European Commission

Monthly Highlights

No. 8/2025

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

eumofa.eu @EU_MARE #EUMOFA

CONTENTS

Global highlights
Global news from fisheries and aquaculture sector

First sales in Europe
Analysis of first sales in reporting countries

Consumption
Freshwater fish

Macroeconomic context
Marine fuel, consumer prices and exchange rates

Extra-EU imports
Analysis of extra-EU imports of freshwater fish in EU Member States

Case studies
1. Cod in the EU
2. Mussels and oysters - latest market trends in the EU

Maritime Affairs and Fisheries

1. GLOBAL HIGHLIGHTS

EU / Iceland: The EU and Iceland have signed a new Memorandum of Understanding to strengthen cooperation on fisheries and ocean affairs. The agreement sets a framework for collaboration on sustainable fisheries, marine conservation, scientific research, and energy transition in the fisheries and aquaculture sector. A key feature is an annual high-level dialogue, starting in early 2026, to advance joint priorities such as shared fish stock management in the North-East Atlantic, cetacean conservation, and biodiversity commitments under the Kunming-Montreal Framework. Both parties also called for swift ratification of the Biodiversity Beyond National Jurisdiction (BBNJ) Agreement, reaffirming their commitment to global ocean governance and effective multilateral cooperation.[1]

© Eurofish International Organisation

EU / Fishery & aquaculture: The European Commission has proposed a new regulation to simplify and streamline the collection of fisheries and aquaculture statistics in the EU. The initiative will replace five existing rule sets with a single, integrated system, reducing the reporting burden on Member States by reusing administrative data already available. For the first time, data will also be collected on discarded catches, recreational fisheries, sensitive species, landings from third-country fleets, and organic aquaculture. The reform aims to improve data quality, support informed policymaking, and strengthen international cooperation while enhancing efficiency and sustainability in the sector.[2]

EU / Maritime Spatial Planning: On 1st July 2025, the implementation dialogue on maritime spatial planning (MSP) was held in Brussels gathering together stakeholders from industry, civil society and public authorities. Participants reaffirmed support for the MSP Directive but called for stronger environmental protection, better alignment with EU climate, biodiversity, energy and food policies, and earlier involvement of fisheries and local communities. The outcomes from the dialogue will inform the upcoming Ocean Act which will revise and modernise the MSP Directive for more sustainable and coordinated use of marine resources.[3]

EU / Fishery: The European Commission reports that more EU fish stocks are being fished at sustainable levels, especially in the North-East Atlantic, though key species continue to face challenges from climate change, overfishing, and ecosystem pressures. While the Mediterranean and Black Seas show gradual improvement and seven stocks have reached sustainability, mortality remains high for others. The Baltic Sea is of particular concern, with several stocks in decline and landed only as by-catch. The Commission has opened consultations on fishing opportunities for 2026, aiming to safeguard sustainable stocks, help others recover, and address broader challenges including energy costs and the ongoing evaluation of the Common Fisheries Policy.[4]

Spain / Marine reserve / Fishery: Spain's network of 12 marine reserves, covering over 105.000 hectares, has become a model for sustainable fisheries management and marine conservation. These protected areas safeguard local ecosystems, support artisanal fishing, and generate benefits for surrounding fisheries through the proven "reserve effect." Alongside conservation, they host scientific research, education, and eco-tourism activities, reinforcing Spain's leadership in sustainable fisheries. This year marks the 30th anniversary of several reserves.[5]

Iceland / Fisheries: In July 2025, Icelandic fishing catches reached 86.000 tonnes, up 10% from July 2024. Pelagic species, mainly mackerel, accounted for most of the volume, while demersal catches declined slightly. However, over the 12 months to July 2025, total catches stood at 980.000 tonnes, down 7% compared with the previous year.[6]

[1] https://ec.europa.eu/commission/presscorner/detail/en/ip_25_1837
[2] https://oceans-and-fisheries.ec.europa.eu/news/commission-proposes-simplification-eu-fisheries-and-aquaculture-statistics-2025-07-30_en
[3] https://oceans-and-fisheries.ec.europa.eu/news/main-outcomes-implementation-dialogue-maritime-spatial-planning-2025-08-07_en
[4] https://blue-economy-observatory.ec.europa.eu/news/eu-fish-populations-recovering-key-species-struggling-2025-07-16_en?utm_source=chatgpt.com
[5] https://www.mapa.gob.es/es/prensa/ultimas-noticias/detalle_noticias/reservas-marinas-de-inter-s-pesquero--m-s-all--de-la-conservaci-n-del-medio-/98da56b7-1042-4615-b785-e58b21681ba8
[6] https://statice.is/publications/news-archive/fisheries/fish-catch-in-july-2025/

2. MACROECONOMIC CONTEXT

2. 1. Marine fuel

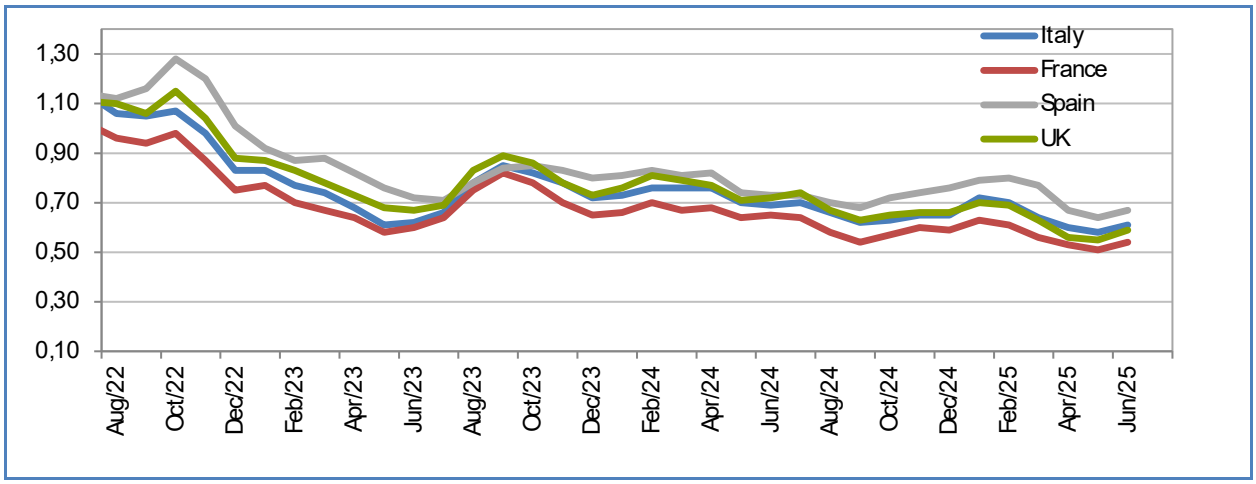
Average prices for marine fuel in **July 2025** ranged between 0,57 and 0,70 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 5,4% compared with the previous month and decreased by an average of 9,6% compared with the same month in 2024.

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

Country	Jul 2025	Change from Jun 2025	Change from Jul 2024
France *(ports of Lorient and Boulogne)*	0,57	6%	-11%
Italy *(ports of Ravenna and Livorno)*	0,64	5%	-9%
Spain *(ports of A Coruña and Vigo)*	0,70	4%	-4%
The UK *(ports of Grimsby and Aberdeen)*	0,63	7%	-15%

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

In July 2025 the EU annual inflation rate was 2,4%, up from 2,3% in June 2025. A year earlier, the rate was 2,8%.

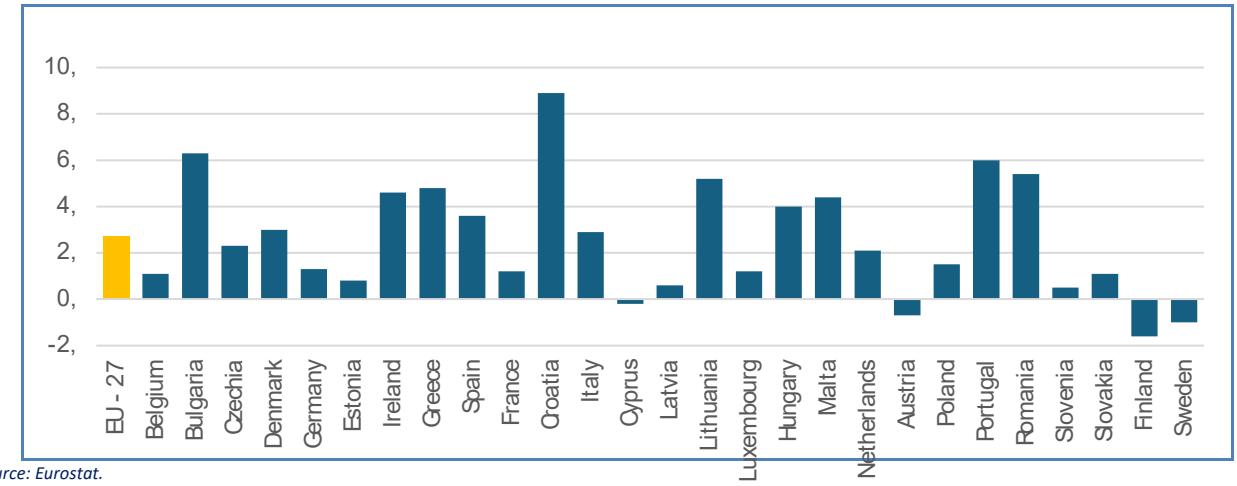
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR JULY 2025, COMPARED WITH JULY 2024**

Lowest inflation rates		Highest inflation rates	
Cyprus	+0,1%	Romania	+6,6%
France	+0,9%	Estonia	+5,6%
Ireland	+1,6%	Slovakia	+4,6%

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 JULY 2025 (value expressed in percentage)**



Source: Eurostat.

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

	Jul 2023	Jul 2024	Jun 2025	Jul 2025	Change from Jun 2025	Change from Jul 2024
Food and non-alcoholic beverages	140,81	143,02	148,35	148,59	0,2%	3,9%
Fish and seafood	139,14	141,09	144,52	144,93	0,3%	2,7%
Fresh or chilled fish	131,23	133,41	138,00	138,65	0,5%	3,9%
Frozen fish	139,09	138,58	141,95	142,35	0,3%	2,7%
Fresh or chilled seafood	127,57	130,19	134,94	134,67	-0,2%	3,4%
Frozen seafood	119,98	118,52	119,32	119,82	0,4%	1,1%
Dried, smoked or salted fish and seafood	140,46	142,42	146,35	147,87	1,0%	3,8%
Other preserved or processed fish and seafood and fish and seafood preparations	134,20	137,45	138,86	138,67	-0,1%	0,9%

Source: Eurostat.

2.4. Exchange rates

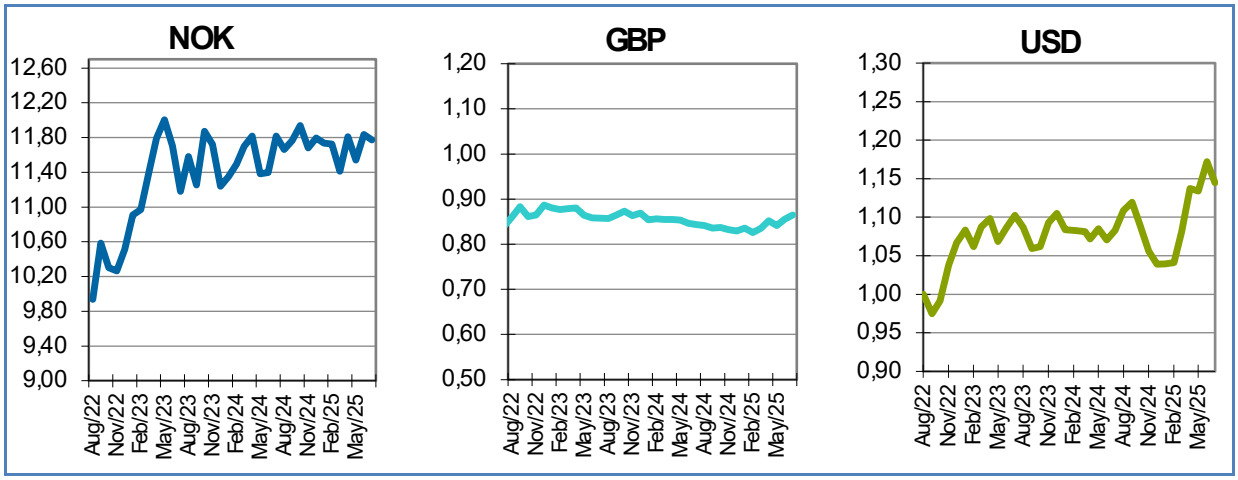
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Jul 2023	Jul 2024	Jun 2025	Jul 2025
NOK	11,1805	11,8175	11,8345	11,7740
GBP	0,8577	0,8438	0,8555	0,8649
USD	1,1023	1,0828	1,1720	1,1446

Source: European Central Bank.

In July 2025, the euro appreciated against the British pound sterling (1,1%) and depreciated against the Norwegian krone (0,5%) and the US dollar (2,3%), relative to the previous month. For the past six months, the euro has fluctuated around 1,1184 against the US dollar. Compared with July 2024, the euro has appreciated 5,7% against the US dollar and 2,5% against the British pound sterling and depreciated 0,4% against the Norwegian krone.

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



Source: European Central Bank.

3. FIRST SALES IN EUROPE[7]

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

Increases in value and volume (Jan-May 2025 vs Jan- May 2024): Finland and France recorded an increase in both first-sales value and volume. Increases in Finland were mainly due to herring, and in France due to eel, scallop and octopus.

Decreases in value and volume (Jan-May 2025 vs Jan-May 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 shrimp *Crangon spp.*, mackerel and blue whiting.

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

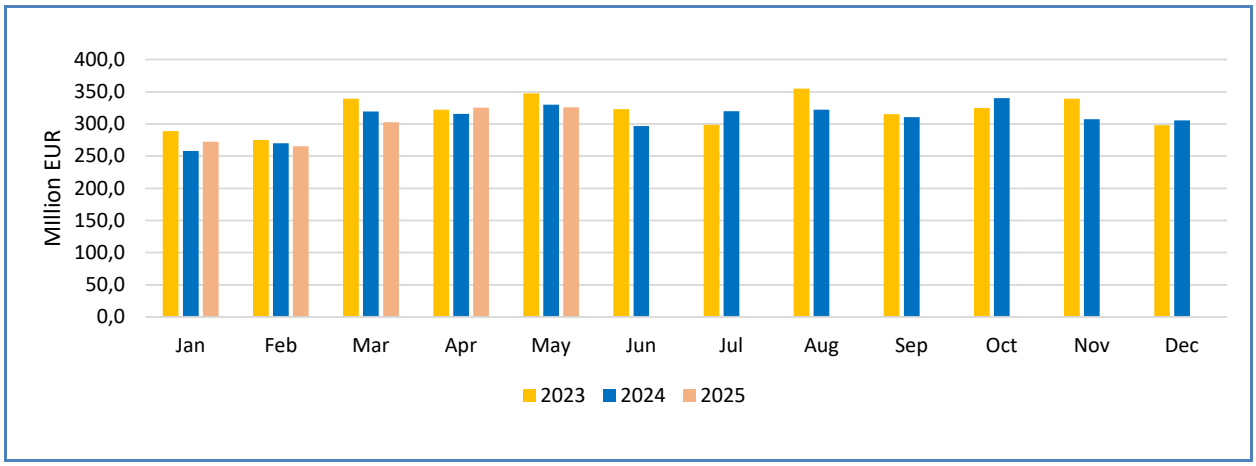
	January – May 2023		January – May 2024		January – May 2025		Change from January – May 2024	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	6.808	39,44	5.403	30,68	5.424	32,09	0%	5%
Bulgaria	843	0,41	1.378	0,73	1.359	0,90	-1%	24%
Cyprus	143	1,03	134	1,01	129	0,91	-3%	-10%
Denmark	406.193	210,33	369.358	208,08	361.470	217,13	-2%	4%
Estonia	40.987	13,45	40.145	19,19	31.628	14,21	-21%	-26%
Finland	37.737	10,60	33.301	12,29	41.235	12,41	24%	1%
France	92.433	298,95	88.280	278,01	91.964	304,99	4%	10%
Germany	19.358	23,47	17.941	29,49	2.824	9,00	-84%	-69%
Italy	30.921	145,17	23.527	108,98	20.791	104,34	-12%	-4%
Latvia	23.374	6,57	21.061	7,66	20.291	8,22	-4%	7%
Lithuania	232	0,54	244	0,34	144	0,19	-41%	-45%
Netherlands	39.259	60,29	6.878	49,94	7.347	47,15	7%	-6%
Poland	45.357	16,05	36.712	18,61	35.761	16,67	-3%	-10%
Portugal	34.699	116,24	29.590	101,81	29.208	107,50	-1%	6%
Spain	180.130	587,32	173.481	587,42	156.235	586,13	-10%	0%
Sweden	84.738	43,00	55.903	38,57	42.800	29,99	-23%	-22%
Norway	1.476.357	1.497,46	1.434.844	1.412,25	1.264.209	1.538,45	-12%	9%
United Kingdom	142.803	259,57	146.957	273,79	147.186	301,81	0%	10%

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

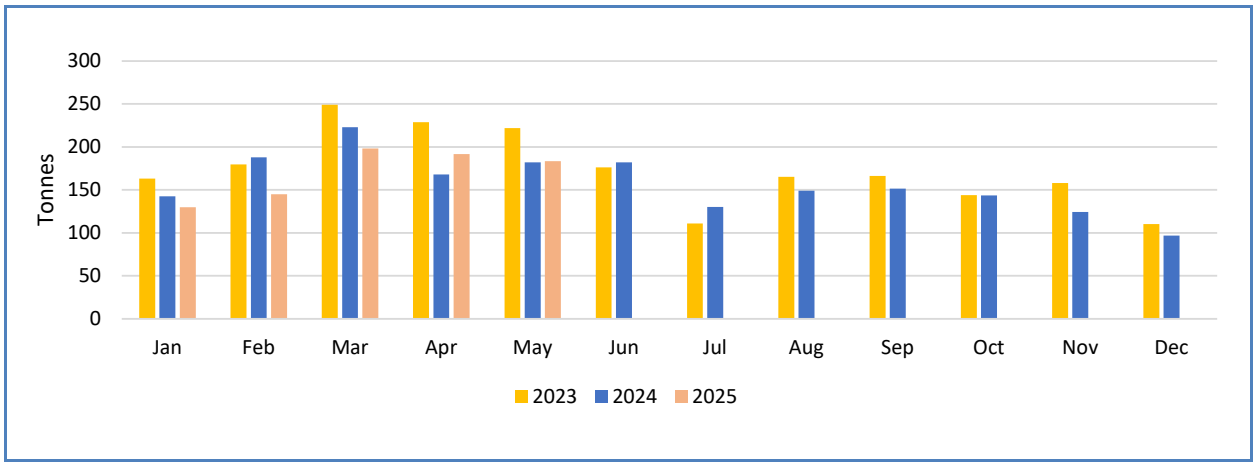
The overall value of first sales in the period January-May in 2025 was EUR 1,49 billion, a stable value compared to 2024, and a 5% decrease compared to 2023. Overall volume was 848.611 tonnes, a 6% decrease compared to 2024, and a 19% decrease compared to 2023.

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



In the first five months of 2025, monthly first-sales value increased in January and April and decreased in February, March and May compared to the same period in 2024 and 2023, except for January when value decreased compared to 2023 and for April when value increased for both 2024 and 2023. Between January and May 2025 first-sales volume decreased compared to the same period in both 2024 and 2023, except for April and May 2025 when volumes were higher than 2024. Between January and May 2025, first-sales value remained stable compared to 2024 when groundfish (+1%) contributed most to the value, and saw a 5% decrease compared to 2023 with groundfish, small pelagics and flatfish (-6%, -7% and -18% respectively) contributing most to the decline. Similarly in the same period in 2025, first-sales volume decreased compared to the same period in both 2024 and 2023 with groundfish and small pelagics mainly responsible for the decline in 2024 (-17% and -17% respectively) and 2023 (-21% and -45% 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 109,9 million, a 13% increase compared to the same period in 2024. First-sales volume came to 45.768 tonnes, an increase of 10% compared to 2024. Scallop and clam were the main commercial species driving the increase in value of the commodity group (+17% and +9%, respectively), while scallop and other molluscs and aquatic invertebrates[10] were the main contributors to the increase in volume (+27% and +20%, respectively).

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

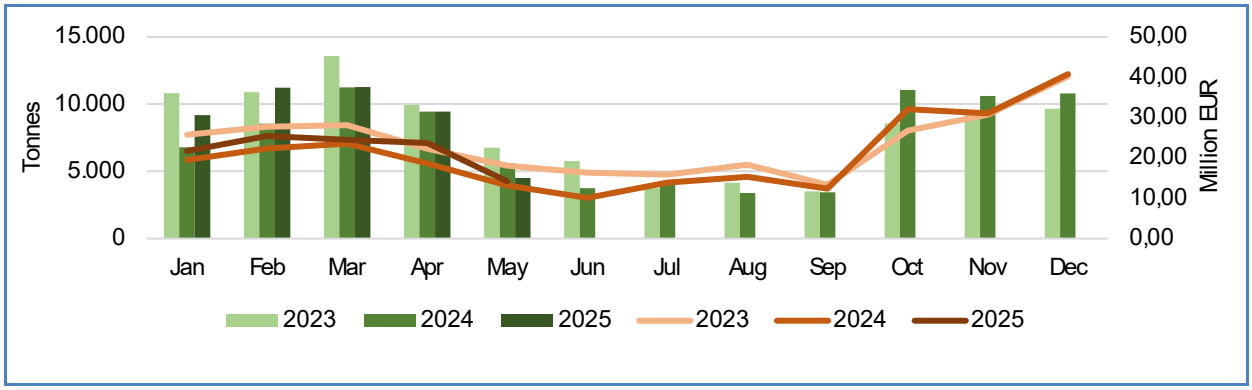


Table 6. **FIRST SALES PRICES OF BIVALVES MCS (JAN-MAY 2024 AND JAN-MAY 2025)**

Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
France	Scallop	2,25 EUR/kg	2,07 EUR/kg	-8%
France	Other molluscs and aquatic invertebrates[11]	2,72 EUR/kg	3,47 EUR/kg	+27%
Spain	Clam	10,76 EUR/kg	11,89 EUR/kg	+10%

Cephalopods

In 2025, first-sales value of "Cephalopods" totalled EUR 129,7 million, a 9% increase compared to 2024. First-sales volume came to 18.674 tonnes, a decrease of 2% compared to 2024. Octopus and squid (+26% and +7%) were the two main commercial species driving the growth in first-sales value, while cuttlefish was the main species (-23%) driving the decrease in first-sales volume.

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

[9] The data 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 58% of total first-sales volume and 70% of the total first-sales value.

[11] Of the main commercial species other molluscs and aquatic invertebrates in France, whelk represents 91% of total first-sales volume and 86% of the total first-sales value.

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

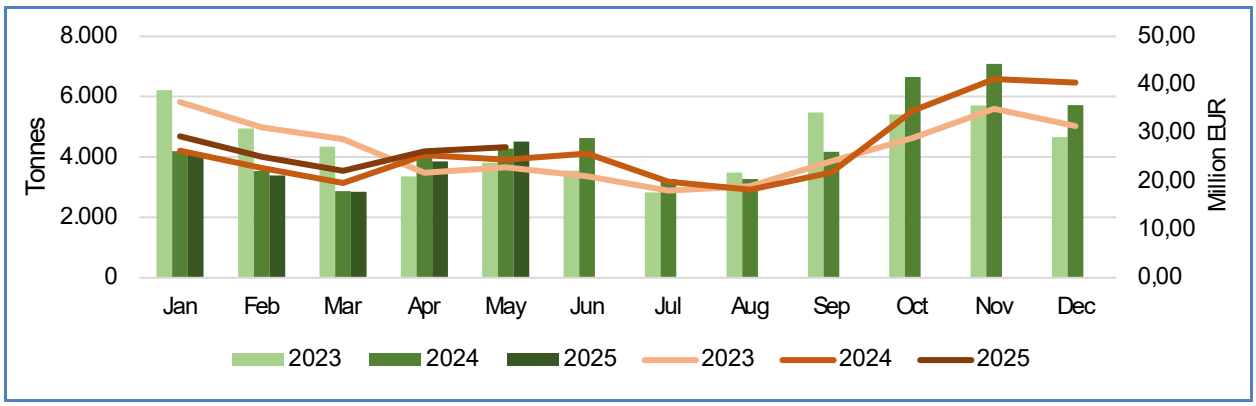


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN-MAY 2024 AND JAN-MAY 2025)**

Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average Price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
France	Octopus	6,81 EUR/kg	7,60 EUR/kg	+12%
Portugal	Octopus	7,65 EUR/kg	8,85 EUR/kg	+16%
France	Squid	9,44 EUR/kg	9,20 EUR/kg	-3%

Crustaceans

In 2025, first-sales value of "Crustaceans" totalled EUR 186,0 million, a decrease of 8% compared to 2024. First-sales volume amounted to 18.374 tonnes, a decrease of 7% compared to 2024. Shrimp *Crangon* spp. and Norway lobster (-42% and -5%) were the two main products responsible for the decrease in first-sales value, while Shrimp *Crangon* spp. and cold-water shrimps (-44% and -54%) were mainly responsible for the decrease in first-sales volume.

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

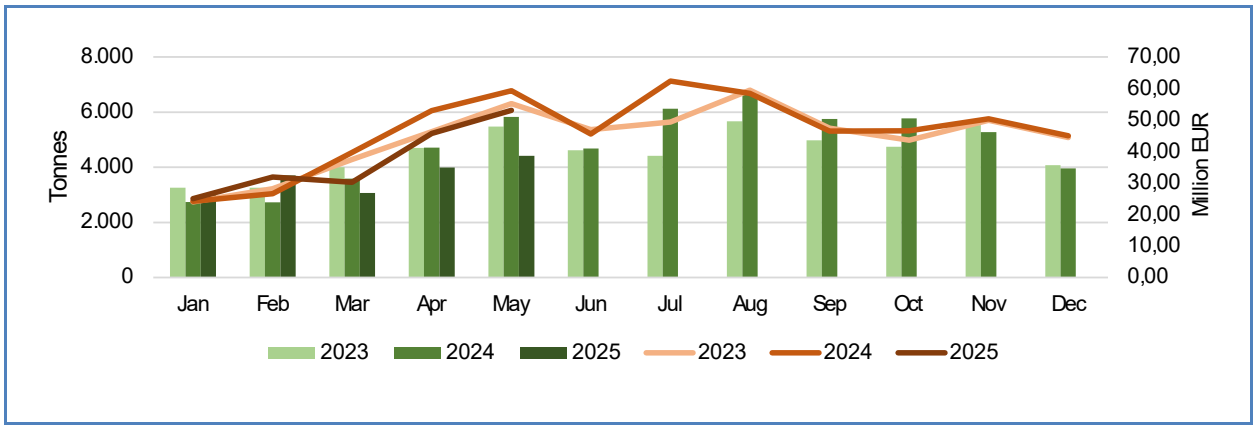


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-MAY 2024 AND JAN-MAY 2025)**

Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average Price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
Germany	Shrimp *Crangon* spp.	10,30 EUR/kg	10,38 EUR/kg	+1%
Netherlands	Shrimp *Crangon* spp.	11,61 EUR/kg	13,07 EUR/kg	+13%
France	Norway lobster	11,55 EUR/kg	14,10 EUR/kg	+22%

Flatfish

In 2025, first-sales value of "Flatfish" came to EUR 140,3 million, a 2% increase compared to 2024. First-sales volume amounted to 19.283 tonnes, a decrease of 6% compared to 2024. Common sole was the main product contributing to first-sales value (+7%), while European flounder and European plaice were the main species driving the decrease in first-sales volume (-31% and -10%).

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

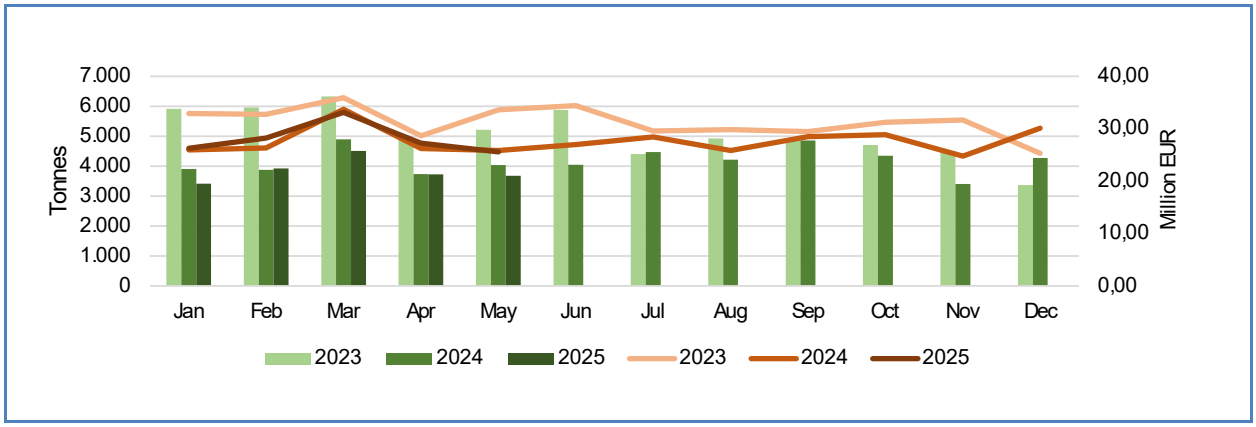


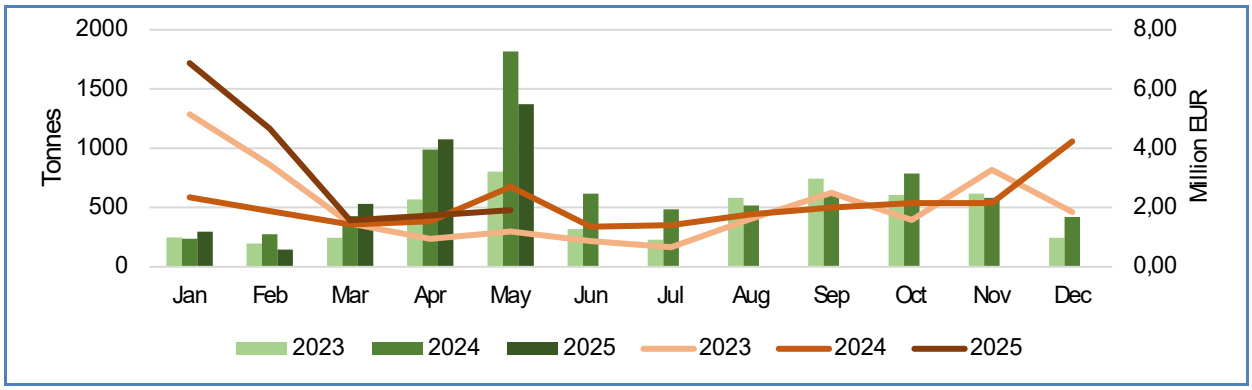
Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN-MAY 2024 AND JAN-MAY 2025)**

Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average Price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
Netherlands	Common sole	17,69 EUR/kg	16,64 EUR/kg	-6%
Spain	Greenland halibut	5,79 EUR/kg	6,58 EUR/kg	+14%
France	Common sole	18,37 EUR/kg	16,98 EUR/kg	-8%

Freshwater fish

In 2025, first-sales value of "Freshwater fish" came to EUR 16,7 million, an increase of 69% compared to 2024. First-sales volume amounted to 3.445 tonnes, a decrease of 9% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+149%), while other freshwater fish[12] was the main contributor to the decrease in first-sales volume (-8%).

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



[12] „Other freshwater fish" comprises 27 products, and together 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-MAY 2024 AND JAN-MAY 2025)**

Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average Price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
France	Eel[13]	41,81 EUR/kg	121,79 EUR/kg	+191%
Estonia	Other freshwater fish[14]	1,41 EUR/kg	1,28 EUR/kg	-9%
Estonia	Pike-perch	4,30 EUR/kg	4,50 EUR/kg	+5%

Groundfish

In 2025, first-sales value of "Groundfish" totalled EUR 286,1 million, an increase of 6% compared to 2024. First-sales volume amounted to 307.410 tonnes, an increase of 1% compared to 2024. Other groundfish[15] (+44% and +66%) was mainly responsible for the increase in both first-sales value and volume.

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

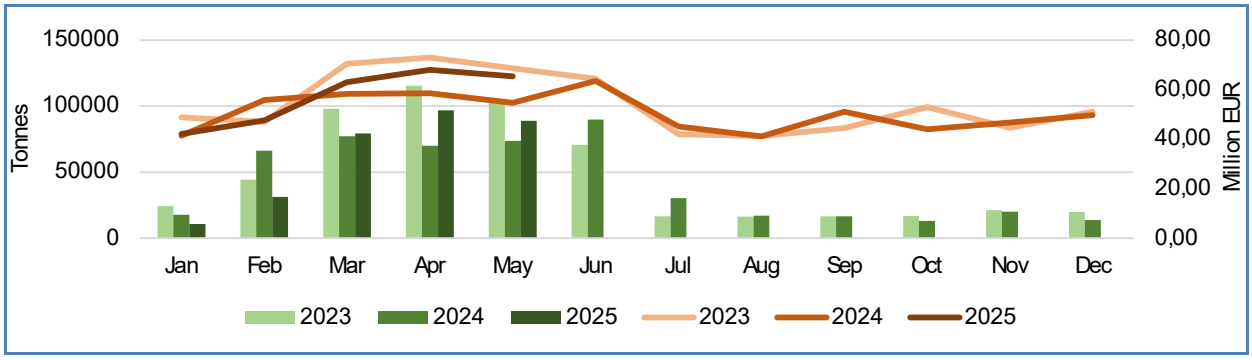


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-MAY 2024 AND JAN-MAY 2025)**

Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average Price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
Denmark	Other groundfish[16]	0,29 EUR/kg	0,36 EUR/kg	+27%
Denmark	Blue whiting	0,30 EUR/kg	0,34 EUR/kg	+14%
Denmark	Saithe	1,81 EUR/kg	2,28 EUR/kg	+26%

Other marine fish[17]

In 2025, first-sales value of "Other marine fish" came to EUR 226,7 million, a decrease of 1% compared to 2024. First-sales volume amounted to 59.426 tonnes, an increase of 1% compared to 2024. Oher sharks and scabbardfish (-7% and -14%) were the main commercial species contributing most to the decrease in first-sales value, while other marine fish[18] was behind the increase in first-sales volume (+24%).

[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 and round goby together represent 85% of the total value and 67% of volume.
[15] „Other goundfish" comprised 46 species of which sandeel nei accounting for 56% of total first-sales value and 91% of the total firstsales volume.
[16] „Other goundfish" in Denmark comprised 6 species of which sandeel nei accounting for 95% of total first-sales value and 99% of total first-sales volume.
[17] 17 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.
[18] Of the „Other marine fish" Main Commercial Species (MCS), boarfishes nei represents 65% of the total first-sales volume and 15% of the value.

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

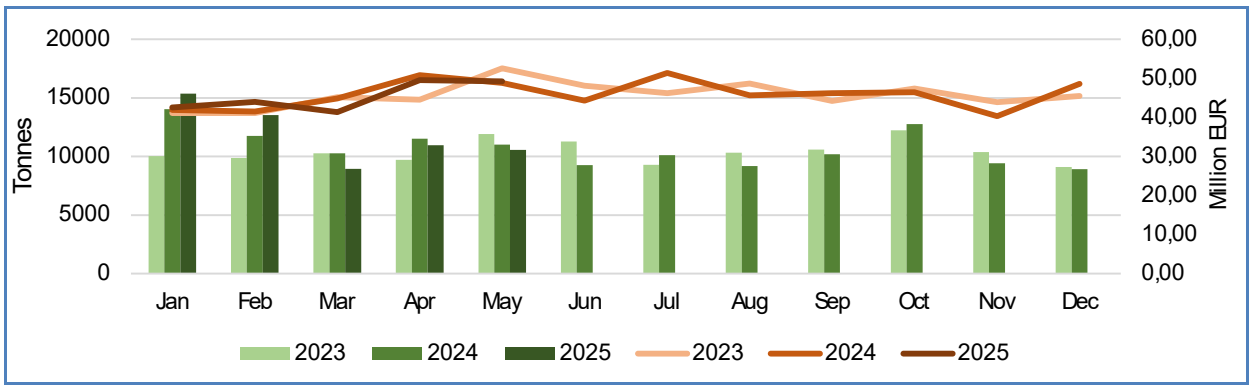


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-MAY 2024 AND JAN-MAY 2025)**

Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average Price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
Spain	Other sharks[19]	3,17 EUR/kg	3,26 EUR/kg	+3%
Spain	Other marine fish[20]	4,60 EUR/kg	4,86 EUR/kg	+6%
Portugal	Scabbardfish	4,50 EUR/kg	4,63 EUR/kg	+3%

Salmonids

In 2025, first-sales value of "Salmonids" came to EUR 311.691, a decrease of 25% compared to 2024, while first-sales volume amounted to 28.256 kg, a decrease of 10% compared to 2024. Salmon (-91% and -70%) was the main species responsible for the decrease in both first-sales value and volume of salmonids.

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

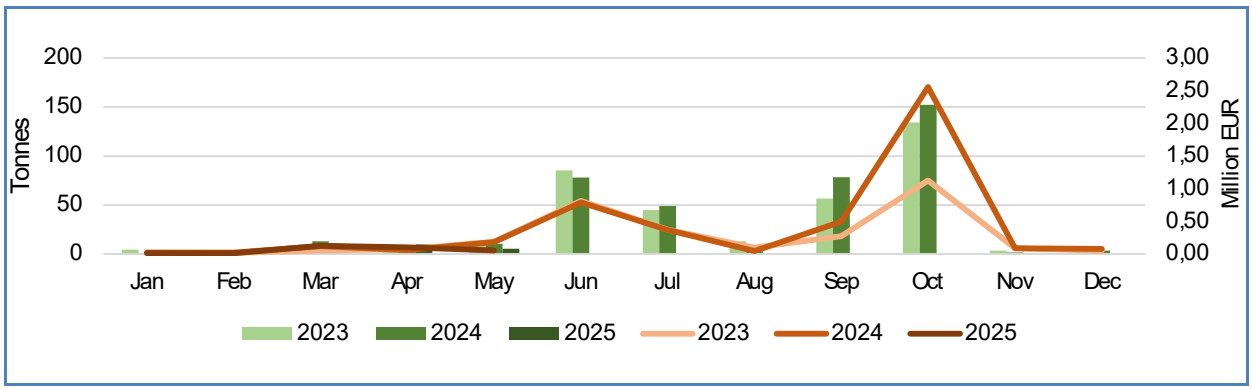


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-MAY 2024 AND JAN-MAY 2025)**

Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average Price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
France	Salmon	76,34 EUR/kg	26,47 EUR/kg	-65%
Sweden	Other salmonids[21]	46,89 EUR/kg	6,05 EUR/kg	-87%
Denmark	Other salmonids[22]	5,86	8,67	+48%

[19] „Other sharks" MCS in Spain comprises 21 species in the period analysed of which blue shark represented 84% of the total value and 85% of volume.
[20] „Other marine fish" MCS in Spain comprises 127 species; in the period analysed red scorpionfish represented 10% of the total value and 4% of volume.
[21] „Other salmonids" MCS in Sweden includes only whitefishes nei (100%).
[22] „Other salmonids" MCS in Denmark includes only European whitefish (100%).

Small pelagics

In 2025, first-sales value of "Small pelagics" amounted to EUR 293,1 million, a decrease of 4% compared to 2024. First-sales volume amounted to 340.616 tonnes, a decrease of 12% compared to 2024. Sprat (-35% and -34%) was the commercial species contributing most to the decrease in first-sales value and volume.

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

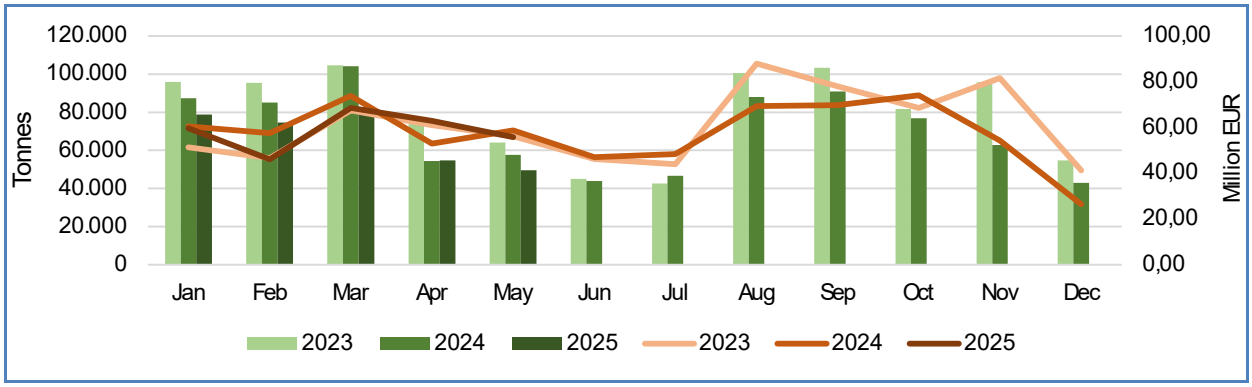


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-MAY 2024 AND JAN-MAY 2025)**

Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average Price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
Denmark	Sprat	0,46 EUR/kg	0,46 EUR/kg	-2%
Sweden	Sprat	0,41 EUR/kg	0,42 EUR/kg	+2%
Estonia	Herring	0,41 EUR/kg	0,35 EUR/kg	-15%

Tuna and tuna-like species

In 2025, first-sales value of "Tuna and tuna-like species" came to EUR 102,7 million, a decrease of 18% compared to 2024. First-sales volume totalled 24.422 tonnes, a decrease of 27% compared to 2024. Yellowfin tuna (-39% and -37%), skipjack tuna (-55% and -53%) and bigeye tuna (-30% and -43%) 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 – MAY 2025**

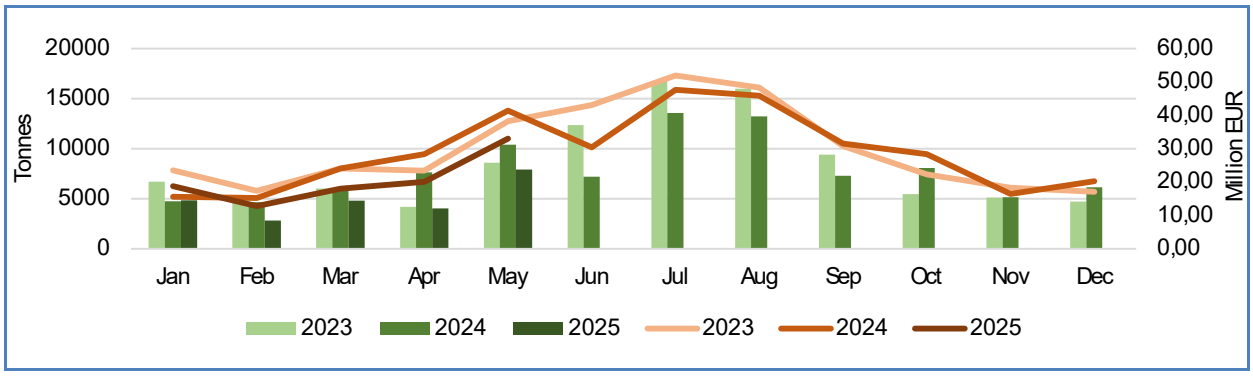


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-MAY 2024 AND JAN-MAY 2025)**

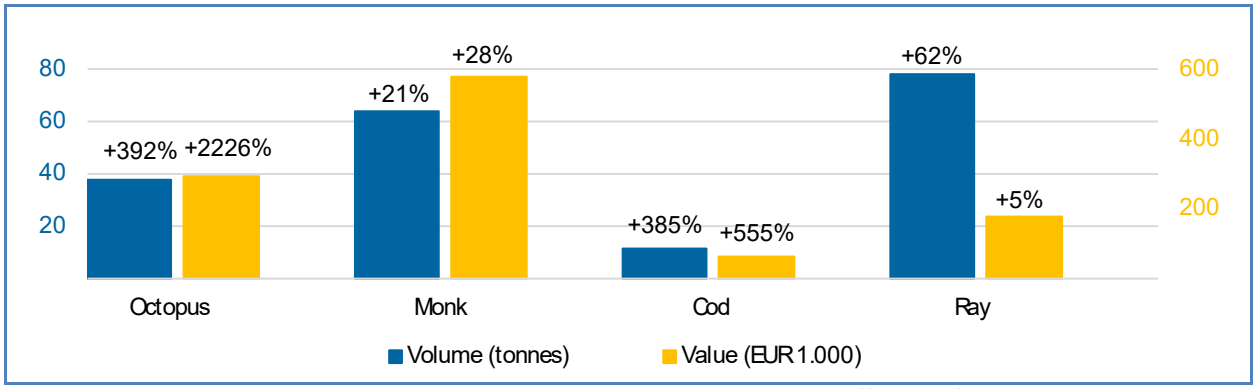
Country	Main Commercial Species	First-sales average price Jan-May 2024	First-sales average Price Jan-May 2025	Trend (Jan-May 2025 vs Jan-May 2024 %)
Spain	Yellowfin tuna	2,73 EUR/kg	2,55 EUR/kg	-7%
Spain	Skipjack tuna	1,67 EUR/kg	1,60 EUR/kg	-4%
Spain	Bigeye tuna	2,33 EUR/kg	2,53 EUR/kg	+9%

3.3. First sales in reporting countries[23]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-May 2025 vs Jan-May 2024	EUR 32,1 million, +5%	5.424 tonnes, 0%	**Value**: octopus, cuttlefish, squid. **Volume**: cuttlefish, common sole, gurnard.	In May 2025, there was an increase in first sales of **octopus** compared to May 2024. As indicated by an ICES report[24], 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. The octopus fishery has recently become a targeted fishery, principally for export. This is reflected in the ex-vessel price obtained in 2025, with an increase of 373%, from 1,64 EUR/kg to 7,76 EUR/kg. In May 2025, an increase in first sales of **cod** was recorded compared to May 2024. Cod is not a major target species in Belgium. The production recorded in May 2025 is similar to that registered in 2023 and 2020, with the bulk of production generally occurring in October-November. The low level of production in May 2025 is mostly explained by changes in fishing strategies, in a context of decreased fishing opportunities in the English Channel[25].
May 2025 vs May 2024	EUR 5,0 million, +1%	741 tonnes, +9%	Octopus, monk, cod, ray.	

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



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

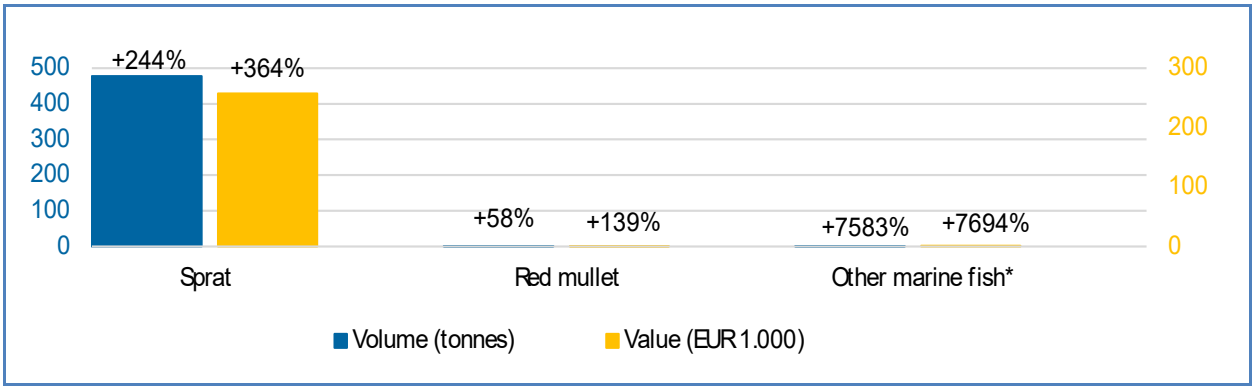
[23] First-sales data updated on 18. 07. 2025. This section covers all countries for which data is available on the date of extraction and analysis.
[24] ICES. 2024. Working Group on Cephalopod Fisheries and Life History (WGCEPH - outputs from 2023 meeting). ICES Scientific Reports. 6:62. 69 pp. https://doi.org/10.17895/ices.pub.26048101

[25] ICES Advice 2023 – cod.27.e–k – https://doi.org/10.17895/ices.advice.21840789

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 0,9 million, +24%	1.359 tonnes, -1%	**Value**: sprat, clam, red mullet. **Volume**: Other molluscs and aquatic invertebrates*.
May 2025 vs May 2024	EUR 0,4 million, +76%	634 tonnes, +31%	Sprat, red mullet, other marine fish*.

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

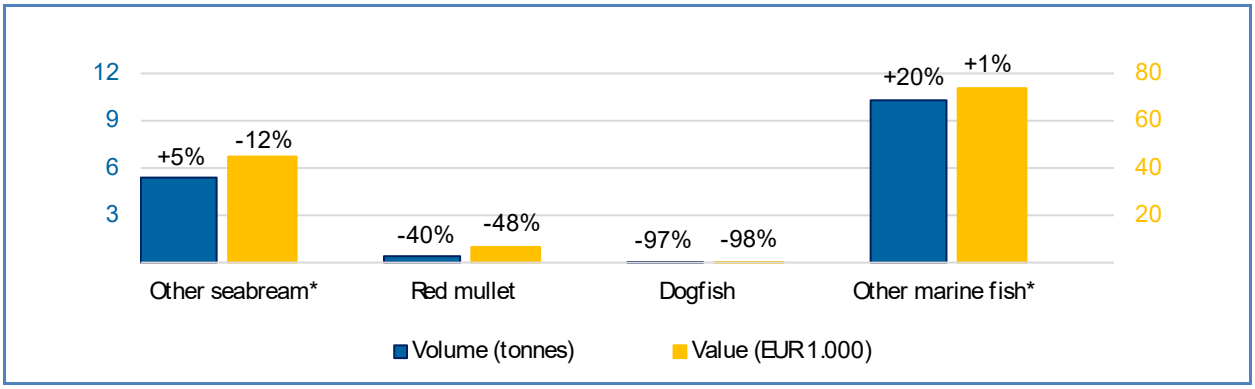


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 0,9 million, -10%	129 tonnes, -3%	Other seabream*, red mullet, picarel.
May 2025 vs May 2024	EUR 0,2 million, -4%	28 tonnes, +12%	**Value**: Other seabream*, red mullet, dogfish. other marine fish*. **Volume**: Other marine fish*.

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



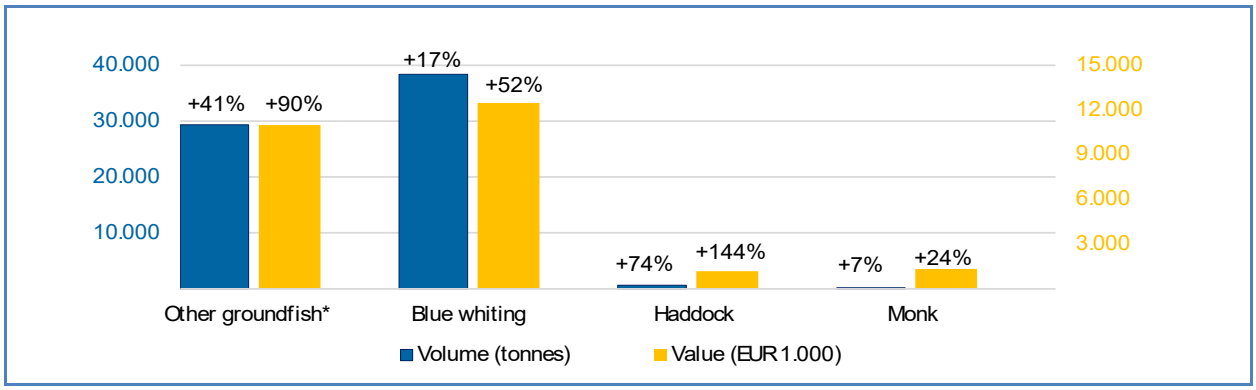
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 217,1 million, +4%	361.470 tonnes, -2%	**Value**: Other groundfish*, blue whiting, saithe **Volume**: sprat, blue whiting, mussel *Mytilus* spp.
May 2025 vs May 2024	EUR 40,4 million, +17%	73.642 tonnes, +21%	Other groundfish*, blue whiting, haddock, monk.

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

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



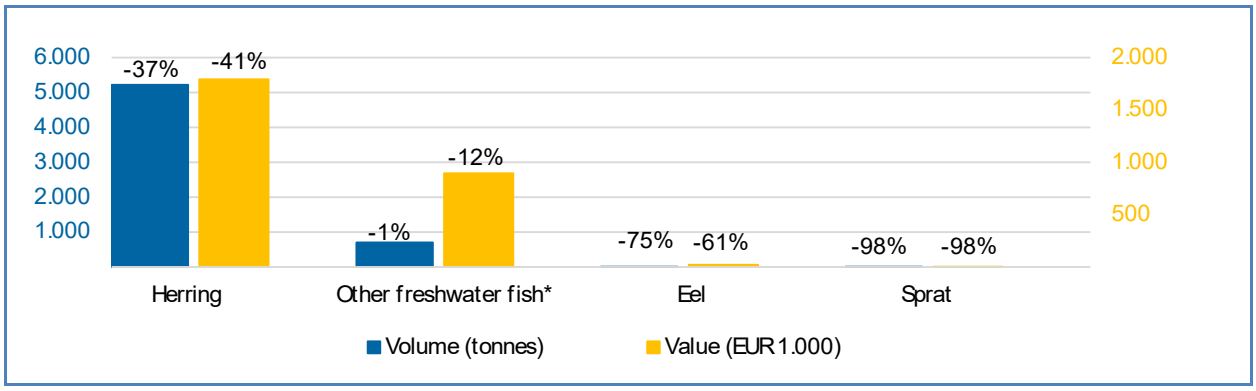
*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 14,2 million, -26%	31.628 tonnes, -21%	Herring, sprat, smelt, eel.
May 2025 vs May 2024	EUR 3,0 million, -29%	6.224 tonnes, -33%	Herring, Other freshwater fish*, eel, sprat.

**EUMOFA aggregation for species*

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

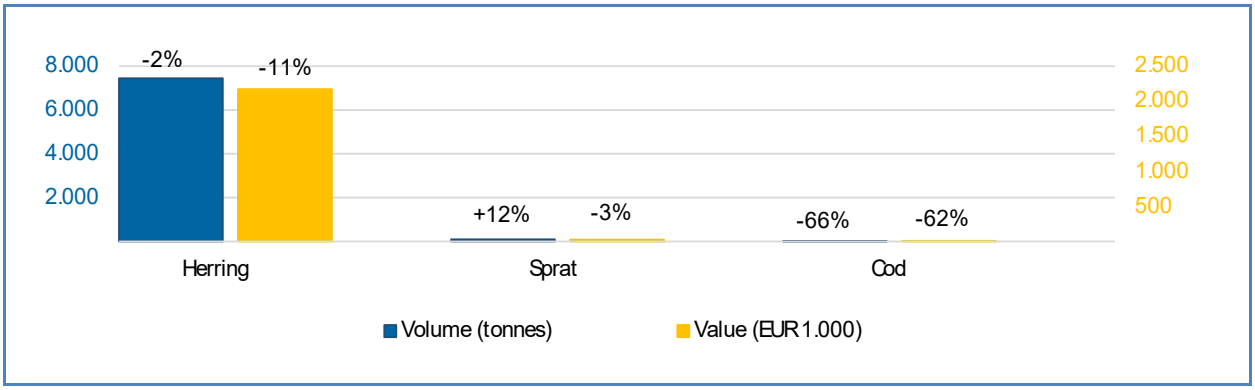


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 12,4 million, +1%	41.235 tonnes, +24%	Herring.
May 2025 vs May 2024	EUR 2,2 million, -11%	7.539 tonnes, -2%	Herring, sprat, cod.

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



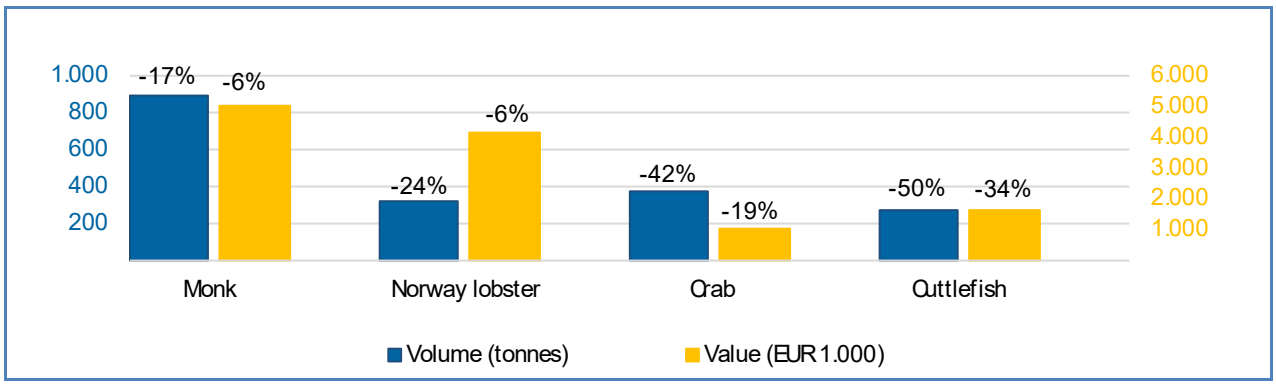
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-May 2025 vs Jan-May 2024	EUR 305,0 million, +10%	91.964 tonnes, +4%	Eel, scallop, octopus, sardine.	In May 2025, there was an increase in first sales of **octopus** compared to the same period in 2024. An ICES report[26] indicates that France 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. The octopus fishery has become a targeted fishery, mainly dedicated for export. This is reflected in the ex-vessel price obtained in 2025 in France, with an increase of 12%, from 6,50 €/kg to 7,25 €/kg.
May 2025 vs May 2024	EUR 54,5 million, 0%	20.360 tonnes, -7%	**Value**: monk, Norway lobster. **Volume**: crab, cuttlefish.	

[26] 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 22. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, MAY 2025**

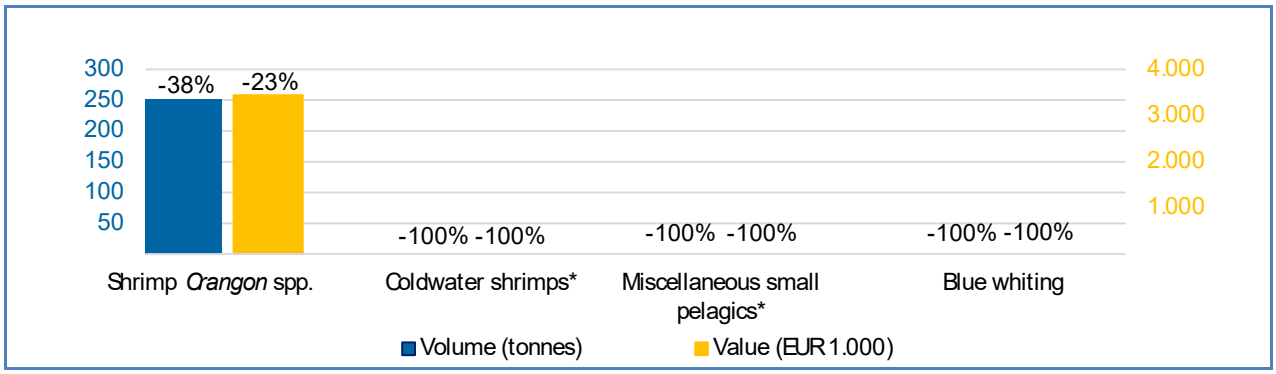


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 9,0 million, -69%	2.824 tonnes, -84%	Shrimp *Crangon* spp., mackerel, blue whiting.
May 2025 vs May 2024	EUR 3,7 million, -45%	425 tonnes, -85%	Shrimp *Crangon* spp., coldwater shrimps*, miscellaneous small pelagics*; blue whiting.

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

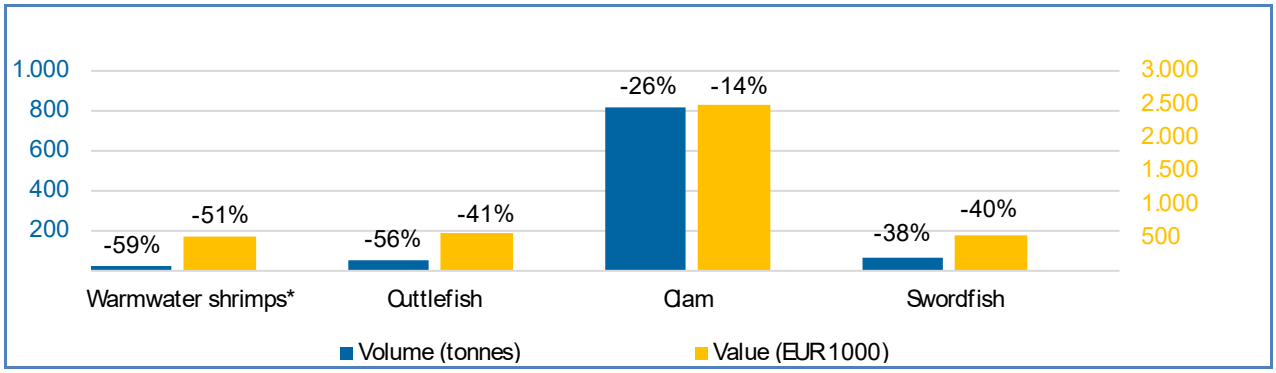


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 104,3 million, -4%	20.791 tonnes, -12%	Anchovy, miscellaneous shrimps*, Norway lobster, sardine.
May 2025 vs May 2024	EUR 25,4 million, -6%	5.285 tonnes, -11%	Warmwater shrimps*, cuttlefish, clam, swordfish.

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

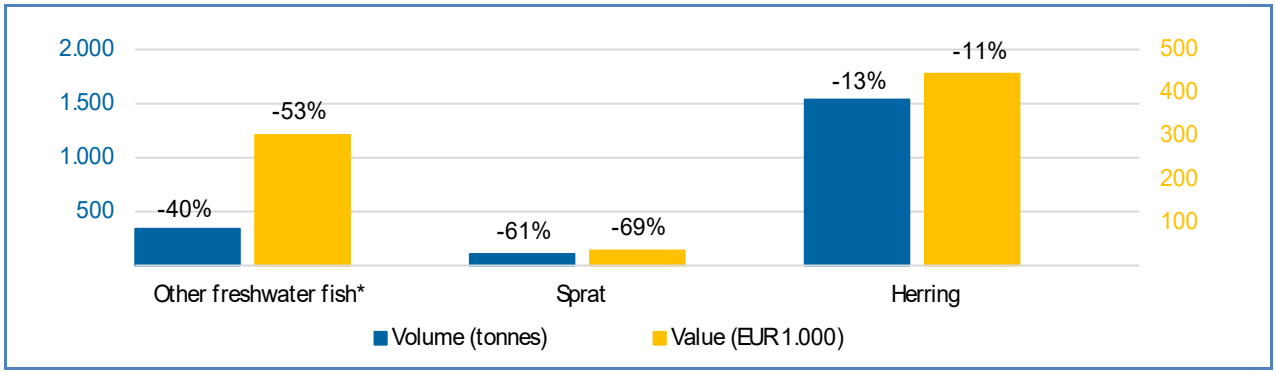


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 8,2 million, +7%	20.291 tonnes, -4%	**Value**: herring, sprat. **Volume**: sprat, other marine fish*, smelt, European founder.
May 2025 vs May 2024	EUR 0,8 million, -35%	2.030 tonnes, -24%	Other freshwater fish*, sprat, herring.

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

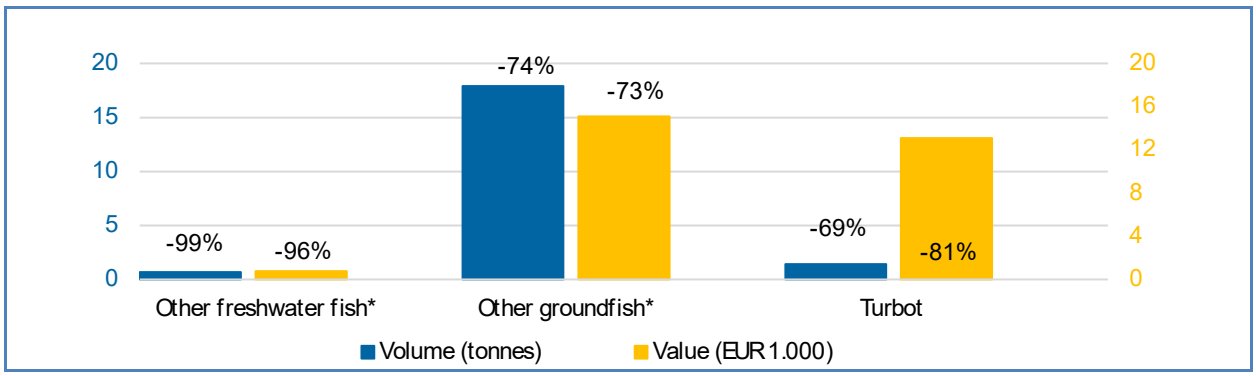


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 0,2 million, -45%	144 tonnes, -41%	Smelt, turbot, other groundfish*, other freshwater fish*.
May 2025 vs May 2024	EUR 0,08 million, -53%	82 tonnes, -49%	Other freshwater fish*, other groundfish*, turbot.

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

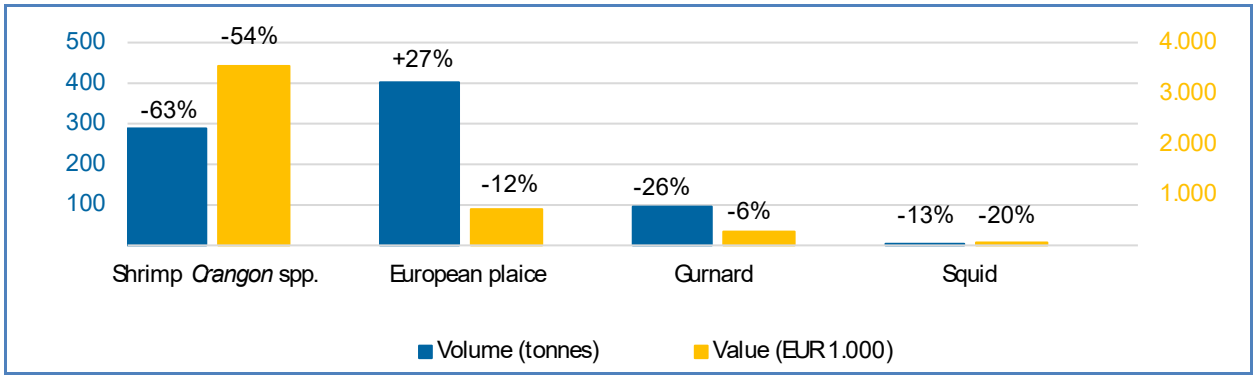


Percentages show change from the previous year.

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

The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 47,1 million, -6%	7.347 tonnes, +7%	**Value**: shrimp *Crangon* spp., squid, European plaice. **Volume**: European flounder, common sole, whiting.
May 2025 vs May 2024	EUR 11,4 million, -14%	1.798 tonnes, -5%	Shrimp *Crangon* spp., European plaice, gurnard, squid.

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

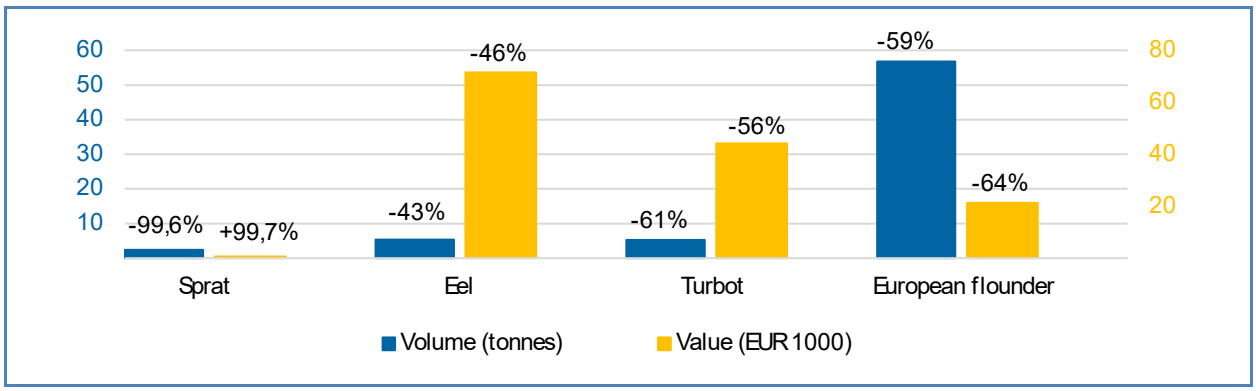


Percentages show change from the previous year.

Figure 28. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, MAY 2025**

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 16,6 million, -10%	35.761 tonnes, -3%	Sprat, European flounder, other freshwater fish*, pike-perch.
May 2025 vs May 2024	EUR 0,6 million, -44%	621 tonnes, -56%	Sprat, eel, turbot, European flounder.

Figure 28. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, MAY 2025**

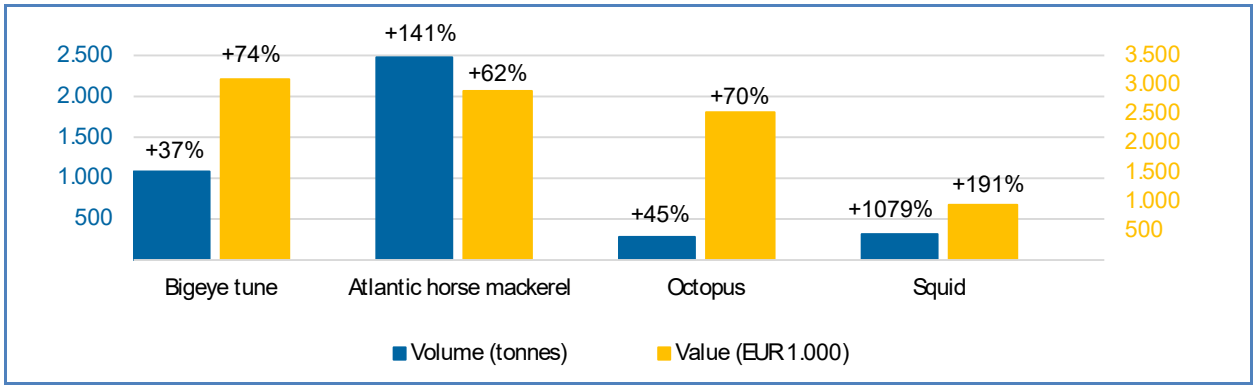


*Percentages show change from the previous year. *EUMOFA aggregation for species,*

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 107,5 million, +6%	29.208 tonnes, -1%	**Value**: Anchovy, octopus, sardine. **Volume**: mackerel, Atlantic horse mackerel, bigeye tuna.
May 2025 vs May 2024	EUR 28,4 million, +15%	11.346 tonnes, +2%	Bigeye tuna, Atlantic horse mackerel, octopus, squid.

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

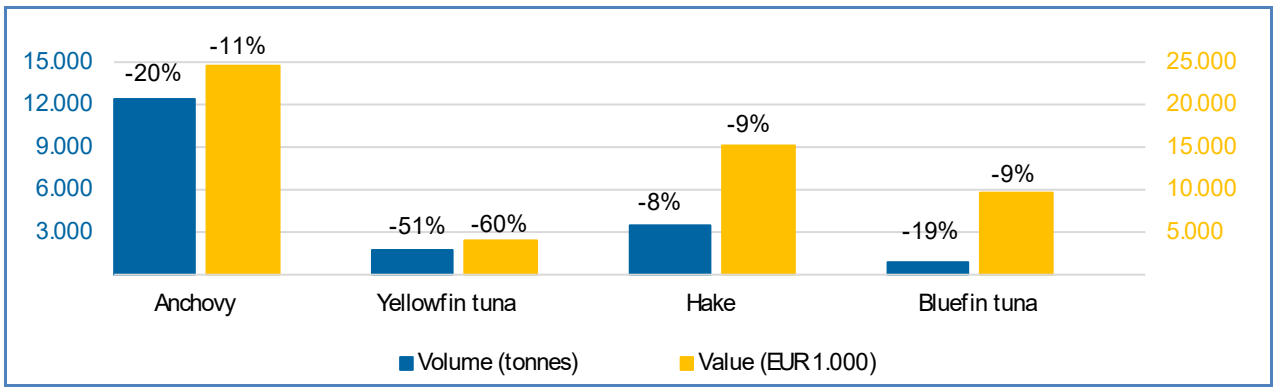


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 586,1 million, 0%	156.235 tonnes, -10%	**Value**: hake, anchovy, mackerel. **Volume**: anchovy, yellowfish tuna, mackerel.
May 2025 vs May 2024	EUR 144,8 million -3%	43.051 tonnes, -7%	Anchovy, yellowfish tuna, hake, bluefin tuna.

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

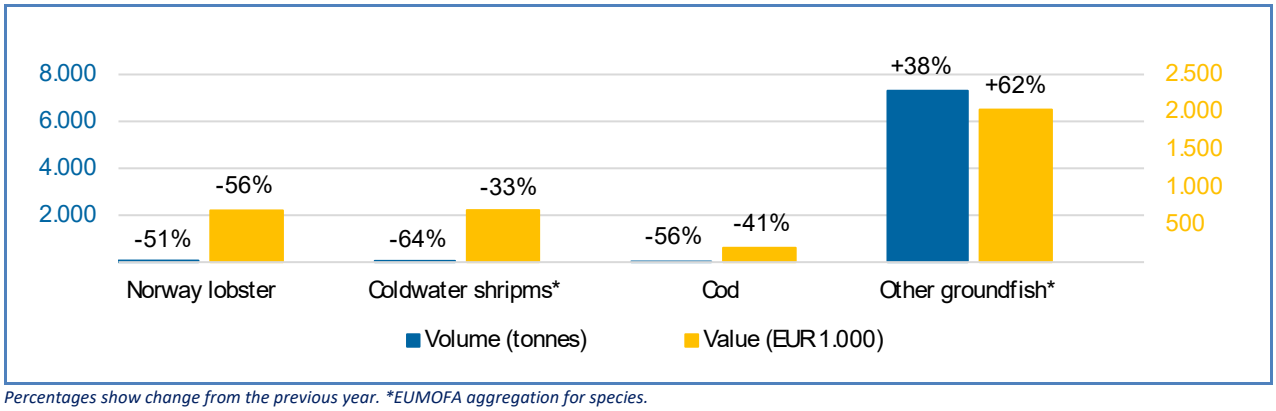


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-May 2025 vs Jan-May 2024	EUR 30,0 million, -22%	42.800 tonnes, -23%	Sprat, herring, coldwater shrimps*.	In May 2025, there was a decrease in first sales of **sprat** compared to May 2024. Compared with the same period in 2024 sales of sprat between January - May 2025 was lower in all months except for April. The supply in the Swedish market declined due partly to a 30% reduction in fishing opportunities for sprat in the Baltic Sea region for 2025. Regardless of falls in sales, the average price of sprat was similar in May 2025 and May 2024, so market demand was satisfied.
May 2025 vs May 2024	EUR 5,2 million, -8%	9.716 tonnes, +16%	Norway lobster, coldwater shrimps*, cod, other groundfish*.	

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

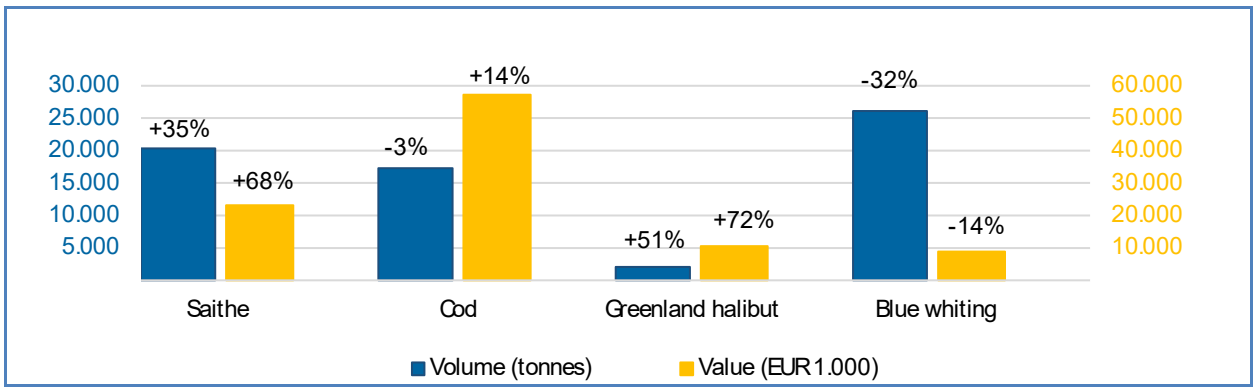


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2025 vs Jan-May 2024	EUR 1,5 billion, +9%	1.264.209 tonnes, -12%	**Value**: cod, mackerel, haddock. **Volume**: miscellaneous small pelagics*, cod, saithe.
May 2025 vs May 2024	EUR 168,1 million +2%	155.283 tonnes, -16%	**Value**: saithe, cod, Greenland halibut. **Volume**: blue whiting.

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

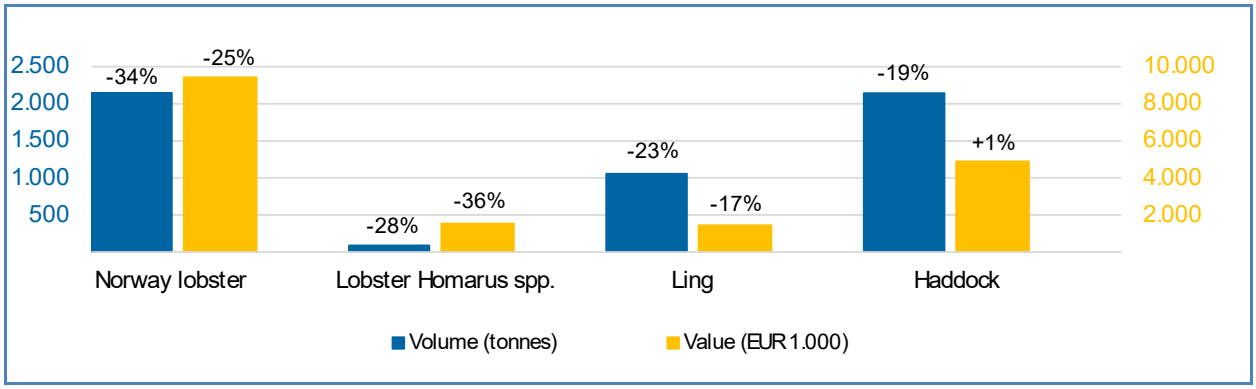


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 33. **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-May 2025 vs Jan-May 2024	EUR 301,8 million, +10%	147.186 tonnes, 0%	Norway lobster, cod, scallop, mackerel, saithe.
May 2025 vs May 2024	EUR 40,1 million -7%	13.084 tonnes, -15%	Norway lobster, lobster Homarus spp., ling, haddock.

Figure 33. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, MAY 2025**



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

4. EXTRA-EU IMPORTS

In January to May 2025, extra-EU imports in the EU-27 increased in value by 9% compared to the same period in 2024, while volume increased by 14%. Those MCSs contributing most to the increase in import values were warmwater shrimps (+30%) and skipjack tuna (+21%), while salmon (+13%) and Alaska pollock (+48%) contributed most to the increase in volume.

Increases in value and volume: Belgium, Bulgaria, Croatia, Cyprus, Czechia, Estonia, Finland, France, Germany, Greece, Ireland, Italy, the Netherlands, Portugal, Romania and Spain recorded an increase in extra-EU imports in both value and volume. The most significant increases in absolute terms in value were recorded in Ireland, driven by an increase in blue whiting and salmon (+116% and +49%), and in volume in Portugal, the increase driven by skipjack tuna and clam (+56% and +67%)

Decreases in value and volume: Austria, Lithuania and Slovenia recorded decreases in extra-EU imports in value and volume. Austria experienced the most significant declines in absolute terms in value due primarily to a decrease in gilthead seabream and trout (-38% and -9%), and Lithuania due to the decline in cod and salmon (-88% and -50%).

Table 34. **JANUARY - MAY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)**[27]

	January - May 2024			January - May 2025			Change from January - May 2024		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	5.204	30,9	5,94	3.944	26,5	6,73	-24%	-14%	13%
Belgium	48.955	309,8	6,33	63.395	409,1	6,45	29%	32%	2%
Bulgaria	4.381	12,1	2,75	5.379	15,9	2,96	23%	32%	8%
Croatia	2.989	14,9	4,99	4.791	17,2	3,60	60%	16%	-28%
Cyprus	3.043	19,1	6,28	3.579	22,2	6,20	18%	16%	-1%
Czechia	5.336	24,8	4,65	6.740	31,5	4,68	26%	27%	1%
Denmark	378.039	1.335,0	3,53	441.035	1.263,3	2,86	17%	-5%	-19%
Estonia	3.547	20,7	5,84	4.570	24,0	5,26	29%	16%	-10%
Finland	12.810	103,8	8,10	15.840	108,0	6,82	24%	4%	-16%
France	226.937	1.234,7	5,44	238.634	1.273,5	5,34	5%	3%	-2%
Germany	134.130	624,4	4,66	173.094	769,3	4,44	29%	23%	-5%
Greece	47.824	204,9	4,28	57.560	248,4	4,32	20%	21%	1%
Hungary	1.046	4,4	4,23	1.023	4,6	4,54	-2%	5%	7%
Ireland	85.737	91,9	1,07	154.786	117,2	0,76	81%	27%	-29%
Italy	189.338	1.109,5	5,86	206.203	1251,6	6,07	9%	13%	4%
Latvia	11.763	26,8	2,27	9.334	26,7	2,86	-21%	0%	26%
Lithuania	24.010	85,9	3,58	19.445	58,7	3,02	-19%	-32%	-16%
Luxembourg	9	0,2	23,08	7	0,3	43,25	-26%	38%	87%
Malta	914	4,9	5,37	1.048	4,6	4,38	15%	-7%	-19%
Netherlands	284.591	1.481,0	5,20	290.196	1.626,6	5,61	2%	10%	8%
Poland	97.519	404,9	4,15	105.025	456,1	4,34	8%	13%	5%
Portugal	63.842	279,5	4,38	79.014	373,2	4,72	24%	34%	8%

[27] 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	8.662	37,5	4,33	10.225	45,7	4,47	18%	22%	3%
Slovakia	2.343	7,4	3,15	2.306	7,6	3,31	-2%	3%	5%
Slovenia	3.095	12,8	4,14	2.833	12,3	4,32	-8%	-4%	4%
Spain	470.946	2.263,0	4,81	517.393	2.627,7	5,08	10%	16%	6%
Sweden	252.306	2.121,4	8,41	276.986	2.079,4	7,51	10%	-2%	-11%
EU-27	**2.369.316**	**11.866,2**	**5,01**	**2.694.385**	**12.901,3**	**4,79**	**14%**	**9%**	**-4%**

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 (+65% and +43%) and clam (+18% and +22%) driving the increase.

Decreases in volume: Only the commodity group salmon experienced a decline in extra-EU import volume, while small pelagics experienced a decrease in extra-EU import volume. Salmon experienced the largest decline in value due to the decline in salmon (-7%), while small pelagics experienced a decline in volume, due primarily to reduced imports of mackerel (-14%) and Atlantic horse mackerel (-28%).

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

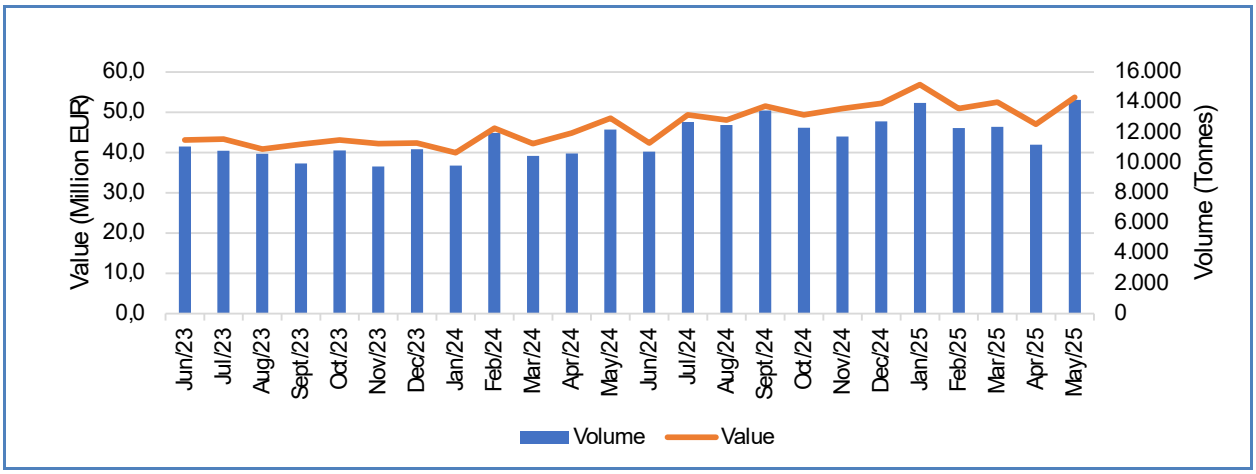
	January - May 2024			January - May 2025			Change from January - May 2024			
Commodity group	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	235,9	50.275	4,69	290,1	64.460	4,50	23%	28%	-4%	Other mussel, clam.
Cephalopods	1.229,9	216.861	5,67	1.472,8	227.779	6,47	20%	5%	14%	Other cephalopods, octopus.
Crustaceans	1.621,8	243.647	6,66	1.882,3	267.980	7,02	16%	10%	6%	Warmwater shrimp, miscellaneous shrimp.
Flatfish	162,1	30.483	5,32	176,8	34.548	5,12	9%	13%	-4%	Greenland halibut, other flatfish.
Freshwater fish	221,6	55.006	4,03	261,0	63.951	4,08	18%	16%	1%	Tilapia, freshwater catfish.
Groundfish	1.883,7	493.985	3,81	2.125,9	551.961	3,85	13%	12%	1%	Alaska pollock, cod.
Other marine fish	711,5	124.751	5,70	771,4	125.487	6,15	8%	1%	8%	Other marine fish, monk.
Salmonids	3.409,1	354.145	9,63	3.182,2	397.401	8,01	-7%	12%	-17%	Salmon, other salmonids.
Small pelagics	412,9	167.402	2,47	435,7	161.661	2,69	6%	-3%	9%	Herring, mackerel.
Tuna and tuna-like species	1.330,8	276.440	4,81	1.563,7	328.346	4,76	17%	19%	-1%	Skipjack tuna, miscellaneous tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of freshwater fish in EU Member States

In January – May 2025, extra-EU imports of freshwater fish accounted for a total value of EUR 261,0 million and total volume of 63.951 tonnes. Compared to the same period in 2024 the value of freshwater fish increased by 18% in value and increased by 16% in volume.

Figure 34. **EXTRA-EU IMPORT VALUE AND VOLUME OF FRESHWATER FISH, JUN 2023 – MAY 2025 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

Extra-EU imports of freshwater fish do not show any specific tends or seasonal behaviour in recorded peaks in value or volume.

In the period between January and May 2025 the Netherlands, Belgium and Germany were the main importers of freshwater fish in the EU and together imported from extra-EU countries about 44% of the total volume of small pelagics, the Netherlands (18%), Belgium (13%) and Germany (12%) respectively.

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

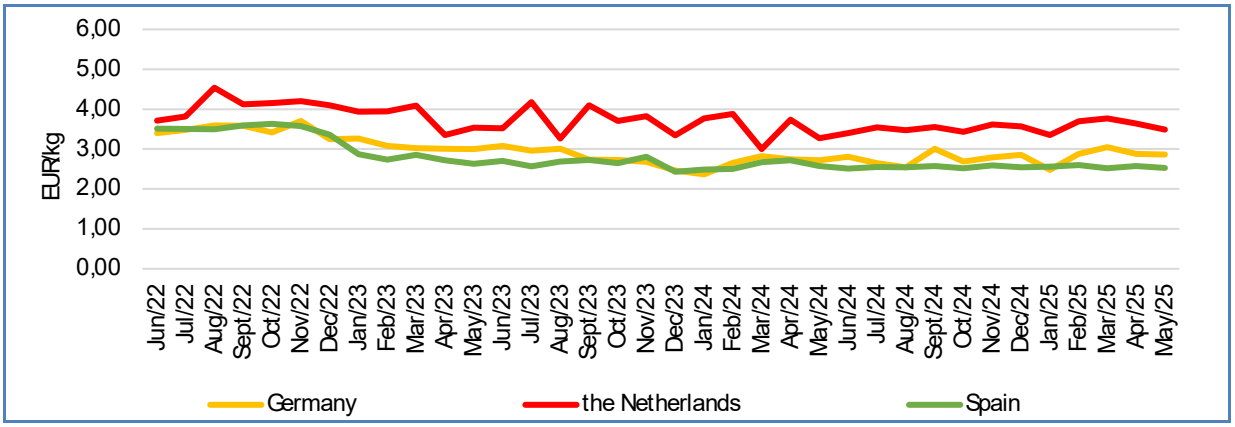
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan–May 2024	Jan-May 2025	Trend (%)	Jan-May 2024	Jan-May 2025	Trend (%)	
The Netherlands	46,4	47,0	1%	10.923	11.728	7%	Freshwater catfish
Belgium	28,3	34,3	21%	6.961	8.482	22%	Freshwater catfish
Germany	29,6	37,5	27%	5.968	7.714	29%	Freshwater catfish

4.2. Extra EU imports of freshwater catfish in EU Member States

In terms of value other freshwater fish and freshwater catfish are the main commercial species of the commodity group "freshwater fish", where freshwater catfish represents 29% of the total value, and other freshwater fish represents 30%.

Between January and May 2025, the Netherlands, Germany and Spain imported the highest volume of freshwater catfish from extra-EU countries.

Figure 35. **EXTRA-EU IMPORT PRICE OF FRESHWATER CATFISH IN THE NETHERLANDS, GERMANY AND SPAIN (JUNE 2022 – MAY 2025)**



Between June 2022 and May 2025, the price of freshwater catfish fluctuated and decreased in the three countries analysed: the Netherlands (-6%), Germany (-2%) and Spain (-10%). Between January and May 2025, the volume of freshwater catfish imported from the Netherlands was 6.667 tonnes, 23% more compared with the same month in 2024, while the price increased by 6%. The Netherlands is one of the main entry points in the EU of farmed *Pangasius* and in 2025 the main imports in terms of volume came from Vietnam (99%), followed by Indonesia.

In the same period, 4.585 tonnes of freshwater catfish were imported to Germany, 30% more compared to 2024, with a stable price to 2024. In terms of volume almost 100% of the total imported freshwater catfish in 2025 was from Vietnam.

Spain imported 3.254 tonnes, of which 100% came from Vietnam. In 2025 import volumes increased by 16% while prices decreased by 1%.

In Germany the highest peak in imports was recorded between September and December. In Spain the highest peak in imports was recorded between May and June. In the Netherlands, no clear seasonality or peaks have been detected in freshwater catfish imports.

Figure 36. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF FRESHWATER CATFISH IN THE NETHERLANDS, JUNE 2022 – MAY 2025 (volume in tonnes, price in EUR/kg)**

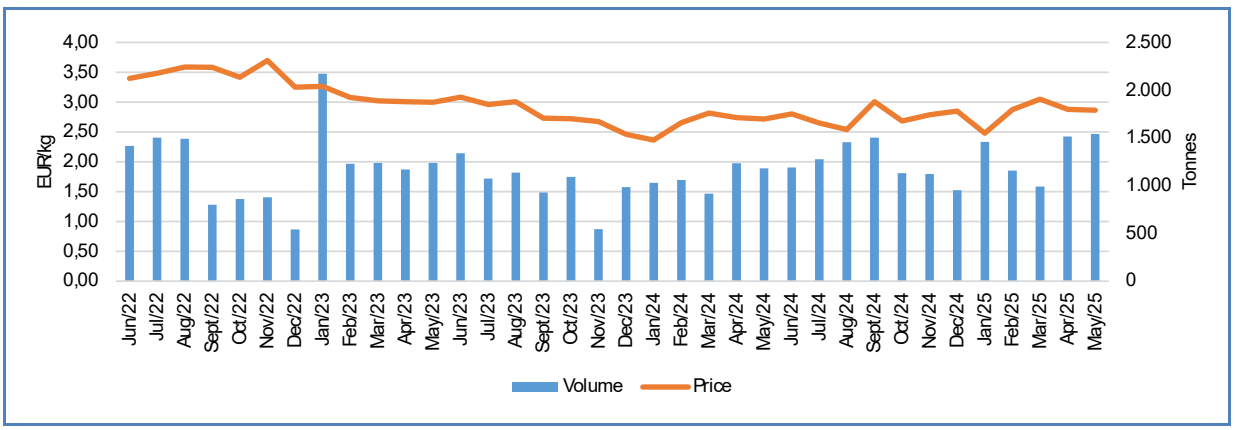


Figure 37. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF FRESHWATER CATFISH IN GERMANY, JUN 2022 – MAY 2025 (volume in tonnes and price in EUR/kg)**

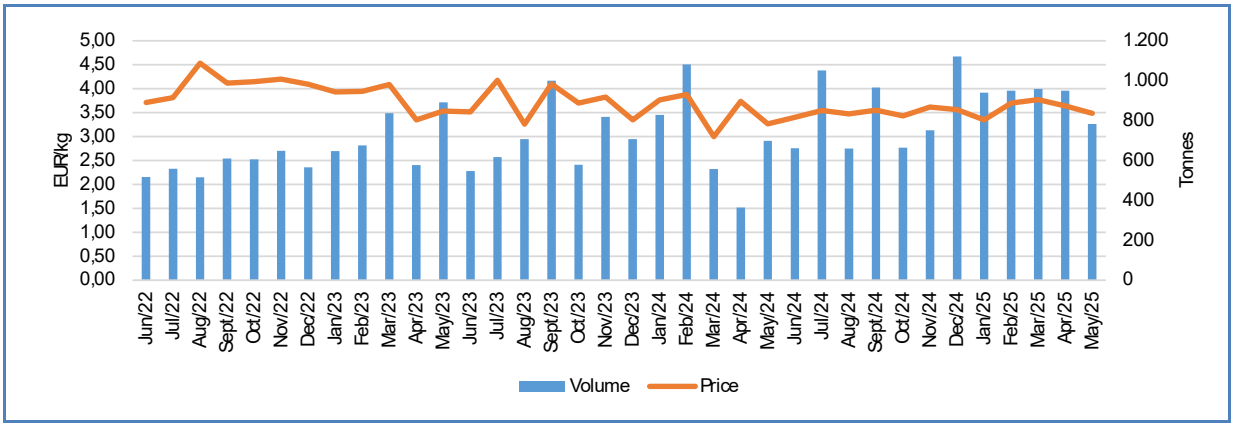
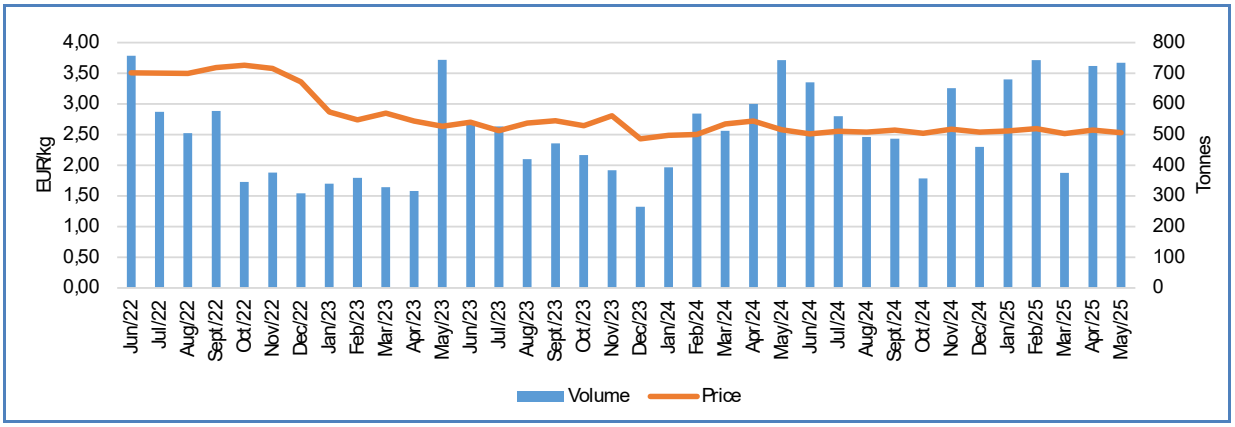


Figure 38. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF FRESHWATER CATFISH IN SPAIN, JUNE 2022 – MAY 2025 (volume in tonnes and price in EUR/kg)**



4.3. Extra EU imports of freshwater catfish by origin

In the period January - May between 2025 and 2024, EU imports of freshwater catfish[28] experienced an increasing trend in volume (+17%) and value (+25%). In 2025 the EU imported 27.869 tonnes of freshwater catfish for a value of EUR 75,3 million. The main extra-EU countries supplying mackerel to the EU in 2025 were Vietnam (97%), Indonesia (2%) and Myanmar (0,7%). An increase in imports of freshwater catfish from extra-EU countries (including Vietnam and Indonesia mentioned in the table below) was observed in 2025 compared to the same period in 2024, while imports decreased from Myanmar (-16%) and Ukraine (-50%).

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

Country	Jan – May 2023		Jan - May 2024		Jan - May 2025		Jan- May 2025/2024	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Vietnam	72,9	25.401	59,1	23.294	73,5	27.023	24%	16%
Indonesia	0,3	164	0,3	137	1,3	589	375%	329%
Myanmar	0,3	130	0,4	236	0,4	198	-14%	-16%
Ukraine	0,0	1	0,2	19	0,1	10	-59%	-50%
Others	0,7	112	0,4	101	0,2	50	-56%	-51%
Total	**74,2**	**25.807**	**60,3**	**23.789**	**75,3**	**27.869**	**25%**	**17%**

[28] 03027200 - Fresh or chilled catfish "*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp."
03032400 - Frozen catfish "*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp."
03043200 - Fresh or chilled fillets of catfish "*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp."
03046200 - Frozen fillets of catfish "*Pangasius* spp., *Silurus* spp., *Clarias* spp., *Ictalurus* spp."

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[29]. They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

Compared with May 2024, household consumption of fresh fishery and aquaculture products in May 2025 increased in both volume and value in Denmark, Germany, Ireland, Poland and Sweden. In contrast, France, Portugal and Spain recorded decreases in volume (2%, 4% and 1% respectively). Hungary and the Netherlands decreased both in volume and value.

The most notable increase was in Sweden, where consumption increased by 30% in volume and 42% in value compared to the previous year. Poland and Germany also had significant increases in volume (17% and 18% respectively) and in value (23% and 16% respectively), followed by Denmark (9% increase in volume and 11% 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	May 2023		May 2024		May 2025		Change from May 2024 to May 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	947	19,95	974	18,99	1.058	21,05	9%	11%
France	32,58	13.245	187,28	13.424	191,39	13.167	197,19	-2%	3%
Germany	12,49	3.832	74,21	3.900	71,28	4.598	82,63	18%	16%
Hungary	6,73	181	1,97	261	2,35	245	2,14	-6%	-9%
Ireland*	20,00	855	15,39	847	15,33	887	16,36	5%	7%
Italy	30,01	18.087	220,56	16.417	215,36	16.354	224,44	0%	4%
Netherlands*	18,88	2.234	47,10	1.989	43,22	1.814	41,41	-9%	-4%
Poland	13,68	2.958	27,36	2.692	31,22	3.154	38,32	17%	23%
Portugal	54,54	4.919	37,22	4.677	37,23	4.497	39,12	-4%	5%
Spain	41,92	40.738	392,97	38.368	397,53	38.041	412,83	-1%	4%
Sweden	22,46	412	6,45	491	7,22	640	10,30	30%	43%

** 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 freshwater fish consumed in the EU

In the household consumption data used by EUMOFA, consumption of freshwater fish species is monitored in four Member States: Germany, the Netherlands, Poland and Sweden. At species level, consumption of carp is monitored in Germany and

[29] Last update: 15.07.2025.

[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.*

Poland, pangasius is monitored in the Netherlands and pike-perch monitored in Sweden. Other freshwater fish are monitored in Germany, the Netherlands and Sweden.

Figure 39. **HOUSEHOLD PURCHASES (in value) OF FRESH FRESHWATER FISH SPECIES IN GERMANY, THE NETHERLANDS, POLAND AND SWEDEN. MAY 2022 – MAY 2025**

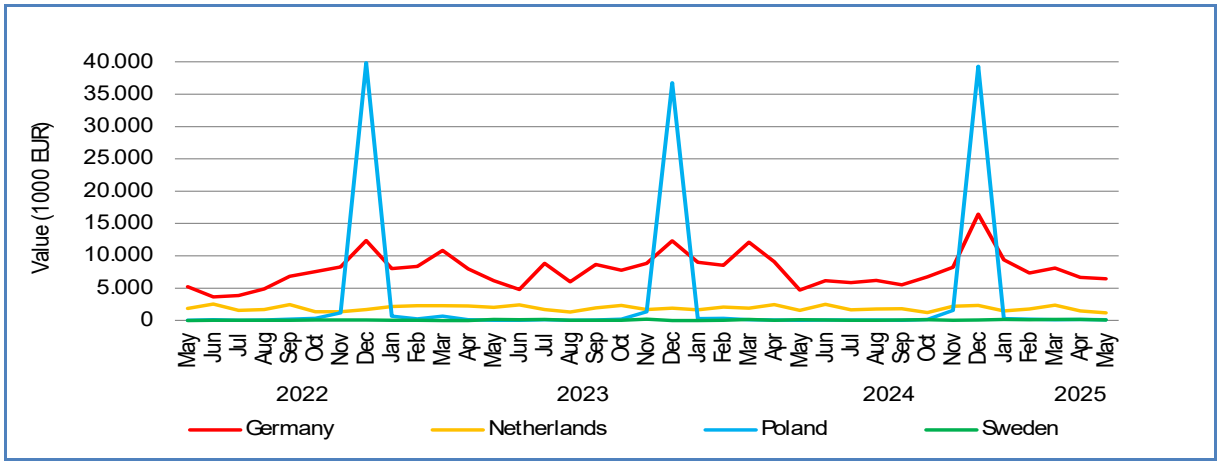
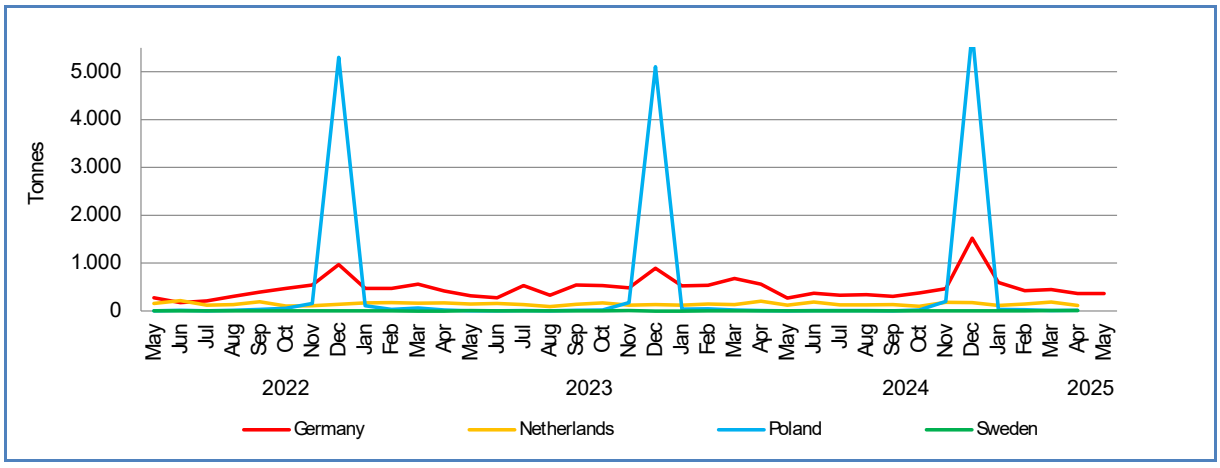


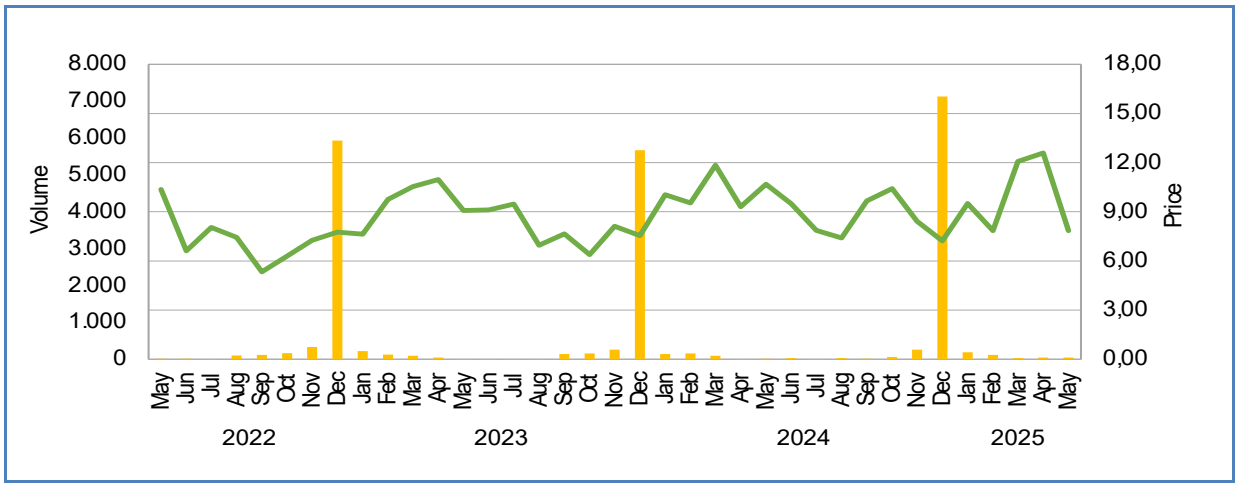
Figure 40. **HOUSEHOLD PURCHASES (in volume) OF FRESH FRESHWATER FISH SPECIES IN GERMANY, THE NETHERLANDS, POLAND, AND SWEDEN (MAY 2022 – MAY 2025)**



5. 3. Household consumption trends of fresh carp - the main species of freshwater fish species in reporting countries

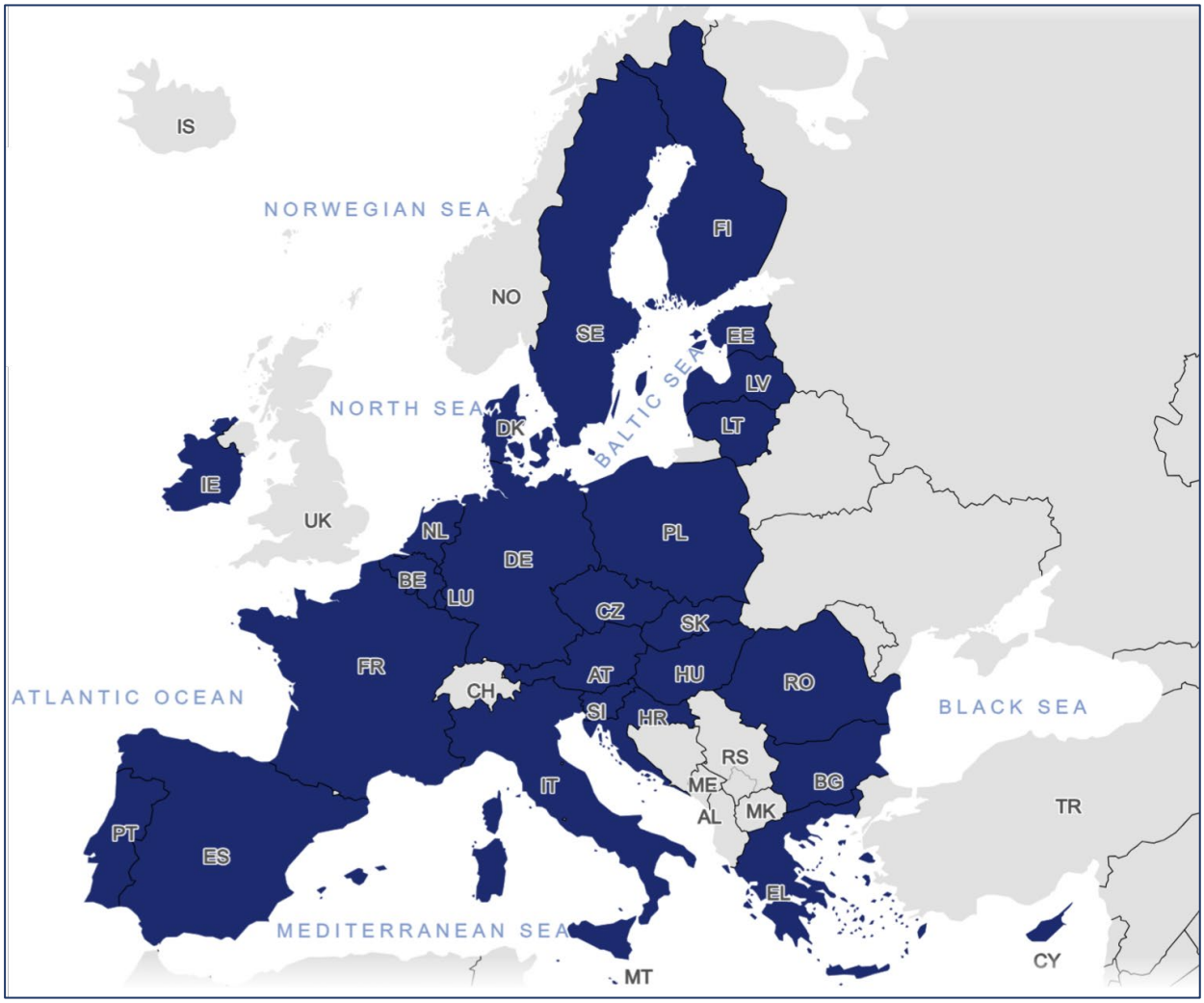
Long-term trend (May 2022 to May 2025): Upward trend in volume and slightly upward trend in price.
Yearly average price: 8,01 EUR/kg (2022), 8,60 EUR/kg (2023), 9,33 EUR/kg (2024), 9,97 (2025, January to May)
Yearly consumption: 7.218 tonnes (2022), 6.748 tonnes (2023), 7.966 tonnes (2024), 435 tonnes (2025, January to May)
Short-term trend (May 2024 to May 2025): Slightly upward trend in price and upward trend in volume.
Price (May 2024 to May 2025): 9,31 EUR/kg.
Consumption (May 2024 to May 2025): 7992,97 tonnes.

Figure 41. **RETAIL PRICE AND VOLUME OF FRESH CARP PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, JUN 2022 – MAY 2025**



Consumption of carp in the reporting countries Germany and Poland shows a seasonal fluctuation with a high increase in December due to the traditional consumption of the species at Christmas. Between May 2022 and May 2025, consumption volumes showed an upward trend, and prices showed a slightly increasing trend over the same period.

6. CASE STUDY: Cod in the EU



Source: Gisco.-Eurostat-European commission

The EU is a major market for cod products. In 2024, cod was the second most important import species in value after salmon. The EU's own catches of cod have fallen significantly over the past decade, so demand is increasingly dependent on supply from imports. In 2016 apparent consumption of cod reached a peak of 2,06 kg LWE per capita. In 2022, average apparent consumption of cod was estimated at 1,63 kg per capita[31].

The EU has concluded more than 40 trade agreements with over 70 countries and regions. For a further 20 or so agreements, negotiations have been concluded but adoption and ratification is ongoing. A few more are currently being negotiated.[32] Every 3 years, the EU establishes Autonomous Tariff Quotas (ATQs) for certain products. An ATQ allows a certain quantity of a product to be imported into the EU at a reduced tariff rate.[33] The quotas help increase the supply of raw materials which the EU processing industry relies on at times when EU supply is insufficient to meet demand.

[31] EUMOFA – The EU Fish Market
[32] European Councile/Council of the European Union https://www.consilium.europa.eu/en/policies/trade-agreements/
[33] European Commission https://oceans-and-fisheries.ec.europa.eu/fisheries/markets-and-trade/international-trade_en

6. 1. EU cod catches

In 2023, EU Atlantic cod catches reached 40.400 tonnes, a 0,5% decrease from 2022 and a more significant 63% drop compared to 10 years ago. The serious decline in Atlantic cod catches affects all fishing nations except Latvia which showed an increase compared to 10 years ago. In 2023, Germany was ranked the largest Atlantic cod catching nation in the EU followed by Spain, Portugal, Denmark and France of which all experienced a significant drop in catches from 2014 to 2023. During the last 10-year period, Sweden experienced the largest drop with an 88% decrease ending at 799 tonnes in 2023.

The decline in EU Atlantic cod catches is mainly due to a strong decline in several European Atlantic cod stocks, particularly in the Baltic Sea. Over the past decadethe decline in Baltic cod has been massive, and the two Atlantic cod populations, Eastern and Western Baltic cod are facing conditions of low salinity and variable oxygen concentrations in the water. ICES advice for both stocks is for zero catch in 2025 and 2026[34].

Table 40. **EU CATCHES OF ATLANTIC COD BY MEMBER STATE (live weight, tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Germany	15.221	15.573	13.961	9.486	14.721	13.362	11.507	9.187	9.900	9.085
Spain	18.697	20.824	15.863	15.448	13.972	16.392	12.089	11.294	12.806	8.709
Portugal	7.439	5.796	10.637	9.463	7.556	9.945	9.094	4.094	5.270	6.156
Denmark	22.260	26.084	23.242	18.434	15.373	12.414	6.996	4.448	3.654	5.440
France	12.250	12.631	10.587	11.544	7.979	7.528	6.659	4.710	4.995	4.601
Latvia	2.038	2.998	2.717	3.645	2.305	288	1.299	708	649	2.303
Estonia	1.073	1.160	524	2.545	2.021	2.148	1.273	1.005	783	819
Sweden	6.926	8.056	7.425	6.199	3.753	2.304	954	877	747	799
Other	24.017	25.093	21.900	14.815	14.430	10.554	4.240	5.141	1.787	2.465
Total	**109.921**	**118.215**	**106.856**	**91.579**	**82.110**	**74.936**	**54.111**	**41.465**	**40.591**	**40.377**

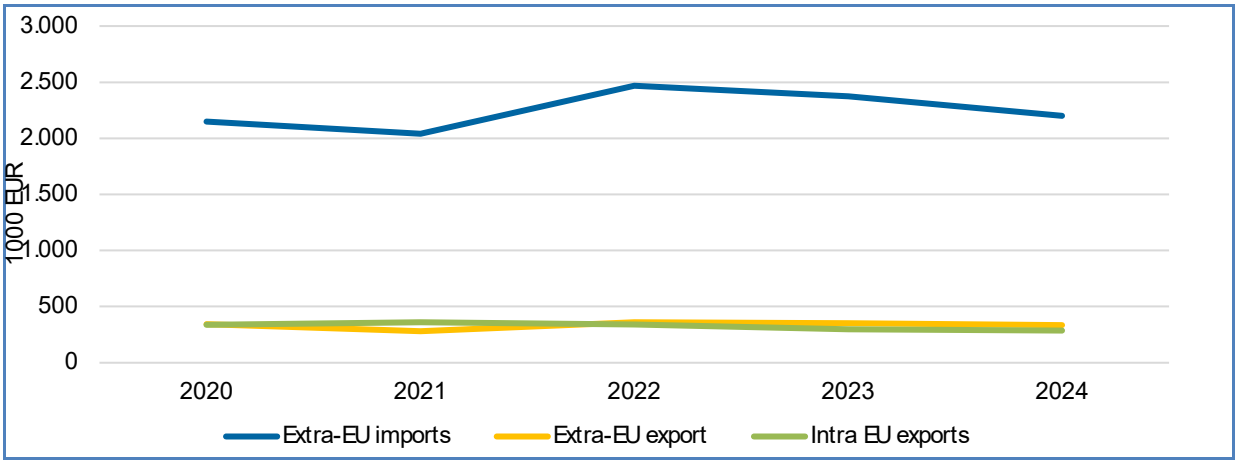
Source: FAO.

6. 2. Trade

The EU trade balance in cod products in terms of value is negative, confirming the EU's dependence on imports. In 2024 EU cod imports reached EUR 2,2 billion, a 7% decrease compared to 2023, an 11% decrease compared to 2022, and an 8% increase compared to 2021. EU cod exports reached EUR 334 million in 2024, a 5% decrease from 2023, an 8% decrease from 2022 and a 19% increase from 2021. From 2023 to 2024 intra-EU exchanges of cod fell by 4% in terms of value, reaching EUR 286 million. From 2021 they fell by 21% and from 2022 they fell by 16%.

34 ICES, Cod (*Gadus morhua*) in subdivisions 24–32, eastern Baltic stock (eastern Baltic Sea). Replacing advice provided in May 2024, Cod (*Gadus morhua*) in subdivisions 22-24, western Baltic stock (western Baltic Sea), ICES Advice 2025

Figure 42. **VALUE OF EU COD TRADE FLOWS**



Source: EUMOFA elaboration of Eurostat-Comext data.

EU imports of cod

In 2024, EU imports of cod products from third countries amounted to 319.000 tonnes (product weight) valued at EUR 2,2 billion. Compared to 2023 this was a 10% decrease in terms of volume and a 7% decrease in terms of value. During January – April in 2025, import volume decreased by 12% to 103.000 tonnes and value increased by 8% to EUR 844 million compared to the same period in 2024. Cod enters the EU mainly via the Netherlands, Denmark, Sweden and Portugal.

In 2024, frozen products amounted to 169.000 tonnes valued at EUR 885 million, a 15% decrease in volume and an 18% decrease in value compared to 2023. In 2024 frozen cod products accounted for 53% of the volume and 40% of the value. The largest suppliers of frozen cod to the EU are Russia, Iceland, China, Greenland and Norway together accounting for 92% of the volume and value.

In terms of value, frozen cod fillets were the most important product presentation in 2024 amounting to 76.000 tonnes valued at EUR 502 million. Frozen headed and gutted (H/G) amounted to 85.000 tonnes valued at EUR 358 million. The main suppliers of frozen H/G are Russia, Greenland and Norway, while main suppliers of frozen fillets are China, Russia, Iceland and Norway. During January - April in 2025, import volume decreased by 10% to 49.000 tonnes and value increased by 13% to EUR 313 million.

In 2024 fresh cod supplied to the EU amounted to 67.000 tonnes valued at EUR 509 million, a 4% decrease in volume and a 1% decrease in value compared to 2023. Fresh cod products accounted for 21% of the volume and 23% of the value in 2024. The largest suppliers of fresh cod products to the EU are Norway and Iceland together accounting for 97% of the volume and value. Fresh or chilled cod were the largest product in this category accounting for 73% of the volume and 52% of the value, followed by fresh cod fillets accounting for 26% of the volume and 48% of the value. The main supplier of fresh H/G is Norway, while Iceland is the largest supplier of fresh cod fillet to the EU. During January- April in 2025, import volume decreased by 17% to 25.000 tonnes and value increased by 1% to EUR 215 million.

In 2024 salted cod supplied to the EU amounted to 43.000 tonnes valued at EUR 373 million, a 2% decrease in volume and an 8% increase in value compared to 2023. Salted cod accounted for 13% of the volume and 17% of the value in 2024. The largest suppliers of salted cod are Norway and Iceland together accounting for 85% of the volume and 88% of the value in 2024. During January- April 2025, import volume decreased by 10% to 17.000 tonnes and value increased by 10% to EUR 178 million.

In 2024 dried cod supplied to the EU amounted to 25.000 tonnes valued at EUR 306 million, a 2% decrease in volume and a 4% increase in value compared to 2023. Dried cod accounted for 8% of the volume and 14% of the value in 2024. The largest supplier of dried cod is Norway accounting for 84% of the volume and 89% of the value in 2024. The products are clipfish and stockfish. During January- April in 2025, import volume decreased by 12% to 6.000 tonnes and value increased by 3% to EUR 82 million.

The unspecified category accounted for 4% of the volume and 5% of the value in 2024. This is dried or salted cod fillet mainly coming from the Faeroe Islands and Iceland.

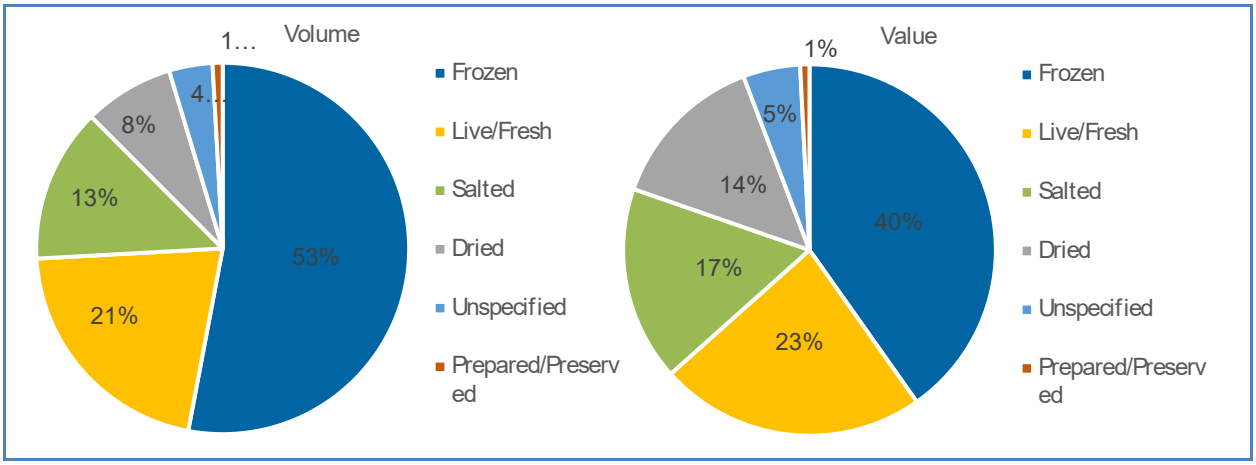
The prepared or preserved product category includes whole cod or cod in pieces mainly imported from Iceland. In 2024, these imports increased by 7% in volume and by 17% in value, to reach 2.800 tonnes worth EUR 18 million.

Table 41. **TOTAL EU IMPORT OF COD PRODUCTS BY PRESERVATION STATE (volume in 1.000 tonnes product weight, value in million EUR)**

	2021		2022		2023		2024		Jan- Apr 24		Jan- Apr 25	
Preservation	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Frozen	225	908	211	1.139	198	1.085	169	885	55	276	49	313
Live/Fresh	91	511	78	547	71	513	67	509	31	213	25	215
Salted	41	230	44	312	44	346	43	373	19	161	17	178
Dried	30	273	29	317	25	295	25	306	6	79	6	82
Unspecified	15	109	16	135	13	120	12	109	5	46	5	48
Prepared/Preserved	2	10	3	18	3	15	3	18	1	6	1	9
Total	**405**	**2.041**	**381**	**2.469**	**354**	**2.375**	**319**	**2.200**	**116**	**782**	**103**	**844**

Source: EUMOFA elaboration of Eurostat-Comext data.

Figure 43. **EU COD IMPORTS BY PRESERVATION STATE VOLUME (left) AND VALUE (right) IN 2024**



Source: EUMOFA elaboration of Eurostat-Comext data.

Of EU imports from third countries in 2024, **Norway** ranked number one in terms of volume and value reaching nearly 91.300 tonnes at EUR 741 million. This was a 21% decrease in volume and a 12% decrease in value from 2023. In 2024 Norway accounted for 34% of the import value and 29% of the volume of cod products to the EU. During January - April 2025, export volumes decreased by 24% and values by 4% reaching 32.500 tonnes and EUR 299 million. The downward trend in the Norwegian cod supply to the EU is due to a decrease in the Barents Sea cod quota over the past years. In 2025, the Barents Sea quota was reduced by 25% and set at 340.000 tonnes of which Norway was allocated 163.000 tonnes. This is the lowest quota since 1991.[35]

The second largest supplier was **Iceland** reaching 74.000 tonnes at EUR 619 million in 2024. In 2024 imports from Iceland accounted for 23% of the volume and 28% of the value. This was a 9% increase in volume and an 8% increase in value compared to 2023. During January - April 2025, export volume decreased by 2% and value increased by 11% reaching 27.500 tonnes and EUR 261 million.

In terms of value, imports from **Russia** ranked third largest and amounted to 75.300 tonnes valued at EUR 411 million in 2024, a 15% decrease in volume and a 16% decrease in value from 2023. Imports from Russia accounted for 24% of the volume and 19% of the value in 2024. During January - April 2025, import volume decreased by 25% and value increased by 9% reaching 17.200 tonnes and EUR 118 million.

[35] FAO Globefish: *Barents Sea cod quota cut by 25 percent* https://www.fao.org/in-action/globefish/news-events/news/news-detail/barents-sea-cod-quota-cut-by-25-percent/en

China is an important supplier of processed cod products to the EU market reaching 27.500 tonnes valued at EUR 156 million in 2024, an 11% decrease in volume and 22% decrease in value from 2023. Imports from China accounted for 9% of the supply in volume and 7% in value in 2024. During January - April 2025, import volume increased by 49% and value increased by 64% compared to the same period last year reaching 11.600 tonnes and EUR 74 million.

Supplies from the **Faroe Islands** in 2024 reached 13.100 tonnes at EUR 102 million, a 2% decrease in volume and 6% increase in value from 2023. Supply to the EU accounted for 4% of the import volume and 5% of the value. During January- April 2025, import volume from the Faeroe Islands decreased by 17% and value increased by 5% compared to the same period last year reaching 4.400 tonnes and EUR 41 million.

Greenland imports to the EU in 2024 were 24.400 tonnes valued at EUR 99 million, a 12% increase in volume and a 10% increase in value from 2023. Cod imports from Greenland accounted for 8% of the volume and 4% of the value in 2024. During January - April 2025, import volume from Greenland increased by 2% and value increased by 26% compared to the same period last year reaching 6.000 tonnes and EUR 30 million.

Imports from **USA** in 2024 reached 6.100 tonnes valued at EUR 27 million in 2024, an 8% decrease in terms of volume and 3% decrease in value from 2023. During the four first months in 2025, import volume increased by 33% and value by 55% compared to the same period in 2024.

EU cod imports from the **UK** in 2024 reached 3.100 tonnes worth EUR 17 million, a 18% decrease in volume and a 15% decrease in value from 2023. During the four first months in 2025, volume decreased by 27% and value by 4% compared to the same period in 2024.

Table 42. **TOTAL EU IMPORT OF COD BY TRADE PARTNER (volume in tonnes product weight, value in million EUR)**

	2021		2022		2023		2024		Jan-Apr 24		Jan-Apr 25		% Change 23/24	
Supplier	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Norway	151.100	774	132.200	899	116.100	840	91.300	741	42.800	312	32.500	299	-21 %	-12 %
Iceland	82.700	558	75.200	603	67.800	575	74.000	619	28.200	235	27.500	261	9 %	8 %
Russia	90.600	355	95.100	522	88.500	488	75.300	411	22.800	108	17.200	118	-15 %	-16 %
China	35.700	166	35.900	222	30.900	200	27.500	156	7.800	45	11.600	74	-11 %	-22 %
Faroe Islands	13.300	78	13.500	99	13.300	96	13.100	102	5.300	40	4.400	41	-2 %	6 %
Greenland	16.500	51	18.100	68	21.800	90	24.400	99	5.900	24	6.000	30	12 %	10 %
USA	5.700	16	4.400	18	6.600	28	6.100	27	1.200	5	1.600	8	-8 %	-3 %
UK	5.500	24	3.300	16	3.800	20	3.100	17	1.100	6	800	5	-18 %	-15 %
Canada	900	5	1.100	7	1.100	6	1.900	12	300	2	400	2	73 %	86 %
Other	2.500	13	2.100	14	4.100	32	2.000	16	800	6	700	5	-51 %	-50 %
Total	**404.500**	**2.041**	**380.900**	**2.468**	**354.000**	**2.375**	**318.700**	**2.200**	**116.200**	**782**	**102.700**	**844**	**-10 %**	**-7 %**

Source: EUMOFA elaboration of Trade Data Monitor data.

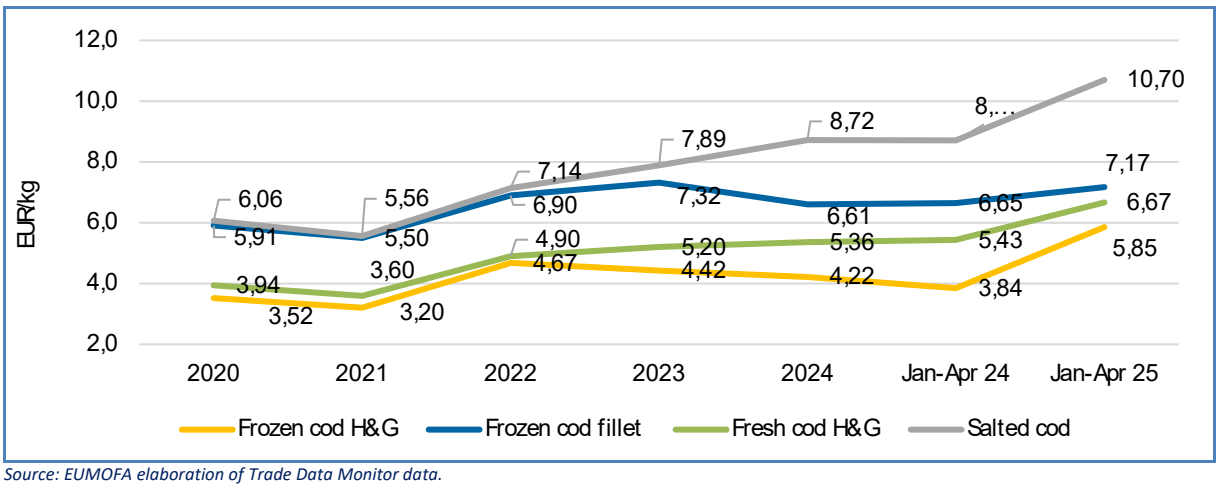
In line with decreasing supply, EU import prices increased notably in 2022 and 2023. From 2021 to 2023 EU import price of frozen cod H/G increased by 38% to 4,42 EUR/kg. A 5% decrease was seen in 2024 from 2023, but during the four first months in 2025, prices increased by 52% to 5,85 EUR/kg compared to the same period in 2024.

From 2021 to 2023 the EU import price of frozen cod fillet increased by 33% to 7,32 EUR/kg, and decreased by 10% to 6,61 EUR/kg in 2024. During January -April 2025, the average import price increased by 8% compared to the same period in 2024 reaching 7,17 EUR/kg.

Fresh cod has shown a continued upward price trend since 2021 reaching 5,36 EUR/kg in 2024, a 3% increase from 2023. During January -April in 2025, fresh cod prices increased by 23% reaching 6,67 EUR /kg compared to the same period in 2024.

From 2021 to 2023 the EU import price of salted cod increased by 42% to 7,89 EUR/kg. From 2023 to 2024 prices of salted cod increased by 11% to 8,72 EUR/kg. During January - April 2025, prices increased by 23% reaching 10,70 EUR/kg compared to the period in 2024.

Figure 44. **AVERAGE EU IMPORT PRICES OF COD**



Source: EUMOFA elaboration of Trade Data Monitor data.

EU exports of cod

In 2024, EU exports of cod reached 49.900 tonnes at EUR 334 million, a 2% increase in volume and 5% decrease in value compared to 2023. The almost unchanged volumes in 2024 came after a downward trend seen since 2019 when export volumes exceeded 86.000 tonnes. The drop seen in past years is mainly linked to decreased exports of frozen cod from the Netherlands mainly to China and frozen fillet to the UK. It is also linked to decreased exports of frozen fillet from Germany to the UK.

During the four first months of 2025, export volumes decreased by 74% in volume to 4.500 tonnes and by 68% in value to EUR 36 million. A significant drop was seen to all markets except Vietnam and Iceland which showed an increase. Exports from Portugal to Brazil decreased by 69% to 686 tonnes and exports from mainly Denmark and the Netherlands to China fell by 82% to 1.100 tonnes in the same period.

Table 43. **TOTAL EXPORT OF COD PRODUCTS FROM THE EU BY MAIN DESTINATION (volume in tonnes, value in million EUR)**

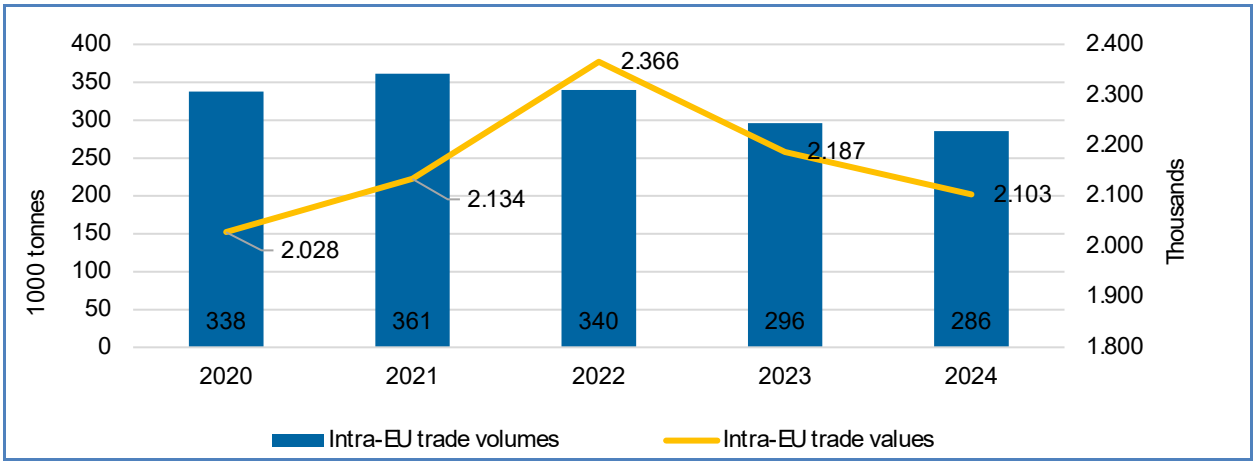
	2021		2022		2023		2024		Jan-Apr 24		Jan-Apr 25		% Change 23/24	
Country	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
UK	14.200	76	12.600	85	10.100	77	11.400	72	3.000	21	700	6	13 %	-6 %
Brazil	6.700	52	6.200	61	7.400	83	5.800	70	2.200	25	700	8	-22 %	-15 %
China	17.400	47	17.400	80	13.100	50	16.100	65	6.100	22	1.100	5	23 %	29 %
Norway	7.900	40	5.500	36	6.000	35	5.400	35	2.000	11	500	5	-10 %	2 %
USA	2.300	18	4.500	39	3.400	38	2.800	30	1.200	13	200	3	-18 %	-20 %
Switzerland	2.100	17	1.900	19	1.700	20	1.300	13	400	4	200	2	-24 %	-33 %
Vietnam	300	0	0	0	100	0	1.500	8	100	0	100	0	1400 %	4744 %
Iceland	1.700	4	1.400	8	1.700	7	1.600	7	500	2	800	4	-6 %	4 %
Canada	500	3	500	4	900	11	500	7	300	3	0	0	-44 %	-39 %
Other	4.600	23	4.900	29	4.700	30	3.500	26	1.300	9	200	2	-26 %	-13 %
Total	**57.700**	**281**	**54.900**	**361**	**49.100**	**350**	**49.900**	**334**	**17.100**	**110**	**4.500**	**36**	**2 %**	**-5 %**

Source: EUMOFA elaboration of Eurostat-COMEXT data.

6. 3. Intra EU trade of cod

In 2024, intra-EU trade[36] of cod products amounted to 286.000 tonnes worth EUR 2,1 billion. Intra-EU trade decreased from 2023 by 4% in both volume and value. Trade within the EU largely consists of re-exports of products originally imported from third countries[37]. These products may also have been going through different steps of processing and value adding before going into the end markets. The creation of added value along the supply chains and the crossing of borders within the EU boosts the value of intra-EU exports. In 2022, the Barents Sea cod quota was reduced by 20% and by approximately the same percentage in following years. Since 2021 the reduced supply from mainly Norwegian and Russian suppliers has caused a 21% volume decrease in intra-EU trade.

Figure 45. **INTRA-EU TRADE OF COD PRODUCTS**



Source: EUMOFA elaboration of Eurostat-COMEXT data.

6. 4. Cod in the EU fish processing industry

Cod enters the EU mainly via the Netherlands, Denmark, Sweden and Portugal. Cod is also re-exported within the EU either processed or for further processing in the EU. The increase in fish consumption and shortages of raw materials are the main challenge for the EU fish processing industry. Since the demand for seafood products is larger than supply coming from landings and aquaculture production, the industry is a net importer and is increasingly dependent on imports due to increasing restrictions on fishing opportunities and the lack of growth in EU aquaculture. Cod from aquaculture production appears not to take place in the EU. Cod from aquaculture in the EU is imported from cod farmers in Norway.

The EU industry benefits from two significant Autonomous Tariff Quota (ATQ) allowances in cod. These ATQs are the basis for raw materials in the EU fish processing industry. In 2024 headed and gutted (H/G) cod (09.2759) had a limit of 110.000 tonnes and cod fillets (09.2776) had a 45.000 tonnes duty free import allowance. Another ATQ for cod is salted cod for processing (09.2765) with a 2.000 tonne duty free import allowance in 2024[38].

In 2021, the overall number of enterprises carrying out fish processing (all species) as a main activity was approximately 3.200. The overall turnover of the sector is estimated at EUR 29,4 billion. Spain is the leading country, with 18% of enterprises and 26% of EU turnover. Italy is in second place in terms of number of active enterprises (14%), while France is in second place in terms of turnover produced by the sector (17%). When looking at employment generated by the sector, Spain is still the top country (27%) followed by Poland which, due to the large size of its processing plants, accounts for 20% of overall EU employment in the sector[39].

[36] Intra-EU trade is based on intra-EU exports
[37] Although "exports" are reported as such by Eurostat-COMEXT, in most cases the northern EU Member States are not the actual exporters, but countries through which products are transported.
[38] International trade - European Commission
[39] European Commission – Fish Processing Industry https://stecf.ec.europa.eu/data-dissemination/fish-processing-industry_en

7. CASE STUDY: Mussels and oysters: latest market trends in the EU

Mussels and oysters are among the most popular shellfish consumed in the EU. EU consumption is mostly supplied from EU production. In 2023, EU production of oysters and mussels amounted to 97.000 tonnes and 346.000 tonnes, respectively. However, in recent years a continuous decreasing trend was reported in fresh consumption volumes in the main markets.

7. 1. Production

WORLD PRODUCTION OF OYSTERS

Global production of oysters amounted to 7,5 million tonnes in 2023, originating almost exclusively from aquaculture (99% of the volume). China represented 89% of the aquaculture production in 2023, followed by the Republic of Korea (4%), the United States (2%), and Japan (2%). Aquaculture production by EU countries ranked fifth, amounting to 96.692 tonnes and covering 1% of global aquaculture production.

Between 2014 and 2023, global aquaculture production of oyster increased by 50%, in line with the increase in Chinese production: +60% in ten years. Aquaculture production of oysters increased in all major producing countries except for Japan, which experienced a 20% decrease over the same period.

Table 44. **WORLD AQUACULTURE PRODUCTION OF OYSTERS (volume in 1.000 tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2014/23
China	4.159	4.381	4.660	4.879	5.140	5.226	5.425	5.819	6.200	6.671	60%
Rep. of Korea	283	265	269	315	303	326	300	306	310	311	10%
USA	125	124	141	141	154	175	147	162	162	156	24%
Japan	184	164	159	174	177	162	159	159	166	146	-20%
EU-27	81	70	83	90	99	93	88	87	92	97	20%
Philippines	22	20	20	23	29	36	53	41	40	33	48%
Others	144	135	152	172	121	112	97	110	122	100	-31%
Total	**4.999**	**5.160**	**5.484**	**5.794**	**6.023**	**6.130**	**6.269**	**6.684**	**7.091**	**7.513**	**50%**

Source: FAO.

Almost all produced species are cupped oysters, representing 99% of global production in 2023, mainly produced by China in the Pacific Northwest. European flat oyster only represented 1% of world production.

WORLD PRODUCTION OF MUSSELS

In 2023 global production of mussels amounted to almost 2 million tonnes, originating almost exclusively from aquaculture (97% of the volume). China accounted for 44% of aquaculture production, followed by Chile (20%), New Zealand (5%), the Republic of Korea (3%) and Thailand (3%). In terms of farmed mussel production, the EU ranked third, amounting to 345.820 tonnes and accounting for 18% of global mussel aquaculture production.

Between 2014 and 2023, global aquaculture production of mussels remained stable (-1% in volume) despite fluctuations. It peaked in 2018 reaching 2,146 million tonnes before decreasing. Chinese production decreased slightly over this period (-2%), while Chilean production increased by 62%. Aquaculture production by EU Member States and Thailand decreased at higher rates: 19% and 58% respectively.

Table 45. **WORLD AQUACULTURE PRODUCTION OF MUSSELS (volume in 1.000 tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2014/23
China	856	899	953	998	963	929	943	885	824	836	-2%
Chile	241	211	302	341	369	381	401	426	429	391	62%
EU-27	426	438	441	449	490	438	395	411	390	346	-19%
New Zealand	97	77	94	100	86	98	102	98	89	93	-5%
Republic of Korea	51	54	55	76	50	52	62	64	53	54	6%
Thailand	117	116	115	50	34	38	69	52	51	49	-58%
Others	138	116	111	119	155	149	128	143	140	148	8%
Total	**1.927**	**1.910**	**2.071**	**2.134**	**2.147**	**2.085**	**2.099**	**2.078**	**1.977**	**1.917**	**-1%**

Source: FAO.

The species most produced is sea mussel, representing 51% of global production in 2023, mainly produced by China in the Pacific Northwest (80% of the species production). Other important produced species are Chilean mussel (20% of global aquaculture production in 2023, exclusively produced by Chile in Pacific Southeast), blue mussel (7%, produced by EU countries in the Atlantic Northeast), green mussel (6%, mainly produced in Western Central Pacific), New Zealand mussel (5%, exclusively produced by New Zealand), Mediterranean mussel (5%, produced in Mediterranean and Black Sea), and Chinese pond mussel (3%, exclusively produced by China in inland waters).

EU PRODUCTION OF OYSTERS

Total EU production of oysters amounted to 104.696 tonnes in 2023, originating exclusively from aquaculture. The main EU producer of oysters was France, representing 86% of EU production (1% of world aquaculture production). Other EU producers include Ireland (8% of EU production), Portugal (2%), the Netherlands (2%) and Spain (2%).

Between 2014 and 2023 EU production increased by 19%, in line with the increase in French production of oysters (20% in ten years) and the increase in Irish and Portuguese aquaculture production: 9% and 124% respectively. The Netherlands experienced a strong decrease in production over the same period (50%), from 3.264 tonnes in 2014 to 1.640 tonnes in 2023.

Table 46. **EU AQUACULTURE PRODUCTION OF OYSTERS BY MS (volume in 1.000 tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2014/ 2023
France	75	65	75	81	93	86	81	81	81	90	20%
Ireland	8	7	8	8	9	8	7	8	8	8	9%
Portugal	1	1	1	1	2	2	2	2	2	2	124%
Netherlands	3	3	3	2	3	2	2	2	2	2	-50%
Spain	1	1	1	1	1	1	1	1	1	1	46%
Others	0	0	0	0	0	0	0	0	1	0	121%
EU-27	**88**	**77**	**89**	**94**	**108**	**99**	**92**	**95**	**96**	**105**	**19%**

Source: Eurostat.

EU production consisted almost exclusively of Pacific cupped oysters (*Magallana gigas*), accounting for 96% of produced volume in 2023, mainly produced by France (89% of the volume), and to a lesser extent Ireland and Portugal (representing respectively 8% and 2% of the production). Other species produced are the European flat oyster (*Ostrea edulis*) (accounting for 2% of EU production; produced by France, Ireland, and Spain) and other cupped oyster species (1% of production).

EU PRODUCTION OF MUSSELS

In 2023 EU global production of mussels amounted to 357.938 tonnes, originating almost exclusively from aquaculture (96% of EU global production; 344.754 tonnes) and to a lesser extent from catches (4%). The main EU producer countries of mussels were

by far Spain, representing 45% of EU production (8% of world aquaculture production), followed by Italy (17% of EU production, 3% of world aquaculture production), and France (16% EU production, 3% of world aquaculture production). Other EU producers include the Netherlands (9% of EU production), Greece (5%) and Ireland (4%).

Between 2014 and 2023 EU production of mussels decreased by 20%, following the decrease in production by all major EU producers: -29% for Spain, -10% for Italy, -5% in France, and -40% in the Netherlands. Greek and Irish production experienced an increase over the same period (8% and 29% respectively), but their production represents a relatively low share of the EU production.

Table 47. **EU AQUACULTURE PRODUCTION OF MUSSELS BY MS (volume in 1.000 tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2014/23
Spain	220	225	216	242	243	228	204	203	192	156	-29%
Italy	64	53	58	63	61	53	50	62	61	57	-10%
France	58	57	50	51	49	60	61	66	59	55	-5%
Netherlands	54	54	53	44	45	38	32	33	30	33	-40%
Greece	17	19	23	19	22	23	19	14	10	18	8%
Ireland	11	16	16	16	14	15	15	17	19	15	29%
Others	6	9	11	9	8	12	25	30	17	12	104%
EU-27	**430**	**433**	**427**	**445**	**442**	**430**	**407**	**425**	**388**	**345**	**-20%**

Source: Eurostat.

EU production consisted exclusively of Mediterranean mussel (*Mytilus galloprovincialis*) and blue mussel (*Mytilus edulis*), accounting for 69% and 31% respectively of the volume produced in 2023. Mediterranean mussels were produced by Spain (66% of the species production), Italy (24%) and Greece to a lesser extent (8%). The main producers of blue mussels were France and the Netherlands, accounting respectively for 49% and 30% of the EU volume in 2023. Other producers of blue mussels include Ireland (14% of the volume), Denmark (6%), and Sweden (2%).

7. 2. EU trade

OYSTERS

In the CN[40] used for registering EU import-export data, oysters are specifically reported as fresh, frozen, prepared/preserved, or smoked, dried, salted or in brine[41].

In 2024, EU imports of oysters from third countries reached 1.037 tonnes, amounting to EUR 4,1 million. Live/fresh oysters accounted for 71% of total extra-EU import value and 90% of volume, followed by frozen oysters (21% of value, 7% of volume) and prepared/preserved oysters (3% of value, 2% of volume). EU imports of oysters from third countries originated almost exclusively from the United Kingdom, accounting for 73% of total extra-EU import value and 90% of volume in 2024. Between 2020 and 2024 imports decreased by 34% in volume and by 20% in value, mostly attributable to the decrease in live/fresh imports of oysters (31% in volume and 23% in value over the same period). The main importing MS were France and Ireland, representing respectively 57% and 15% of extra-EU import value in 2024. Imports have significantly increased in Ireland (382% between 2020 and 2024) while they decreased over the same period by 24% in France and by 60% in the Netherlands.

In 2024, EU exports to third countries amounted to 6.306 tonnes at a value of EUR 57,5 million. Exports consisted almost exclusively of live/fresh oysters, accounting for 96% of total extra-EU export value and 96% of volume. Prepared/preserved oysters accounted for 2% of total export value and 2% of volume. The main destinations in value terms were Hong Kong and China, accounting respectively for EUR 11,5 million and EUR 10,9 million (20% and 19% of total extra-EU export value in 2024), followed by Switzerland (13%), the United Kingdom (10%) and Ukraine (7%). France was by far the main exporter of oysters to

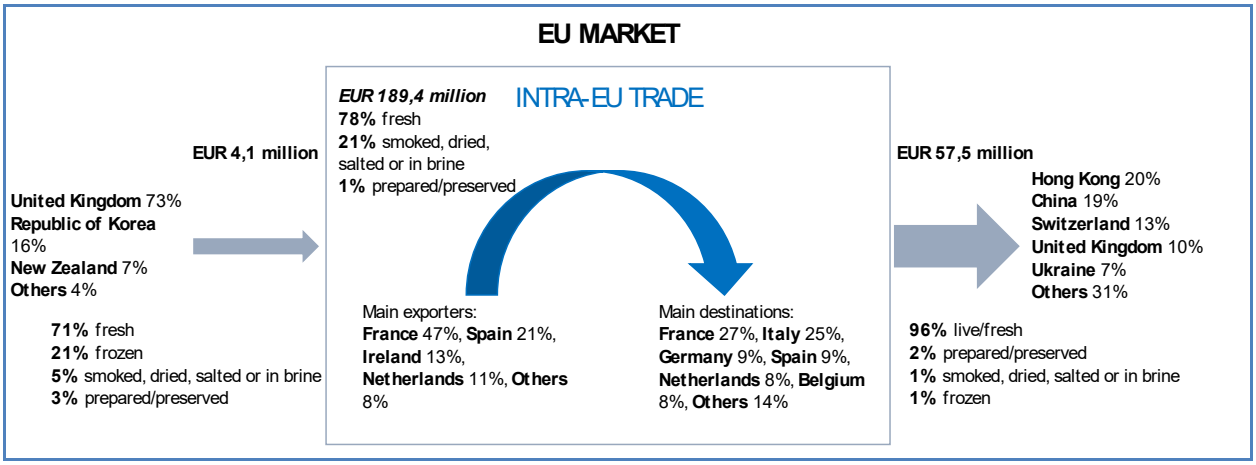
[40] The Combined Nomenclaure (CN) is the EU's eight-digit coding system, comprising the Harmonised System (HS) codes with further EU subdisions. It serves the EU's common customs tariff and provides statistics for trade within the EU and between the EU and the rest of the world.
[41] 03071190 - Oysters, even in shell, live, fresh or chilled (excl. live flat oysters "Ostrea" weighing "incl. shell" <= 40 g)
03071110 - Live flat oysters "Ostrea" weighing "incl. shell" <= 40 g
03071200 - Oysters, even in shell, frozen
03071900 - Oysters, even in shell, smoked, dried, salted or in brine
16055100 - Oysters, prepared or preserved (excl. smoked)

third counties in 2024, accounting for 69% of the total EU export value, followed by Ireland (19% of the export value) and the Netherlands (7%).

Over the 2020-2024 period, extra-EU export volumes of oysters fluctuated, peaking in 2021 at 7.435 tonnes. Overall, exports of oysters to third countries since 2020 increased by 25% in volume and by 39% in value, due to the increase in volumes exported by France (29%) and Ireland (72%). Export prices of oysters increased by 11% from 8,26 EUR/kg in 2020 to 9,12 EUR/kg in 2024.

In 2024, intra-EU exports of oysters amounted to 11.255 tonnes at a value of EUR 64,2 million. The intra-EU trade consisted mostly of live/fresh oysters accounting for 67% of trade value (61% of the volume), and of smoked, dried, salted or in brine oysters accounting for 32% of trade volume (38% of trade volume). France is a hub for the intra-EU trade of oysters, accounting for 47% of export trade value in 2024. Spain (21% of trade value), Ireland (13%), and the Netherlands (11%) were the other main exporting MS for intra-EU exports. The main destinations for intra-EU trade were France and Italy, representing 27% and 25% of value trade.

Figure 46. **THE OYSTER EU-TRADE MARKET IN 2024, IN VALUE**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

MUSSELS

In the CN[42] used for registering EU import-export data, mussels are specifically reported as fresh, frozen, prepared/preserved, or smoked, dried, salted or in brine[43].

In 2024, EU imports of mussels from third countries reached 61.059 tonnes, amounting to EUR 189,9 million. Prepared/preserved mussels accounted for 84% of total extra-EU import value and 86% of the volume, followed by frozen mussels (13% of value, 6% of volume) and fresh mussels (3% of value, 8% of volume). EU imports of mussels from third countries came almost exclusively from Chile, accounting for 83% of total extra-EU import value and 86% of volume in 2024. Between 2020 and 2024 imports increased by 39% in volume and by 45% in value, mostly attributable to the increase in prepared/preserved imports of mussels (40% in volume and 50% in value over the same period) and to a lesser extent to the increase in frozen imports (26% in volume and 46% in value). The main importing MS were Spain, France and Italy, representing 49%, 15% and 13% respectively of extra-EU import value in 2024. Imports have increased significantly in Spain between 2020 and 2024 (104% in value). They increased at lower rates in Italy (8%) and France (7%) over the same period, while they decreased by 38% in the Netherlands.

In 2024, EU exports to third countries amounted to 6.038 tonnes at a value of EUR 27,5 million. Exports consisted mainly of prepared/preserved mussels, accounting for 61% of the total extra-EU export value and 52% of the volume. Live/fresh mussels

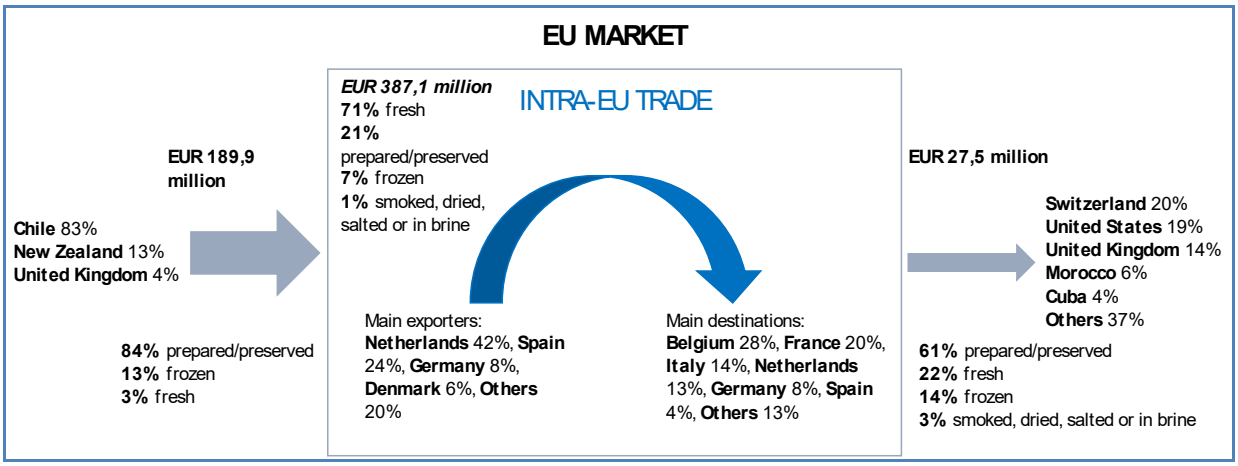
[42] The Combined Nomenclaure (CN) is the EU's eight-digit coding system, comprising the Harmonised System (HS) codes with further EU subdisions. It serves the EU's common customs tariff and provides statistics for trade within the EU and between the EU and the rest of the world.
[43] 16055390 - Mussels, prepared or preserved (excl. in airtight containers, and merely smoked)
16055310 - Mussels, prepared or preserved, in airtight containers (excl. merely smoked)
03073290 - Mussels "*Perna* spp.", frozen, even in shell
03073110 - Mussels "*Mytilus* spp.", live, fresh or chilled, with or without shell
03073980 - Mussels "*Perna* spp.", smoked, dried, salted or in brine, even in shell
03073210 - Mussels "*Mytilus* spp.", frozen, even in shell
03073190 - Mussels "*Perna* spp.", live, fresh or chilled, with or without shell
03073920 - Mussels "*Mytilus* spp.", smoked, dried, salted or in brine, even in shell

accounted for 22% of the total export value and 29% of the volume, followed by frozen mussels (14% of export value and 17% of volume). Smoked, salted or mussels in brine accounted for 3% of export value and 2% of volume in 2024. The main destinations in value terms were Switzerland and the United States, accounting for EUR 5,4 million and EUR 5,3 million respectively (20% and 19% of total extra-EU export value in 2024), followed by the United Kingdom (14%), and to a lesser extent Morocco (6%) and Cuba (4%). Spain was by far the main exporter of mussels to third countries in 2024, accounting for 45% of total EU export value, followed by Italy (11% of the export value) and France (10%).

Over the period 2020-2024, exported volumes of mussels decreased by 23% while exported value increased by 6% due to the decrease in fresh volumes exported (62%) and the increase in export value of fresh, prepared/preserved and frozen exports (22%, 61% and 14% respectively). Export prices of fresh mussels increased by 68% from 2,11 EUR/kg in 2020 to 3,54 EUR/kg in 2024.

In 2024, intra-EU exports of mussels amounted to 196.183 tonnes at a value of EUR 387,1 million. Intra-EU trade consisted mostly of live/fresh mussels accounting for 71% of trade value (81% of the volume), and of prepared/preserved mussels accounting for 21% of the trade value (15% of the trade volume). The Netherlands and Spain were the main intra-EU exporters of mussels, accounting for 42% and 24% respectively of the intra-EU trade value in 2024. Other exporters include Germany (8% of intra-EU export value), Denmark (6%), Ireland (4%), and France (4%). The main destinations for intra-EU trade were Belgium and France, representing 28% and 20% of the trade value in 2024, followed by Italy (14%) and the Netherlands (13%).

Figure 47. **THE MUSSEL EU-TRADE MARKET IN 2024, IN VALUE**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

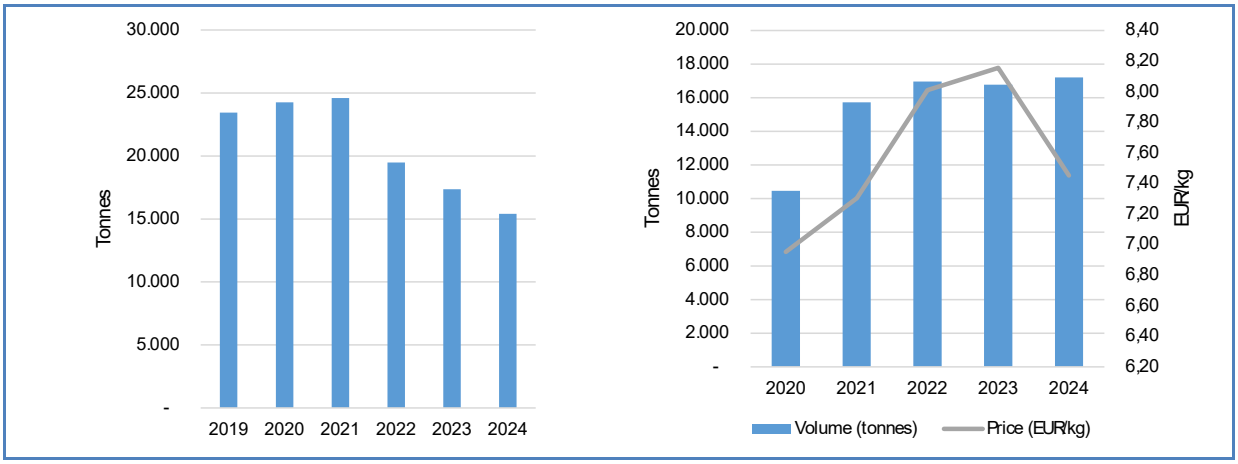
7. 3. Latest market trends

OYSTERS

Similar to 2023, a norovirus outbreak was reported in France in December 2024. This outbreak led to a temporary ban on the sale of oysters in several production regions, causing a significant decline in sales. According to the French National Shellfish Committee, around 70% of annual consumption in France takes place during the holidays, particularly at Christmas. Local consumption bans announced two years in a row led to a substantial drop in consumer demand in what is normally the top sales period. Consequently, the first nine months of 2024 saw limited consumption of oysters, even though less than 10% of French production was potentially impacted[44]. According to Kantar/FranceAgriMer panel data, in volume terms, the consumption of oyster in France decreased by 11% in 2024 compared to 2023. This fall in consumption followed the decreasing trend observed since 2022 and led to a fall in prices in the domestic and export markets. In 2024, French exports of oysters increased by 3% whereas average prices fell by 9%.

[44] Source: https://openknowledge.fao.org/server/api/core/bitstreams/31cad194-49d5-47fa-8c72-b7a36ec8c374/content

Figure 48. **FRENCH HOUSEHOLD CONSUMPTION OF OYSTERS (LEFT, IN TONNES) AND FRENCH EXPORTS OF OYSTERS (RIGHT) IN VOLUME (TONNES) AND AVERAGE UNIT VALUE (EUR/KG)**



Source: KANTAR Worldpanel/FranceAgrimer for the consumption data and Eurostat-Comext for export data.

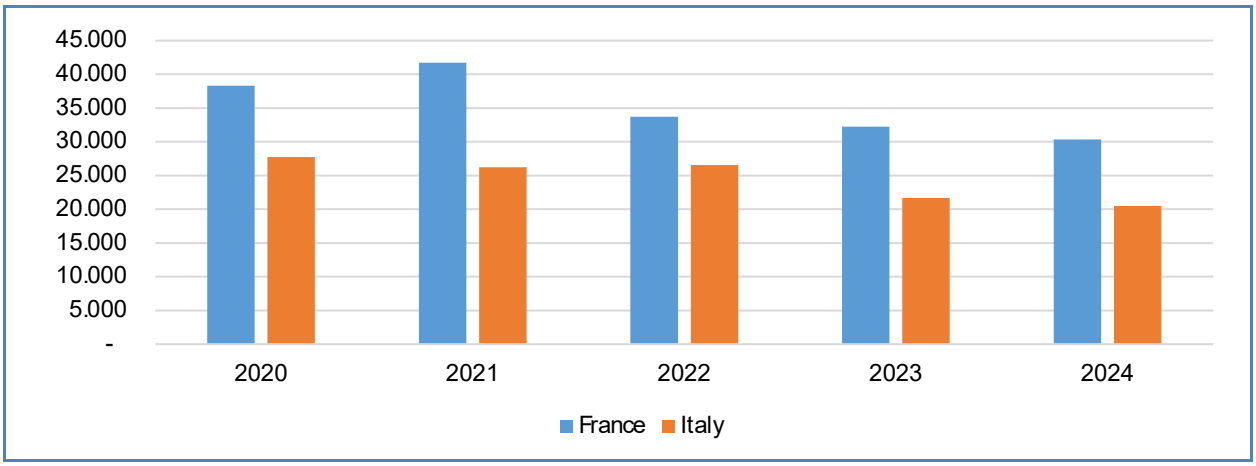
MUSSELS

In Spain, a positive mussel production year was reported for 2024, after several years of declining harvest. The quality of the mussels collected was also better than in previous years, due probably to weather conditions which were more favourable for mussel growth than the extreme conditions experienced in 2022 and 2023. The mussel sector is relatively optimistic about the future, with demand reportedly being very strong[45].

In France, the season for bouchot mussels (representing most of the national production) varies from year to year, but usually runs from July to February, followed by the breeding period. In January 2024, there were still plenty of mussels on the market as sales were delayed and consumption did not completely meet expectations. Hence, even though the yield and quality were good, there was still stock to sell due to decreased consumption. According to Kantar/FranceAgriMer panel data, in volume terms, the consumption in France of fresh mussels decreased by 6% in 2024 compared to 2023.

In Italy a comparable decreasing trend was observed (5%). In the meantime, unlike for oysters, average prices increased slightly.

Figure 49. **HOUSEHOLD CONSUMPTION OF FRESH MUSSELS IN FRANCE AND ITALY ()**



Source: KANTAR Worldpanel/FranceAgrimer for France and Europanel for Italy.

Overall, the EU market for oysters has been challenged by consumption declines linked to sanitary restrictions in France, whereas mussels benefited from a rebound in Spanish production and strong demand.

[45] FAO https://openknowledge.fao.org/server/api/core/bitstreams/31cad194-49d5-47fa-8c72-b7a36ec8c374/content

Manuscript completed in September 2025

Luxembourg: Publications Office of the European Union, 2025

PDF ISSN 2314-9671 KL-01-25-018-EN-N

ISBN: 978-92-68-24087-8 DOI: 10.2771/1312323

FOR MORE INFORMATION AND COMMENTS:

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

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

Global highlights: European Commission, MAPA, EU Blue Economy Observatory, Statistics Iceland.

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

First sales: ICES.

Case studies: European Council, ICES, FAO, EU Seafood Supply Synopsis, FAO, EUMOFA, Eurostat-Comext, Globefish.

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