), a previously misidentified new species in Taiwan". Molluscan Research. 43 (1). Taylor & Francis Group: 12–21.
[47] Crespo, Daniel; Dolbeth, Marina; Leston, Sara; Sousa, Ronaldo; Pardal, Miguel Ângelo (July 2015). "Distribution of Corbicula fluminea (Müller, 1774) in the invaded range: a geographic approach with notes on species traits variability". Biological Invasions. 17 (7): 2087–2101.
[48] https://fish-commercial-names.ec.europa.eu/fish-names/species/ruditapes-decussatus_en#ecl-accordion-header-conserv-meas
[49] https://doris.ffessm.fr/Especes/Spisula-solida-Mactre-epaisse-2066/(rOffset)/9

## 7. 2. Production

### World catches

In 2023, global catches of clams, cockles and arkshells came to 457.047 tonnes. The USA accounted for 26% of the global catches, followed by Indonesia (17%), EU (13%), Canada (9%) and the Republic of Korea (7%).

Between 2014 and 2023, global catches of clams decreased by 10%, in relation to the 28% reduction in catches USA in ten years. The Indonesian fleet experienced a 53% increase in catches over the same period, with increases also by the EU fleet (26%), Canadian fleet (40%), and Korean fleet (46%).

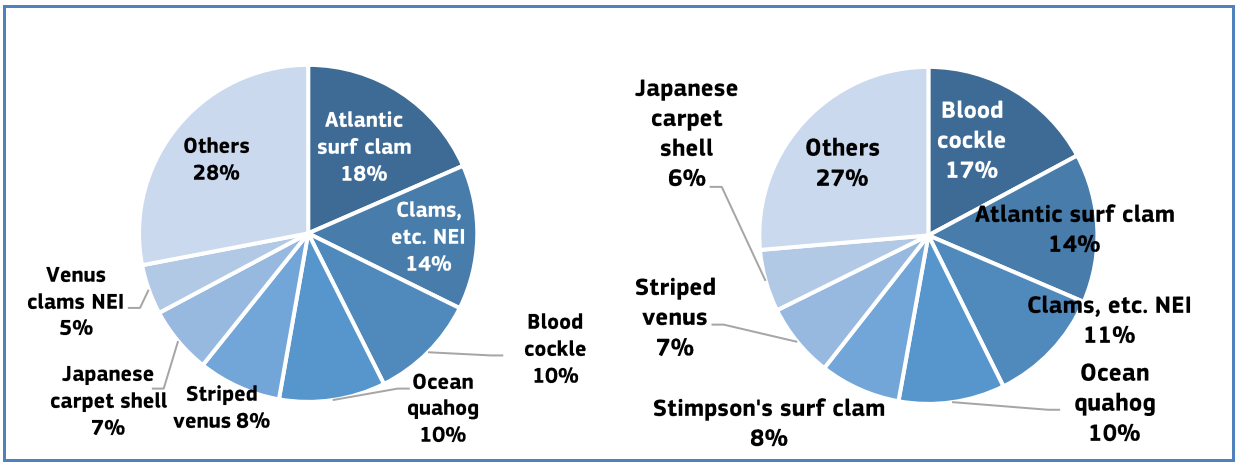
Table 40. **TOTAL WORLD CATCHES OF CLAMS (volume in tonnes)**

| Country | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | Evol. 2014/2023 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| United States | 167.332 | 165.552 | 116.211 | 122.171 | 103.533 | 135.536 | 79.359 | 161.343 | 133.907 | 119.896 | -28% |
| Indonesia | 50.282 | 52.279 | 37.651 | 67.791 | 87.225 | 104.959 | 93.802 | 82.773 | 77.161 | 76.955 | 53% |
| EU-27 | 46.224 | 57.802 | 56.115 | 56.637 | 50.477 | 63.267 | 56.683 | 73.173 | 75.308 | 58.074 | 26% |
| Canada | 28.403 | 32.731 | 43.890 | 45.374 | 37.277 | 41.045 | 34.129 | 40.150 | 56.348 | 39.703 | 40% |
| Republic of Korea | 21.362 | 23.192 | 19.886 | 24.048 | 38.948 | 30.609 | 35.514 | 33.359 | 24.572 | 31.125 | 46% |
| Japan | 53.457 | 50.319 | 44.593 | 41.002 | 39.380 | 40.736 | 31.205 | 28.043 | 28.511 | 28.400 | -47% |
| Venezuela | 17.386 | 29.294 | 29.129 | 24.511 | 17.299 | 16.357 | 19.182 | 21.351 | 19.185 | 19.185 | 10% |
| Others | 126.177 | 133.237 | 117.644 | 136.589 | 136.340 | 131.558 | 106.034 | 91.144 | 95.486 | 83.708 | -34% |
| **Total** | **510.623** | **544.406** | **465.120** | **518.123** | **510.479** | **564.066** | **455.909** | **531.336** | **510.478** | **457.047** | **-10%** |

*Source: FAO.*

The main species caught belong to the *Mactridae*, *Arcidae* and *Veneridae* families, representing respectively 25%, 23% and 21% of global catches in 2023. The most caught species was the blood cockle, accounting for 17% of global catches, caught almost exclusively by Indonesia (95% of catches). The Atlantic surf clam represented 14% of the caught volume in 2023, caught exclusively by the USA, followed by the ocean quahog (10% of catches caught exclusively by the USA), the Stimpson's surf clam (8% of catches; caught exclusively by Canada), the striped venus (7%; caught by Italy and Turkey), and the Japanese carpet shell (6%; caught by Korea).

Figure 51. **WORLD CATCHES OF CLAMS BY SPECIES IN 2014 (left) AND 2023 (right) (% volume)**




*Source: FAO.*

### EU catches

By far the most important EU Member States in terms of global catch volume of clams were Italy and the Netherlands, representing respectively 32% (4% of world catches) and 31% (4% of world catches) of EU catches. France was third in volume with 12% of EU catches, followed by Portugal (9%), Denmark (8%) and Spain (6%).

EU catches increased by 26% between 2014 and 2023, reflected by the development of Dutch catches (from 187 tonnes in 2014 to 17.833 tonnes in 2023) and the increase in catches by the Italian and French fleets: +14% and +13% respectively. Spain experienced a big fall in clam catches (66%); it was the second EU producer in 2014 and ranked sixth in 2023.

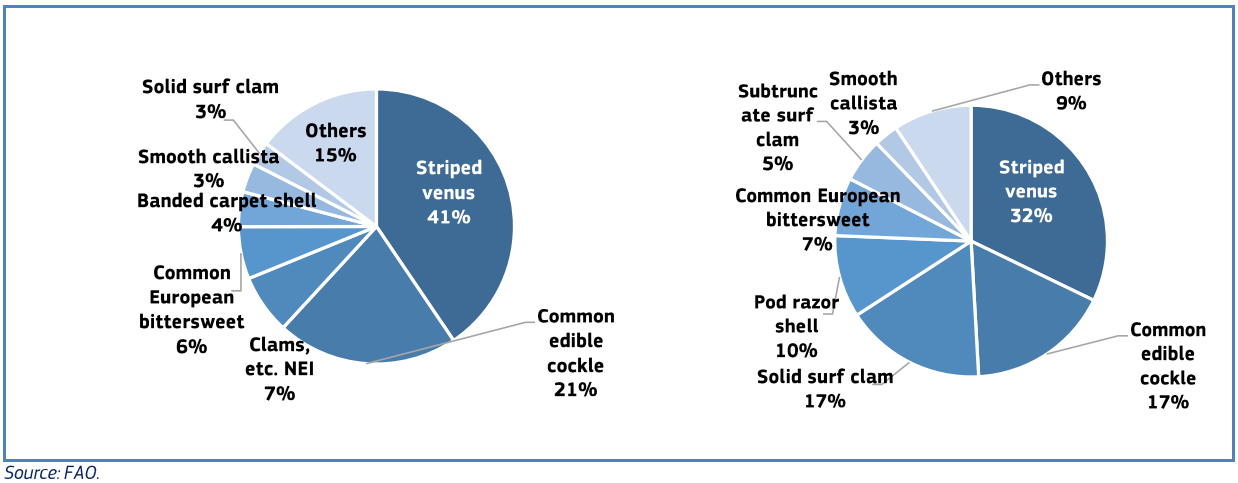
Table 41. **EU CATCHES OF CLAMS BY MS (volume in tonnes)**

| Country | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | Evol. 2014/2023 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Italy | 16.032 | 16.505 | 18.384 | 13.638 | 16.069 | 17.426 | 20.592 | 21.585 | 19.142 | 18.355 | 14% |
| Netherlands | 187 | 5.332 | 7.060 | 6.669 | 8.124 | 11.211 | 12.001 | 20.360 | 25.497 | 17.833 | 9436% |
| France | 6.004 | 5.762 | 6.593 | 6.084 | 7.891 | 7.706 | 6.359 | 7.735 | 8.647 | 6.774 | 13% |
| Portugal | 5.351 | 8.600 | 4.536 | 8.602 | 6.823 | 4.257 | 5.412 | 5.743 | 3.490 | 4.954 | -7% |
| Denmark | 6.265 | 7.955 | 6.276 | 8.866 | 3.400 | 11.602 | 4.609 | 11.075 | 11.436 | 4.740 | -24% |
| Spain | 10.776 | 12.136 | 10.688 | 9.929 | 5.616 | 8.237 | 5.213 | 4.422 | 5.503 | 3.702 | -66% |
| Ireland | 1.079 | 870 | 1.050 | 1.240 | 1.069 | 1.250 | 1.260 | 1.040 | 814 | 1.244 | 15% |
| Others | 530 | 642 | 1.528 | 1.608 | 1.485 | 1.579 | 1.237 | 1.213 | 778 | 472 | -11% |
| **EU-27** | **46.224** | **57.802** | **56.115** | **56.637** | **50.477** | **63.267** | **56.683** | **73.173** | **75.308** | **58.074** | **26%** |

*Source: FAO.*

Catches by the EU fleet consisted mostly of clams, cockles and arkshells belonging to the *Veneridae* (39% of the catches), *Mactridae* (22%), *Cardiidae* (17%), and *Pharidae* families (12%). Striped venus was the most caught species in 2023, accounting for 32% of EU catches, caught mainly in Italy (90% of the volume), followed by the common edible cockle (17% of EU catches), caught by Denmark (41%), Portugal (22%), the Netherlands (19%) and France (13%). Catches of solid surf clam accounted for 17% of EU volume (against 3% in 2014), mainly caught by the Netherlands (74%) and Portugal (12%). Other species caught in the EU include the pod razor shell, the common European bittersweet, the subtruncate surf clam and the smooth callista.

Figure 52. **EU CATCHES OF CLAMS BY SPECIES IN 2014 (left) AND 2023 (right), % volume.**




*Source: FAO.*

## Aquaculture

Global aquaculture production of clams amounted to almost 6 million tonnes in 2023. Almost all clam aquaculture production (95%) originated from China. Other producers include the Democratic People's Republic of Korea, Taiwan, the United States, and Thailand, representing 1% each of the global production. Clam aquaculture production by EU Member States accounted for 1% of global production. Between 2014 and 2023, global production of clams increased by 14% in relation to the increase in Chinese production (16%).

Table 42. **TOTAL AQUACULTURE PRODUCTION OF CLAMS (volume in 1.000 tonnes)**

| Country | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 | Evol. 2014/2023 |
|---|---|---|---|---|---|---|---|---|---|---|---|
| China | 4.881 | 4.950 | 5.274 | 5.393 | 5.306 | 5.224 | 5.463 | 5.490 | 5.571 | 5.643 | 16% |
| Democratic People's Republic of Korea | 60 | 60 | 60 | 62 | 62 | 62 | 62 | 62 | 62 | 62 | 3% |
| Taiwan | 60 | 64 | 39 | 52 | 49 | 50 | 52 | 53 | 54 | 55 | -8% |
| United States | 33 | 33 | 30 | 28 | 25 | 36 | 32 | 30 | 45 | 42 | 27% |
| Thailand | 54 | 59 | 62 | 26 | 30 | 33 | 34 | 34 | 29 | 30 | -44% |
| EU-27 | 43 | 43 | 44 | 45 | 41 | 26 | 32 | 32 | 28 | 30 | -30% |
| Others | 61 | 29 | 35 | 43 | 75 | 68 | 70 | 71 | 67 | 47 | -23% |
| **Total** | **5.192** | **5.238** | **5.544** | **5.649** | **5.588** | **5.499** | **5.745** | **5.771** | **5.857** | **5.910** | **14%** |

*Source: FAO.*

In 2023, global aquaculture production of clam consisted mostly of Japanese carpet shell, accounting for 75% of the volume, followed by constricted tagelus (15% of the volume) and blood cockle (7% of the volume).

In 2023 EU aquaculture production of clams reached 30.165 tonnes. Italy was the main producer with 21.577 tonnes (72% of EU production), followed by Portugal (21%) and to a lesser extent France and Spain (4% and 3% respectively of EU production). EU aquaculture production of clams consisted almost exclusively of Japanese carpet shell and grooved carpet shell: 76% and 20% respectively of EU production.

## 7. 3. Clams: first sales in the EU

First sales of clams in 2024 have been reported to EUMOFA by 8 EU countries (Bulgaria, Denmark, France, Greece, Ireland, Italy, Portugal, Spain). In more detail, first sales cover many species of clams, the most important in volume being the striped venus (44% of first-sales volume in 2024) and the common edible cockle (20% of volume). In terms of value, the striped venus represented 29% of first-sales value in 2024, followed by the Japanese carpet shell (18% of the value for 9% of the volume) and the common edible cockle (10%). First-sales prices of clams differ a lot depending on the species, from 0,65 EUR/kg for common European bittersweet to 14,78 EUR/kg for arched razor shell. First-sales prices of striped venus reached 2,61 EUR/kg in 2024, while they reached 2,03 EUR/kg for common edible cockle, and 7,93 EUR/kg for Japanese carpet shell. Average first-sales prices increased by 17% between 2020 and 2024. First-sales prices of solid surf clam experienced a 110% increase while first-sales prices of striped venus increased at a lower rate over the same period (6%). Common edible cockle experienced a slight decrease in price (1%) and prices of Japanese carpet shell remained stable over the period.

Table 43. **FIRST-SALES PRICES OF CLAMS BY SPECIES IN 2024 (price in EUR/kg)**

| Species | 2020 | 2021 | 2022 | 2023 | 2024 | Evol. 2020/2024 |
|---|---|---|---|---|---|---|
| Striped venus | 2,47 | 2,62 | 2,83 | 2,60 | 2,61 | 6% |
| Common edible cockle | 2,05 | 1,57 | 1,68 | 1,90 | 2,03 | -1% |
| Japanese carpet shell | 7,90 | 9,41 | 8,09 | 8,80 | 7,93 | 0% |
| Common European bittersweet | 0,51 | 0,54 | 0,60 | 0,68 | 0,65 | 27% |
| Solid surf clam | 2,86 | 3,50 | 4,00 | 4,95 | 6,02 | 110% |
| Smooth callista | 4,30 | 4,56 | 4,78 | 4,86 | 5,44 | 27% |
| Warty venus | 4,26 | 5,37 | 5,65 | 6,05 | 5,88 | 38% |
| Arched razor shell | 9,59 | 11,94 | 13,22 | 12,22 | 14,78 | 54% |
| Corrugated venus | - | 22,05 | 19,26 | 17,10 | 11,58 | 6% |
| **Total** | **3,36** | **3,35** | **3,44** | **4,09** | **3,93** | **17%** |

*Source: EUMOFA, based on data transmitted by Member States (https://eumofa.eu/sources-of-data).*

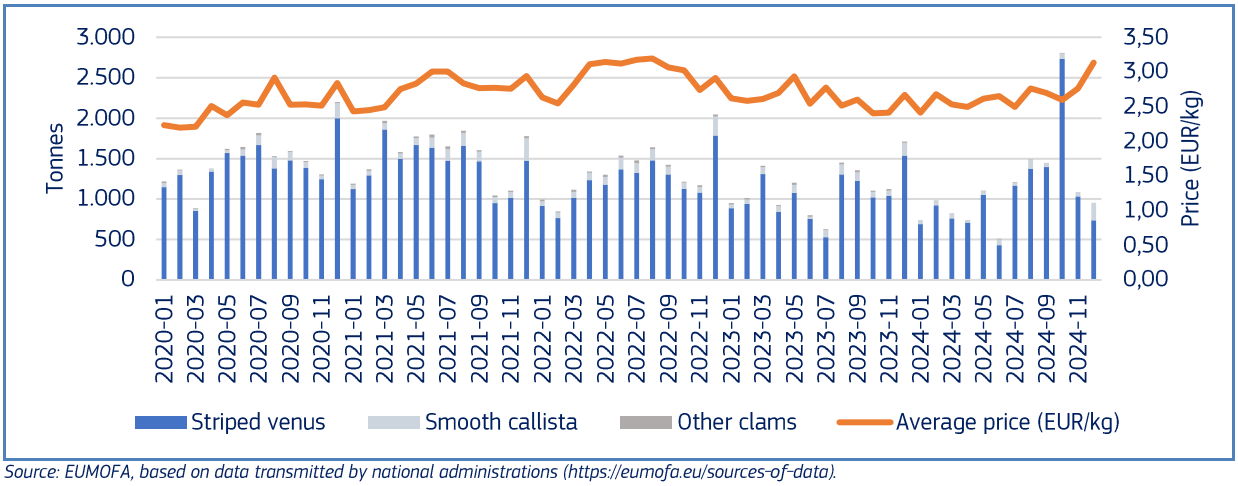
In 2024, overall, first sales of clams in EU reporting countries amounted to 32.071 tonnes at a value of over EUR 129 million and an average price of 3,93 EUR/kg. First sales decreased by 26% in volume between 2015 and 2023 while they remained stable in value, amounting to EUR 129 million in 2023.

Among the reporting countries, Italy accounted for most first-sales volumes (43%) in 2024, followed by Portugal (22%), Spain (14%) and France (14%). Spain and France reported significant diminishing volumes since 2015: -66% for Spain (used to be the most important MS in terms of first-sales volume in 2015), and -25% for France. Over the same period, Italy and Portugal reported increasing first-sales volumes: +27% and +6% respectively.

First-sales data show different seasonality patterns among reporting countries, with the majority of first sales occurring during autumn for Portugal: on average, 39% of first sales take place between October and December. In Spain, 69% of the first sales occur between July and December. In Italy, seasonality is scarce with first-sales volume higher all year long. However, volumes tend to peak in December. In Italy, first sales consist almost exclusively of striped venus, while in Portugal they consist of mostly common edible cockle (48% of the volume), Japanese carpet shell (21%) and solid surf clam (13%), and in Spain first sales consist of Japanese carpet shell (28%), striped venus (23%), arched razor shell (10%) and common edible cockle (9%). Though not always clear in Italy, first-sales price variations in Portugal and Spain were correlated with first-sales volume (with price peaks when volumes were lowest). Prices reported in Spain between January 2020 and December 2024 (9,06 EUR/kg on average) were significantly higher than prices recorded in Italy (2,69 EUR/kg) and Portugal (2,93 EUR/kg) over the same period.

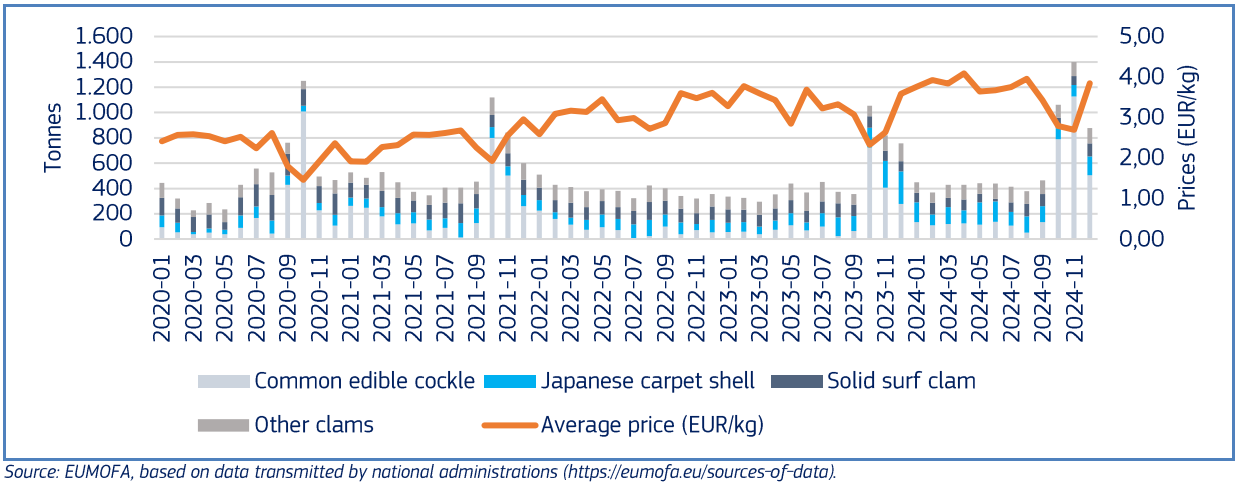
In 2024, the main places of sale for clams (in volume terms) were in Italy, Portugal and France. Of the main reporting places of sale, the first and third - Ancona (13% of first sales in volume in EU) and Fano (6%) - are located in Italy. The second– Aveiro (6% in volume) – is located in Portugal, followed by Granville in France (6%), while other countries were not included in the top ten. Spanish places of sale were not in the top ten in volume terms, but first sales of clams were reported in 115 places in 2024.

Figure 53. **FIRST SALES: CLAMS IN ITALY (tonnes, clam average price in EUR/kg)**



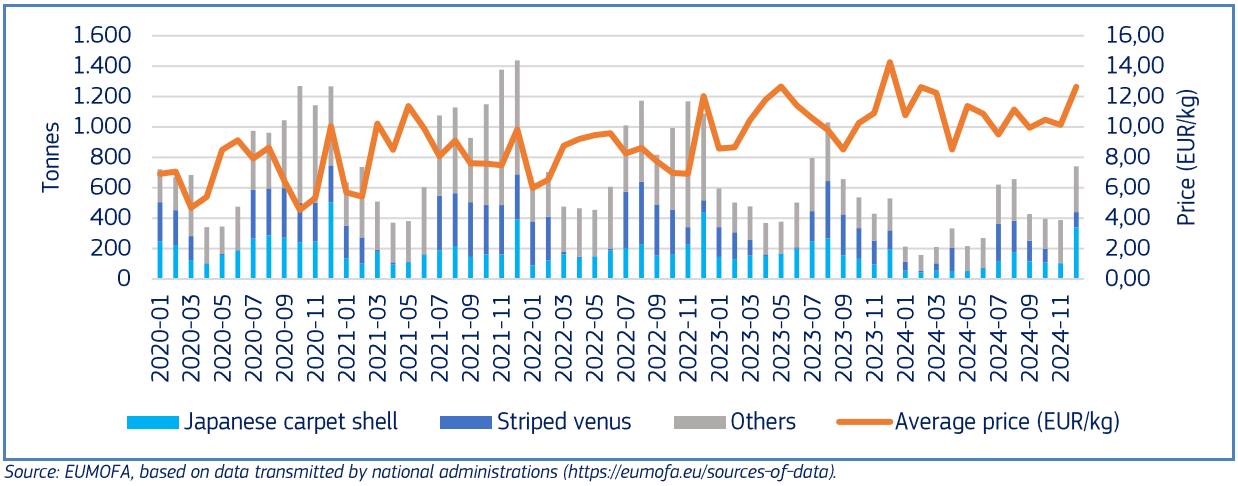

*Source: EUMOFA, based on data transmitted by national administrations (https://eumofa.eu/sources-of-data).*

Figure 54. **FIRST SALES: CLAMS IN PORTUGAL (tonnes, clam average price in EUR/kg)**




*Source: EUMOFA, based on data transmitted by national administrations (https://eumofa.eu/sources-of-data).*

Figure 55. **FIRST SALES: CLAMS IN SPAIN (tonnes, clam average price in EUR/kg)**




*Source: EUMOFA, based on data transmitted by national administrations (https://eumofa.eu/sources-of-data).*

## 7. 4. International trade

In the CN[50] used for registering EU import-export data, clams are specifically reported as fresh, frozen, smoked or prepared/preserved[51].

In 2024, EU imports of clams from third countries reached 131.490 tonnes, amounting to EUR 131,5 million. Prepared/preserved clams accounted for 78% of the total extra-EU import value and 95% of the volume, followed by fresh clams (19% of the value, 4% of the volume) and frozen clams (3% of the value, 1% of the volume). EU imports of clams from third countries originated mostly from Viet Nam and the United Kingdom, accounting respectively for 45% and 24% of the total extra-EU import value in 2024. Between 2020 and 2024, imports increased by 23% in volume and by 34% in value, due mostly to the increase of prepared/preserved imports of clams (26% in volume and 78% in value over the same period). The main importing MS were Spain and Italy, representing respectively 57% and 26% of extra-EU import value in 2024. Imports increased by 49% in value in Spain and by 47% in Italy between

[50] 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.
[51] 03077100 - Live, fresh or chilled, even in shell, clams, cockles and ark shells "families Arcidae, Arcticidae, Cardiidae, Donacidae, Hiatellidae, Mactridae, Mesodesmatidae, Myidae, Semelidae, Solecurtidae, Solenidae, Tridacnidae and Veneridae"
03077210 - Striped venus or other "Veneridae", even in shell, frozen
03077290 - Frozen, even in shell, clams, cockles and ark shells "families Arcidae, Arcticidae, Cardiidae, Donacidae, Hiatellidae, Mactridae, Mesodesmatidae, Myidae, Semelidae, Solecurtidae, Solenidae, Tridacnidae"
03077900 - Smoked, dried, salted or in brine, even in shell, clams, cockles and ark shells "families Arcidae, Arcticidae, Cardiidae, Donacidae, Hiatellidae, Mactridae, Mesodesmatidae, Myidae, Semelidae, Solecurtidae, Solenidae, Tridacnidae and Veneridae"
16055600 - Clams, cockles and arkshells, prepared or preserved (excl. smoked)

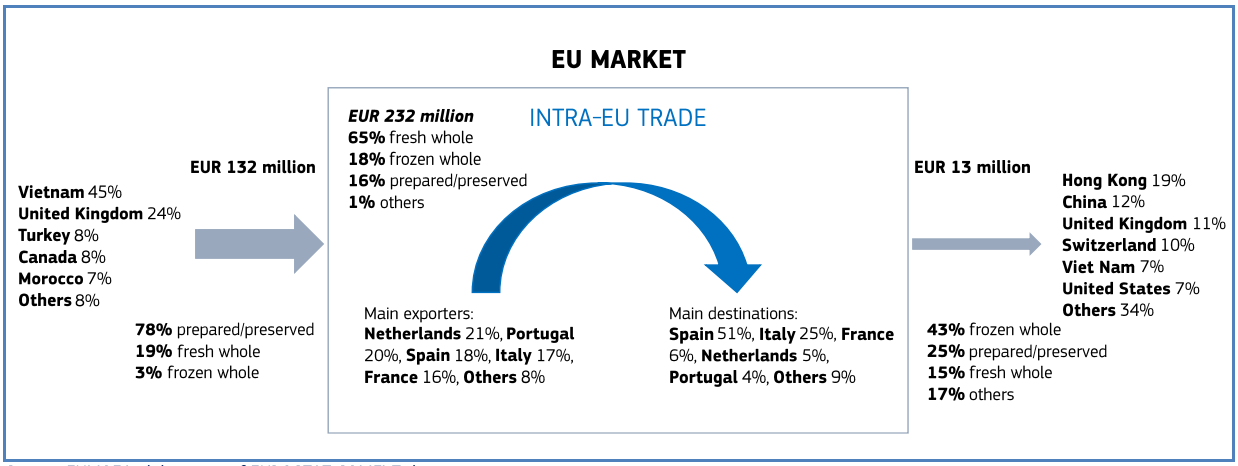
2020 and 2024. France experienced a 311% increase over the same period while Portuguese imports of clams from third countries decreased by 11% and those from the Netherlands fell by 67%.

In 2024, EU exports to third countries amounted to 2.062 tonnes at a value of EUR 13,4 million. Exports consisted mainly of frozen clams, accounting for 43% of the total extra-EU export value and 47% of the volume and prepared/preserved clams, accounting for 25% of the total export value and 33% of the volume. The main destinations in value terms were Hong Kong, accounting for EUR 2,5 million (19% of the total extra-EU export value in 2024), followed by China (12%), the United Kingdom (11%) and Switzerland (10%). Ireland was by far the main exporter of clam to third counties in 2024, accounting for 49% of the total EU export value, followed by Spain (20% of the export value) and Italy (12%).

Over the 2020-2024 period, exported volumes of clams decreased despite a peak in 2023 with 2.970 tonnes exported. Overall, exports of clams to third countries decreased by 41% in volume and by 7% in value since 2020, due to the decrease in the volumes exported by Italy (6%), Denmark (79%), Portugal (31%), the Netherlands (51%) and France (99%). Export prices of clams increased by 59% from 4,08 EUR/kg in 2020 to 6,47 EUR/kg in 2024. Ireland and Spain were the only MS experiencing an increase of the volume exported to third countries: +328% for Ireland and +62% for Spain.

In 2024, intra-EU exports of clams amounted to 44.112 tonnes at a value of EUR 232,6 million. Intra-EU trade consisted mostly of fresh clams accounting for 65% of the trade value (67% of the volume), and to a lesser extent of frozen and prepared/preserved clams accounting respectively for 18% and 16% of the trade value (14% and 18% of the trade volume). The Netherlands is a hub for the intra-EU trade of clam, accounting for 21% of the export trade value in 2024. Portugal (20% of the trade value), Spain (18%), Italy (17%) and France (16%) were the other main exporting MS for intra-EU exports. The main destinations for intra-EU trade were Spain and Italy, representing 51% and 25% of the value trade.

Figure 56. **THE CLAM EU-TRADE MARKET IN 2024, IN VALUE**



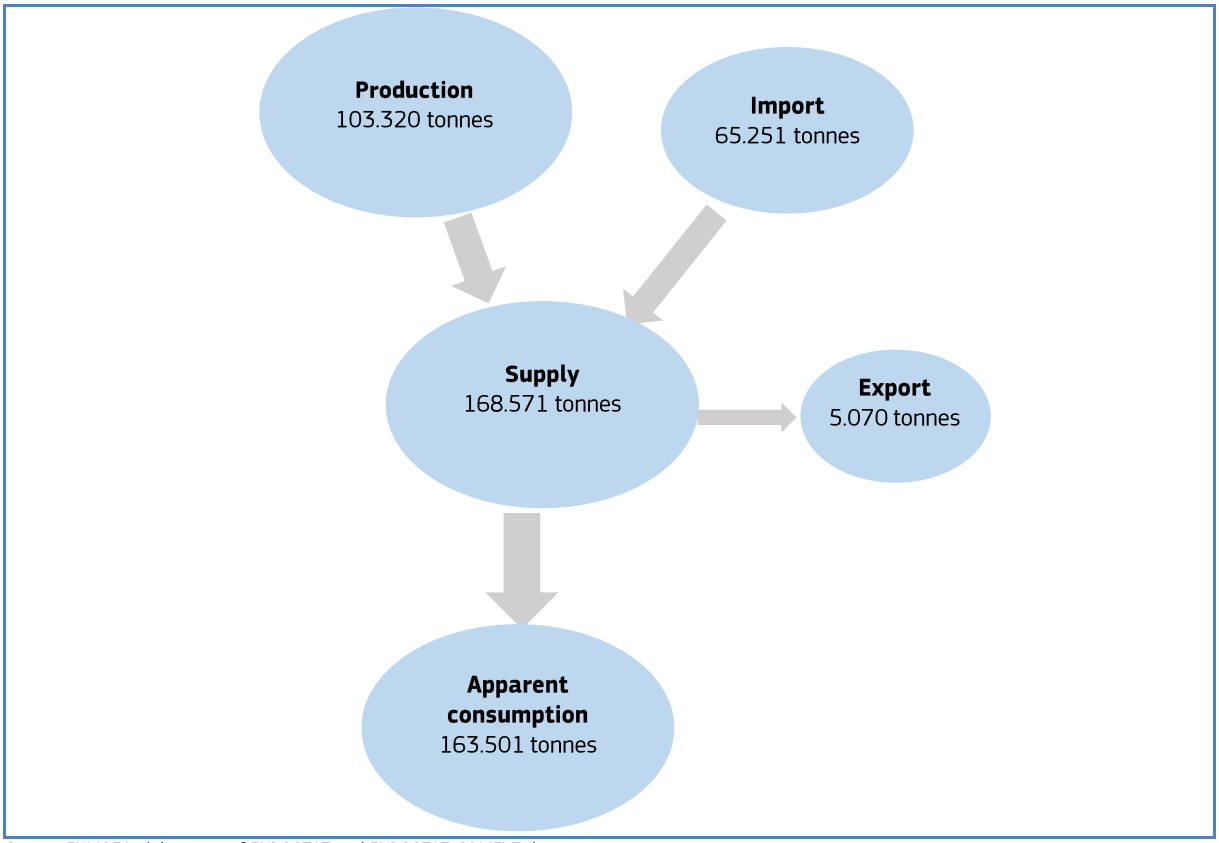

*Source: EUMOFA elaboration of EUROSTAT-COMEXT data.*

## 7. 5. Apparent consumption

Apparent consumption of clams at EU level was estimated at 163.501 tonnes LWE in 2022 (-1% compared to 2013), equivalent to 0,367 kg/per capita. Supply reached 168.571 tonnes LWE, originating from EU fisheries (44% of the volume), EU aquaculture production (17%) and imports (39%). Exports represented 3% of the overall supply, therefore, apparent consumption accounted for 97% in 2022.

At MS level, the main consumption markets of clams were Spain with a consumption estimated at 78.101 tonnes in 2022 LWE (1,645 kg/per capita) (+10% compared to 2013), Italy (66.138 tonnes LWE, +58%; 1,120 kg/per capita), Portugal (16.199 tonnes LWE, -61%; 1,554 kg/per capita), the Netherlands (20.795 tonnes LWE; 0,803 kg/per capita and Denmark (9.086 tonnes LWE; +85%; 1,547 kg/per capita).

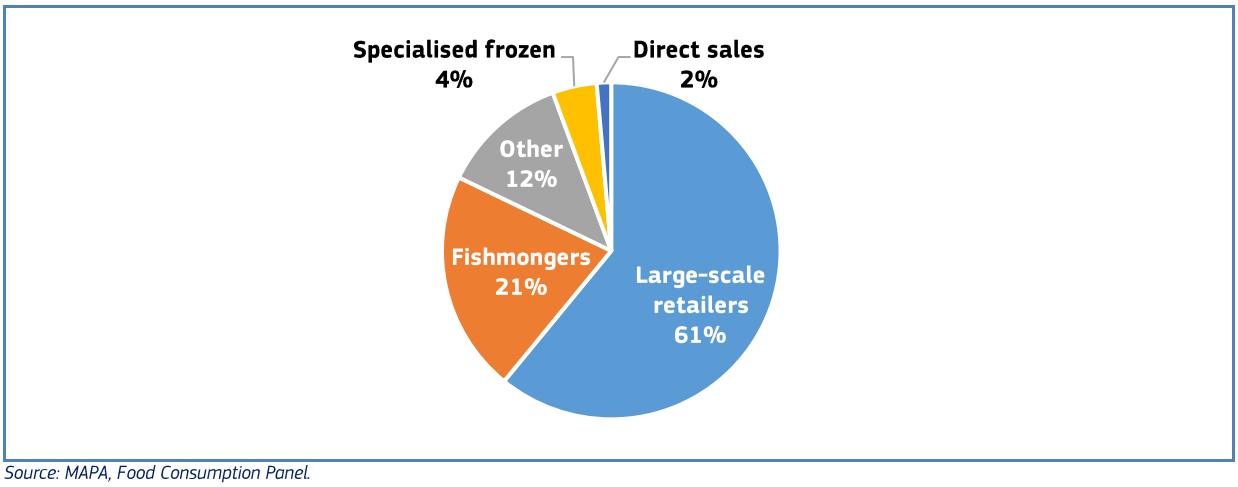
Figure 57. **APPARENT CONSUMPTION OF CLAMS IN 2022 (tonnes, LWE)**




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

In Spain, the biggest EU market for clams, clams at retail stage are mainly sold in supermarkets and large stores, accounting for 61% of the sales value in 2023 according to the Food Consumption Panel of the Ministry of Agriculture. Fishmongers represented 21% of sales value, while specialized frozen outlets accounted for 4% and direct sales represented 2% of the sales value.

Figure 58. **SPANISH SALES CHANNELS BREAKDOWN IN 2023 (% of value)**

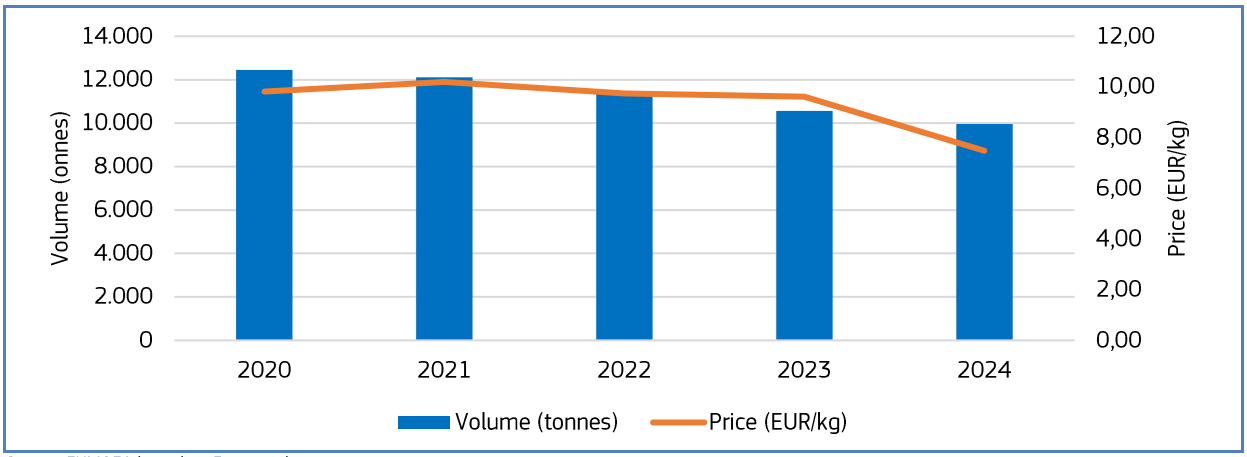



*Source: MAPA, Food Consumption Panel.*

Europanel data cover the volumes and values of household consumption of fresh clams in Italy and in Portugal. Over the 2020-2024 period, decreasing trends in volume and value were observed in both countries. Italian household consumption of fresh clams fell by 20% in volume and by 39% in value despite the increase in its national supply. Portuguese consumption decreased at lower rates: -9% in volume and -10% in value, directly linked with the reduction of supply at national level. Prices fell by 24% in Italy, reaching

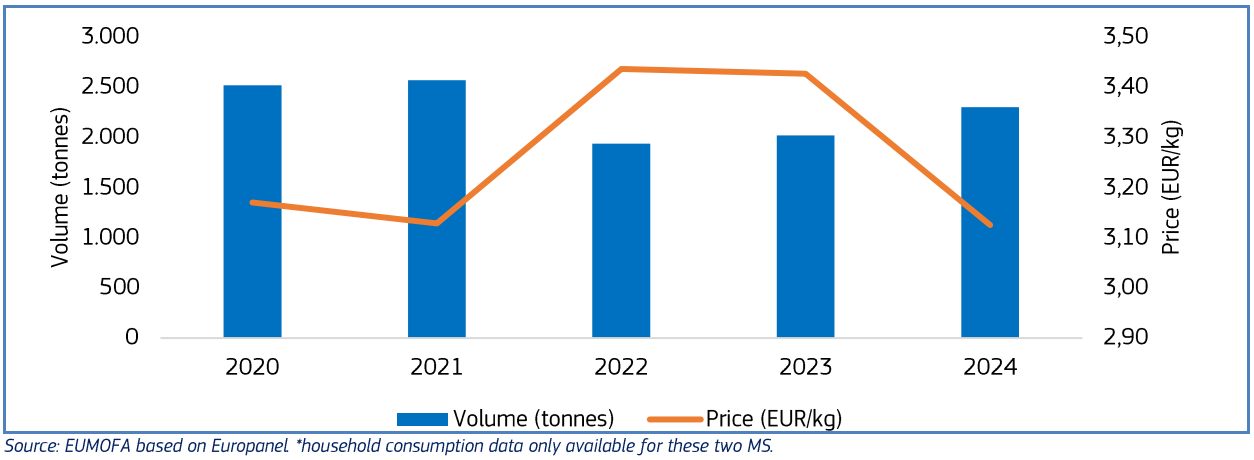
7,48 EUR/kg in 2024, while they remained stable in Portugal. Consequently, average prices increased significantly over the period in Denmark (23%), while they remained stable overall in Portugal (-1%) reaching 3,13 EUR/kg.

Figure 59. **HOUSEHOLD CONSUMPTION: FRESH CLAMS IN ITALY***




*Source: EUMOFA based on Europanel.*

Figure 60. **HOUSEHOLD CONSUMPTION: FRESH CLAMS IN PORTUGAL***




*Source: EUMOFA based on Europanel. *household consumption data only available for these two MS.*

Manuscript completed in July 2025


Luxembourg: Publications Office of the European Union, 2025


PDF ISSN 2314-9671 KL-01-25-017-EN-N

ISBN: 978-92-68-24114-1 DOI: 10.2771/2380860

**FOR MORE INFORMATION AND COMMENTS:**

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

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

**Global highlights:** FAO, European Commission, Groupe d'études géopolitiques, Statistics Iceland.

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

**First sales:** ICES, Thünen Institute of Sea Fisheries.

**Case studies:** European Commission, MERCOSUR, Comunidad Andina, Tri Marine Group, FAO, National Museum Wales, Marine Bivalve Shells of the British Isles, DORIS, ANIMALIA, ResearchGate, Journal of Shellfish Research, Molluscan Research, Biological Invasions, MAPA.

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

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

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

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

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

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

EUMOFA **Privacy Policy**

Publications Office of the European Union