



Monthly Highlights

No. 9/2025

EUMOFA

European Market Observatory for
Fisheries and Aquaculture Products



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1. GLOBAL HIGHLIGHTS

Subsidies / WTO: The EU welcomed the entry into force of the WTO Agreement on Fisheries Subsidies, a landmark agreement after two decades of negotiations. The agreement bans subsidies that fuel illegal, unreported and unregulated (IUU) fishing, those for fishing on the unregulated high seas, and those targeting overfished stocks. With strong transparency rules, it represents a major step towards curbing overfishing and promoting sustainable fisheries worldwide. The agreement also activates the WTO Fish Fund which will help developing countries implement the new rules. This outcome supports UN SDG 14.6 and is a priority under the European Ocean Pact. The EU calls on all WTO Members, especially major fishing nations, to join together to maximise global benefits.¹



© Eurofish International Organisation

High seas / BBNJ: On 19 September 2025, the Biodiversity Beyond National Jurisdiction (BBNJ) Agreement reached 60 ratifications, triggering its entry into force in early 2026. Covering nearly two-thirds of the world's ocean, the treaty enables the creation of marine protected areas on the high seas, a crucial tool to meet the global goal of protecting 30% of the ocean by 2030. It also introduces mandatory environmental impact assessments for economic activities in international waters. The agreement emphasises equity, with strong capacity-building and technology transfer for developing countries, supported by a benefit-sharing mechanism for marine genetic resources.²

Fisheries / GFCM: On 22 September 2025, the EU Commission proposed fishing opportunities for 2026 in the Mediterranean and Black Seas, aiming to ensure sustainable management of fish stocks. The proposal maintains measures under the western Mediterranean multiannual plan for demersal stocks, including fishing effort limits, catch limits for deep water shrimps, and a compensation mechanism for trawlers. It also continues the implementation of GFCM management plans across the Mediterranean and Adriatic Seas, with updated measures expected after the GFCM annual session in November 2025. For the Black Sea, the proposal maintains the 2025 sprat catch limit and sets turbot quotas in line with the GFCM plan.³

CFP / AGRIFISH: On 22–23 September 2025, the Agriculture and Fisheries Council met to discuss the future EU funding framework for fisheries, aquaculture, and maritime policy post-2027. Ministers welcomed the proposed simplification and flexibility of the framework and exchanged views on how to ensure continued strong support for the sector in 2028–2034. They also prepared for the 2026 fish stock consultations with the UK, Norway and other coastal states, and confirmed that the EU's position will remain guided by ICES scientific advice and the sustainability objectives of the Common Fisheries Policy.⁴

Fisheries / IATTC: From 1–5 September 2025, the 103rd session of the Inter-American Tropical Tuna Commission (IATTC) adopted key measures for sustainable tuna management in the Eastern Pacific Ocean. For the first time since 2009, the seasonal purse seine closure was reduced (from 72 to 64 days), following scientific advice confirming healthy tuna stocks. The fleet, responsible for 97% of regional catches, reaffirmed its commitment to science-driven management by financing port sampling, tagging, and 100% observer coverage under the AIDCP. A major milestone was the launch of the International Alliance for the Recovery of FADs, signed by four tuna associations to prevent stranding and fund recovery projects.⁵

Fisheries / Iceland: In August 2025, total catches reached 106.000 tonnes, up 32% from August 2024. Pelagic species dominated with 74.000 tonnes (mainly mackerel), while demersal catches fell by 7% to nearly 30.000 tonnes. Over the past twelve months (Sept 2024–Aug 2025), catches totalled 1 million tonnes, a slight decrease of 2% year-on-year.⁶

¹ https://ec.europa.eu/commission/presscorner/detail/en/ip_25_2093

² https://ec.europa.eu/commission/presscorner/detail/en/ip_25_2151

³ https://oceans-and-fisheries.ec.europa.eu/news/commission-proposes-fishing-opportunities-2026-mediterranean-and-black-seas-2025-09-22_en

⁴ <https://www.consilium.europa.eu/en/meetings/agrifish/2025/09/22-23/>

⁵ <https://europeche.chil.me/post/493961/sustainable-fisheries-management-yields-results-at-iattc>

⁶ <https://www.statice.is/publications/news-archive/fisheries/fish-catch-in-august-2025/>

2. MACROECONOMIC CONTEXT

2.1. Marine fuel

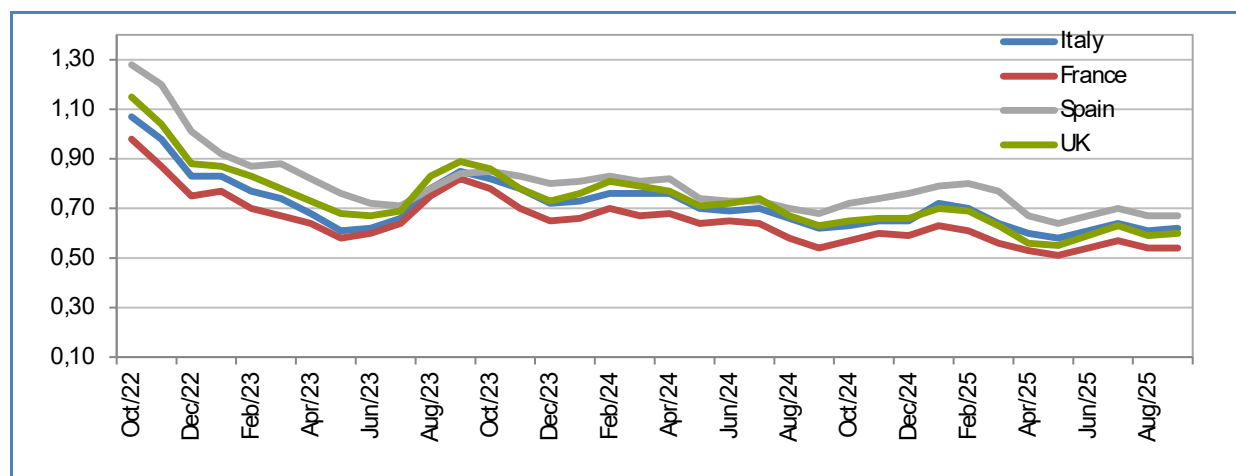
Average prices for marine fuel in **September 2025** ranged between 0,54 and 0,67 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 0,8% compared with the previous month and decreased by an average of 1,6% compared with the same month in 2024.

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

Country	Sep 2025	Change from Aug 2025	Change from Sep 2024
France (ports of Lorient and Boulogne)	0,54	0%	0%
Italy (ports of Ravenna and Livorno)	0,62	2%	0%
Spain (ports of A Coruña and Vigo)	0,67	0%	-1%
The UK (ports of Grimsby and Aberdeen)	0,60	2%	-5%

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 August 2025 the EU annual inflation rate was 2,4%, stable compared to July 2025. A year earlier, the rate was 2,4%.

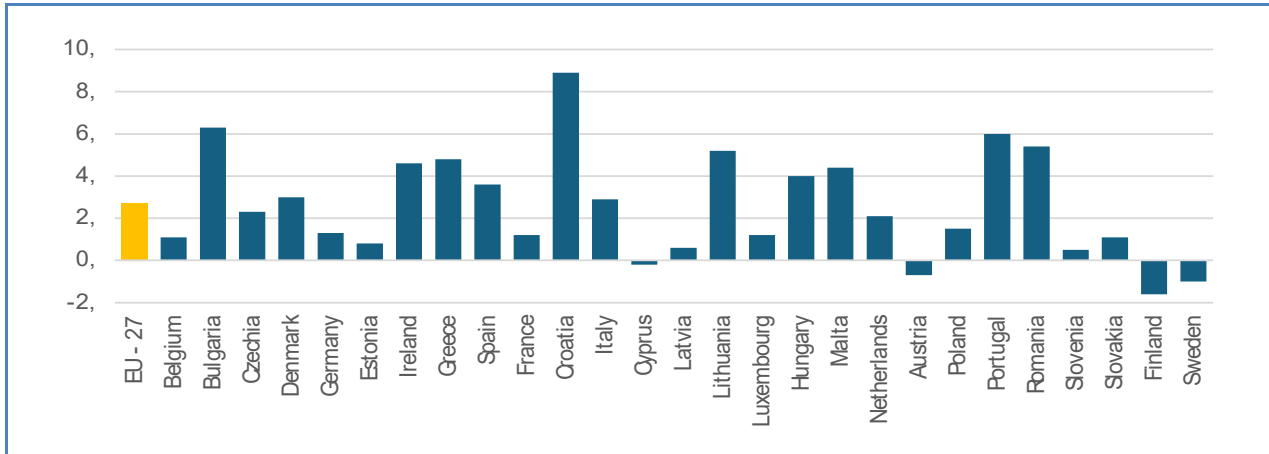
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR AUGUST 2025, COMPARED WITH AUGUST 2024**

Lowest inflation rates		Highest inflation rates	
Cyprus	0,0%	Romania	+8,5%
France	+0,8%	Estonia	+6,2%
Italy	+1,6%	Croatia	+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)

	Aug 2023	Aug 2024	Jul 2025	Aug 2025	Change from Jul 2025	Change from Aug 2024
Food and non-alcoholic beverages	140,32	143,08	148,59	148,68	0,1%	3,9%
Fish and seafood	139,49	141,53	144,93	145,58	0,4%	2,9%
Fresh or chilled fish	131,50	133,69	138,65	138,88	0,2%	3,9%
Frozen fish	139,32	139,22	142,35	143,72	1,0%	3,2%
Fresh or chilled seafood	127,45	130,93	134,67	136,19	1,1%	4,0%
Frozen seafood	119,14	118,01	119,82	119,91	0,1%	1,6%
Dried, smoked or salted fish and seafood	140,53	143,18	147,87	148,12	0,2%	3,5%
Other preserved or processed fish and seafood and fish and seafood preparations	135,20	137,92	138,67	139,36	0,5%	1,0%

Source: Eurostat.

2.4. Exchange rates

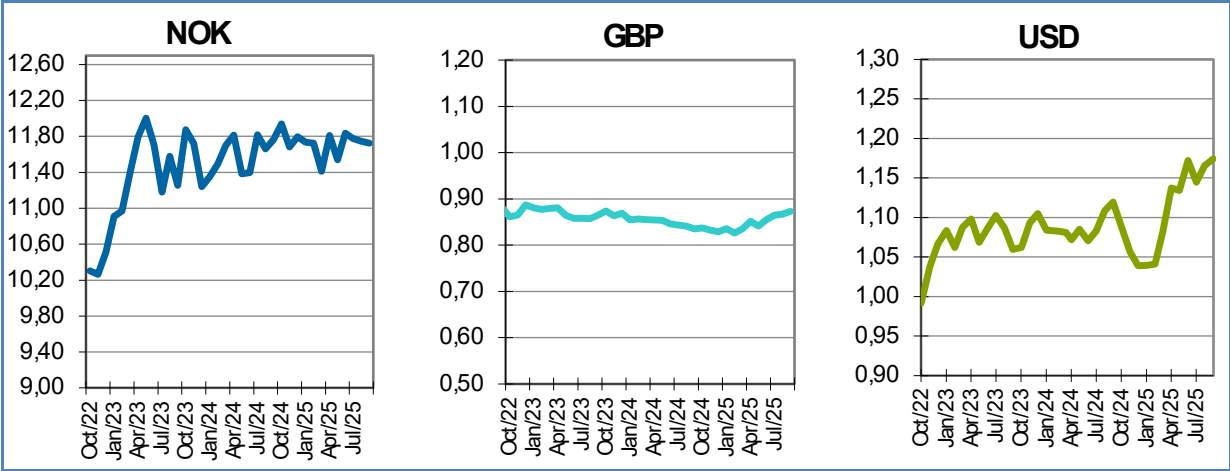
Table 4. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Sep 2023	Sep 2024	Aug 2025	Sep 2025
NOK	11,2535	11,7645	11,7465	11,7265
GBP	0,8646	0,8354	0,8668	0,8734
USD	1,0594	1,1196	1,1658	1,1741

Source: European Central Bank.

In September 2025, the euro appreciated against the US dollar (0,7%) and the British pound sterling (0,8%) and depreciated against the Norwegian krone (0,2%) relative to the previous month. For the past six months the euro has fluctuated around 0,8589 against the British pound sterling. Compared with September 2024 the euro has appreciated 4,9% against the US dollar and 4,5% against the British pound sterling and depreciated 0,3% against the Norwegian krone.

Figure 3. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.



3. FIRST SALES IN EUROPE⁷

3.1. Year-to-date comparison of first sales

Increases in value and volume (Jan - Jul 2025 vs Jan - Jul 2024): Finland, France and Ireland recorded an increase in both first-sales value and volume. The highest increases in volume were observed in Finland mainly due to herring, and increases in value in Ireland due to mackerel, Atlantic horse mackerel, and Norway lobster.

Decreases in value and volume (Jan - Jul 2025 vs Jan - Jul 2024): Cyprus, Estonia, Germany, Italy, Lithuania, the Netherlands, Poland, and Sweden recorded decreases in first-sales value and volume. Germany stood out with the most significant drops in relative terms due to mackerel, blue whiting and cod.

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

Country	January – July 2023		January – July 2024		January – July 2025		Change from January – July 2024	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	8.792	53,70	6.885	41,58	6.846	43,41	-1%	4%
Bulgaria	1.858	0,86	2.359	1,29	2.288	1,56	-3%	21%
Cyprus	446	2,07	380	1,82	376	1,66	-1%	-9%
Denmark	482.870	281,39	476.647	282,10	459.599	301,93	-4%	7%
Estonia	42.925	14,52	40.543	19,96	32.803	15,23	-19%	-24%
Finland	42.083	12,19	34.345	13,03	44.342	13,58	29%	4%
France	150.773	412,80	141.134	387,37	148.018	422,83	5%	9%
Germany	21.085	31,57	20.618	35,89	4.377	22,95	-79%	-36%
Ireland	143.803	172,85	145.046	164,33	157.434	200,80	9%	22%
Italy	41.512	191,98	33.309	156,32	29.889	154,96	-10%	-1%
Latvia	25.106	6,96	23.189	8,30	21.914	8,64	-5%	4%
Lithuania	277	0,58	285	0,38	184	0,24	-35%	-38%
Netherlands	42.898	79,83	11.861	80,58	11.717	75,64	-1%	-6%
Poland	46.429	16,89	38.076	20,01	36.607	18,21	-4%	-9%
Portugal	64.484	173,16	56.359	158,37	55.742	173,23	-1%	9%
Spain	260.723	859,03	253.895	850,58	230.095	861,17	-9%	1%
Sweden	98.112	57,15	75.829	51,44	54.570	42,57	-28%	-17%
Norway	1.853.787	1.858,92	1.757.625	1.751,64	1.663.277	1.959,20	-5%	12%
United Kingdom	181.823	365,95	180.430	353,47	184.048	394,20	2%	12%

Possible discrepancies in % changes are due to rounding.

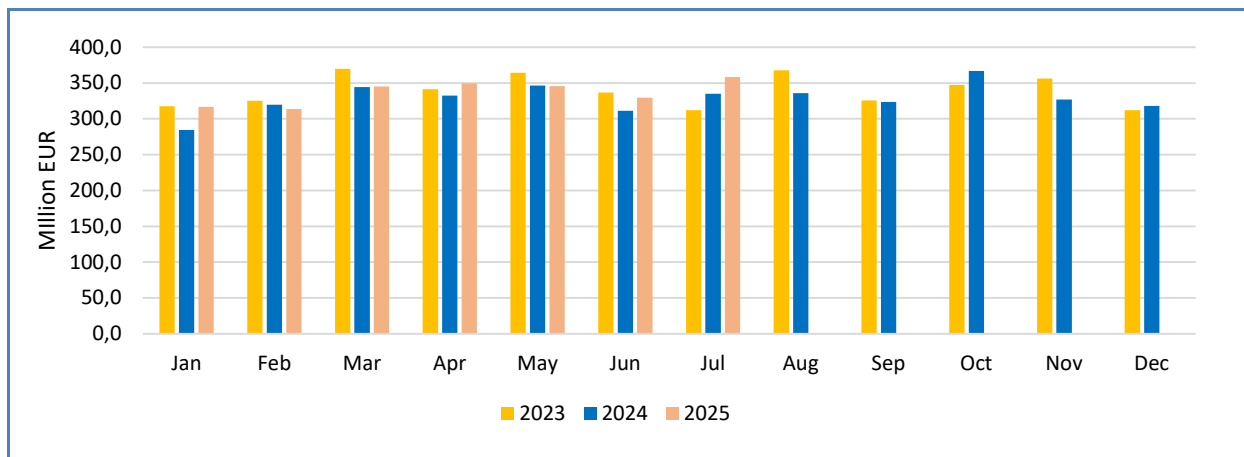
**Volumes are reported in net weight for EU Member States, and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (nominal values without VAT). For Norway, prices are reported in EUR/kg of live weight.*

⁷ During January–July 2025, 17 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 -July in 2025 was EUR 2,36 billion, a 4% increase compared to 2024, and stable value compared to 2023. Overall volume was 1,3 million tonnes, a 5% decrease compared to 2024, and a 12% decrease compared to 2023.

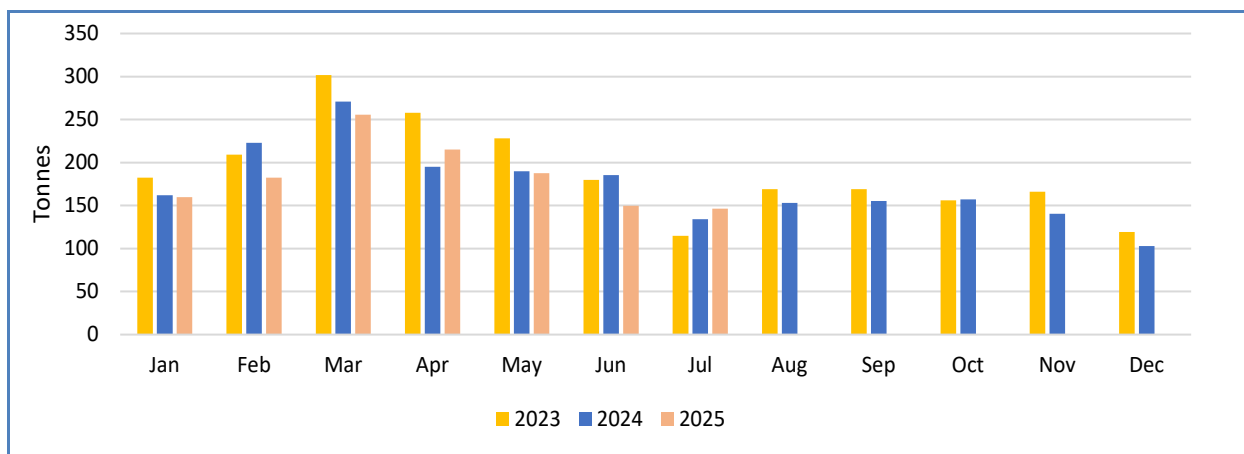
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VALUE FROM THE REPORTING COUNTRIES⁸**
(value in million EUR)



Compared to 2024, monthly first-sales value increased every month in the first seven months of 2025 except February. Compared to 2023, values generally decreased except in April and July. Between January and July 2025, first-sales volume decreased compared to the same period in both 2024 and 2023, except in April and July in 2024 and July 2023 when volumes were higher than in 2025.

The increase in first-sales value compared to 2024 was mainly driven by small pelagics (+9%). Compared to 2023, first-sales value in 2025 remained stable, due mainly to small pelagics (+15%) and crustaceans (+8%). Similarly, in the same period in 2025, the decrease in first-sales volume was mainly due to groundfish and small pelagics, which fell by -7% and -4% respectively in comparison to 2024, and by -14% and -12% in comparison to 2023.

Figure 5. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VOLUME FROM THE REPORTING COUNTRIES**
(volume in 1.000 tonnes)



⁸ During January – July 2025, 17 EU Member States (MS), reported first-sales data on value and volume.



3. 2. First-sales evolution at commodity group level^{9, 10}

Bivalves and other molluscs and aquatic invertebrates

In 2025, first-sales value of “Bivalves and other molluscs and aquatic invertebrates” amounted to EUR 145,9 million, a 10% increase compared to the same period in 2024. First-sales volume came to 58.105 tonnes, an increase of 8% compared to 2024. Scallop and clam were the main commercial species driving the increase in value of the commodity group (+16% and +6%, respectively), while scallop and sea urchin were the main contributors to the increase in volume (+27%).

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

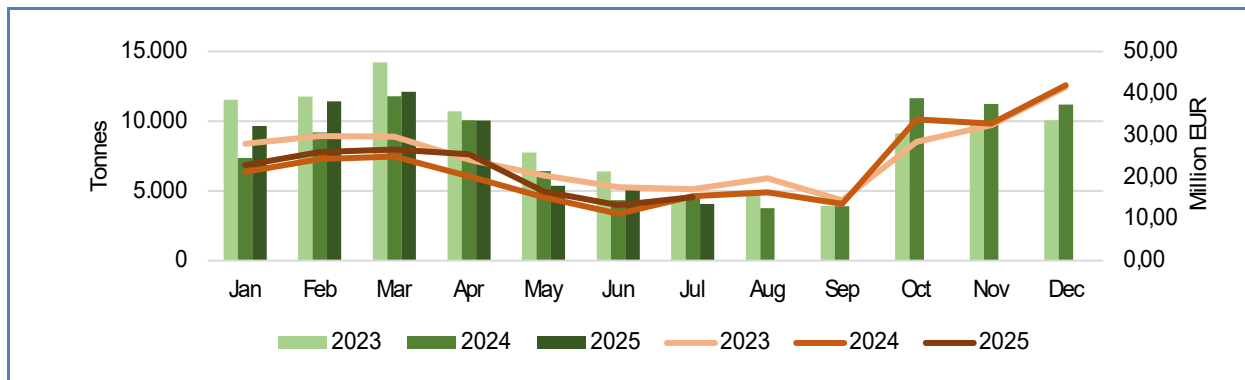


Table 6. **FIRST SALES PRICES OF BIVALVES MAIN COMMERCIAL SPECIES (MCS) (JAN-JUL 2024 AND JAN-JUL 2025)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan Jul 2024 %)
France	Scallop	2,23 EUR/kg	2,04 EUR/kg	-8%
France	Other molluscs and aquatic invertebrates ¹¹	2,64 EUR/kg	3,37 EUR/kg	+28%
Italy	Clam	2,55 EUR/kg	2,92 EUR/kg	+14%

Cephalopods

In 2025, first-sales value of “Cephalopods” totalled EUR 173,5 million, a 6% increase compared to 2024. First-sales volume came to 24.648 tonnes, a decrease of 9% compared to 2024. Octopus (+30%) was the main commercial species driving the growth in first sales value, while squid and cuttlefish were the main species (-17% and -21% respectively) driving the decrease in first-sales volume.

⁹ 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>

¹⁰ 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>

¹¹ Of the main commercial species other molluscs and aquatic invertebrates in France, whelk represents 92% of total first-sales volume and 87% of the total first-sales value.



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

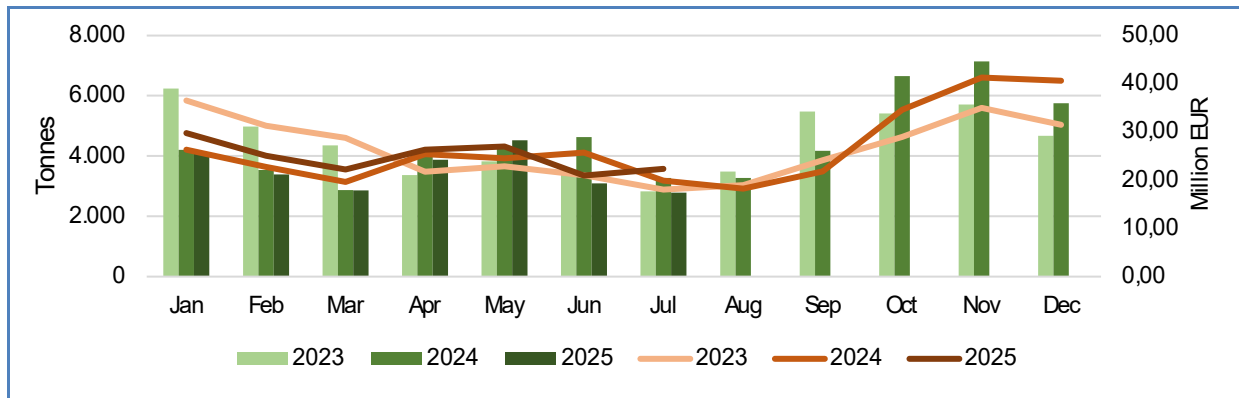


Table 7. FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN-JUL 2024 AND JAN-JUL 2025)

Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan-Jul 2024 %)
France	Octopus	6,85 EUR/kg	7,54 EUR/kg	+10%
Portugal	Octopus	7,77 EUR/kg	8,95 EUR/kg	+15%
Spain	Octopus	7,08 EUR/kg	7,82 EUR/kg	+10%

Crustaceans

In 2025, first-sales value of “Crustaceans” totalled EUR 356,5 million, a stable value compared to 2024. First-sales volume amounted to 35.612 tonnes, a decrease of 3% compared to 2024. Norway lobster and miscellaneous shrimp (0% and +3%) were the two main products responsible for the first-sales value, while Shrimp *Crangon* spp. and cold-water shrimps (-23% and -46%) were mainly responsible for the decrease in first-sales volume.

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

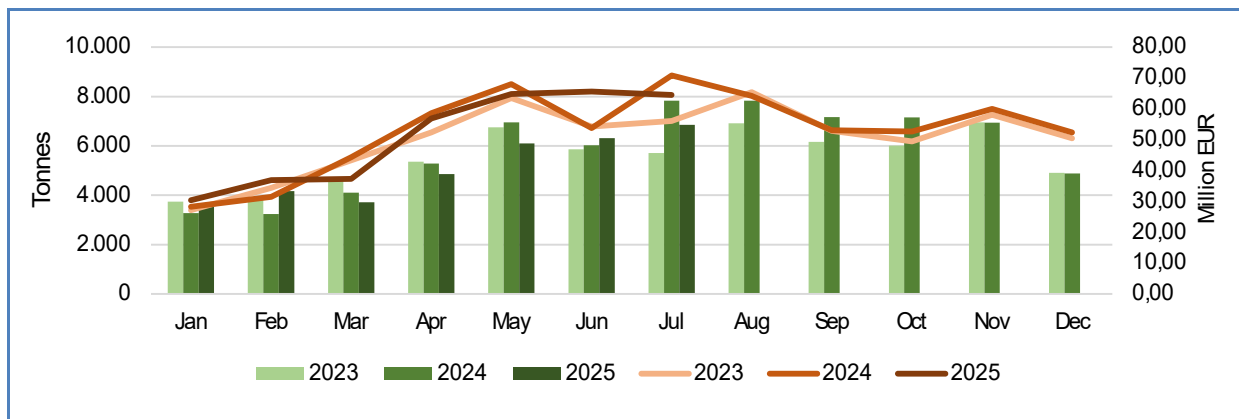


Table 8. FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-JUL 2024 AND JAN-JUL 2025)

Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan-Jul 2024 %)
Netherlands	Shrimp <i>Crangon</i> spp.	8,07 EUR/kg	9,37 EUR/kg	+16%
France	Norway lobster	11,67 EUR/kg	14,41 EUR/kg	+23%
Spain	Norway lobster	17,95 EUR/kg	23,22 EUR/kg	+29%

Flatfish



In 2025, first-sales value of “Flatfish” came to EUR 197,4 million, a 1% decrease compared to 2024. First-sales volume amounted to 27.767 tonnes, a decrease of 8% compared to 2024. European plaice (-26% and -12%) and European flounder (-42% and -29%) were the main products contributing to the decrease in first-sales value and volume.

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

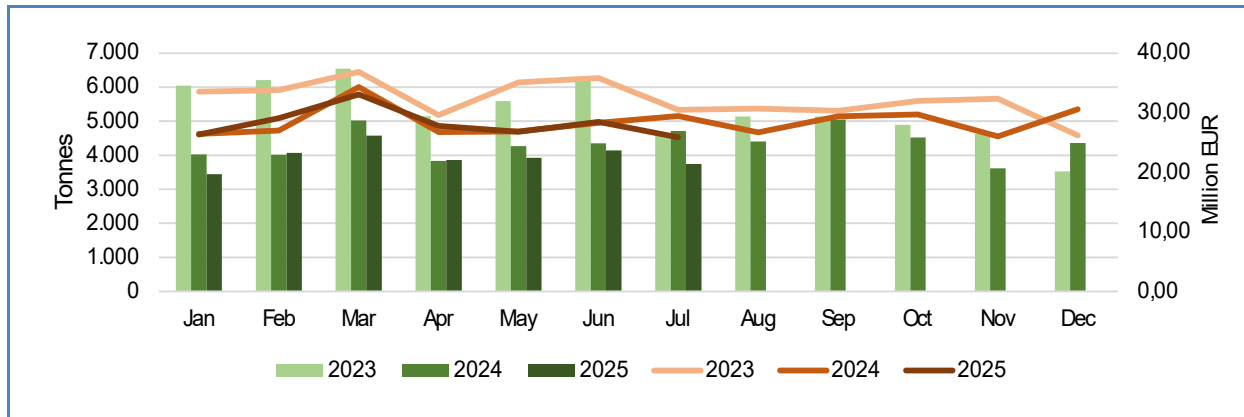


Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN – JUL 2024 AND JAN – JUL 2025)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan Jul 2024 %)
Denmark	European plaice	2,66 EUR/kg	2,54 EUR/kg	-11%
Netherlands	European plaice	2,59 EUR/kg	1,92 EUR/kg	-26%
France	Turbot	21,82 EUR/kg	24,62 EUR/kg	+13%

Freshwater fish

In 2025, first-sales value of “Freshwater fish” came to EUR 19,3 million, an increase of 53% compared to 2024. First-sales volume amounted to 4.508 tonnes, a decrease of 7% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+118%), while other freshwater fish¹² was the main contributor to the decrease in first-sales volume (-5%).

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

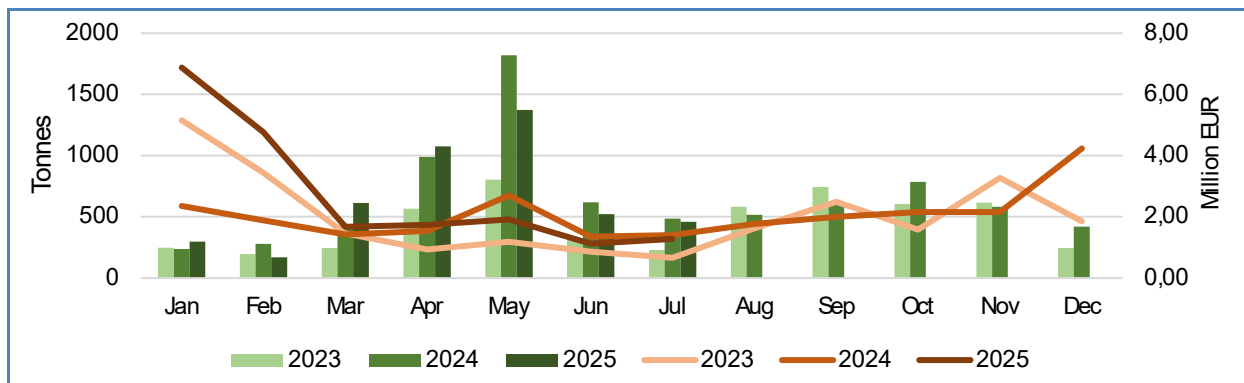


Table 10. **FIRST-SALES PRICE OF FRESHWATER FISH MCS (JAN – JUL 2024 AND JAN – JUL 2025)**

¹² „Other freshwater fish“ comprises 29 products, and together round goby, freshwater bream and roach represent 73% of first-sales volume.



Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan Jul 2024 %)
France	Eel ¹³	36,33 EUR/kg	100,21 EUR/kg	+176%
Estonia	Other freshwater fish ¹⁴	1,57 EUR/kg	1,42 EUR/kg	-10%
Estonia	Pike-perch	4,32 EUR/kg	4,44 EUR/kg	+3%

Groundfish

In 2025, first-sales value of “Groundfish” totalled EUR 439,0 million, an increase of 6% compared to 2024. First-sales volume amounted to 473.002 tonnes, a decrease of 7% compared to 2024. Other groundfish¹⁵ (+13%) was mainly responsible for the increase in first-sales value, while blue whiting (-7%) was mainly responsible for the decrease in first-sales volume.

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

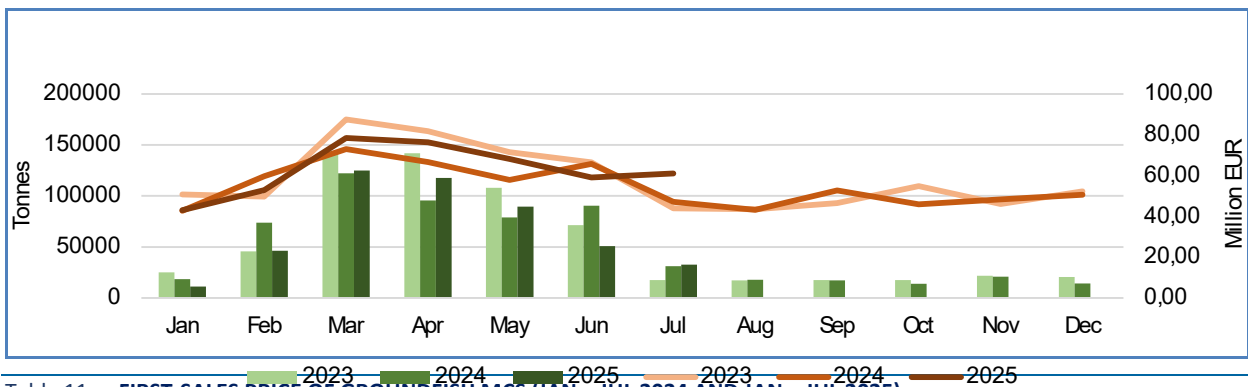


Table 11. FIRST-SALES PRICE OF GROUNDFISH MCS (JAN – JUL 2024 AND JAN – JUL 2025)

Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan Jul 2024 %)
Denmark	Other groundfish ¹⁶	0,29 EUR/kg	0,40 EUR/kg	+36%
Spain	Cod	3,06 EUR/kg	8,42 EUR/kg	+175%
Denmark	Blue whiting	0,29 EUR/kg	0,34 EUR/kg	+15%

Other marine fish¹⁷

In 2025, first-sales value of “Other marine fish” came to EUR 335,8 million, a stable value compared to 2024. First-sales volume amounted to 91.101 tonnes, an increase of 2% compared to 2024. Monk (+4%) was the main commercial species contributing most to first-sales value, while other marine fish¹⁸ was behind the increase in first-sales volume (+22%).

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 88% of the total value and 70% of volume.

¹⁵ „Other groundfish“ comprised 46 species of which sandeel nei accounting for 66% and European conger together account for 77% of total first-sales value.

¹⁶ „Other groundfish“ in Denmark comprised 7 species of which sandeel nei accounting for 97% of total first-sales value and 99% of total first-sales volume.

¹⁷ Seventeen Main Commercial Species are included in the Commodity 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), boarfish and boarfishes nei represent together 73% of the total first-sales volume.



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

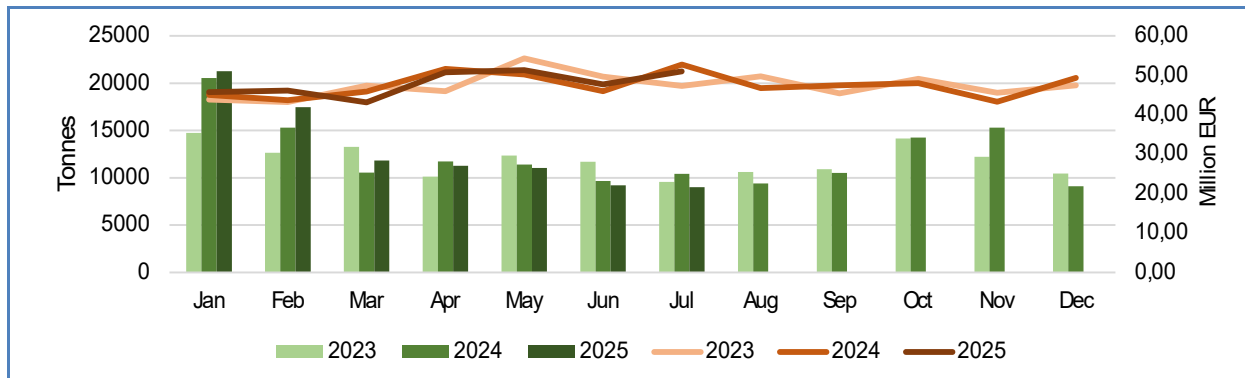


Table 12. FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN – JUL 2024 AND JAN – JUL 2025)

Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan Jul 2024 %)
Spain	Monk	5,76 EUR/kg	6,45 EUR/kg	+12%
France	Monk	5,52 EUR/kg	5,97 EUR/kg	+8%
Spain	Other sharks ¹⁹	3,20 EUR/kg	3,38 EUR/kg	+6%

Salmonids

In 2025, first-sales value of “Salmonids” came to EUR 974.647, a decrease of 38% compared to 2024, while first-sales volume amounted to 99.031 kg, a decrease of 38% compared to 2024. Salmon (-45% and -42%) 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 – JUL 2025

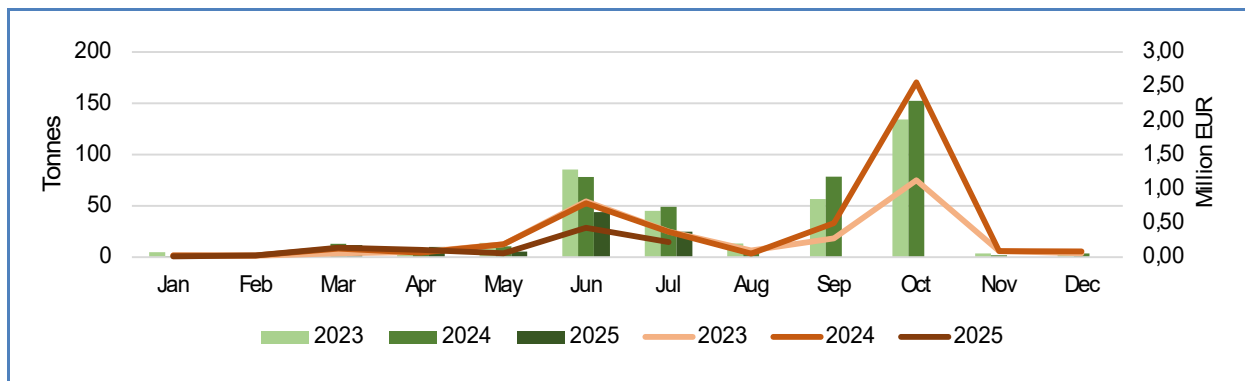


Table 13. FIRST-SALES PRICE OF SALMONIDS MCS (JAN-JUL 2024 AND JAN-JUL 2025)

Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan Jul 2024 %)
Sweden	Salmon	8,18 EUR/kg	8,87 EUR/kg	+8%
Finland	Salmon	9,75 EUR/kg	10,62 EUR/kg	+9%

Small pelagics

In 2025, first-sales value of “Small pelagics” amounted to EUR 494,2 million, an increase of 9% compared to 2024. First-sales volume amounted to 495.757 tonnes, a decrease of 4% compared to 2024. Mackerel and Atlantic horse mackerel (+18% and

¹⁹ „Other sharks“ MCS in Spain comprises 22 species in the period analysed of which blue shark represented 85% of the total value and 85% of volume.

+72%) were the commercial species contributing most to the increase in first-sales value, while sprat (-20%) was the main commercial species contributing most to the decrease in first-sales volume.

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

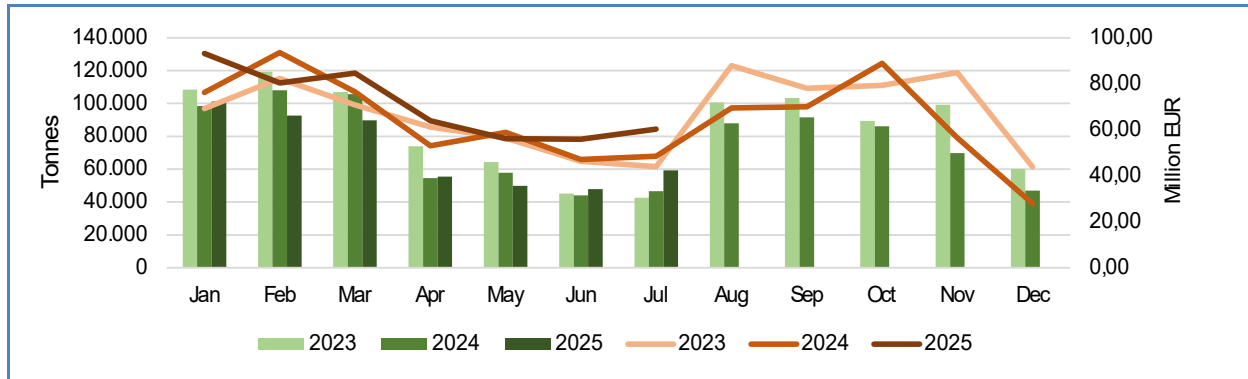


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN – JUL 2024 AND JAN – JUL 2025)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan Jul 2024 %)
Ireland	Mackerel	1,61 EUR/kg	2,14 EUR/kg	+33%
Ireland	Atlantic horse mackerel	1,17 EUR/kg	1,18 EUR/kg	+1%
Spain	Mackerel	1,31 EUR/kg	1,88 EUR/kg	+43%

Tuna and tuna-like species

In 2025, first-sales value of “Tuna and tuna-like species” came to EUR 193,6 million, a decrease of 5% compared to 2024. First-sales volume totalled 48.955 tonnes, a decrease of 10% compared to 2024. Yellowfin tuna (-31% and -28%), swordfish (-8% and -8%) and skipjack tuna (-26% and -27%) 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 – JUL 2025**

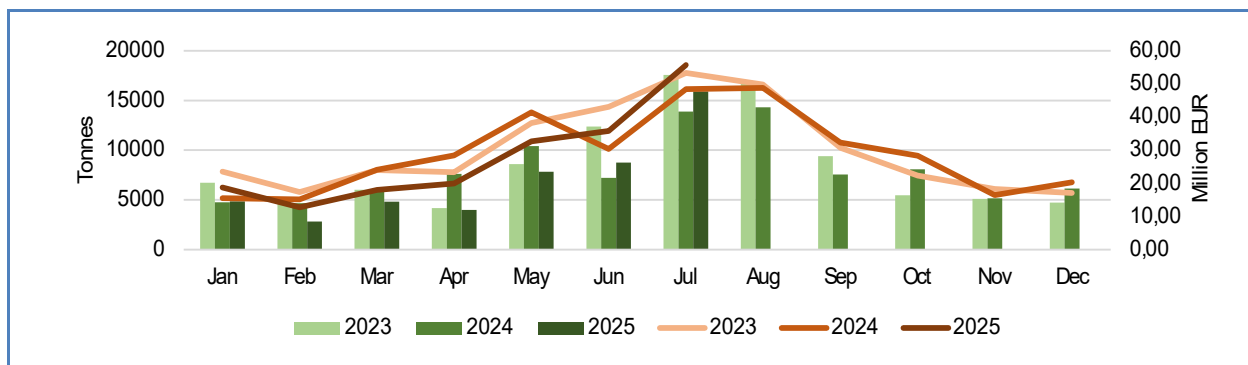


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN – JUL 2024 AND JAN – JUL 2025)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2024	First-sales average Price Jan-Jul 2025	Trend (Jan-Jul 2025 vs Jan Jul 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%

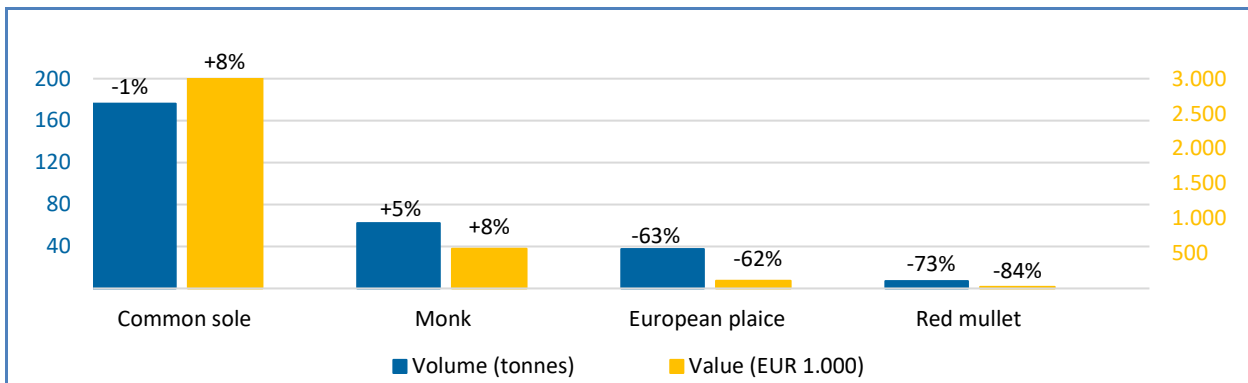


3.3. First sales in reporting countries²⁰

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

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-July 2025 vs Jan-July 2024	EUR 43,4 million, +4%	6.846 tonnes, -1%	Value: octopus, cuttlefish, monk. Volume: cuttlefish, gurnard, whiting.
July 2025 vs July 2024	EUR 5,7 million, 0%	685 tonnes, -14%	Value: common sole, monk. Volume: European plaice, red mullet.

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

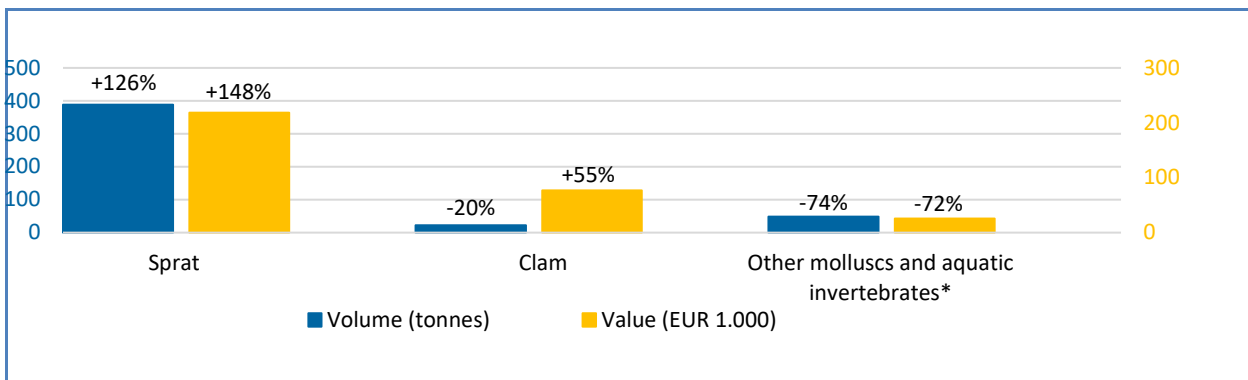


Percentages show change from the previous year.

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

 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 1,6 million, +21%	2.288 tonnes, -3%	Value: sprat, clam, red mullet. Volume: Other molluscs and aquatic invertebrates*.
Jul 2025 vs Jul 2024	EUR 0,3 million, +29%	463 tonnes, +15%	Sprat, clam, other molluscs and aquatic invertebrates*.

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



Percentages show change from the previous year. *EUMOFA aggregation for species.²¹

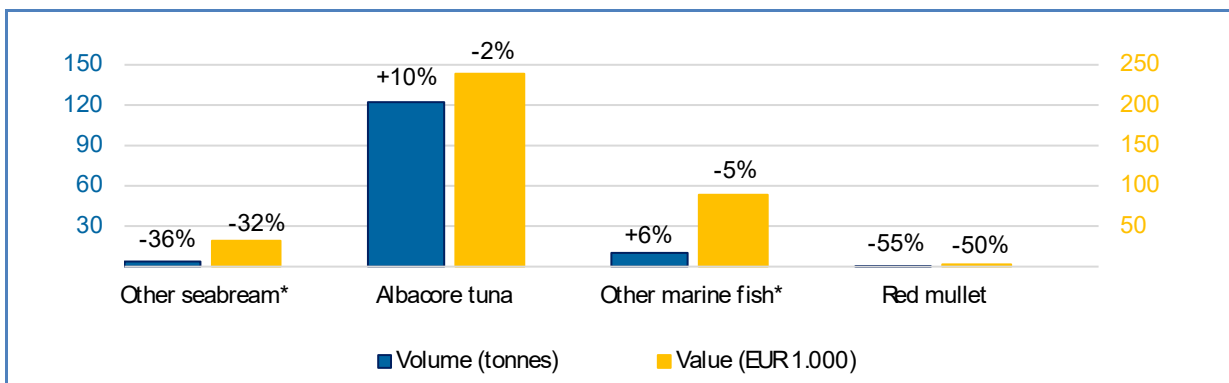
²⁰ First-sales data updated on 20. 09. 2025. This section covers all countries for which data is available on the date of extraction and analysis.

²¹ Metadata 2, Annex 3: <https://eumofa.eu/supply-balance-and-other-methodologies>

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

 Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 1,7 million, -9%	376 tonnes, -1%	Other seabream*, red mullet, picarel.
Jul 2025 vs Jul 2024	EUR 0,4 million, -5%	142 tonnes, +8%	Value: Other seabream*, albacore tuna, other marine fish*, red mullet. Volume: albacore tuna.

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



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

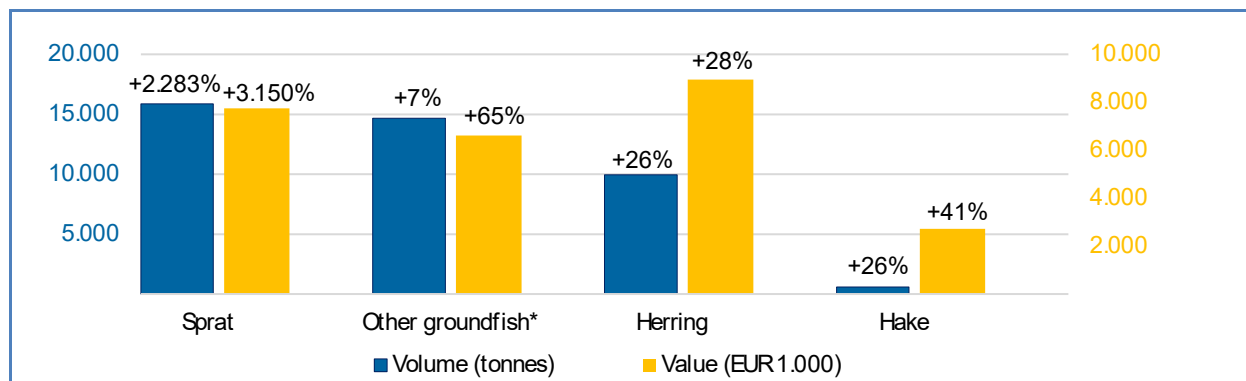
Table 19. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK

 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Jul 2025 vs Jan-Jul 2024	EUR 391,9 million, +7%	459,599 tonnes, -4%	Value: Other groundfish*, blue whiting, haddock, saithe. Volume: blue whiting, sprat, Other groundfish*.	In July 2025 compared to July 2024, there was a remarkable increase in terms of value (3150%) and volume (2283%) of sprat . This trend in catches is linked with increasing quota in 2025. When it comes to value, it has changed slightly in relation to the volume and, partly, prices increased due to annual inflation in July 2025. Comparing all months from January to July 2025 with the same period in 2024, it was only in July where such a huge difference in supply occurred. That is because sprat fishery tends to have high seasonal fluctuation. In addition, the supply of sprat to the market is correlated to Danish market demand. As such, the supplier switched their routine of supply and made additional efforts to satisfy the market.
Jul 2025 vs Jul 2024	EUR 42,9 million, +42%	46.075 tonnes, +65%	Sprat, Other groundfish*, haddock, hake.	

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



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



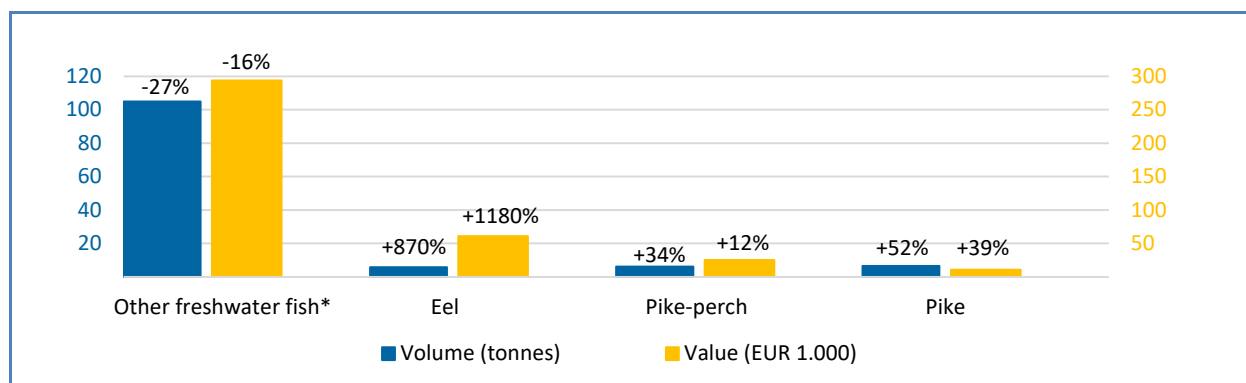
Percentages show change from the previous year. *EUMOFA aggregation for species

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

 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Jul 2025 vs Jan-Jul 2024	EUR 15,2 million, -24%	32.803 tonnes, -19%	Herring, sprat, smelt, European flounder.	In July 2025 compared to July 2024, eel registered significant increase in first sales value (1180%) and volume (870%). Prices increased as well, which indicated that the market demand was high. Prices increased beyond inflation, while volume placed on the market went up due to higher level of production available, good weather conditions and suppliers' capacity to supply the market.
Jul 2025 vs Jul 2024	EUR 0,4 million, +1%	132 tonnes, -18%	Value: eel, pike, pike-perch. Volume: Other freshwater fish*.	

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

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

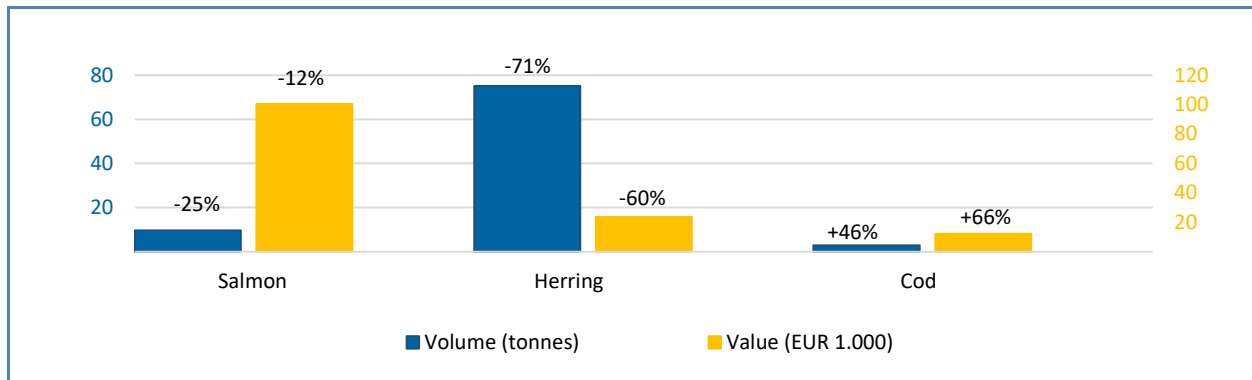


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 13,6 million, +4%	44.342 tonnes, +29%	Herring.
Jul 2025 vs Jul 2024	EUR 0,1 million, -28%	88 tonnes, -72%	Salmon, herring, cod.

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

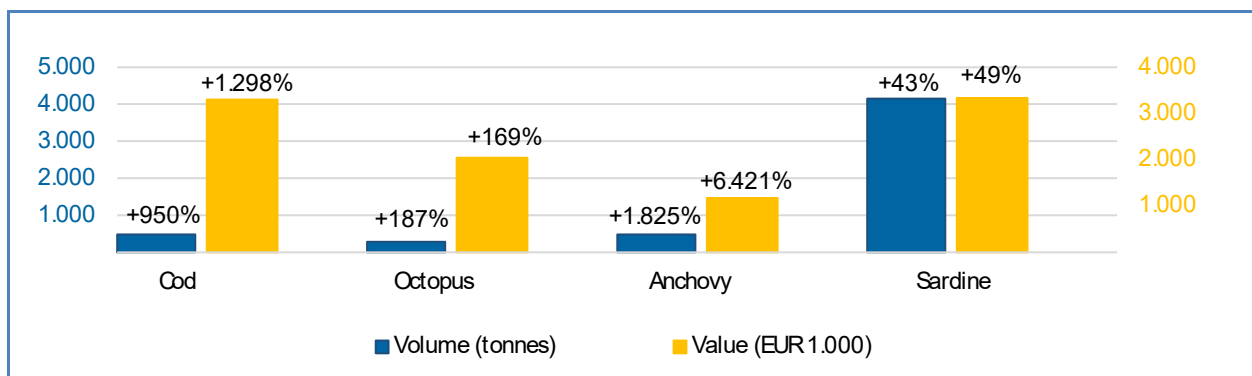


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 433,8 million, +9%	148.018 tonnes, +5%	Octopus, eel, scallop, sardine, anchovy.
Jul 2025 vs Jul 2024	EUR 61,6 million, +7%	27.812 tonnes, +8%	Cod, octopus, anchovy, sardine.

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

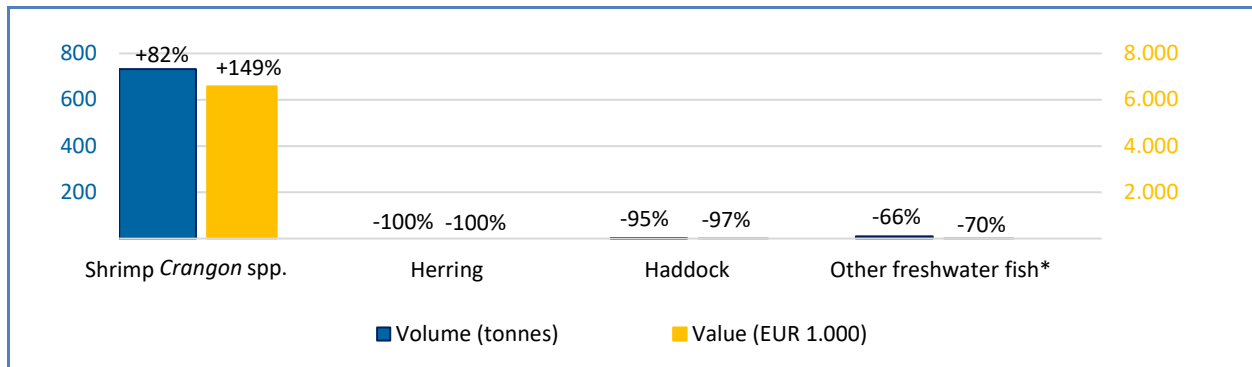


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 22,9 million, -36%	4.377 tonnes, -79%	Mackerel, blue whiting, cod, Greenland halibut.
Jul 2025 vs Jul 2024	EUR 6,8 million, +70%	772 tonnes, -67%	Value: shrimp <i>Crangon</i> spp. Volume: herring, Other freshwater fish*, haddock.

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

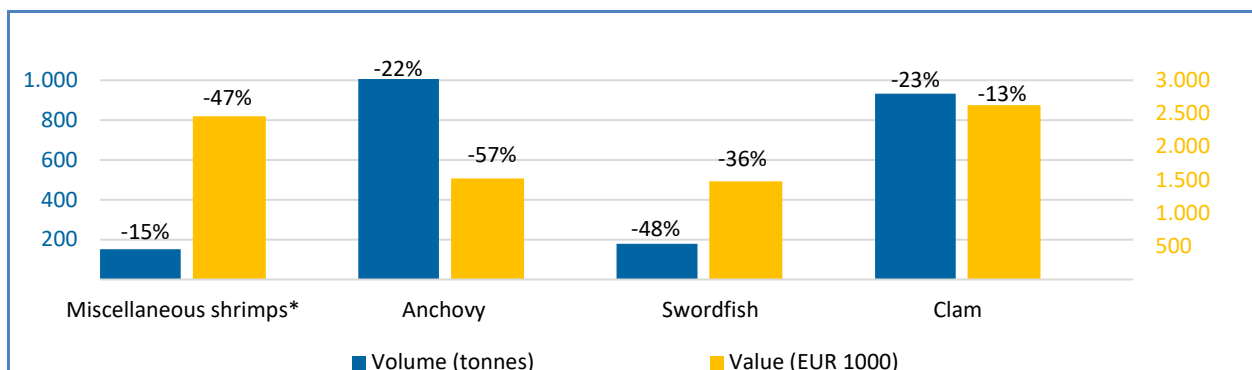


Percentages show change from the previous year. *EUMOFA aggregation for species

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

 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 154,3 million, -1%	29.889 tonnes, -10%	Swordfish, sardine, cuttlefish, miscellaneous shrimps*, warmwater shrimps*.
Jul 2025 vs Jul 2024	EUR 20,3 million, -23%	4.383 tonnes, -18%	Miscellaneous shrimps*, anchovy, swordfish, clam.

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

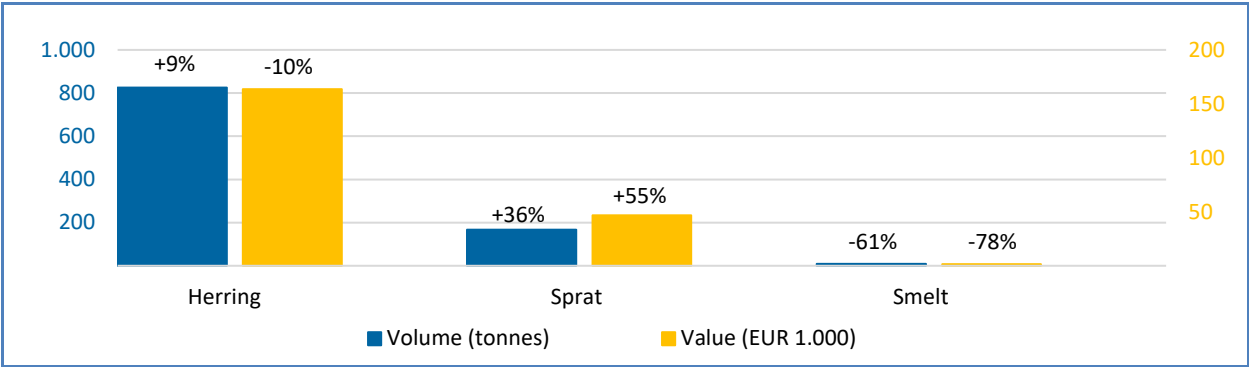


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 8,6 million, +4%	21.914 tonnes, -5%	Value: herring, sprat. Volume: sprat, Other marine fish*, Other freshwater fish*.
Jul 2025 vs Jul 2024	EUR 0,2 million, -1%	1.020 tonnes, +9%	Value: herring, smelt. Volume: herring, sprat.

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

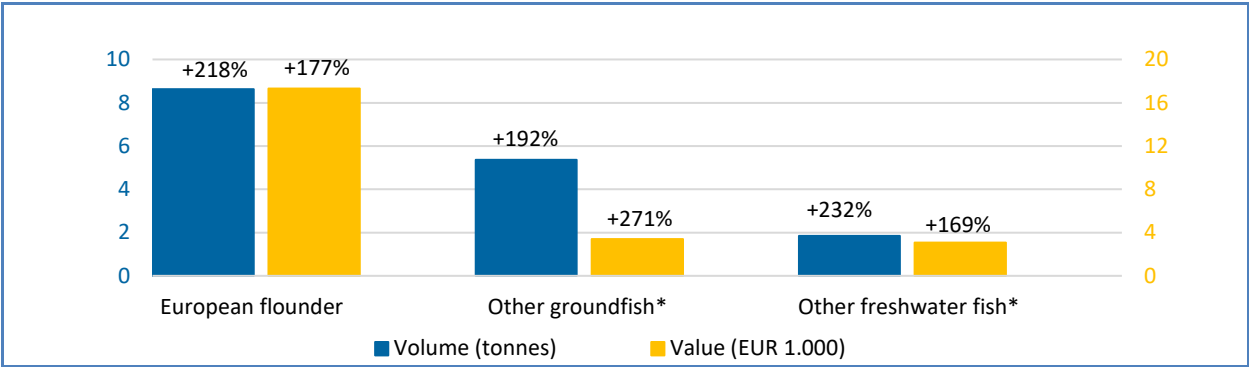


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species	Notes
Jan-Jul 2025 vs Jan-Jul 2024	EUR 0,2 million, -38%	184 tonnes, -35%	Smelt, turbot, Other groundfish*, Other freshwater fish*.	In July 2025 compared to July 2024, there was a significant increase of European flounder in terms of value (177%) and in terms of volume (218%). In July 2024 and 2025 all flounder sales suppliers have been within the small-scale fisheries segment which operate in coastal areas of the Baltic Sea. Active vessels and fish stock availability on the coastal area allowed an increase in the volume of landings compared to July 2024. A slight increase in fishing activities also led to an increase in volumes of flounder supplied to the market. The price was lower, which shows that volumes were sufficient to supply the market. European flounder is popular for local consumption and the moderate price resulted in a rise of consumption
Jul 2025 vs Jul 2024	EUR 0,03 million, +162%	19 tonnes, +249%	European flounder, Other groundfish*, Other freshwater fish*.	

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

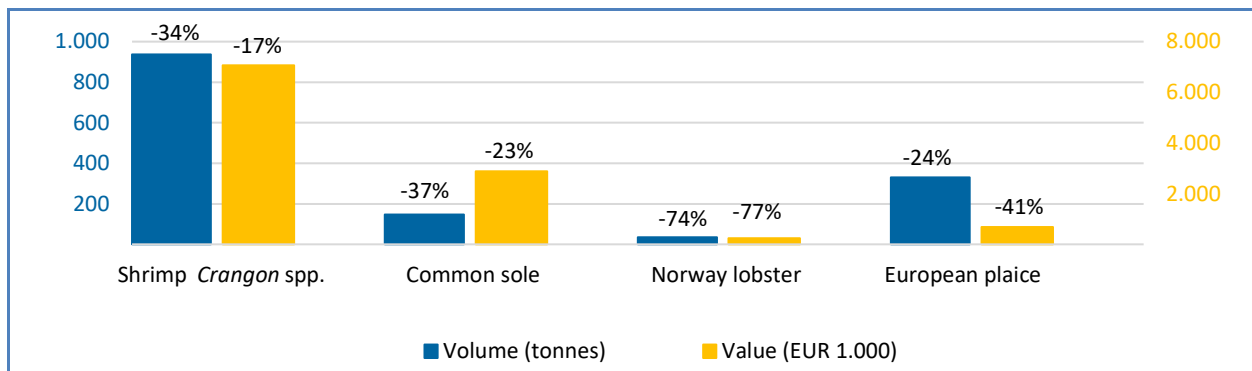


Percentages show change from the previous year. *EUMOFA aggregation for species

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-Jul 2025 vs Jan-Jul 2024	EUR 75,6 million, -6%	11.717 tonnes, -1%	Shrimp <i>Crangon</i> spp., European plaice, squid, gurnard
Jul 2025 vs Jul 2024	EUR 14,5 million, -15%	2.183 tonnes, -23%	Shrimp <i>Crangon</i> spp., common sole, Norway lobster, European plaice

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

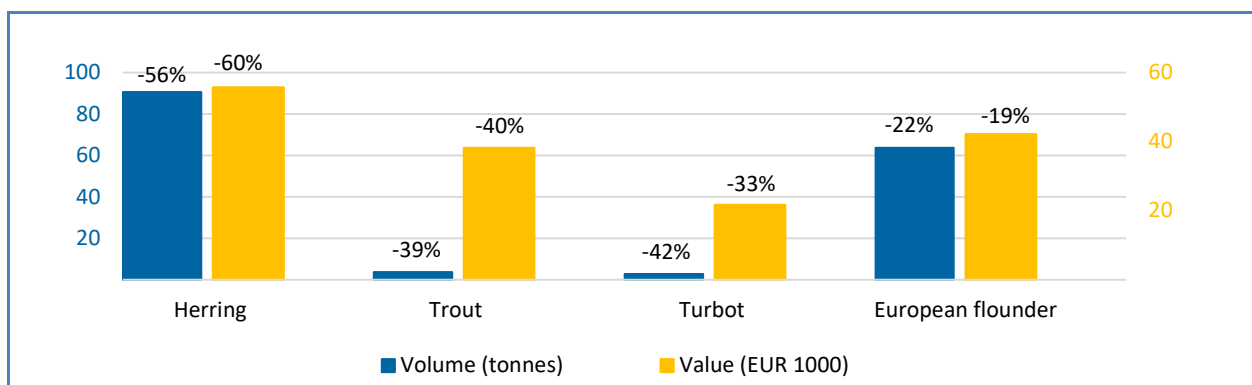


Percentages show change from the previous year.

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

 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 18,2 million, -9%	36.607 tonnes, -4%	Sprat, European flounder, eel, turbot.
Jul 2025 vs Jul 2024	EUR 0,5 million, -20%	414 tonnes, -21%	Herring, trout, turbot, European flounder.

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

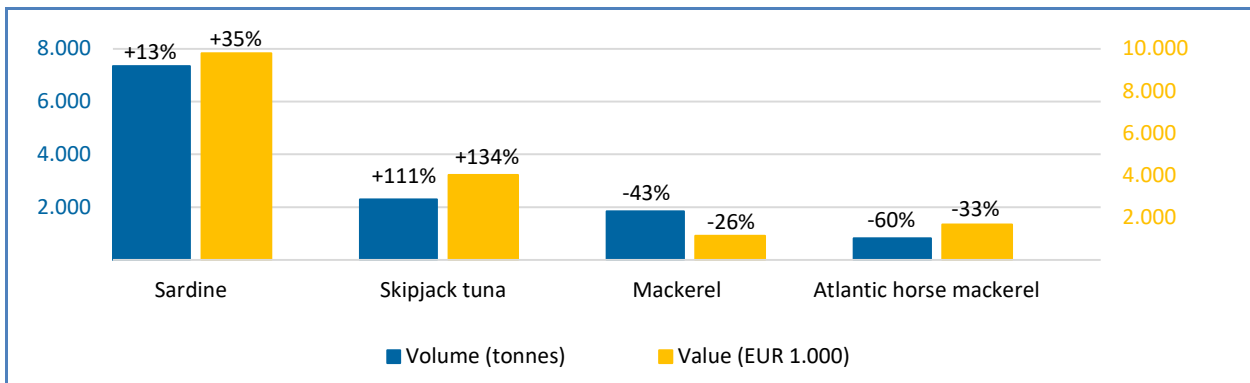


Percentages show change from the previous year.

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

 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 173,2 million, +9%	55.742 tonnes, -1%	Value: sardine, anchovy, octopus. Volume: mackerel, Atlantic horse mackerel, scabbardfish.
Jul 2025 vs Jul 2024	EUR 36,4 million, +16%	15.708 tonnes, -3%	Value: sardine, skipjack tuna. Volume: mackerel, Atlantic horse mackerel.

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

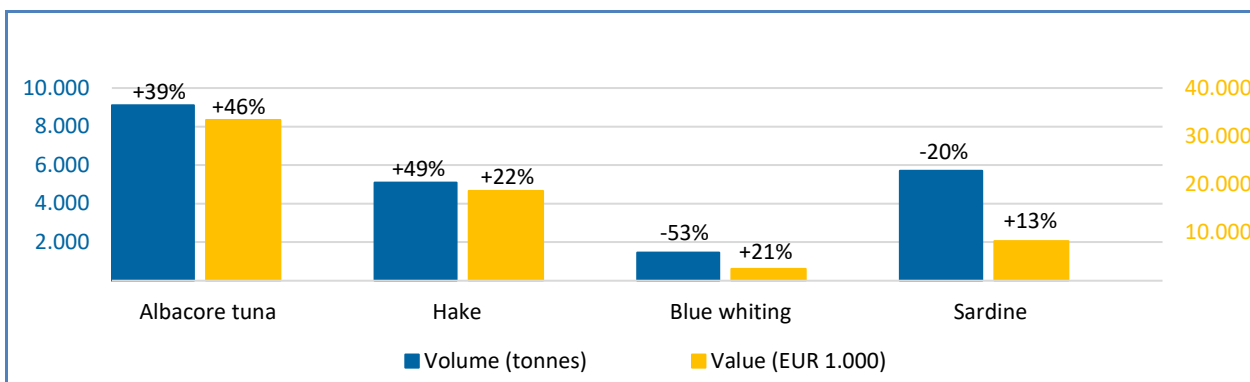


Percentages show change from the previous year.

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

 Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 861,2 million, +1%	230.095 tonnes, -9%	Value: albacore tuna, mackerel, cod. Volume: anchovy, skipjack tuna, yellowfish tuna, blue whiting, squid.
Jul 2025 vs Jul 2024	EUR 149,0 million, +6%	39.295 tonnes, -9%	Value: albacore tuna, hake, cod. Volume: blue whiting, sardine, anchovy.

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

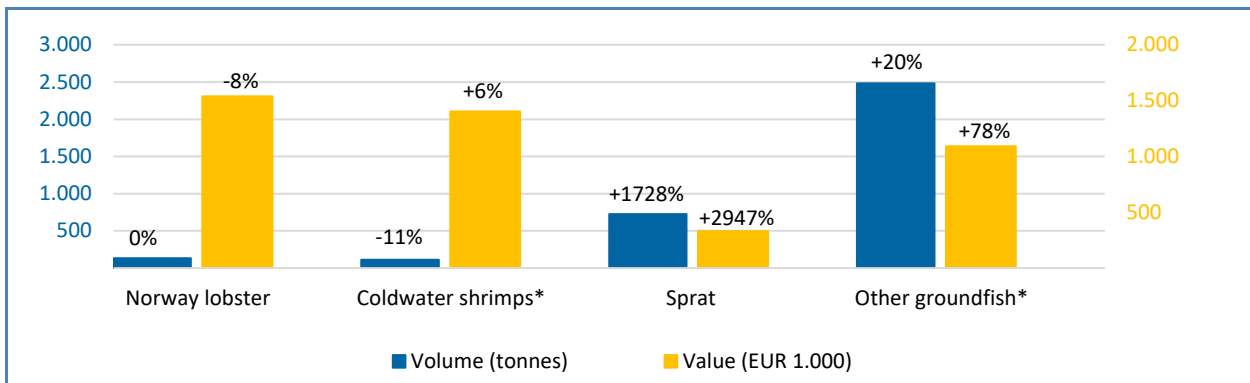


Percentages show change from the previous year.

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

 Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 42,6 million, -17%	54.570 tonnes, -28%	Sprat, herring, coldwater shrimps*.
Jul 2025 vs Jul 2024	EUR 5,1 million, 0%	3.937 tonnes, +9%	Value: Norway lobster, coldwater shrimps. Volume: sprat, other groundfish*.

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

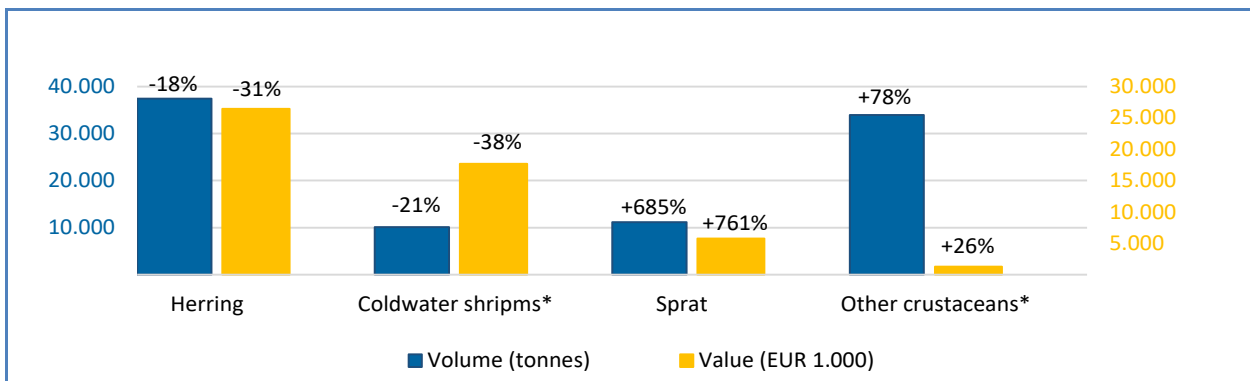


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2025 vs Jan-Jul 2024	EUR 1,9 billion, +12%	1.663.277 tonnes, -5%	Value: cod, haddock, saithe. Volume: miscellaneous small pelagics*, cod, saithe.
Jul 2025 vs Jul 2024	EUR 144,2 million -11%	154.532 tonnes, +3%	Value: herring, coldwater shrimps*. Volume: other crustaceans*, sprat.

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

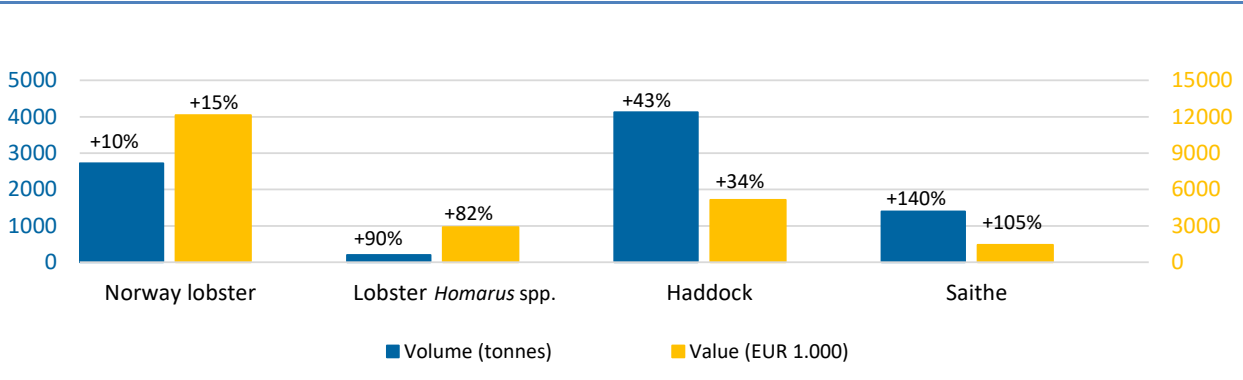


Percentages show change from the previous year. *EUMOFA aggregation for species.

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-Jul 2025 vs Jan-Jul 2024	EUR 394,2 million, +12%	184.048 tonnes, +2%	Norway lobster, saithe, cod, ling.
Jul 2025 vs Jul 2024	EUR 47,4 million +19%	20.784 tonnes, +9%	Norway lobster, lobster <i>Homarus</i> spp., haddock, saithe.

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



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

In January to July 2025, extra-EU imports in the EU-27 increased in value by 8% compared to the same period in 2024, while volume increased by 13%. Those MCSs contributing most to the increase in import values were warmwater shrimp (+29%) and cod (+13%), while salmon (+13%) and blue whiting (+21%) contributed most to the increase in volume.

Increases in value and volume: Belgium, Bulgaria, Croatia, Cyprus, Czechia, Estonia, France, Germany, Greece, Ireland, Italy, the Netherlands, Poland, 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 Croatia, driven by an increase in bluefin tuna and squid (+110% and +46%), and in volume recorded in Bulgaria, driven by mackerel (+47%)

Decreases in value and volume: Austria, Lithuania, Latvia, Slovakia and Slovenia recorded decreases in extra-EU imports in value and volume. Lithuania had the most significant decline in absolute terms in value due primarily to a decrease in herring and caviar, liver and roe (-11% and -33%), and in volume due to the decline in cod and salmon (-75% and -43%).

Table 34. **JANUARY - JULY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS**
(volume in tonnes and value in million EUR)²²

Country	January - July 2024			January - July 2025			Change from January - July 2024		
	Volume	Value	Price	Volume	Value	Price	Volume	Value	Price
Austria	7.118	43,68	6,14	5.949	40,17	6,75	-16%	-8%	10%
Belgium	74.854	456,45	6,10	90.604	571,58	6,31	21%	25%	3%
Bulgaria	6.497	17,52	2,70	8.065	23,69	2,94	24%	35%	9%
Croatia	5.102	22,29	4,37	9.961	26,66	2,68	95%	20%	-39%
Cyprus	4.221	26,63	6,31	4.846	29,46	6,08	15%	11%	-4%
Czechia	7.990	37,37	4,68	8.785	41,20	4,69	10%	10%	0%
Denmark	499.778	1820,35	3,64	574.694	1770,48	3,08	15%	-3%	-15%
Estonia	5.518	30,73	5,57	6.678	34,09	5,10	21%	11%	-8%
Finland	20.887	150,70	7,22	23.527	150,96	6,42	13%	0%	-11%
France	329.040	1813,56	5,51	348.073	1831,61	5,26	6%	1%	-5%
Germany	188.458	870,65	4,62	253.743	1073,07	4,23	35%	23%	-8%
Greece	75.724	308,75	4,08	89.301	360,23	4,03	18%	17%	-1%
Hungary	1.545	6,20	4,01	1.510	6,70	4,44	-2%	8%	11%
Ireland	112.893	127,79	1,13	175.440	153,41	0,87	55%	20%	-23%
Italy	271.568	1590,68	5,86	296.220	1766,16	5,96	9%	11%	2%
Latvia	16.736	36,74	2,20	12.727	36,51	2,87	-24%	-1%	31%
Lithuania	31.379	111,18	3,54	26.069	79,08	3,03	-17%	-29%	-14%
Luxembourg	11	0,31	29,12	8	0,37	48,58	-29%	18%	67%
Malta	3.439	13,20	3,84	6.055	17,14	2,83	76%	30%	-26%
Netherlands	396.713	2049,17	5,17	412.795	2264,77	5,49	4%	11%	6%
Poland	133.533	573,71	4,30	141.306	623,00	4,41	6%	9%	3%
Portugal	93.434	403,01	4,31	113.864	537,36	4,72	22%	33%	9%

²² 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	12.347	53,43	4,33	14.147	63,81	4,51	15%	19%	4%
Slovakia	3.131	9,84	3,14	2.729	8,97	3,28	-13%	-9%	4%
Slovenia	4.513	18,67	4,14	4.273	18,18	4,25	-5%	-3%	3%
Spain	682.709	3199,71	4,69	748.126	3642,80	4,87	10%	14%	4%
Sweden	364.868	2943,72	8,07	409.563	2905,48	7,09	12%	-1%	-12%
EU-27	3.354.004	16736,06	4,99	3.789.057	18076,94	4,77	13%	8%	-4%

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: Bivalves, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, other marine fish, small pelagics 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 (+42% and +28%) and clam (+19% and +26%) driving the increase.

Decreases in value: Only the commodity group salmonids experienced a decline in extra-EU import value where the largest decline in value was due to the decline in salmon (-7%).

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

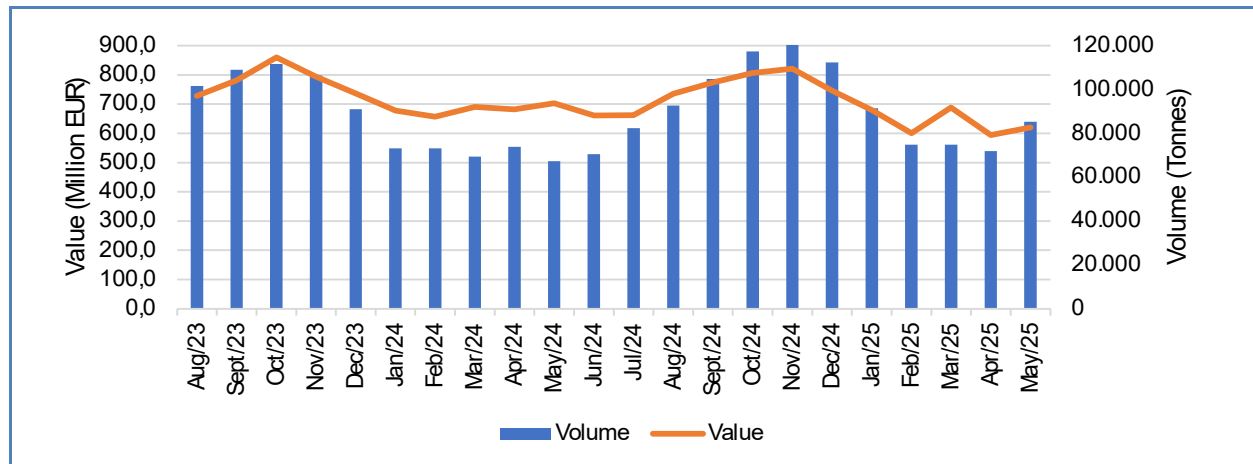
Commodity group	January - July 2024			January - July 2025			Change from January - July 2024			MCS
	Value	Volume	Price	Value	Volume	Price	Value	Volume	Price	
Bivalves	363,2	77.269	4,70	426,1	94.333	4,52	17%	22%	-4%	Other mussel, clam.
Cephalopods	1.713,1	312.121	5,49	2.046,4	331.965	6,16	19%	6%	12%	Other cephalopods, octopus.
Crustaceans	2.390,8	356.278	6,71	2.747,5	395.170	6,95	15%	11%	4%	Warmwater shrimp, miscellaneous shrimp.
Flatfish	259,4	49.938	5,20	277,5	53.676	5,17	7%	7%	-1%	Greenland halibut, other flatfish.
Freshwater fish	313,3	78.425	4,00	354,4	89.264	3,97	13%	14%	-1%	Tilapia, freshwater catfish.
Groundfish	2.574,1	659.319	3,90	2.931,8	713.531	4,11	14%	8%	5%	Alaska pollock, cod.
Other marine fish	1.018,8	179.183	5,69	1.110,3	182.571	6,08	9%	2%	7%	Other marine fish, monk.
Salmonids	4.732,8	529.262	8,94	4.428,6	590.824	7,50	-6%	12%	-16%	Salmon, other salmonids.
Small pelagics	558,8	224.693	2,49	604,5	234.992	2,57	8%	5%	3%	Herring, mackerel.
Tuna and tuna-like species	1.877,2	395.118	4,75	2.114,0	449.362	4,70	13%	14%	-1%	Skipjack tuna, miscellaneous tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of salmonids in EU Member States

In January – July 2025, extra-EU imports of salmonids accounted for a total value of EUR 4,4 million and total volume of 563.714 tonnes. Compared to the same period in 2024 the value of salmonids decreased by 6% in value and increased by 11% in volume.

Figure 34. **EXTRA-EU IMPORT VALUE AND VOLUME OF SALMONIDS, AUG 2023 – JUL 2025 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

Extra-EU salmonid imports peak between October and November, both in terms of value and volume, driven by the approaching Christmas season, with higher volumes supplying both the fresh and smoked salmon markets.

In the period between January and July 2025, Sweden, Denmark and the Netherlands were the main importers of salmonids in the EU and together imported from extra-EU countries about 74% of the total volume of salmonids, Sweden (53%), Denmark (16%) and the Netherlands (8%) respectively.

Table 36. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR SALMONIDS**

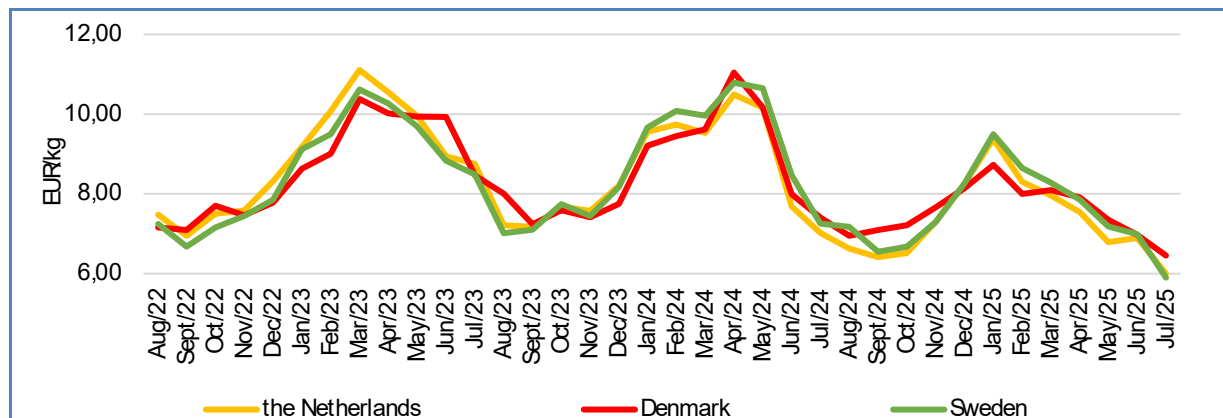
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan-Jun 2024	Jan-Jun 2025	Trend (%)	Jan-Jun 2024	Jan-Jun 2025	Trend (%)	
Sweden	2.453,1	2.366,2	-4%	261.947	312.272	19%	Salmon
Denmark	863,2	703,2	-19%	95.459	94.173	-1%	Salmon
The Netherlands	326,8	341,2	4%	36.022	44.737	24%	Salmon



4.2. Extra EU imports of salmon in EU Member States

In terms of value salmon is the main commercial species of the commodity group “salmonids”, representing 96% of the total volume, followed by trout with 4%. The price analysis below focuses on the main EU importers of salmon from non-EU countries, namely Sweden, Denmark and the Netherlands.

Figure 35. EXTRA-EU IMPORT PRICE OF SALMON IN SWEDEN, DENMARK AND THE NETHERLANDS (AUG 2022 – JUL 2025)



Between August 2022 and July 2025, the price of salmon fluctuated and decreased in the three countries analysed: Denmark (-7%), the Netherlands (-3%), and Sweden (-7%). Between January and July 2025, the volume of salmon imported by Denmark was 92.800 tonnes, 1% less compared with the same period in 2024, while the price decreased by 6%. In terms of volume, imports came from Norway (74%), followed by Faroe Islands (22%).

In the same period, 43.283 tonnes of salmon were imported to the Netherlands, 24% more compared to 2024, with a price decrease of 17% compared to 2024. In terms of volume almost 43% of the total imported salmon in 2025 was from Norway, 17% from Iceland and 23% from the Faroe Islands. Sweden is one of the main entry points in the EU of salmon and in 2025 304.701 tonnes entered the country, of which almost 100% came from Norway. In 2025, import volumes increased by 19% while prices decreased by 19%.

The three countries analysed display similar seasonal patterns, with import volumes peaking between September and October, while price peaks are observed between January and April.

Figure 36. EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SALMON IN DENMARK, AUG 2022 – JUL 2025 (volume in tonnes, price in EUR/kg)

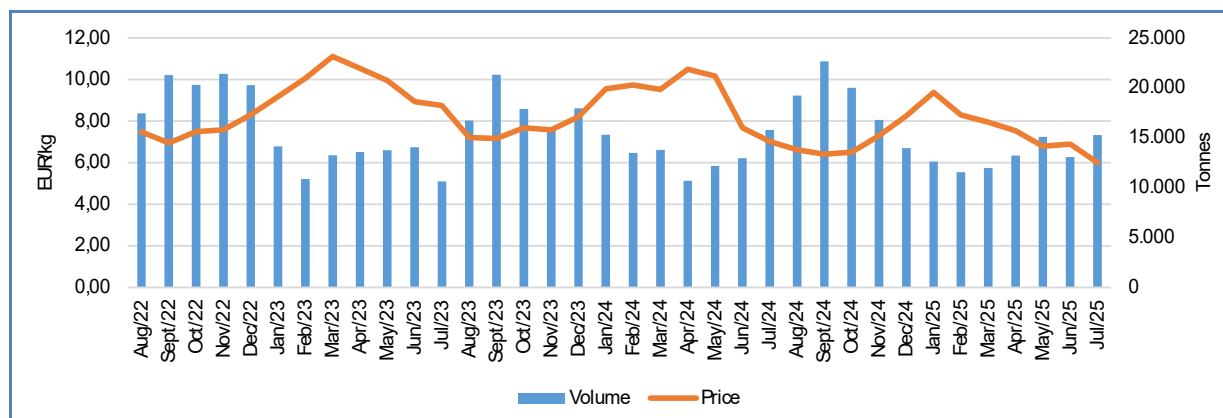




Figure 37. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SALMON IN THE NETHERLANDS, AUG 2022 – JUL 2025 (volume in tonnes and price in EUR/kg)**

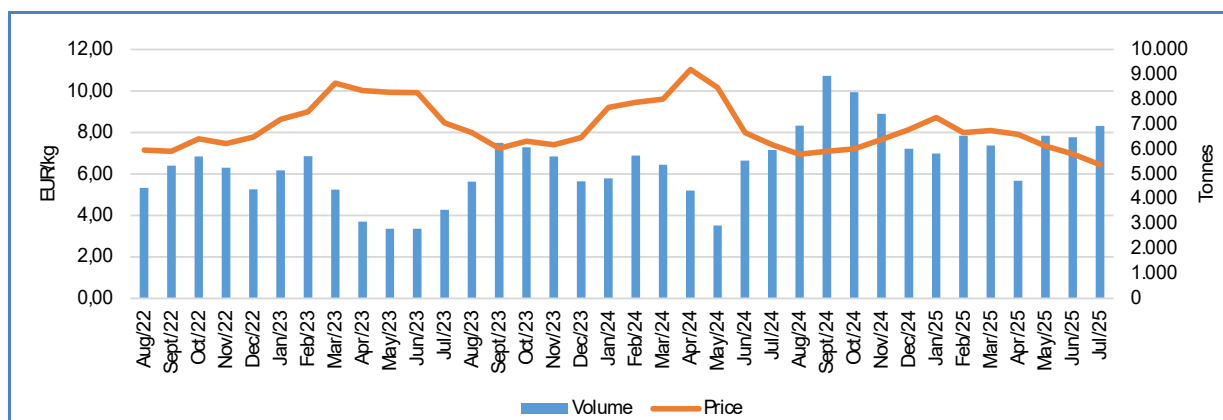
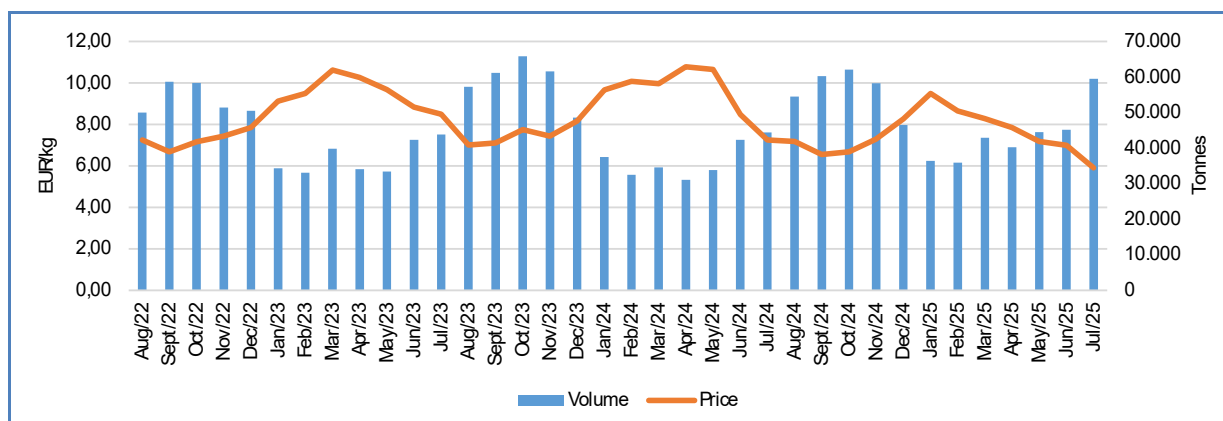


Figure 38. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SALMON IN SWEDEN, AUG 2022 – JUL 2025 (volume in tonnes and price in EUR/kg)**



4.3. Extra EU imports of salmon by origin

Between 2025 and 2024 in the period January - July, EU imports of salmon²³ experienced an increasing trend in volume (+12%) and a decrease in value (-7%). In 2025 the EU imported 569.103 tonnes of salmon at a value of EUR 4,3 million. The main extra-EU countries supplying salmon to the EU in 2025 were Norway (79%), followed by the United Kingdom (7%) and the Faroe Islands (5%). An increase in imports of salmon from the extra-EU countries Norway, the Faroe Islands and Iceland was observed in 2025 compared to the same period in 2024, while imports decreased from the United Kingdom (-4%), Chile (-31%) and China (-16%).

Table 37. EXTRA-EU IMPORTS OF SALMON BY ORIGIN IN 2025 (value in million EUR and volume in tonnes)

Country	Jan – Jul 2023		Jan – Jul 2024		Jan – Jul 2025		Jan – Jul 2024/2025	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Norway	3.694,7	395.191	3.575,2	388.578	3.368,4	450.862	-6%	16%
United Kingdom	312,0	32.197	390,4	40.406	299,5	38.893	-23%	-4%
Faroe Islands	197,3	16.203	250,5	24.210	252,4	31.238	1%	29%
Iceland	84,9	9.931	110,2	12.378	121,8	16.353	11%	32%
Others	284,8	33.657	265,2	41.336	242,1	31.757	-9%	-23%
Total	4.573,6	487.178	4.591,4	506.908	4.284,2	569.103	-7%	12%

²³ 03019911 - Live Pacific salmon "*Oncorhynchus nerka*, *Oncorhynchus gorbuscha*, *Oncorhynchus keta*, *Oncorhynchus tshawytscha*, *Oncorhynchus kisutch*, *Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"

03021300 - Fresh or chilled Pacific salmon "*Oncorhynchus nerka*, *Oncorhynchus gorbuscha*, *Oncorhynchus keta*, *Oncorhynchus tshawytscha*, *Oncorhynchus kisutch*, *Oncorhynchus masou* and *Oncorhynchus rhodurus*"

03021400 - Fresh or chilled Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"

03031100 - Frozen sockeye salmon [red salmon] "*Oncorhynchus nerka*"

03031200 - Frozen Pacific salmon (excl. sockeye salmon "red salmon")

03031300 - Frozen, Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"

03031900 - Frozen salmonidae (excl. trout and Pacific, Atlantic and Danube salmon)

03044100 - Fresh or chilled fillets of Pacific salmon "*Oncorhynchus nerka*, *Oncorhynchus gorbuscha*, *Oncorhynchus keta*, *Oncorhynchus tshawytscha*, *Oncorhynchus kisutch*, *Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"

03048100 - Frozen fillets of Pacific salmon "*Oncorhynchus nerka*, *Oncorhynchus gorbuscha*, *Oncorhynchus keta*, *Oncorhynchus tshawytscha*, *Oncorhynchus kisutch*, *Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"

03053910 - Fillets of Pacific salmon "*Oncorhynchus nerka*, *Oncorhynchus gorbuscha*, *Oncorhynchus keta*, *Oncorhynchus tshawytscha*, *Oncorhynchus kisutch*, *Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*", salted or in brine, but not smoked

03054100 - Smoked Pacific salmon "*Oncorhynchus nerka*, *Oncorhynchus gorbuscha*, *Oncorhynchus keta*, *Oncorhynchus tshawytscha*, *Oncorhynchus kisutch*, *Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*", incl. fillets (excl. offal)

03056950 - Pacific salmon "*Oncorhynchus nerka*, *Oncorhynchus gorbuscha*, *Oncorhynchus keta*, *Oncorhynchus tshawytscha*, *Oncorhynchus kisutch*, *Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*", only salted or in brine (excl. fillets and offal)

16041100 - Prepared or preserved salmon, whole or in pieces (excl. minced)

16042010 - Prepared or preserved salmon (excl. whole or in pieces)

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel.²⁴ They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

Compared with July 2024, household consumption of fresh fishery and aquaculture products in July 2025 increased in both volume and value in Germany, Ireland, Italy, the Netherlands and Poland. In contrast, Denmark, France, Hungary, Portugal and Spain recorded decreases in both value and volume. Swedish consumption decreased in volume (-1%) but increased in value (+4%).

The most notable increase was in Germany and Ireland, where consumption increased in volume by 20% and 16% respectively and in value by 14% and 23% respectively compared to 2024. France and Hungary recorded the highest decreases in both volume (-10% and 17% respectively) and value (-7% and 3% respectively).

Table 38. 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	July 2023		July 2024		July 2025		Change from July 2024 to July 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	885	18,06	998	19,31	926	18,85	-7%	-2%
France	32,58	13.978	182,38	15.287	196,38	13.781	183,16	-10%	-7%
Germany	12,49	4.394	79,78	3.834	71,04	4.585	80,68	20%	14%
Hungary	6,73	145	1,34	270	2,16	223	2,10	-17%	-3%
Ireland*	20,00	1.023	18,44	813	14,66	946	17,97	16%	23%
Italy	30,01	17.876	213,62	17.244	211,07	17.504	231,89	2%	10%
Netherlands*	18,88	2.866	51,19	2.469	44,98	2.668	46,43	8%	3%
Poland	13,68	2.531	27,08	2.725	32,29	2.761	34,83	1%	8%
Portugal	54,54	5.635	41,54	4.897	39,10	4.687	38,49	-4%	-2%
Spain	41,92	39.665	390,90	38.955	391,67	36.633	383,32	-6%	-2%
Sweden	22,46	504	8,42	596	9,36	618	9,27	4%	-1%

*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.

²⁴ Last update: 15. 09.2025.

5. 2. Overview of household consumption²⁵ of salmonids consumed in the EU

In the household consumption data used by EUMOFA, consumption of fresh salmonids is monitored in ten²⁶ Member States of which France, Germany, Italy, Poland and Spain are the main consumers. At species level, salmon consumption is monitored in ten Member States²⁶, and trout is monitored in Denmark, France, Germany, Netherlands and Poland. Other salmonids are monitored in Sweden.

Figure 39. **HOUSEHOLD PURCHASES (in value) OF FRESH SALMONIDS SPECIES IN FRANCE, GERMANY, ITALY, POLAND AND SPAIN AUG 2022 – JUL 2025**

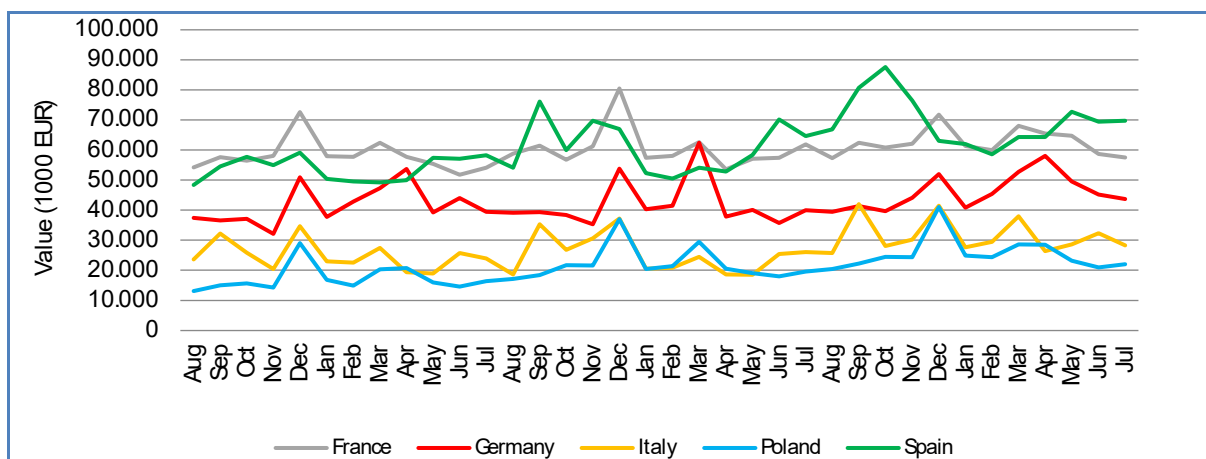
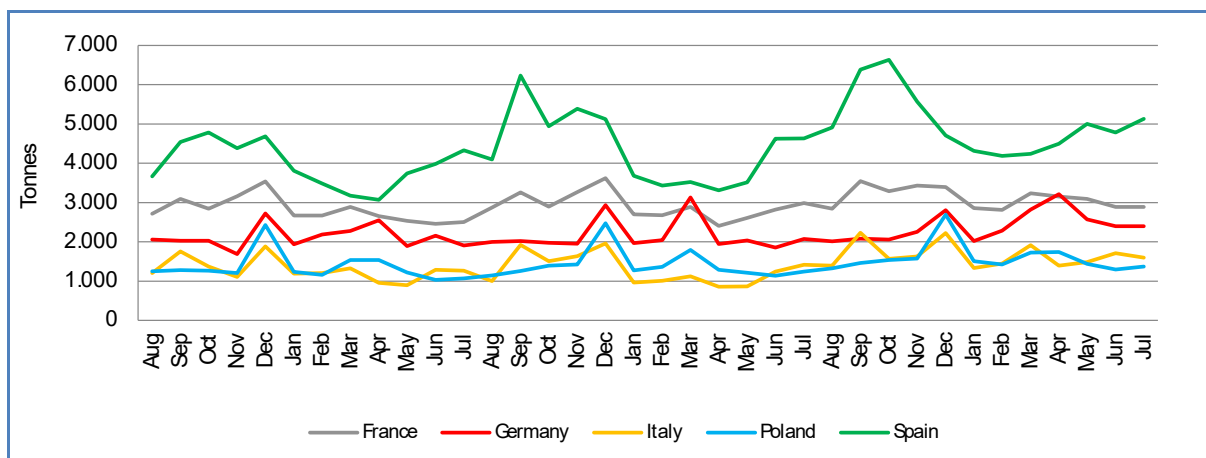


Figure 40. **HOUSEHOLD PURCHASES (in volume) OF FRESH SALMONIDS SPECIES IN FRANCE, GERMANY, ITALY, POLAND, AND SPAIN AUG 2022 – JUL 2025**



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

²⁶ Denmark, France, Germany, Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden.

5. 3. Household consumption trends of fresh salmon - the main species of salmonid species in reporting countries

Long-term trend (Aug 2022 to Jul 2025): Upward trend in volume and slightly downward trend in price.

Yearly average retail price (Jan – Jul): 19,19 EUR/kg (2023), 19,31EUR/kg (2024), 18,50 EUR/kg (2025)

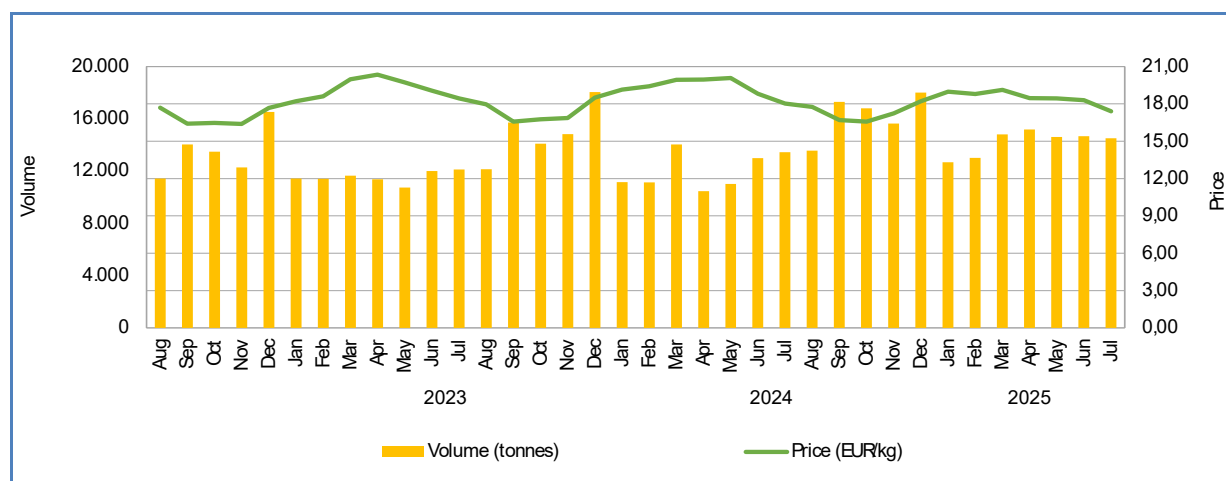
Yearly consumption (Jan – Jul): 80.749 tonnes (2023), 84.246 tonnes (2024), 99.471 tonnes (2025)

Short-term trend (Aug 2024 to Jul 2025): Slightly downward trend in price and upward trend in volume.

Average retail price (Aug 2024 to Jul 2025): 17,96 EUR/kg.

Consumption (Aug 2024 to Jul 2025): 180.806 tonnes.

Figure 41. **RETAIL PRICE AND VOLUME OF FRESH SALMON PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, AUG 2022 – JUL 2025**



Consumption of salmon in the reporting countries shows a seasonal fluctuation with a peak in September and December. Prices showed higher peaks between March and May, while they decreased between September and November. Between August 2022 and July 2025, consumption volumes showed a slight upward trend, and prices showed a slightly decreasing trend over the same period.

6. CASE STUDY: Fisheries and Aquaculture in Thailand

Thailand, in Southeast Asia, shares borders with Myanmar (northwest), Laos (northeast), Cambodia (southeast), and Malaysia (south), with coastlines on the Andaman Sea (west) and the Gulf of Thailand (south and east). Thailand's exclusive economic zone (EEZ) covers around 300.000 km², and its coastline extends over 7.000 km.

The country's rich marine and inland water resources make the fishery and aquaculture sector vital to national food security, employment and export revenue. Marine fisheries are conducted in both inshore and offshore waters, while aquaculture includes freshwater and brackish water farming systems. Thailand exports a wide variety of fishery and aquaculture products such as frozen and chilled fish, canned tuna, shrimp, sardine and value-added seafood. Its main export destinations include regional markets (China, Japan, South Korea, Taiwan and Malaysia) and high-demand countries such as the USA, Canada, the United Arab Emirates and Australia.²⁷

6. 1. Fisheries and aquaculture in Thailand

In 2023, Thailand's total aquatic food production was approximately 2,5 million tonnes, with fisheries contributing around 1.5 million tonnes and aquaculture accounting for over 1 million tonnes. Fisheries, from both marine and inland sources, have shown signs of stagnation in recent years. Between 1995 to 2015 marine fisheries volumes dropped from 2,8 million tonnes to above 1,3 million tonnes a year. The decline was largely due to overfishing, unreported and unregulated fishing and to restricted access to foreign fishing waters.²⁸ In 2015, stricter regulations were introduced after the European Union (EU) issued a "yellow card"²⁹ to Thailand – an expression of concern about illegal, unreported and unregulated (IUU) fishing that can lead to a ban on selling fish to the Europe Union. This pushed Thailand to undertake significant reforms. Between 2015 and 2018, the authorities prosecuted more than 4.200 IUU cases and issued fines of over THB 100 million (USD 2,7 million) to domestic vessels and boats from overseas. Several measures to improve human rights were also brought in. This was done to eliminate trafficking, child labour, forced labour and unacceptable forms of work in the sector which has been part of the illegal commercial fishing and seafood processing industry in Thailand. After actions were taken to eliminate the violation of human rights, the EU lifted its yellow card in 2019.³⁰

In the years after 2015, marine catches have been relatively stable reaching 1,35 million tonnes in 2023 which is in line with the 9- year average and a 3% growth compared to 2015. Inland fisheries remained relatively stable over the period from 2019 to 2023. However, between 2015 and 2023, inland fisheries decreased by 38%. Over the period 2015-2023, total fisheries (marine + inland) decreased by 2% to around 1,47 million tonnes.

Aquaculture in Thailand takes place in freshwater, brackish water and coastal (marine) environment. In the period from 2015 to 2023, aquaculture in freshwater grew by 12% reaching 460.000 tonnes. Aquaculture from brackish water increased by 43% to 452.000 tonnes, while aquaculture from the marine environment decreased by 54% to 90.000 tonnes. Over the 2015-2023 period, total aquaculture production increased by 9% to around 1 million tonnes.

The fishery and aquaculture sector provides direct employment to over 350.000 people in Thailand, with many more involved in supporting activities such as, logistics, and marketing.³¹

The Department of Fisheries (DOF) under the Ministry of Agriculture and Cooperatives is the main organisation responsible for the sector's management. This includes quality improvement of aquaculture, freshwater and marine fishery products according to Thailand and international standards. DOF is responsible for the monitoring, control and surveillance of fishing activities to prevent illegal, unreported and unregulated (IUU) fishing in coordination with the Thai Maritime Enforcement Command Center (Thai-MECC), Marine Department, Royal Thai Navy, Marine Police Division, and Department of Labor.³²

²⁷ FSEAFDEC, <https://www.seafdec.org/fisheries-country-profile-thailand/>

²⁸ Evolution of Fish and Shellfish Supplies Originating from Wild Fisheries in Thailand Between 1995 and 2015

²⁹ It signals that the country's fisheries governance and enforcement systems are **not meeting EU standards**. When the EU Commission has evidence that a third country does not cooperate fully in the fight against IUU fishing, it will issue a **yellow card**.

³⁰ After a Decade of Progress, Thailand is Rolling Back Fishery Regulations

³¹ International Labour Organization; [wcms_738042.pdf](#)

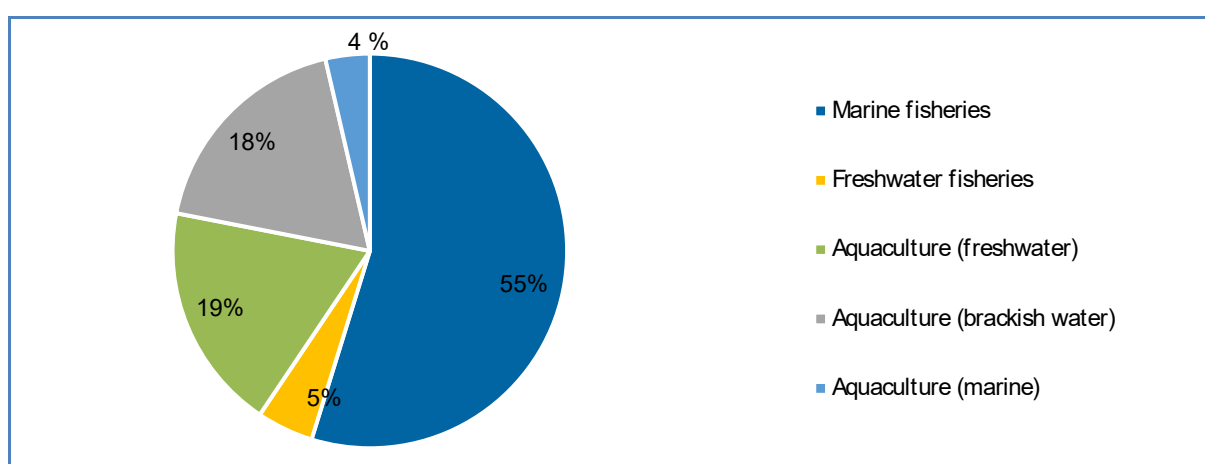
³² FSEAFDEC, <https://www.seafdec.org/fisheries-country-profile-thailand/>

Table 39. **TOTAL FISHERY AND AQUACULTURE PRODUCTION OF THAILAND IN VOLUME (volume in 1.000 tonnes)**

Environment/fishing area	2015	2016	2017	2018	2019	2020	2021	2022	2023
Marine fisheries	1.318	1.343	1.300	1.393	1.411	1.472	1.300	1.280	1.352
Freshwater fisheries	184	189	193	144	116	117	115	106	115
Aquaculture (freshwater)	412	418	413	426	427	455	451	467	460
Aquaculture (brackish water)	315	348	383	417	447	438	441	445	452
Aquaculture (marine)	194	197	98	78	89	119	99	89	90
Total fisheries and aquaculture	2.423	2.496	2.388	2.458	2.490	2.600	2.405	2.387	2.467

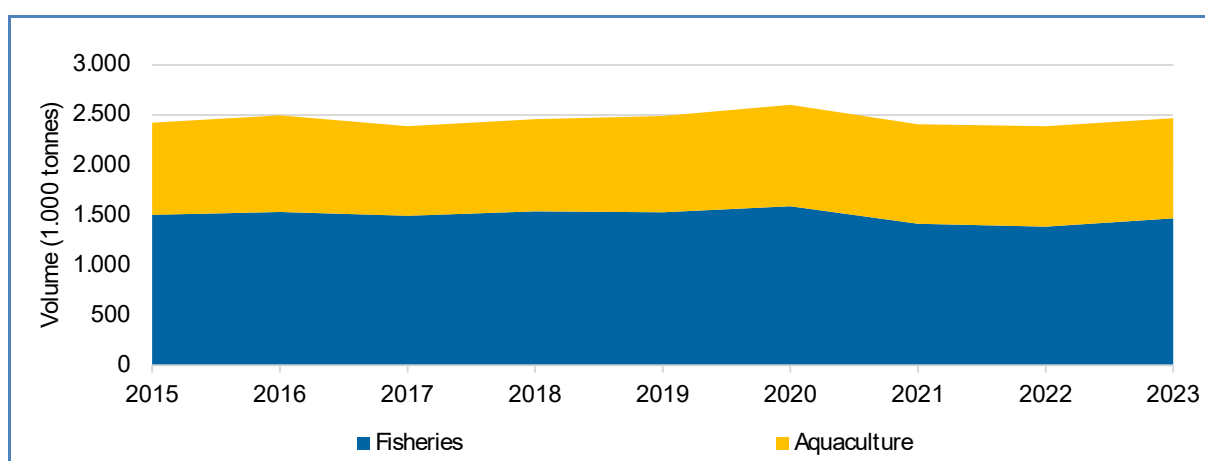
Source: FAO.

Figure 42. **TOTAL FISHERY PRODUCTION IN THAILAND 2023 BY PRODUCTION AREA**



Source: FAO.

Figure 43. **TOTAL FISHERY AND AQUACULTURE PRODUCTION IN THAILAND (volume in 1.000 tonnes)**



Source: FAO.

Fisheries production

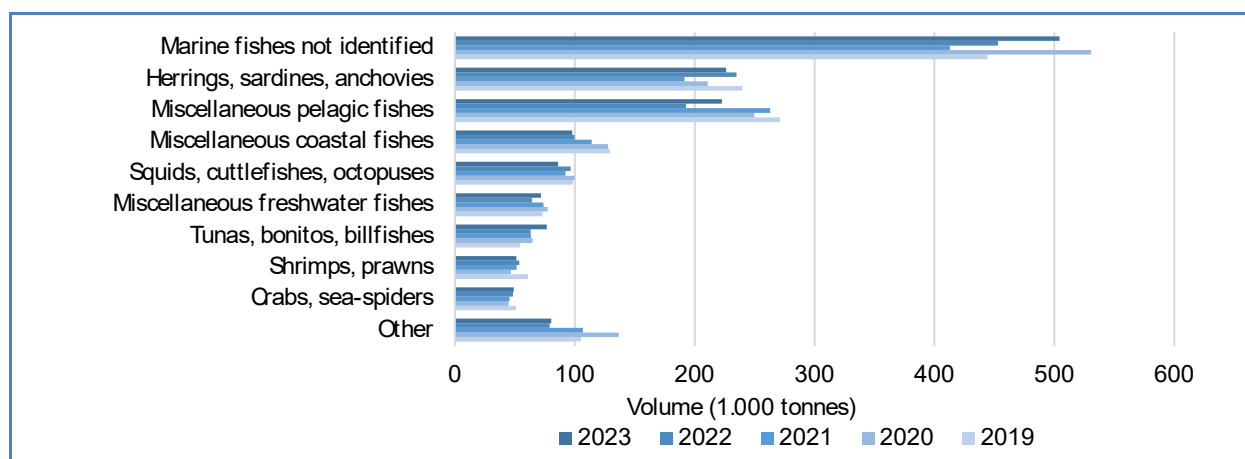
Thailand's fisheries sector is categorised into commercial and artisanal based on the size of the fishing vessels and the location of the fishing grounds. Commercial fisheries refer to larger vessels (larger than 10 GT³³) operating in offshore areas while artisanal fisheries refer to smaller vessels (less than 10GT) operating in coastal areas and where catches are sold locally or consumed in local households³⁴.

Data available in the FAO database regarding fishery in Thailand contains a large group under the category marine fishes not identified which reached above 500.000 tonnes in 2023, an 11% increase from 2022 and a 14% increase compared to 2019. It is difficult to identify the species within this group, but it is fresh fish for human consumption. It could include small pelagics like anchovies and sardines, different demersal species, it could also be bycatch species from trawl fisheries. Over time this group has decreased. Back in 2000 it was nearly 1 million tonnes a year.

In 2023, the marine fishes not identified made up around 34% of the capture fisheries. Herring, sardines and anchovies comprised the second largest group accounting for 15% of the fisheries in 2023.

The third largest group Miscellaneous pelagic fishes, mostly comprising Indian mackerels and scads, made up around 15% of the fisheries in 2023. Miscellaneous coastal fish catches reached 98.000 tonnes in 2023, a 2% decrease compared to 2022, and a 24% decrease compared to 2019. The most important species are threadfin breams, lizardfishes and bigeyes, nei³⁵. Catches of squid, cuttlefish and octopus decreased by 11% in 2023 from the year before and catches were also 13% below catches in 2019. The Miscellaneous freshwater fish catch showed a 12% increase from 2022 to 2023 but has nevertheless been relatively stable since 2019. In addition to unidentified freshwater species this group contains catches of striped snakehead, torpedo-shaped catfishes, pangas catfish and climbing perch. Catches of tuna, bonito and billfish increased by 21% from 2022 to 2023 and by 41% from 2019. Longtail tuna, Kawakawa and Seer fishes are the most common species. Shrimp and prawn catches decreased by 4% in 2023 from the year before and by 16% from 2019. Crabs and sea-spiders catches increased by 1% in 2023 from the year before and decreased by 4% compared to 2019. Other species increased by 2% from 2022 to 2023 and decreased by 24% compared to 2019.

Figure 44. THAILAND FISHERIES BY SPECIES GROUP BY VOLUME (2019 – 2023)



Source: FAO.

Aquaculture production

In Thailand, aquaculture is conducted across freshwater, brackish water and marine environments, and plays a key role in meeting domestic fish demand and supporting export markets. The sector is supported by a combination of government policy, private investment, and an abundance of natural conditions suited for farming a wide range of aquatic species.

Thailand is one of the world's largest aquaculture producers with annual production now around 1 million tonnes. Nearly 40 different species are farmed in Thailand, including whiteleg shrimp, Nile tilapia, giant river prawn, barramundi and giant tiger prawn as the five largest in terms of value. In 2023, farmed species totalled around 1 million tonnes worth EUR 2,6 billion, which was close to the same volumes as in 2022 but a 7% decrease in terms of value.

³³ GT: Gross tonnage, a measure of the internal volume in ships

³⁴ FSEAFDEC, <https://www.seafdec.org/fisheries-country-profile-thailand/>

³⁵ Not elsewhere included

Whiteleg shrimp accounts for a significant portion of total aquaculture production in Thailand accounting for 37% of the production volume and 53% of the value in 2023. Nile tilapia, the second largest species, accounted for 27% of the volume and 13% of the value.

Whiteleg shrimp farming in Thailand was severely hit by a disease outbreak in 2012 which sharply reduced volumes in the following years from above 600.000 tonnes in 2011 to around 263.000 tonnes at its lowest in 2014. The industry has recovered but whiteleg shrimp volumes are still far from the levels seen in 2011.³⁶ Despite challenges of disease, Thailand is the sixth largest global producer of whiteleg shrimp after China, Ecuador, India, Vietnam and Indonesia (FAO2023). Thailand's fish production is projected to reach approximately 1,1 million metric tonnes by 2028, up from around 1 million metric tonnes in 2023. This marks an average annual growth rate of 1%.³⁷

Table 40. **TOTAL AQUACULTURE PRODUCTION OF THAILAND BY VALUE AND VOLUME (volume in 1.000 tonnes, value in million EUR)**

Species	2019		2020		2021		2022		2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Whiteleg shrimp	379	1.643	374	1.549	371	1.448	369	1.594	370	1.388
Nile tilapia	229	329	247	328	253	310	269	342	266	338
Giant river prawn	32	198	41	210	43	198	45	229	42	209
Barramundi (=Giant seaperch)	47	153	45	128	48	133	52	164	55	146
Giant tiger prawn	18	129	15	92	17	102	20	123	22	137
Africa-bighead catfish, hybrid	97	129	100	124	96	116	94	117	91	116
Blood cockle	33	114	34	91	34	88	29	87	30	99
<i>Scylla</i> spp.	2	16	3	25	3	28	3	27	4	33
Silver barb	22	28	19	26	24	32	21	28	21	27
Freshwater fishes nei	13	17	15	18	6	13	5	10	7	17
Other	92	98	119	84	94	66	93	76	93	81
Total	963	2.852	1.012	2.675	991	2.534	1.001	2.799	1.001	2.590

Source: FAO.

6. 2. International trade

Export of fishery and aquaculture products from Thailand

In 2024, Thailand exported approximately 1,4 million tonnes of fishery and aquaculture products valued at EUR 5,2 billion. This represented an increase of 18% in volume and an increase of 8% in value compared to 2023. Major export products included tuna, shrimp and value-added seafood, primarily in frozen or processed form.

The USA became Thailand's largest destination by value in 2024, accounting for 198.159 tonnes, valued at over EUR 1 billion. This marked a 19% increase in volume and 7% increase in value from 2023. Japan imported nearly 152.000 tonnes valued at EUR 833 million, a 2% decrease in volume and a 9% decrease in value from 2023. Exports to China amounted to 212.300 tonnes valued at EUR 548 million, a 13% increase in volume and 5% decrease in value from 2023. Australia was the fourth largest destination amounting to 57.000 tonnes and EUR 285 million, followed by Canada with 41.000 tonnes and EUR 200 million.

In 2024, exports from Thailand to the European Union (EU) ranked sixth in terms of value and fifth in terms of volume. Exports were 44.000 tonnes of fishery and aquaculture products, valued at EUR 149 million. Key exports to the EU included cephalopods, tuna, different marine fish, shrimp and fish oil. While the EU accounts for a smaller share compared to the USA, Canada and regional partners, it remains a strategic market for high-value seafood products such as frozen fillets of tuna and marine fish, shrimps, and processed marine fish.

³⁶ https://www.seafoodwatch.org/globalassets/sfw-data-blocks/reports/s/mba_seafoodwatch_thaifarmedshrimpreport.pdf

³⁷ Thailand Aquaculture Industry Outlook 2024 - 2028

In March 2023, the EU and Thailand relaunched negotiations for a Free Trade Agreement (FTA) which were put on hold in 2014, following the military takeover in the country.³⁸ Negotiations have made great recently.³⁹

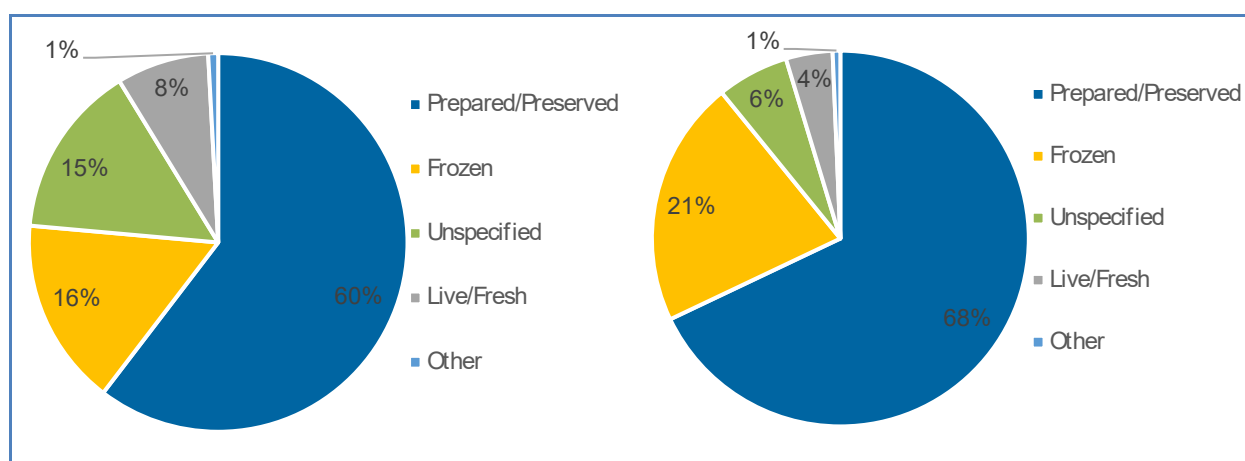
Table 41. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM THAILAND BY TRADE PARTNER (volume in 1000 tonnes, value in million EUR)**

Trade partner	2020		2021		2022		2023		2024	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
United States	230	1.210	188	1.011	197	1.191	167	970	198	1.040
Japan	168	889	161	853	166	1.005	155	911	152	833
China	176	399	150	401	149	467	187	574	212	548
Australia	57	254	51	227	60	312	50	260	57	285
Canada	39	183	35	169	37	211	30	163	41	200
EU 27	19	55	29	78	32	117	29	103	44	149
United Arab Emirates	34	106	20	63	34	134	35	138	41	147
Libya	40	123	25	77	27	112	33	131	37	138
Saudi Arabia	21	133	25	159	25	167	22	139	22	134
South Korea	15	52	12	42	19	81	16	66	31	121
Israel	45	199	38	182	39	219	30	171	39	198
Other	591	1.519	552	1.382	518	1.577	443	1.356	544	1.608
Total	1.390	4.924	1.247	4.461	1.263	5.373	1.166	4.813	1.379	5.204

Source: EUMOFA elaboration of Trade Data Monitor data.

The main export products by preservation state are prepared and preserved products accounting for 60% of export volumes and 68% of values in 2024. This is mainly canned tuna, shrimps and other marine fish. Exports of frozen seafood products accounted for 16% of volume and 21% of value, of which the main species were shrimp, cephalopods, yellowfin tuna, octopus, salmon and other marine fish. The unspecified group, accounting for 15% of the volume and 6% of the value is mainly fishmeal and fish oil. Exports of fresh products represented 8% of the volume and 4% of the value and comprises mainly shrimp and other marine fish.

Figure 45. **THAILAND EXPORTS BY PRESERVATION STATE VOLUME (left) AND VALUE (right) IN 2024**



Source: FAO.

³⁸ EU trade relations with Thailand

³⁹ <https://www.nationthailand.com/business/economy/40051879>

Imports of fishery and aquaculture products to Thailand

In 2024, Thailand imported approximately 2,4 million tonnes of fishery and aquaculture products, valued at EUR 4,2 billion. This represented a 9% increase in volume and a 1% increase in value compared to the previous year.

In terms of value, the largest supplier in 2024 was China, accounting for 288.000 tonnes and EUR 507 million, followed by Norway, Vietnam, India and South Korea. Together, these five countries provided more than 30% of the total import volume and nearly 40% of the value. China remained dominant in both volume and value, exporting mainly frozen marine fish and processed seafood products to Thailand.

Norway ranked second in terms of value, supplying high-value salmonids such as salmon and trout, amounting to 26.218 tonnes valued at EUR 258 million and mackerel amounting to 11.000 tonnes valued at EUR 26 million. Vietnam and India also remained significant trade partners, with Vietnam providing mainly freshwater catfish, tuna, cephalopods and different other marine fish (surimi, mackerel, anchovy) and India mainly supplying frozen squid, Indian mackerel and surimi.

The top six import species by value were skipjack tuna, other marine fish, cephalopods, salmon, miscellaneous tuna and yellowfin tuna together accounting for 76% of the volume and 72% of the value.

Table 42. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO THAILAND BY TRADE PARTNER** (volume in 1000 tonnes, value in million EUR)

Trade partner	2020		2021		2022		2023		2024	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
China	293	450	295	394	322	523	301	453	288	507
Norway	37	171	45	237	52	352	50	296	52	312
Vietnam	117	231	137	246	155	356	123	270	131	272
India	58	138	100	238	159	352	171	329	126	268
South Korea	108	165	101	141	96	181	101	216	140	267
Taiwan	171	252	150	203	138	243	125	239	161	253
Japan	127	204	132	180	136	196	94	182	125	211
Indonesia	98	188	50	113	54	159	53	144	76	192
Myanmar	290	188	264	169	241	153	227	158	277	190
United States	206	246	142	189	75	225	80	188	100	190
Other	993	1.424	1.007	1.519	948	1.866	845	1.697	898	1.540
Total	2.498	3.658	2.422	3.630	2.377	4.606	2.169	4.172	2.375	4.202

Source: EUMOFA elaboration of Trade Data Monitor data.

6. 3. Thailand's fish processing industry

Thailand is one of the largest producers and exporters of processed seafood. The processing industry can be divided into canning, chilled/frozen and prepared/preserved, of which 66% of the production is exported and 34% goes for domestic consumption (2023). Thai consumers prefer fresh seafood, except for canned sardines and frozen fish, which are for domestic consumption and used in food services. Thailand is one of the major production bases for canned tuna and produces approximately 600.000 tonnes of canned tuna per year of which around 90% is exported⁴⁰. The leading canned tuna producers e.g., Thai Union and Sea Value, produce many leading global canned tuna brands⁴¹. A large share of the raw material for the tuna processing industry is imported. In 2024 tuna imports amounted to 900.000 tonnes. Shrimp is another main species most of which is sourced from the domestic aquaculture industry, processed and exported.

There are 527 fish processing factories in Thailand (2024), and a significant amount of the country's population is employed in processing plants.⁴²

⁴⁰ <https://www.yamada-spire-th.com/wp-content/uploads/2024/10/Processed-Seafood-Industry-in-Thailand.pdf>

⁴¹ Ibidem

⁴² Processed-Seafood-Industry-in-Thailand.pdf

6. 4. Trade flows with the EU

EU export of fishery and aquaculture products to Thailand

In 2024, the total export volume from the EU to Thailand reached over 13.200 tonnes, a 15% decrease from the previous year. The total value decreased by 10% to nearly EUR 41 million. The most significant export product in terms of value was salmon most of which was frozen (77%). Salmon made up over 12% of the total value and accounted for 5% of the volume. Other export products included fishmeal, frozen skipjack tuna, prepared shrimps and prawns, oysters, frozen herring, frozen fish fins, heads, tails, maws and other edible fish offal.

In 2024, the largest EU exporters of fishery and aquaculture products to Thailand were France, Spain, the Netherlands and Denmark together accounting for 90% of the volume and 87% of the value. Exports from France consist mainly of fishmeal, oysters and fresh marine fish while exports from Spain are mainly frozen skipjack and bigeye tuna. Salmon, herring and mackerel comes mainly from the Netherlands, and prepared shrimps and fishmeal are the main products sourced from Denmark.

Table 43. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM THE EU TO THAILAND BY MAIN COMMERCIAL SPECIES**
(volume in tonnes, value in 1.000 EUR)

MCS	2020		2021		2022		2023		2024	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Salmon	916	2.972	457	2.624	902	6.337	693	7.131	687	5.000
Fishmeal	2.000	3.848	1.849	3.873	1.955	4.931	1.600	4.410	1.634	4.959
Tuna, skipjack	4.749	5.834	3.340	3.416	13.080	19.035	5.807	9.763	3.649	4.007
Shrimp, miscellaneous	216	1.645	12	81	116	817	4	134	590	3.972
Other products	1.597	2.146	1.733	2.534	1.918	2.747	1.022	1.799	1.264	3.769
Other marine fish	415	1.324	330	1.560	598	2.439	1.054	3.590	366	2.708
Oyster	162	1.092	144	980	278	2.198	324	2.641	307	2.377
Other	9.548	17.384	8.513	16.911	8.487	25.904	5.132	15.624	4.719	13.895
Total	19.604	36.246	16.379	31.978	27.333	64.407	15.637	45.092	13.216	40.686

Source: EUMOFA elaboration of Eurostat-Comext data.

EU imports from Thailand

In 2024, the overall EU import volume from Thailand totalled 34.400 tonnes, an 11% increase compared to 2023. The total value increased to EUR 194 million, up 1,4% from the previous year. The increased volumes reflect higher imports of tuna and surimi products.

In 2024, squid was the largest EU import from Thailand reaching 7.700 tonnes valued at EUR 71 million, a decrease of 6% in volume and 12% in value compared with 2023. Italy was by far the largest importer of squid accounting for 92% of both the volume and value.

Imports of skipjack tuna increased by 4% in volume and value reaching 5.700 tonnes and EUR 28 million. Finland, Germany and Denmark were the largest EU importers. Surimi imports also increased by 17% in terms of volume and 16% in terms of value reaching 5.900 tonnes and EUR 20 million. Italy, Netherlands and Spain were the top three importers.

Imports of yellowfin and miscellaneous tunas increased significantly reaching 2.161 (46%) and 5.443 (71%) tonnes in 2024. Miscellaneous tuna was mainly imported to Slovakia, the Netherlands and Romania and yellowfin tuna was mainly imported to Spain, Italy and Greece. Shrimp imports decreased in 2024 to 854 tonnes (16%) valued at EUR 10 million (-21%).

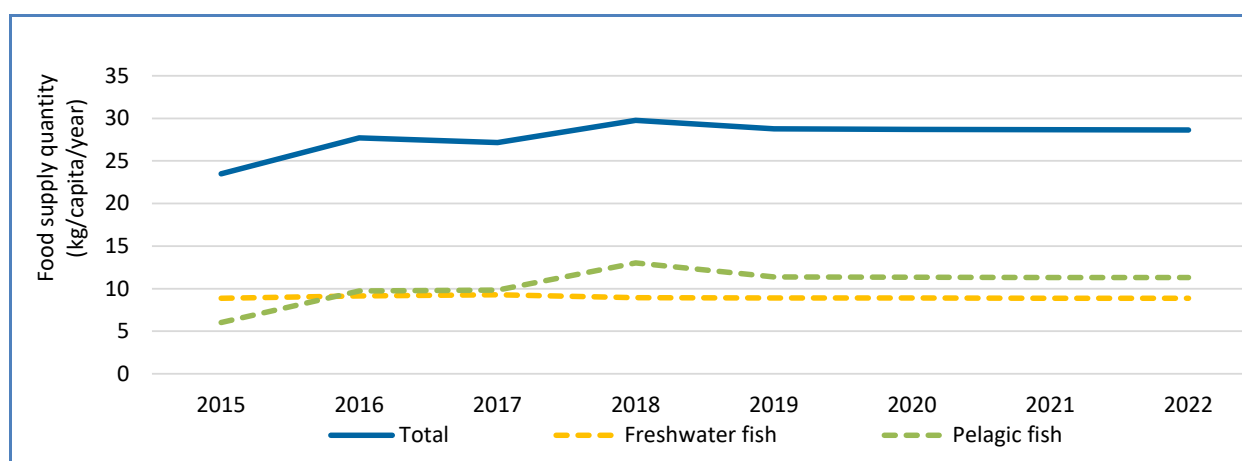
Table 44. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO THE EU FROM THAILAND BY MAIN COMMERCIAL SPECIES**
(volume in tonnes, value in million EUR)

MCS	2020		2021		2022		2023		2024	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Squid	8.008	60	8.000	70	9.506	98	8.161	81	7.675	71
Tuna, skipjack	12.686	48	8.981	35	7.681	37	5.485	27	5.699	28
Surimi	5.434	16	5.943	18	6.484	23	5.077	17	5.924	20
Tuna, miscellaneous	5.159	16	3.866	12	3.666	14	3.179	12	5.443	20
Shrimp, miscellaneous	1.116	12	1.076	11	1.182	15	1.013	13	854	10
Tuna, yellowfin	3.483	15	2.650	12	3.861	20	1.480	8	2.161	8
Other marine fish	723	4	947	5	1.041	7	681	4	870	6
Other products	1.805	6	1.843	7	1.422	7	1.379	6	1.380	6
Other non-food use	233	5	248	6	289	7	146	5	110	6
Fish oil	44	0	60	0	163	1	507	3	957	5
Other	5.316	23	5.614	24	6.338	30	3.834	16	3.337	14
Total	44.008	207	39.229	202	41.633	258	30.943	191	34.410	194

Source: EUMOFA elaboration of Eurostat-Comext data.

6. 5. Consumption of fishery and aquaculture products in Thailand

From 2018 to 2022, consumption of fishery and aquaculture products in Thailand was around 28-30 kg per year, which is above the global average (20,24 kg in 2022). Thai people have strong preferences for seafood in their diet, and the most consumed species are freshwater and pelagic fish. Main consumed species include tilapia, barramundi, mackerel, catfish, snapper and squid. They are typically prepared grilled, steamed or deep-fried and served with sauces⁴³. Consumption patterns vary across regions due to differences in geography, local ecosystems, cultural preferences, and economic activities⁴⁴.

Figure 46. **CONSUMPTION OF FISHERY AND AQUACULTURE PRODUCTS IN THAILAND, 2015 – 2022**

Source: FAO.

⁴³ <https://traveltothailandblog.com/what-fish-do-you-eat-in-thailand>⁴⁴ <https://www.seafdec.org/fisheries-country-profile-thailand-2018/>

7. CASE STUDY: Fisheries and Aquaculture in Portugal

Portugal is located on the western edge of the Iberian Peninsula. It has an Atlantic coastline and two Atlantic archipelagos: the Azores and Madeira (both are Outermost Regions). The country's maritime space spans continental shelf and oceanic island ecosystems, with environmental gradients from temperate upwelling conditions on the northwest and west coasts to warmer, more oligotrophic waters in the south and around the islands. Major estuaries (notably the Tagus, Sado, Mondego and Douro) and coastal lagoons (Ria de Aveiro and Ria Formosa) provide nursery habitats that support coastal fisheries and shellfish resources⁴⁵.

Portugal's port system combines deep-sea commercial hubs with dedicated fishing ports. Key multi-purpose fishing ports include Sines, Lisbon, Leixões, Setúbal and Aveiro along with a network of coastal fishing ports and auction services handling first-sale operations both on the mainland and in the Outermost Regions. Portugal has inland waters, but they play a limited role in commercial fisheries compared to marine areas⁴⁶.



Source: European Union. "EU Countries — Full List of Member Countries and Key Facts."

Marine fisheries operate primarily on the continental shelf and slope of the Northeast Atlantic (ICES Division 9a for mainland waters), with distinct island fisheries around the Azores and Madeira. Fleet segments include polyvalent small-scale coastal vessels, trawlers and purse seiners, each aligned with target species and local grounds. Aquaculture is present in marine and transitional waters (e.g., estuaries and lagoons) and in freshwater facilities, with production systems ranging from extensive and semi-intensive shellfish and finfish farming to intensive units; offshore pilot initiatives exist in some areas⁴⁷.

The sector is framed by EU and national policies covering resource management, maritime spatial planning, food safety and market organisation. Dedicated public infrastructure supports first sale, hygiene controls and logistics from landing to wholesale and retail. Where relevant, regional characteristics, such as tourism seasonality in coastal regions and island supply chains shape market flows and product forms.

7. 1. Fisheries in Portugal

Portugal's fisheries sector operates across three maritime regions with distinct management and market regulations under the control of Docapesca⁴⁸ for mainland waters, Lotaçor⁴⁹ for the Azores, and the regional authority DGRM⁵⁰ for Madeira. By regulation, landings of fresh and frozen fish are recorded and sold through first-sale auctions, providing coverage of volumes, values and prices⁵¹. In 2024, catches in Portugal reached 122.000 tonnes with a first-sale value of EUR 337,7 million. Compared with 2023, this represents a 7% decline in volume (131.000 tonnes in 2023) and a 0,6% decrease in value (EUR 339,8 million in 2023). Over the period 2019 to 2024, volumes fluctuated between 110.000 and 141.000 tonnes⁵². By region in 2024, the mainland accounted for most catches and their nominal value at first sale (89% of landing volume and 83% of total value), with smaller but

⁴⁵ Instituto Nacional de Estatística - Anuário Estatístico de Portugal: 2024. Lisboa: INE, 2025. www.ine.pt/xurl/pub/738814397. ISSN 0871-8741. ISBN 978-989-25-0731-6

⁴⁶ Instituto Nacional de Estatística - Estatísticas da Pesca: 2024. Lisboa: INE, 2025. www.ine.pt/xurl/pub/729251749. ISSN 0377-225-X. ISBN 978-989-25-0715-6

⁴⁷ OECD (2025), Improving Policy Coherence for Portugal's Ocean Economy: A Strategic Plan for Natural Resources, Safety and Maritime Services, OECD Publishing, Paris, <https://doi.org/10.1787/0b539499-en>

⁴⁸ <https://www.docapesca.pt/en>

⁴⁹ <https://www.lotacor.pt/>

⁵⁰ <https://www.dgrm.pt/pt/>

⁵¹ Directorate General for Natural Resources, Safety and Maritime Services, National Data Collection Program (PNRD) www.dgrm.pt/en/pnrd

⁵² DGRM – Direção-Geral de Recursos Naturais, Segurança e Serviços Marítimos; Lotaçor – Serviço de Lotas dos Açores, S.A.; DRP-RAM – Direção Regional de Pescas da Região Autónoma da Madeira. Descarga de pesca em portos nacionais (peixe fresco ou refrigerado; exclui retiradas e rejeições), 2019–2024. Administrative dataset disseminated via INE's Estatísticas da Pesca.

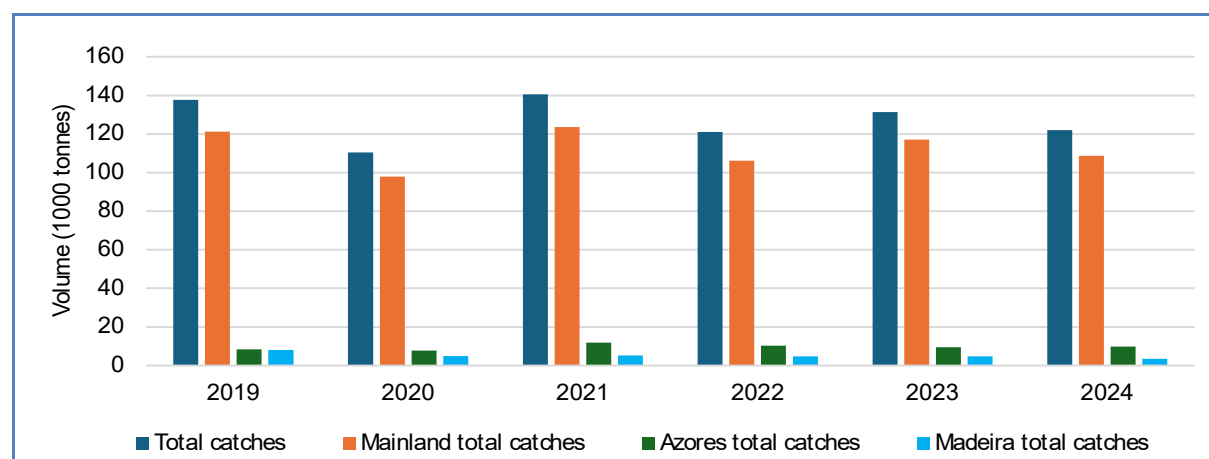
material contributions from the Azores (8% of landing volume and 12% of value) and Madeira (3% of landing volume and 5% of value)⁵³.

Table 45. **TOTAL FISHERIES CATCHES IN PORTUGAL, 2019 – 2024 (volume in 1.000 tonnes)**

Year	Portugal total		Continental area		Azores		Madeira	
	Vole	Vale	Vol	Vale	Vole	Vale	Vole	Val
2019	137.669	295.341	121.272	238.875	8.292	33.933	8.104	22.533
2020	110.454	262.233	97.909	218.899	7.682	28.815	4.863	14.518
2021	140.562	335.044	123.520	284.233	11.851	36.725	5.190	14.085
2022	121.069	335.542	106.158	279.513	10.200	40.467	4.711	15.561
2023	131.295	339.794	117.089	282.200	9.504	39.369	4.702	18.225
2024	122.039	337.666	108.682	279.275	9.841	41.667	3.517	16.724

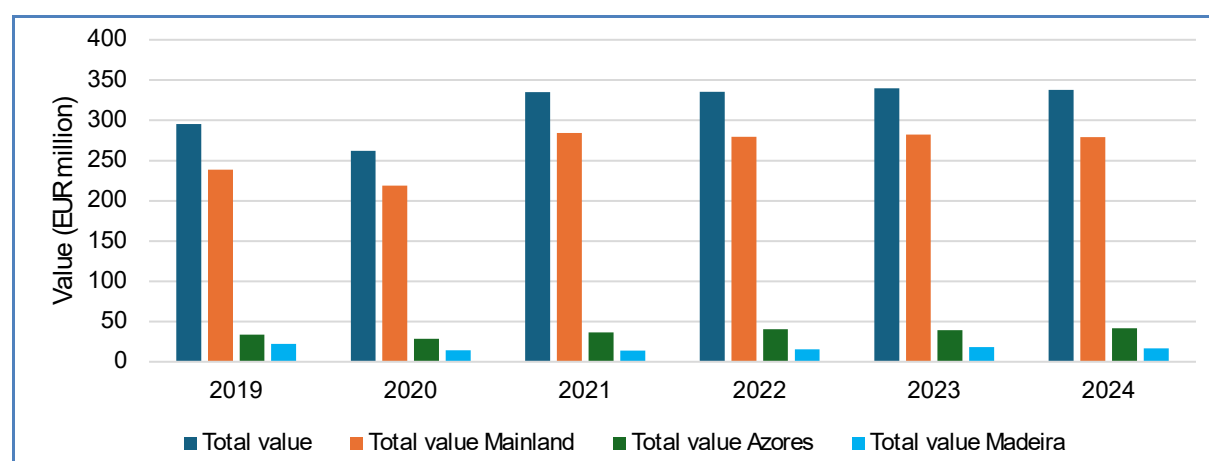
Source: Statistic Portugal.

Figure 47. **PORTUGUESE CAPTURE FISHERIES IN VOLUME BY MARITIME REGION, 2019 – 2024**



Source: Statistics Portugal

Figure 48. **PORTUGUESE CAPTURE FISHERIES IN VALUE BY MARITIME REGION, 2019 – 2024**



Source: Statistics Portugal

⁵³ Instituto Nacional de Estatística - Estatísticas da Pesca: 2024. Lisboa: INE, 2025. www.ine.pt/xurl/pub/729251749. ISSN 0377-225-X. ISBN 978-989-25-0715-6

The fleet is structured by fishing area and gear across the mainland and the Outermost Regions. On the mainland (ICES 9a), the bulk of vessels are small-scale fixed-gear units under 12 m, accounting for 90% of the mainland fleet and 76% of the total fleet. These vessels primarily target mixed demersal species and cephalopods. In contrast, vessel capacity (measured in gross tonnage) is concentrated in larger fixed-gear vessels, with bottom trawlers and purse-seiners together representing 34% of the total gross tonnage. As of 2024, 25 vessels (0,4% of the total fleet) operate in international waters. In the Azores, the fleet is predominantly small-scale fixed-gear (83% of the Azores fleet), complemented by larger longline/fixed-gear vessels targeting demersal and small-pelagic species, including tuna and tuna-like species. In Madeira (CECAF area⁵⁴), small-scale vessels represent 90% of the fleet, with a minor presence of vessels above 12m with fixed gears (9%) and purse seiners (0,8% of the fleet)⁵⁵.

Table 46. NUMBER OF VESSELS IN PORTUGAL DIVIDED BY REGIONAL AREA, TARGETED STOCK AND GEARS, 2020 – 2024

Area	Stock	Gears	2020	2021	2022	2023	2024
Continental			5.727	5.768	6.567	6.532	6.499
CIEM IXa	Demersal	Small scale <12 n	5.963	5.932	5.903	5.189	5.171
CIEM VIIIc,IXa,IXb,X E CECAF	Demersal	Fixed arts >=12 n	324	319	317	308	285
CIEM VIIIc,IXa,IXb	Demersal (+ horse mackerel)	Trawling	80	82	82	81	82
CIEM IXa	Small Pelagic	Purse Seine	175	174	172	165	164
International water	Demersal and pelagic	Polyvalent	25	25	25	25	25
Azores			685	687	734	711	706
CIEM X	Demersal	Small Scale <12 n	614	591	586	567	566
CIEM X and International water	Demersal and pelagic	Fixed arts >= 12 m	120	120	120	120	119
Madeira			399	401	417	412	403
CECAF	Demersal	Small Scale <12 n	374	369	361	361	359
CECAF and International water	Demersal and pelagic	Fixed arts >=12 n	40	40	39	37	37
	Pelagic	Purse Seine		3	3	3	3

Source: Statistic Portugal.

Marine fish represent the main volume and nominal value of catches (83%), led by small pelagics. Sardine (*Sardina pilchardus*) represented 26% of total catches in 2024, followed by Atlantic mackerel (15%) (*Scomber scombrus*) and Atlantic horse mackerel (12%) (*Trachurus trachurus*), with anchovy (*Engraulis encrasicolus* mostly) a relevant catch of purse-seines (5%). Among demersal species, hake (*Merluccius merluccius*), monkfish (*Lophius* spp.) and megrim (*Lepidorhombus* spp.) represented 3%, 0,8% and 0,3% of total catches respectively. Tuna and tuna-like species are characteristic of the Azores and Madeira (61% and 25% in 2024). Molluscs were the second major group by volume (15%), dominated by octopus and cockle, followed by clams, cuttlefish and squid. Crustaceans represented a smaller share (1,3%), mainly prawn/shrimp, crab and Norway lobster (*Nephrops norvegicus*).

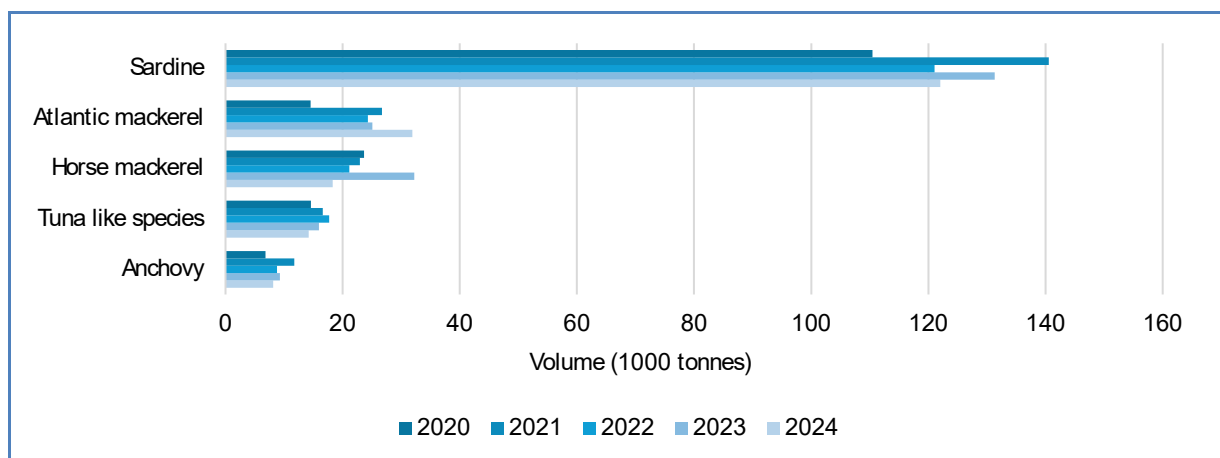
Brackish and freshwater species (0,06% of total catches) are primarily shad (*Alosa* spp.), lamprey and European eel (*Anguilla anguilla*). Overall, the top species by volume are sardine, mackerel, Atlantic horse mackerel, tuna and anchovy⁵⁶. In terms of value, octopus was the main species with EUR 32 million in revenue in 2024, followed by sardine (EUR 22 million), tuna and tuna-like species (EUR 19 million), Atlantic horse mackerel (EUR 17 million) and swordfish (EUR 15 million).

⁵⁴ Madeira is located within the Fishery Committee for the Eastern Central Atlantic (CECAF) area 34. www.fao.org/fi/static-media/MeetingDocuments/CECAF/CECAF-SSC8/Inf.6e.pdf

⁵⁵ Instituto Nacional de Estatística - Estatísticas da Pesca: 2024. Lisboa: INE, 2025. www.ine.pt/xurl/pub/729251749. ISSN 0377-225-X. ISBN 978-989-25-0715-6

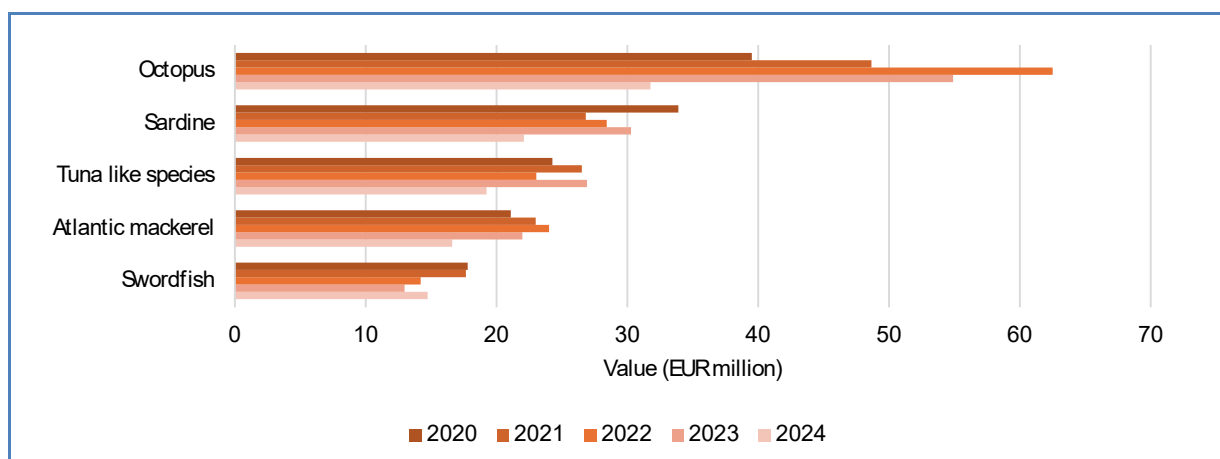
⁵⁶ Instituto Nacional de Estatística - Estatísticas da Pesca: 2024. Lisboa: INE, 2025. www.ine.pt/xurl/pub/729251749. ISSN 0377-225-X. ISBN 978-989-25-0715-6

Figure 49. TOP CAPTURED SPECIES IN PORTUGAL IN VOLUME, 2020 – 2024



Source: Statistics Portugal

Figure 50. TOP CAPTURED SPECIES IN PORTUGAL IN NOMINAL VALUE AT FIRST SALE, 2020 – 2024



Source: Statistics Portugal

7. 2. Aquaculture in Portugal

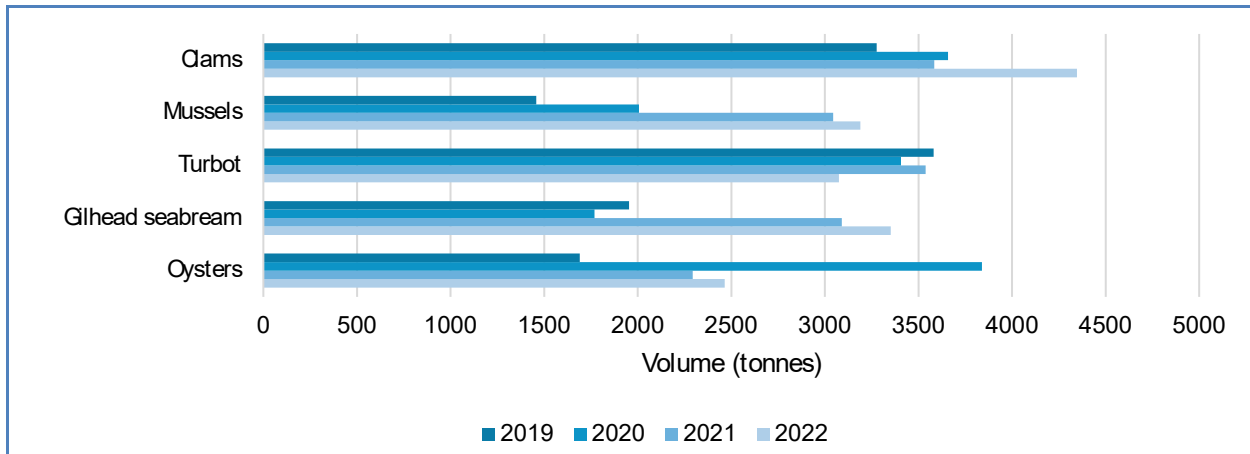
In 2023 compared to 2022, total farmed production reached 20.100 tonnes (+11%), with sales of EUR 205,9 million (+29%). Production is concentrated in marine and brackish waters (98% of total), while freshwater accounted for 308 tonnes (2%).

In marine and brackish waters, molluscs accounted for 57% of total volume produced in 2023, led by clams (mainly European clam, *Ruditapes decussatus* and macha clam, *Venerupis corrugata*), mussels (*Mytilus galloprovincialis*) and oysters (*Crassostrea angulata*) reared mainly in nursery/park plots in lagoon and estuary complexes. Cockles (*Cerastoderma edule*) and razor clams (*Ensis* spp.) are produced on smaller scales (0,5% and a 0,02% of total production respectively). Marine fish production is dominated by turbot (*Scophthalmus maximus*) from land-based tanks (15% of the total), gilthead seabream (*Sparus aurata*) and European seabass (*Dicentrarchus labrax*) produced in tanks and cages (13% and 8%). Crustaceans have a minor role in aquaculture output as they account for less than 1% of total production. Algae production is limited (0,3%) and largely consists of green macroalgae (*Ulva* spp.). Freshwater aquaculture is small (1,5%) and almost entirely rainbow trout (*Oncorhynchus mykiss*), with a minor amount of brown trout (*Salmo trutta*).

In 2023, Portugal had 1.307 licensed aquaculture units, of which 1.187 were active units. 99,5% of the active units were grow-out units, while reproduction facilities remained few (0,5% of the active units). Within grow-out, coastal nursery/park plots in transitional and marine waters form the core of the system (94% of the active units) and correspond to the traditional aquaculture methods in Portugal, in which juvenile fish are confined in brackish water transitional systems, such as ponds and wetlands, for them to grow until they are the right size for consumption. Nurseries are complemented by a small number of land-based tank farms and floating structures (4% and 2% respectively of the total active units). Inland aquaculture accounts for 1,5% of total aquaculture production and is almost entirely intensive tank operations.

With respect to farming method, extensive systems dominate the number of active sites in brackish and marine areas (87%), with semi-intensive units present on a much smaller scale (3%) and intensive sites forming a limited but specialised segment (2%). This spatial pattern has been stable over recent years: coastal lagoons and estuaries (e.g., Ria de Aveiro, Tagus, Sado, Ria Formosa) concentrate extensive nursery plots for bivalves, while intensive and semi-intensive finfish production is carried out in tanks and selected floating structures.

Figure 51. **AQUACULTURE PRODUCTION OF TOP 5 SPECIES IN PORTUGAL, 2019 – 2022**



Source: Statistics Portugal

Table 47. **ACTIVE PRODUCTION LOCATIONS (NUMBER) IN TOTAL BY REPRODUCTION UNIT AND GROWING UNIT (INLAND WATERS AND BRACKISH WATERS) 2019 – 2023**

	Inland Waters					Brackish Waters				
	2023	2022	2021	2020	2019	2023	2022	2021	2020	2019
Reproduction unit	2	2	3	3	0	3	5	4	1	1
Growing unit	5	3	4	5	11	1.177	1.183	1.152	1.179	1.136
Floating	1	1	1	1	1	22	16	17	15	10
Tank	4	2	3	4	10	41	43	38	32	31
Nursery	0	0	0	0	0	1.114	1.124	1.097	1.132	1.095
Total	7	5	7	8	11	1.180	1.188	1.156	1.180	1.137

Source: Statistics Portugal

Table 48. **ACTIVE PRODUCTION LOCATIONS (NUMBER) IN TOTAL BY THE EXPLOITATION TYPE, 2019 – 2023**

Exploitation type	Inland Waters					Brackish Waters				
	2023	2022	2021	2020	2019	2023	2022	2021	2020	2019
Extensive	0	0	0	0	0	1.132	1.137	1.119	1.149	1.110
Intensive	7	5	7	8	11	14	12	11	8	7
Semi-intensive	0	0	0	0	0	34	39	26	23	20
Total	7	5	7	8	11	1.180	1.188	1.156	1.180	1.137

Source: Statistics Portugal

7. 3. International trade

Trade data for 2024 illustrate the following: exports of prepared/preserved fish reached 62.100 tonnes (EUR 356 million), dried/salted/smoked fish 6.800 tonnes (EUR 49 million), fish fillets and other fish meat 28.100 tonnes (EUR 159 million), and molluscs 42.700 tonnes (EUR 235 million). On the input side, imports supplied key raw materials, including salted/dried and salted (not dried) cod, frozen and fresh tuna and tuna-like species, frozen shrimp/prawns, and cephalopods. There is a reliance on imported raw materials for *bacalhau* as Portugal imports 100% of the cod it uses (27.000 tonnes of cod imported in 2024) for this preparation. Imports of tuna and tuna-like species (8.140 tonnes were landed and 5.210 tonnes were imported in 2024) sardine

(4,1 tonnes imported and 63.800 tonnes landed), mackerel (36.600 tonnes landed and 8,100 tonnes imported) and Atlantic horse mackerel (130.000 tonnes landed and 9.800 tonnes imported) and octopus (9.900 tonnes landed and 20.100 tonnes imported) complement domestic catches.

7. 3. 1. Export

Portugal's 2024 fishery and aquaculture products exports (309.000 tonnes and EUR 1,46 billion⁵⁷) were diverse but concentrated in a handful of core species and product forms. Of fresh/chilled fish products (11% of total volume), small pelagics dominated: sardine/sardinella/sprat (mainly *Sardina pilchardus*) (24% of fresh/chilled fish products) and anchovy (21%), followed by mackerel (8%) and tuna and tuna-like species (5%). Frozen fish (29% of total) was the largest category exported, led by mackerel (16% of frozen fish volume) and tuna and tuna-species (14%), followed by sardine (13%) and cod (9%). Fish fillets and other fish meat (9% of total exported volume) were mostly frozen fillets (80% of fish fillets and other meats). In the category of dried/salted/smoked products (2% of total volume exported), *bacalhau* lines prevailed with salted and dried cod (53% of all dried/salted/smoked products). Among exported invertebrates, crustaceans (4% of total exported volume) were the main ones (mostly frozen shrimp/prawns), while molluscs (14%) were driven by cuttlefish/squid/octopus and clams/cockles. Processed exports comprised a key segment of export and represent 55% of the total volume exported with: prepared/preserved fish amounting to 39% of total processed volume, of which, sardines (36%), tuna and tuna-like species (7,1%) and mackerel (17,4%) are the main species; prepared/preserved crustaceans & molluscs represent 3% of the total exported volume.

Exports in 2024 were mainly destined to the EU, with Spain (74% of volume, 185.600 tonnes and 63% in value, EUR 780,2 million) being the main market destination across all major product groups: fresh and chilled fish, frozen small pelagics, cephalopods and bivalves, and canned fish. France (12% of volume, 30.200 tonnes and 12% of value, EUR 145,3 million) was the second EU destination, receiving a broad mix led by molluscs (notably cephalopods) and prepared fish.

Brazil led the extra-EU demand in 2024 with 4% of total volume (9.600 tonnes) and 7% of value (EUR 87,4 million). The USA bought a more value-oriented basket, with smaller volumes spread across cephalopods and preserved fish with 1% of total volume and 2% of total value (2.600 tonnes and EUR 26,7 million). China registered concentrated, higher-value shipments covering 0,4% of total volume and 1,6% of total value (924 tonnes and EUR 19 million). Overall, exports are consistent with recent years: neighbouring EU markets absorb the bulk of fresh, frozen and mollusc exports, while extra-EU sales are driven by preserved fish and a small number of specific products, selected, such as salted cod and cephalopods.

Table 49. **ACTIVE PRODUCTION LOCATIONS (NUMBER) IN TOTAL BY THE EXPLOITATION TYPE, 2019 – 2023**

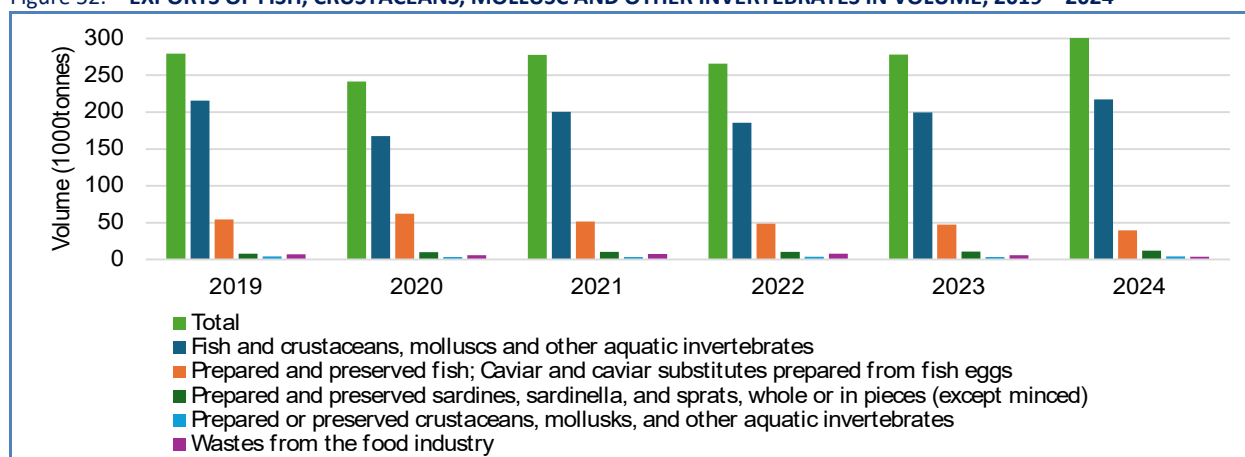
Year	2020		2021		2022		2023		2024	
Trade partners	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
EU-27										
Spain	122	413	147	541	140	642	155	667	186	780
France	28	117	31	130	29	139	30	143	30	145
Italy	15	94	16	111	15	126	14	114	15	125
Belgium	0	0	0	0	0	0	0	1	0	2
Non-EU Countries										
Brazil	10	56	11	62	11	77	13	108	10	87
Canada	3	7	3	9	2	6	2	7	2	8
USA	3	21	4	35	4	44	3	29	3	27
United Kingdom	5	24	4	20	2	12	2	13	3	18
China	0	1	0	12	1	29	1	29	1	19
Angola	1	3	1	4	1	7	1	6	1	4
Switzerland	2	11	2	11	2	12	2	13	2	13

Source: Statistics Portugal

⁵⁷ Instituto Nacional de Estatística - Estatísticas da Pesca: 2024. Lisboa: INE, 2025.

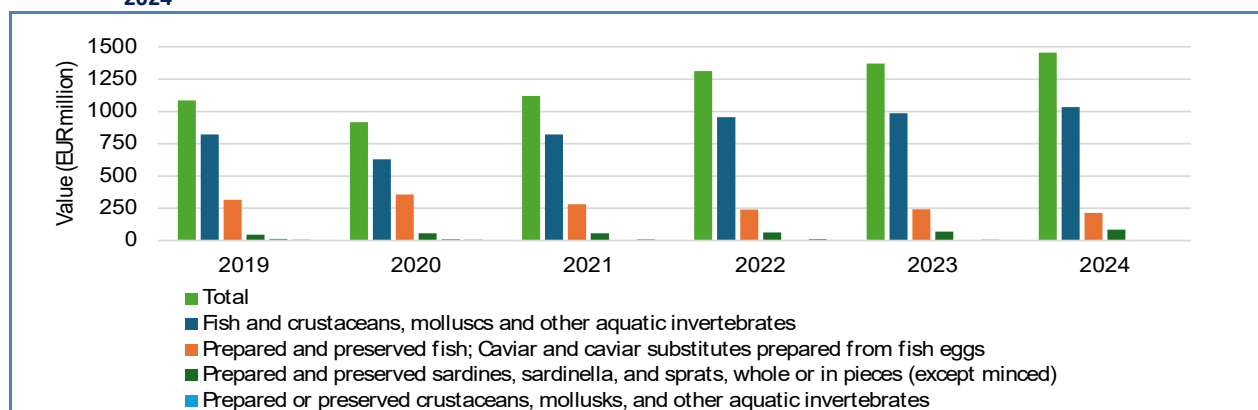
https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=706295176&DESTAQUESmodo=2

Figure 52. EXPORTS OF FISH, CRUSTACEANS, MOLLUSC AND OTHER INVERTEBRATES IN VOLUME, 2019 – 2024



Source: Statistics Portugal.

Figure 53. EVOLUTION OF EXPORTED FISH AND CRUSTACEANS, MOLLUSC AND OTHER INVERTEBRATES IN VALUE, 2019 – 2024



Source: Statistics Portugal.

7.3.2. Imports

In 2024, Portugal imported 512.200 tonnes of fishery and aquaculture products, valued at EUR 2,73 billion. Atlantic salmon (*Salmo salar*) was the top product in the category fresh/chilled (5% of the total imports volume) and frozen products (1%). Atlantic cod (*Gadus morhua*) appeared as frozen (5%), salted/dried (4%) and salted but not dried (6% of total imports), in addition to fresh/chilled (1%). Tunas and tuna-like species were significant in both frozen (6%) and fresh/chilled (1%) categories. Among small pelagics, sardine was both fresh/chilled (1%) and frozen (3%) while mackerel was mostly imported frozen (2% of total import volume). Hake/ling imports were also frozen (4%). Processed fish fillets and other fish meat comprised 8% of total imports. As for invertebrates (8%), crustaceans were dominated by frozen shrimp/prawns (71% of total crustacean imports), while molluscs dominated cephalopods (55% of total mollusc imports) (13% of total imports). Overall, these species and product groups accounted for most of the fisheries and aquaculture product imports in 2024⁵⁸.

Imports of FAPs originate mainly from other EU countries, which supplied about 66% of volume (323.100 tonnes) and 71% of value (EUR 1,9 billion). Spain was the main supplier, providing 219.400 tonnes (44%) worth EUR 1,14 billion (42%). The Netherlands was the second source of FAPs (26.900 tonnes worth EUR 220,8 million), followed by Sweden (19.700 tonnes worth EUR 185,6 million).

The main extra-EU supplier was China with 26.600 tonnes worth EUR 85,2 million, mostly fish fillets and canned goods, followed by Ecuador (15.600 tonnes worth EUR 80,2 million) and Russia (12.500 tonnes worth EUR 78 million). Norway is the main source of dried fish outside the EU, mostly cod for the preparation of *bacalhau* (8.200 tonnes worth EUR 80,5 million).

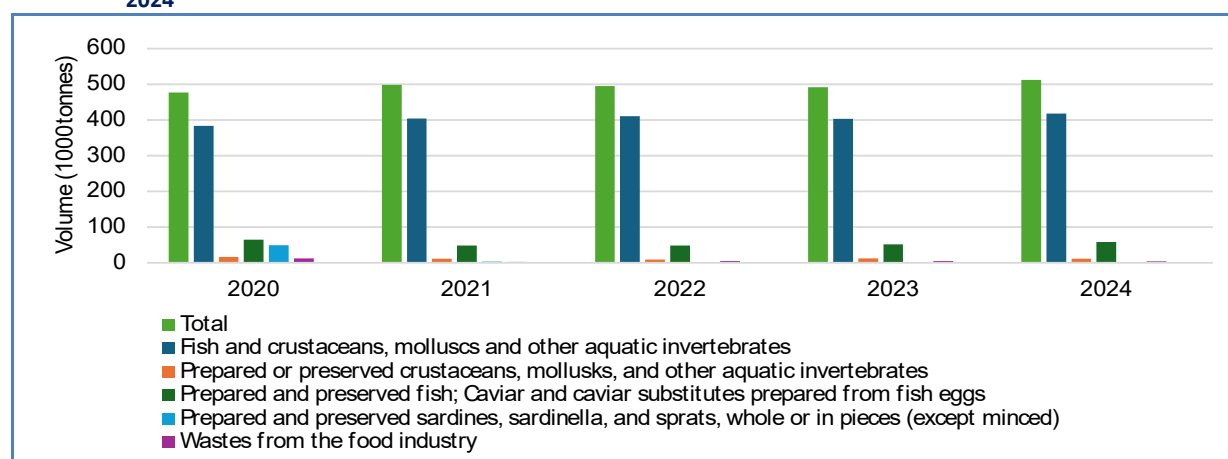
⁵⁸ Instituto Nacional de Estatística - Estatísticas da Pesca: 2024. Lisboa: INE, 2025.

https://www.ine.pt/xportal/xmain?xpid=INE&xpgid=ine_destaques&DESTAQUESdest_boui=706295176&DESTAQUESmodo=2

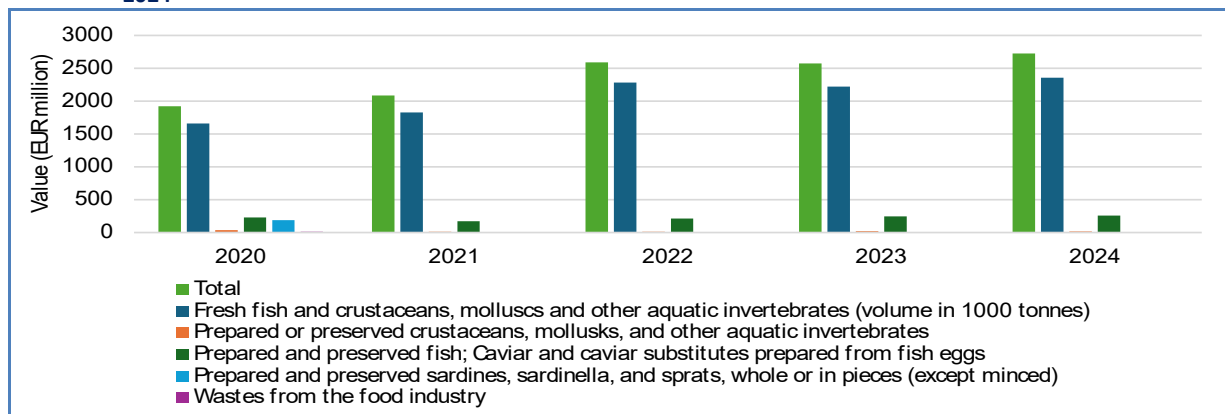
Table 50. **IMPORTED FISH AND CRUSTACEANS, MOLLUSC AND OTHER INVERTEBRATES IN VOLUME (in 1.000 tonnes) AND IN VALUE (in million EUR) BY COUNTRY, 2019 – 2024**

Year	2019		2020		2021		2022		2023		2024	
Trade partners	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
EU MS												
Spain	200	817	192	751	205	872	206	1.031	206	1.058	219	1.138
Denmark	1	9	7	39	1	6	10	67	12	80	13	82
Netherlands	31	163	24	117	30	139	40	271	33	256	27	220
Sweden	28	220	36	249	44	275	22	219	20	183	20	186
Germany	4	13	7	17	4	14	4	15	4	6	5	36
Lithuania	0	0	0	0	0	0	0	0	0	0	1	11
France	3	21	2	15	4	26	4	37	4	30	4	30
Belgium	0,5	5	0	0	0	0	0,1	0,4	0,1	0,5	0,1	1
Ireland	0	0	0,3	2	1	5	1	7	0	0	0	0
Greece	7	34	0	0	0	0	0	0	0	0	0	0
Non-EU Countries												
China	22	77	13	41	20	54	15	57	20	71	27	85
Ecuador	2	10	7	32	10	44	10	62	10	55	16	80
Russia	21	86	14	47	13	48	13	72	16	90	12	78
India	12	50	9	34	10	42	10	56	9	42	9	42
Norway	3	20	2	14	2	17	1	2	2	12	8	80
South Africa	8	31	6	24	5	14	5	20	5	23	5	23
Chile	0,5	1	0,7	2	3	9	3	12	4	17	4	17
Türkiye	2,5	12	3	17	4	19	3	21	4	21	3	20
Morocco	0	0,0	1	7	0	0	1	8	1	14	4	23
Senegal	1	6	0,2	2	1	8	0,2	3	0,3	4	0,3	4

Source: Statistics Portugal

Figure 54. **EVOLUTION OF IMPORTED FISH AND CRUSTACEANS, MOLLUSC AND OTHER INVERTEBRATES IN VOLUME, 2020 - 2024**

Source: Statistics Portugal.

Figure 55. **EVOLUTION OF IMPORTED FISH AND CRUSTACEANS, MOLLUSC AND OTHER INVERTEBRATES IN VALUE, 2020 - 2024**

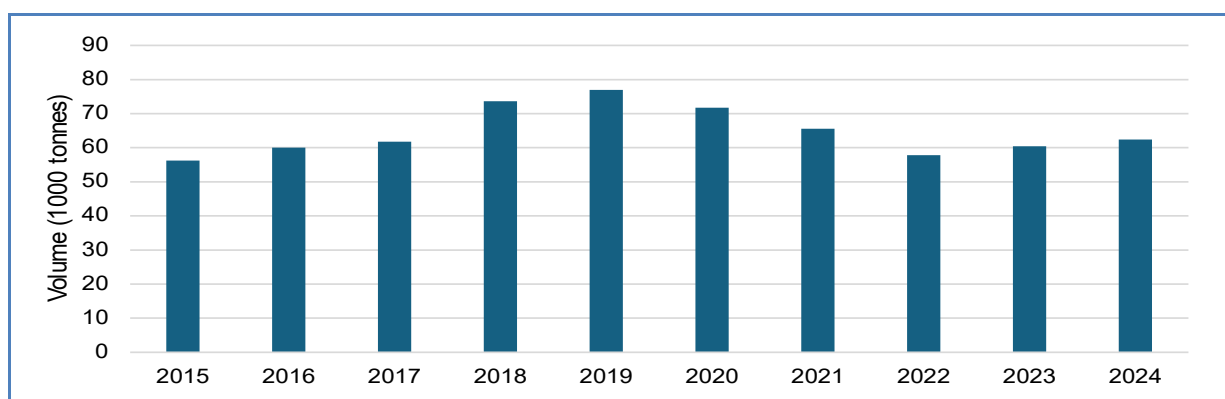
Source: Statistics Portugal.

7. 4. Processing

Portugal's fish-processing industry is diverse and closely integrated with both domestic landings and imports. In 2023, the main products sold were "Frozen whole salt water fish", of which core activities include salting and drying of cod (*bacalhau*) and canning of small pelagics (sardine and mackerel) and tuna species, freezing and portioning of small pelagics and whitefish, preparation of cephalopods (octopus, squid/cuttlefish) and depuration/packing of bivalves.⁵⁹ In 2023, the total turnover was EUR 1,7 billion for 165 companies.⁶⁰

7. 5. Consumption

Portugal has the highest per capita consumption of fishery and aquaculture products in the European Union and is ranked third globally, consuming around 59 kg of fish per person annually. Consumption patterns consistently feature high demand for *bacalhau* (salted/dried cod often rehydrated at home or sold as ready-to-cook pieces), fresh sardine in season and canned fish (sardine, tuna and tuna-like species, mackerel) year-round. Cephalopods (particularly octopus, squid and cuttlefish) are widely consumed, while clams and cockles are important in regional cuisines, especially in the Algarve and estuarine areas. Retail distribution is led by supermarkets and hypermarkets, complemented by municipal markets and independent fishmongers for fresh products. The HORECA channel (restaurants, hotels, catering) is a significant outlet for cephalopods, bivalves and higher-value fish, and demand is influenced by tourism seasonality.⁶¹

Figure 56. **EVOLUTION OF HOUSEHOLD CONSUMPTION OF FRESH FISHERY AND AQUACULTURE PRODUCTS, 2015 -2024⁶²**

⁵⁹ Instituto Nacional de Estatística - Estatísticas da Pesca: 2024. Lisboa: INE, 2025. www.ine.pt/xurl/pub/729251749. ISSN 0377-225-X. ISBN 978-989-25-0715-6

⁶⁰ EUMOFA, country profile: Portugal, Last update 31/01/2025. "Portugal in the world and in the EU" <https://eumofa.eu/en/portugal>

⁶¹ European Commission: Directorate-General for Maritime Affairs and Fisheries and EUMOFA, The EU fish market –2024 edition, Publications Office of the European Union, 2024, <https://data.europa.eu/doi/10.2771/9420236>

⁶² EUMOFA, consumption data, Portugal. Last update 07/2025: <https://eumofa.eu/data>

Manuscript completed in October 2025

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PDF ISSN 2314-9671 KL-01-25-021-EN-N

ISBN: 978-92-68-24105-9 DOI: 10.2771/0441868

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

Global highlights: European Commission, Council of the European Union, Europêche, Statistics Iceland.

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

First sales: ICES.

Case studies: SEAFDEC, MDPI, The Maritime Executive, ILO, Seafood Watch, Thailand Aquaculture Industry Outlook, European Commission, The Nation, Thailand's Processed Seafood Industry, Ibidem, Tavel to Thailand blog, Statistics Portugal, Docapesca, Directorate-General for Natural Resources, Safety and Maritime Services, FAO.

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

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

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

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

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