



Monthly Highlights

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EUMOFA

European Market Observatory for
Fisheries and Aquaculture Products



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1. GLOBAL HIGHLIGHTS

EU / International Fisheries: On 8 October 2025, the European Parliament approved a new four-year fisheries protocol between the EU and Côte d'Ivoire, setting catch limits for EU vessels targeting tuna and other migratory species in Ivorian waters. The agreement provides an annual EU contribution of EUR 740.000, comprising EUR 305.000 for access by 25 tuna purse-seiners and seven longliners from Spain, France and Portugal, and EUR 435.000 to support sustainable fisheries development. Funds will strengthen small-scale fisheries, aquaculture, scientific capacity and infrastructure at the Port of Abidjan, while enhancing monitoring and control against Illegal Unreported and Unregulated (IUU) fishing. EU shipowners will pay EUR 80-85 per tonne of catch and annual license fees of EUR 12.000-12.750 for seiners and EUR 4.000-4.250 for longliners. Adopted by 520 votes to 97, the protocol, provisionally in force since 6 June 2025, aligns with ICCAT conservation rules and aims to ensure responsible exploitation and local economic benefits until June 2029.¹



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EU / Blue Bioeconomy: On 16 October 2025, Commissioner for Fisheries and Oceans Costas Kadiş opened the 2nd EU Algae Awareness Summit in Berlin, co-organised by the European Commission and Germany's Federal Ministry of Food and Agriculture. The event gathered policymakers, researchers and industry stakeholders to advance Europe's algae sector as a strategic resource for climate mitigation, food security and blue economy growth. Building on the 2022 Communication "Towards a strong and sustainable EU algae sector" and under the European Ocean Pact, the Commission aims to scale up algae production, launch the Blue Bioeconomy Innovation Initiative by 2027, and establish voluntary EU-wide growth targets. Commissioner Kadiş and German Minister Alois Rainer highlighted the potential of algae to generate sustainable jobs, restore marine ecosystems, and foster new value chains across coastal and rural communities².

EU / Environment and Fisheries: On 17 October 2025, the European Commission adopted new guidance to help Member States reconcile fishing activities with the protection of marine Natura 2000 sites. The document provides practical tools to assess, manage and mitigate the impacts of commercial and recreational fishing on sensitive habitats such as reefs, sandbanks and seagrass meadows, key spawning and nursery grounds for many fish species. The guidance supports the EU Biodiversity Strategy for 2030 and the Marine Action Plan, aiming to strengthen cooperation between environmental and fisheries authorities and enhance dialogue with fishers. It outlines procedures to evaluate site-specific risks, establish conservation measures, and ensure compliance with the Habitats and Birds Directives³.

EU / Aquaculture and Food Policy: On 22 October 2025, Members of the European Parliament and the European Molluscs Producers' Association (EMPA) called for shellfish farming to play a stronger role in EU food and maritime strategies. During the European Parliament event "Food of the Future: The Shellfish Vision for 2040", chaired by MEP Stéphanie Yon-Courtin, speakers highlighted mussel and oyster farming as key contributors to sustainable food systems, coastal employment and marine biodiversity. EMPA President Addy Risseuw urged the full integration of shellfish farming into the Commission's Vision for Fisheries and Aquaculture 2040. Representing over 50% of EU aquaculture output and valued at EUR 1,17 billion annually, Europe's mollusc industry was recognised as vital to the EU's Ocean Pact ambitions and long-term food autonomy⁴.

EU / Aquaculture: On 14 October 2025, the EU announced EUR 5,7 million in EMFAF funding for four projects to scale sustainable seaweed and algae farming and boost blue-economy innovation. Together, these actions will link innovation hubs in southern Europe, make major research and testing facilities available for land-based algae products, pilot large-scale offshore seaweed farming with full environmental monitoring, and trial regenerative seaweed systems in Atlantic waters while developing standards, assessment protocols, and eco-labelling schemes to support wider deployment across the EU.⁵

¹ <https://www.europeaninterest.eu/parliament-confirms-tuna-fisheries-protocol-between-eu-and-cotedivoire/>

² https://oceans-and-fisheries.ec.europa.eu/news/commissioner-kadis-joins-eu-algae-awareness-summit-berlin-2025-10-16_en

³ https://environment.ec.europa.eu/news/commission-adopts-guidance-natura-2000-and-fishing-2025-10-17_en

⁴ <https://weareaquaculture.com/news/aquaculture/shellfish-farming-should-play-a-greater-role-in-eu-food-policy-say-meps-and-mollusc-producers>

⁵ <https://thefishsite.com/articles/eu-allocates-5-7-million-for-four-fresh-aquaculture-projects>

2. MACROECONOMIC CONTEXT

2.1. Marine fuel

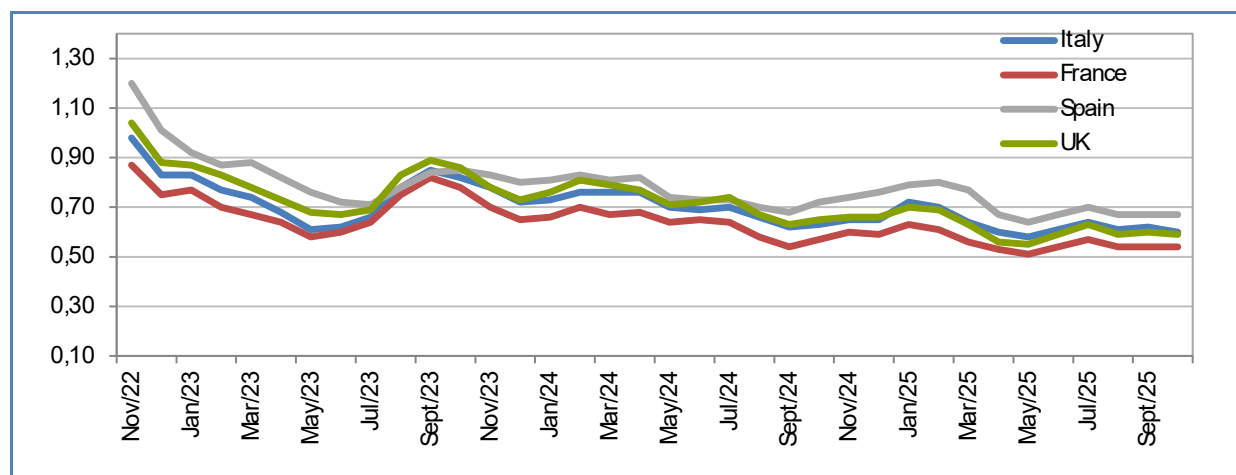
Average prices for marine fuel in **October 2025** ranged between 0,54 and 0,67 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices decreased by an average of about 1,2% compared with the previous month and decreased by an average of 6,6% compared with the same month in 2024.

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

Country	Oct 2025	Change from Sep 2025	Change from Oct 2024
France (ports of Lorient and Boulogne)	0,54	0%	-5%
Italy (ports of Ravenna and Livorno)	0,60	-3%	-5%
Spain (ports of A Coruña and Vigo)	0,67	0%	-7%
The UK (ports of Grimsby and Aberdeen)	0,59	-2%	-9%

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 September 2025 the EU annual inflation rate was 2,6%, up from 2,4% compared to August 2025. A year earlier, the rate was 2,1%.

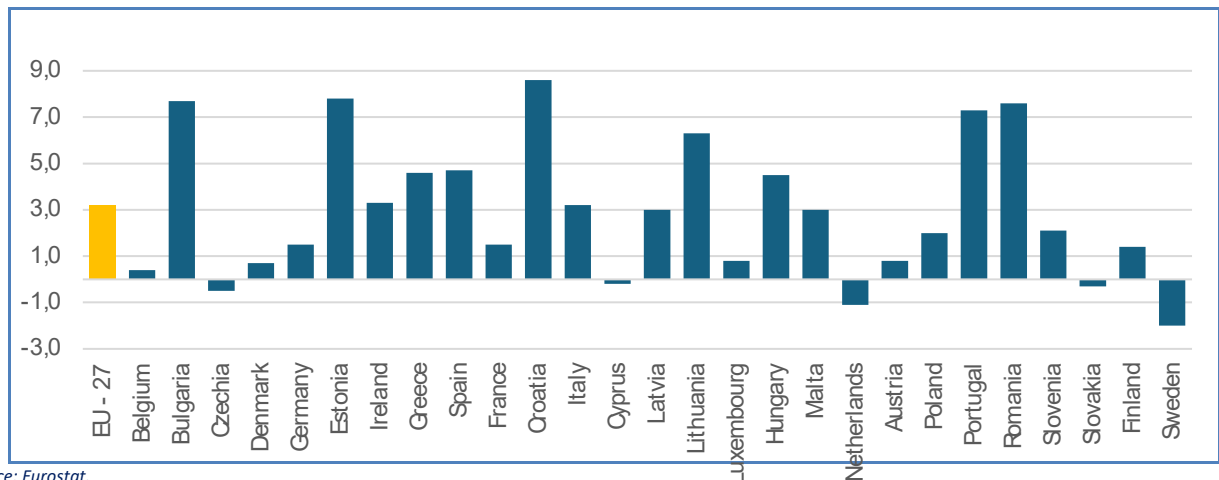
Table 2. HIGHEST AND LOWEST INFLATION RATES FOR SEPTEMBER 2025, COMPARED WITH SEPTEMBER 2024

Lowest inflation rates		Highest inflation rates	
Cyprus	0,0%	Romania	+8,6%
France	+1,1%	Estonia	+5,3%
Italy, Greece	+1,8%	Croatia, Slovakia	+4,6%

Source: Eurostat.

2.3. Annual inflation rate of fish and seafood products in the EU

Figure 2. ANNUAL RATE OF CHANGE FOR FISH AND SEAFOOD PRODUCTS IN AUGUST 2025 (value expressed in percentage)



Source: Eurostat.

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

	Sep 2023	Sep 2024	Aug 2025	Sep 2025	Change from Aug 2025	Change from Sep 2024
Food and non-alcoholic beverages	140,30	143,38	148,68	148,41	-0,2%	3,5%
Fish and seafood	138,84	141,39	145,58	145,95	0,3%	3,2%
Fresh or chilled fish	130,42	133,96	138,88	140,15	0,9%	4,6%
Frozen fish	138,10	138,59	143,72	143,96	0,2%	3,9%
Fresh or chilled seafood	126,35	130,66	136,19	135,81	-0,3%	3,9%
Frozen seafood	119,63	118,85	119,91	120,46	0,5%	1,4%
Dried, smoked or salted fish and seafood	140,24	142,66	148,12	148,02	-0,1%	3,8%
Other preserved or processed fish and seafood and fish and seafood preparations	135,33	137,54	139,36	138,96	-0,3%	1,0%

Source: Eurostat.

2.4. Exchange rates

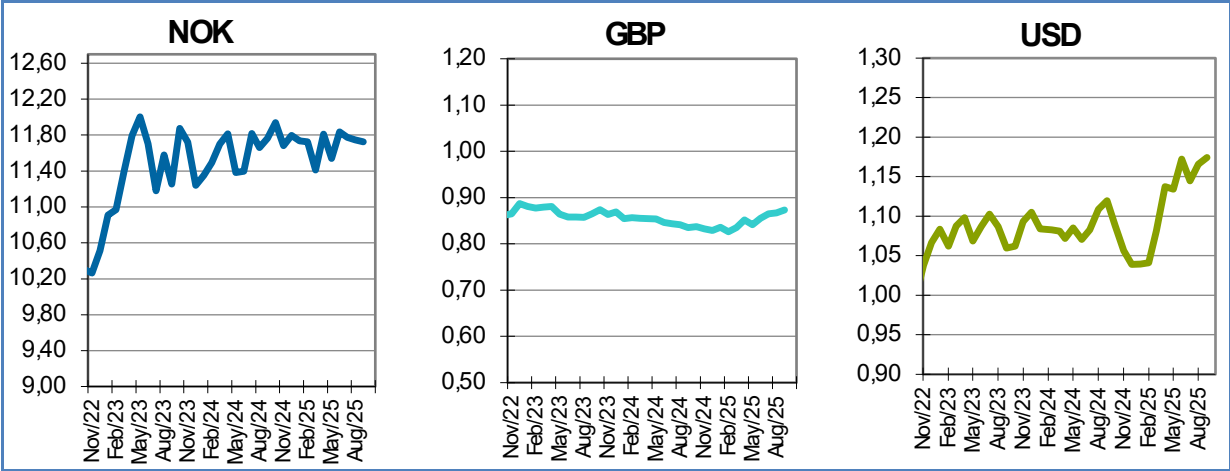
Table 4. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Oct 2023	Oct 2024	Sep 2025	Oct 2025
NOK	11,8735	11,9385	11,7265	11,6485
GBP	0,8737	0,8375	0,8734	0,8816
USD	1,0619	1,0882	1,1741	1,1554

Source: European Central Bank.

In October 2025, the euro appreciated against the British pound sterling (0,9%) and depreciated against the US dollar (1,6%) and the Norwegian krone (0,7%), relative to the previous month. For the past six months, the euro has fluctuated around 11,7118 against the Norwegian krone. Compared with October 2024, the euro has appreciated 6,2% against the US dollar and 5,3% against the British pound sterling and depreciated 2,4% against the Norwegian krone.

Figure 3. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.



3. FIRST SALES IN EUROPE⁶

3.1. Year-to-date comparison of first sales

Increases in value and volume (Jan - Aug 2025 vs Jan - Aug 2024): Finland, France, Ireland, Portugal and the United Kingdom recorded increases in both first-sales value and volume. The highest increase in volume was observed in Finland mainly due to herring, while the highest growth in value in Ireland was due to mackerel, Atlantic horse mackerel and Norway lobster.

Decreases in value and volume (Jan - Aug 2025 vs Jan - Aug 2024): Croatia, 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 drop in volume in relative terms, due to mackerel, blue whiting and cod. Lithuania experienced a fall in value, due mainly to smelt and turbot.

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

Country	January – August 2023		January – August 2024		January – August 2025		Change from January – August 2024	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	9.690	59,72	7.655	46,60	7.618	48,96	0%	5%
Bulgaria	2.199	1,02	2.583	1,50	2.472	1,73	-4%	16%
Croatia	32.089	39,54	24.225	34,81	19.220	31,98	-21%	-8%
Cyprus	547	2,43	475	2,20	468	1,93	-2%	-12%
Denmark	551.349	350,49	538.925	338,86	528.414	362,36	-2%	7%
Estonia	43.843	15,30	40.742	20,42	32.915	15,52	-19%	-24%
Finland	42.641	12,34	34.647	13,12	44.345	13,61	28%	4%
France	170.738	470,43	159.705	445,72	169.977	481,40	6%	8%
Germany	22.275	38,19	21.334	39,61	5.733	30,49	-73%	-23%
Ireland	147.706	185,72	148.820	177,97	160.525	214,31	8%	20%
Italy	47.225	217,20	37.609	174,43	32.635	170,16	-13%	-2%
Latvia	26.817	7,29	24.371	8,64	23.268	8,99	-5%	4%
Lithuania	280	0,59	290	0,39	190	0,25	-35%	-37%
Netherlands	44.527	89,80	15.122	98,19	13.891	89,06	-8%	-9%
Poland	47.137	17,65	38.710	20,74	37.220	18,83	-4%	-9%
Portugal	78.854	203,32	70.396	187,13	72.752	208,08	3%	11%
Spain	302.570	995,87	289.913	974,68	264.524	991,41	-9%	2%
Sweden	104.891	67,80	82.761	60,43	64.433	51,46	-22%	-15%
Norway	2.077.680	2.109,95	1.964.629	2.017,18	1.861.265	2.329,76	-5%	15%
United Kingdom	218.679	436,01	218.273	412,99	228.291	457,82	5%	11%

Possible discrepancies in % changes are due to rounding.

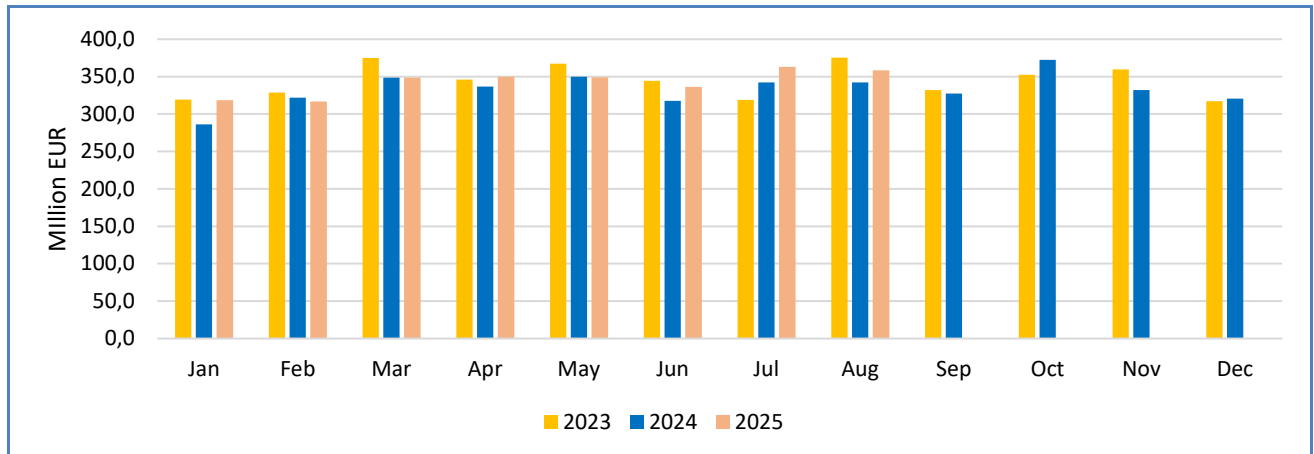
* Volumes are reported in net weight for EU Member States, and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (nominal values without VAT). For Norway, prices are reported in EUR/kg of live weight.

⁶ During January–August 2025, 18 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 - August in 2025 was EUR 2,74 billion, a 4% increase compared to 2024, and a 1% decrease compared to 2023. Overall volume was 1,5 million tonnes, a 4% decrease compared to 2024, and a 12% decrease compared to 2023.

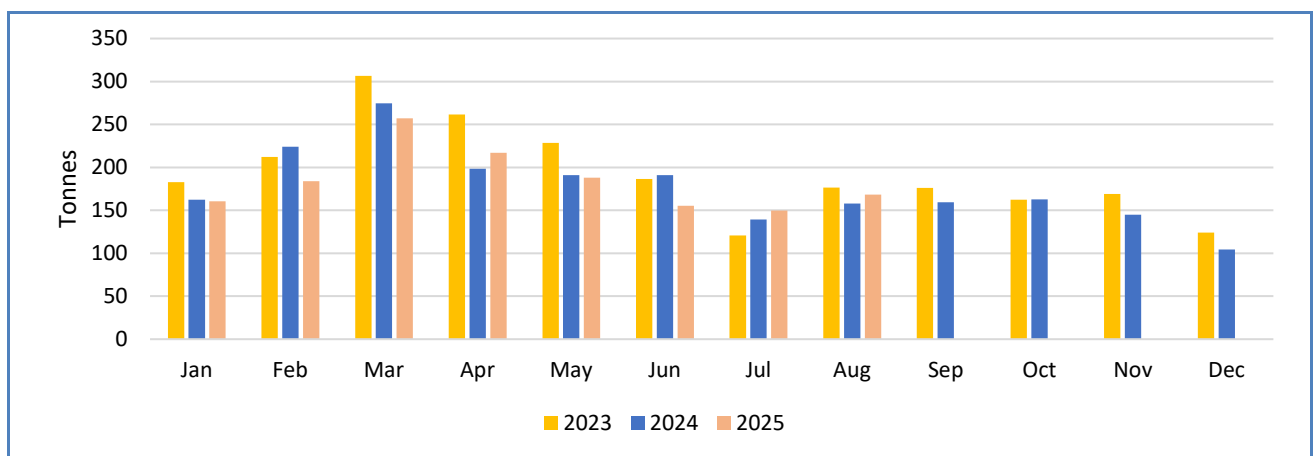
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VALUE FROM THE REPORTING COUNTRIES⁷**
(value in million EUR)



In the first eight months of 2025, monthly first-sales value increased in most months compared to 2024 except in February, March and May. Compared to 2023, values generally decreased except in April and June. Between January and August 2025, first-sales volume decreased compared to the same period in both 2024 and 2023, except in April, July and August 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 decreased by 1%, with flatfish (-16%) mostly contributing to the decrease. Similarly, in the same period in 2025, the decrease in first-sales volume was mainly due to groundfish and small pelagics, which fell by -8% and -2% respectively in comparison to 2024 and by -14% and -11% in comparison to 2023.

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



⁷ During January–August 2025, 18 EU Member States (MS), reported first-sales data on value and volume.



3. 2. First-sales evolution at commodity group (CG) level^{8,9}

Bivalves and other molluscs and aquatic invertebrates

In January-August 2025, first-sales value of “Bivalves and other molluscs and aquatic invertebrates” amounted to EUR 159,2 million, a 6% increase compared to the same period in 2024. First-sales volume reached 60.889 tonnes, an increase of 5% compared to 2024. Scallop and whelk and purple dye murex¹⁰ were the main commercial species driving the increase in value of the commodity group (+17% and +12%, respectively), while the increase in volume was mainly due to scallop (+27%).

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

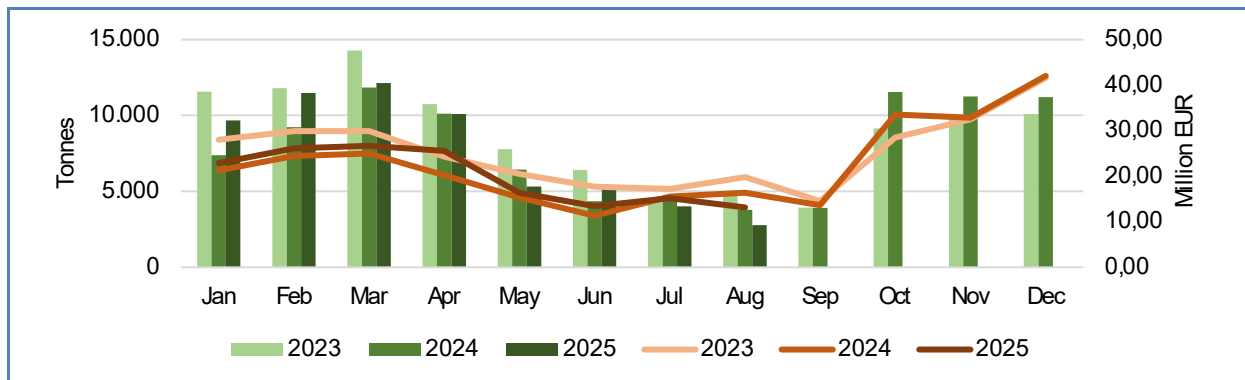


Table 6. FIRST SALES PRICES OF BIVALVES MAIN COMMERCIAL SPECIES (MCS) (JAN-AUG 2024 AND JAN-AUG 2025)

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan-Aug 2024 %)
France	Scallop	2,21 EUR/kg	2,04 EUR/kg	-8%
France	Other molluscs and aquatic invertebrates*	2,76 EUR/kg	3,47 EUR/kg	+26%
Portugal	Other molluscs and aquatic invertebrates**	8,84 EUR/kg	14,42 EUR/kg	+63%

*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.

** Of the main commercial species other molluscs and aquatic invertebrates in Portugal, purple dye murex represents 59% of total first-sales volume and 65% of the total first-sales value.

Cephalopods

In 2025, first-sales value of “Cephalopods” totalled EUR 195,0 million, a 6% increase compared to 2024. First-sales volume totalled 27.784 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 (-19% and -19%) driving the decrease in first-sales volume.

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

⁹ The data analysis in this section (figures and tables) is downloaded from the EUMOFA database and is provided by national sources or collected through their related website. <https://eumofa.eu/sources-of-data>

¹⁰ Whelk and purple dye murex belong to the species group „other molluscs and aquatic invertebrate“. Of total first-sales value in 2025, whelk represents 71% of total first-sales value followed by purple dye murex with 11%.



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

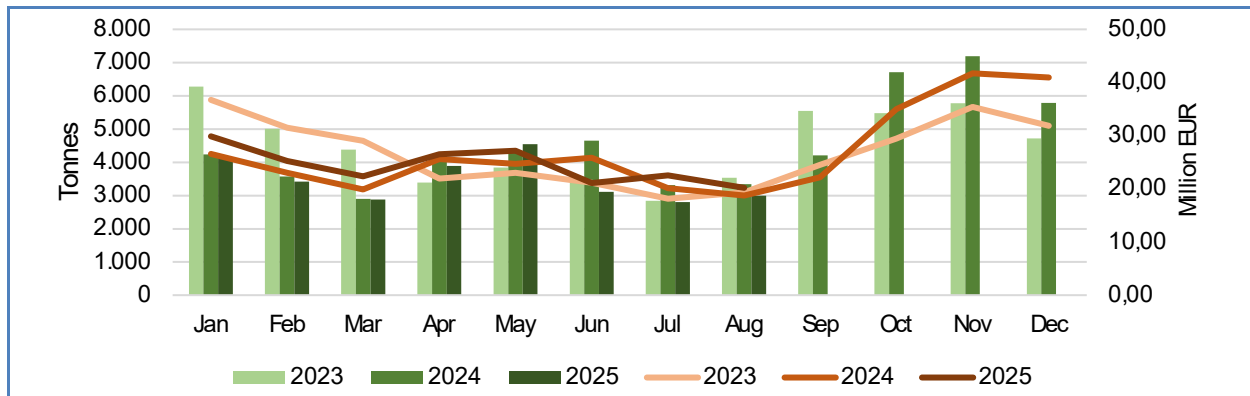


Table 7. FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN-AUG 2024 AND JAN-AUG 2025)

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan- Aug 2024 %)
France	Octopus	6,92 EUR/kg	7,54 EUR/kg	+9%
Portugal	Octopus	7,84 EUR/kg	8,95 EUR/kg	+14%
Spain	Octopus	7,08 EUR/kg	7,88 EUR/kg	+11%

Crustaceans

In 2025, first-sales value of “Crustaceans” totalled EUR 432,4 million, a 2% increase in value compared to 2024. First-sales volume amounted to 48.815 tonnes, a decrease of 3% compared to 2024. Miscellaneous shrimp and deep water rose shrimp (+7% and +10%) were the two main products responsible for the increase in first-sales value, while shrimp *Crangon* spp. and cold-water shrimp (-20% and -43%) were mainly responsible for the decrease in first-sales volume.

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

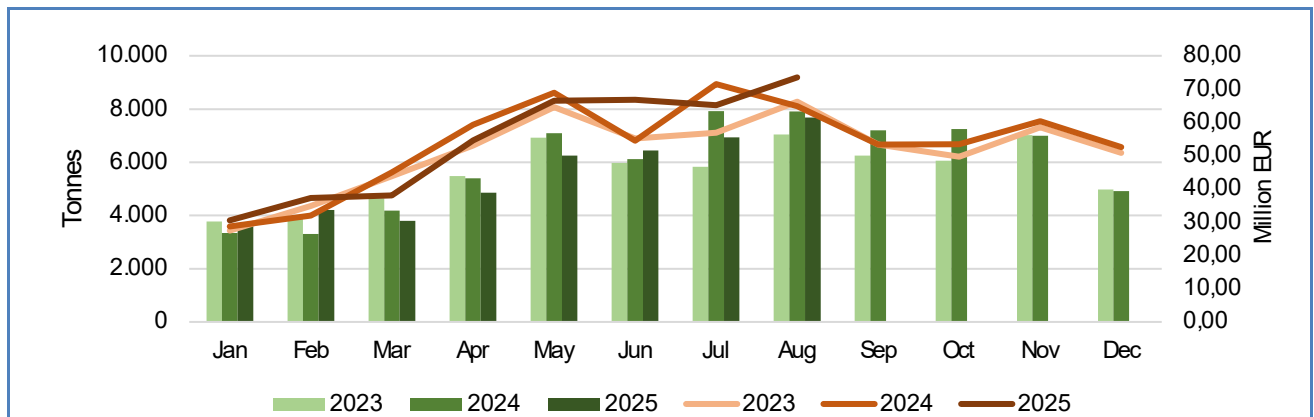


Table 8. FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-AUG 2024 AND JAN-AUG 2025)

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan- Aug 2024 %)
Germany	Shrimp <i>Crangon</i> spp.	8,69 EUR/kg	9,37 EUR/kg	+8%
Ireland	Norway lobster	10,15 EUR/kg	11,61 EUR/kg	+14%
Spain	Deep-water rose shrimp	9,09 EUR/kg	7,92 EUR/kg	-13%



Flatfish

In 2025, first-sales value of “Flatfish” totalled EUR 224,5 million, a 1% decrease compared to 2024. First-sales volume amounted to 31.864 tonnes, a decrease of 8% compared to 2024. European plaice (-25% and -13%) and European flounder (-41% and -30%) 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 – AUG 2025

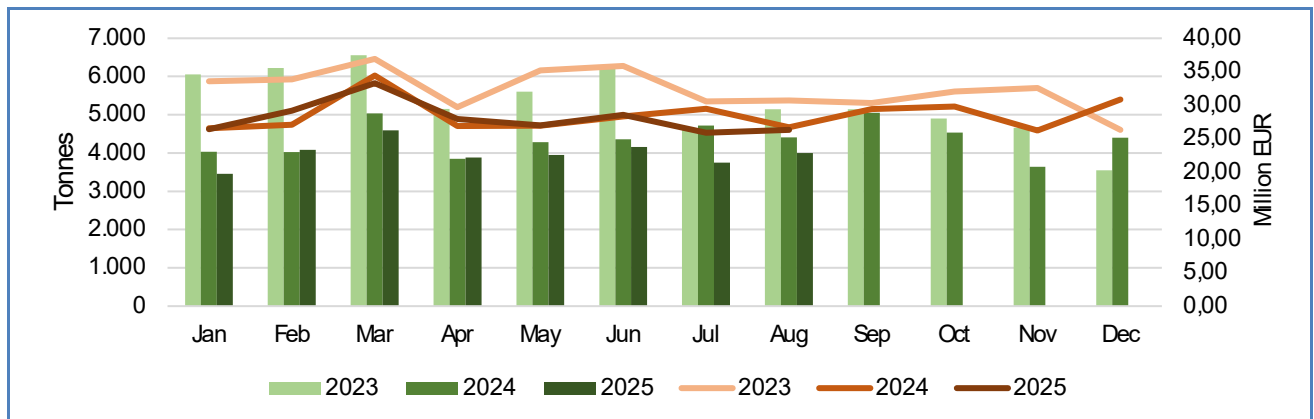


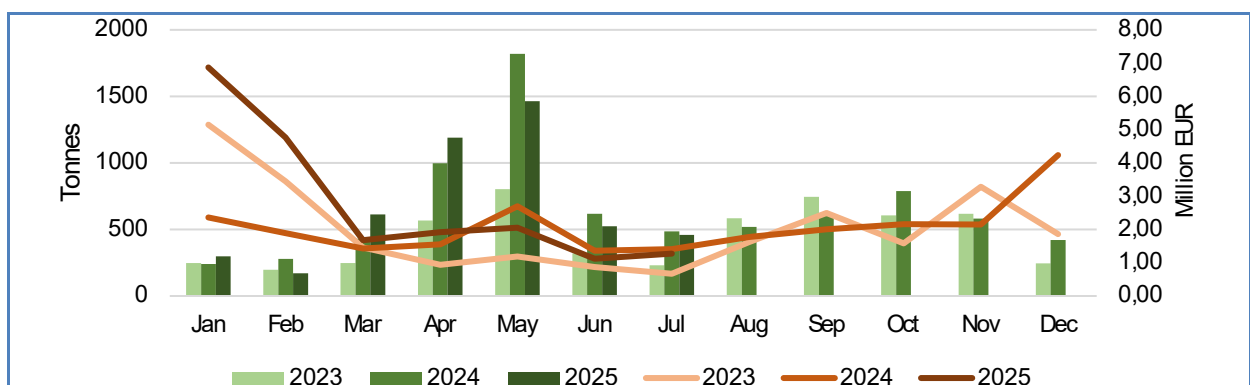
Table 9. FIRST-SALES PRICE OF FLATFISH MCS (JAN-AUG 2024 AND JAN-AUG 2025)

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan-Aug 2024 %)
Denmark	European plaice	2,77 EUR/kg	2,49 EUR/kg	-10%
Netherlands	European plaice	2,56 EUR/kg	1,96 EUR/kg	-23%
France	Turbot	22,34 EUR/kg	25,26 EUR/kg	+13%

Freshwater fish

In 2025, first-sales value of “Freshwater fish” reached EUR 20,9 million, marking a 45%-increase compared to 2024. First-sales volume amounted to 5.143 tonnes, a decrease of 4% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+101%), while the category “other freshwater fish”¹¹ was the main contributor to the decrease in first-sales volume (-4%).

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



¹¹ „Other freshwater fish” comprises 29 products, and together round goby, freshwater bream and roach represent 71% of first-sales volume.



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

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan-Aug 2024 %)
France	Eel*	36,26 EUR/kg	100,14 EUR/kg	+176%
Denmark	Eel	9,43 EUR/kg	9,32 EUR/kg	-1%
Estonia	Pike-perch	4,31 EUR/kg	4,43 EUR/kg	+3%

*The average price of eel reflects different products: glass eel (up to 419 EUR/kg), yellow eel (up to 21 EUR/kg) and silver eel (up to 17 EUR/kg).

Groundfish

In 2025, first-sales value of “Groundfish” totalled EUR 484,4 million, an increase of 5% compared to 2024. First-sales volume amounted to 488.158 tonnes, a decrease of 8% compared to 2024. The category “other groundfish”¹² (+14%) was mainly responsible for the increase in first-sales value, while blue whiting (-8%) was mainly responsible for the decrease in first-sales volume.

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

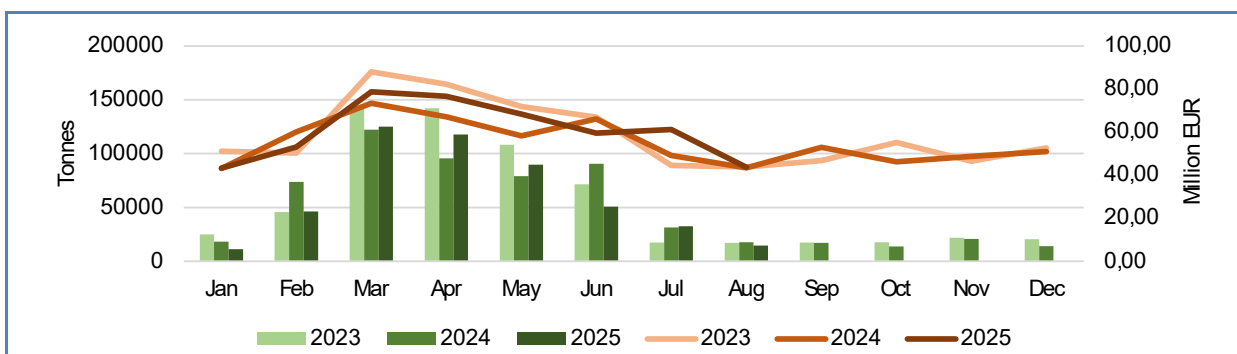


Table 11. FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-AUG 2024 AND JAN-AUG 2025)

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan-Aug 2024 %)
Denmark	Other groundfish ¹³	0,29 EUR/kg	0,40 EUR/kg	+36%
Denmark	Saithe	1,63 EUR/kg	2,15 EUR/kg	+32%
Denmark	Blue whiting	0,29 EUR/kg	0,34 EUR/kg	+15%

Other marine fish¹⁴

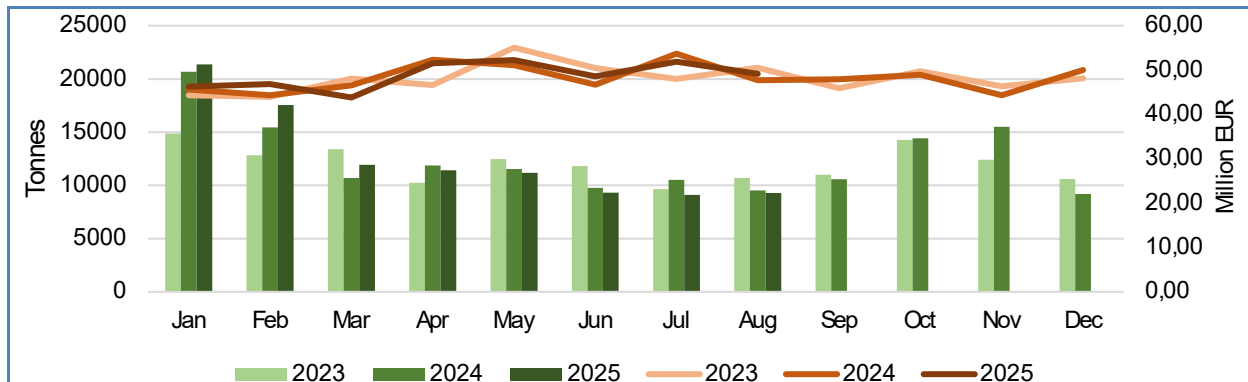
In 2025, first-sales value of the category “other marine fish” totalled EUR 390,4 million, an increase of 1% compared to 2024. First-sales volume amounted to 101.182 tonnes, an increase of 1% compared to 2024. Monk (+4%) was the main commercial species contributing to the rise in first-sales value, while the category “other marine fish”¹⁵ was behind the increase in first-sales volume (+21%).

¹² In 2025 „Other groundfish“ comprised 44 species of which sandeel nei and European conger together account for 75% of total first-sales value.

¹³ „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.

¹⁴ 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.

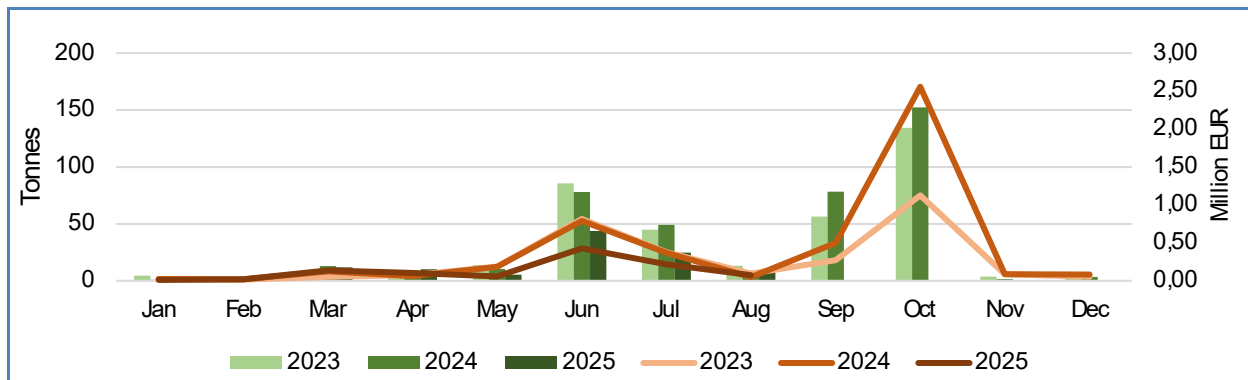
¹⁵ Of the „Other marine fish“ Main Commercial Species (MCS), boarfish and boarfishes nei together represent 70% of the total first-sales volume.

Figure 12. **FIRST-SALES VALUE AND VOLUME OF OTHER MARINE FISH, JAN 2023 – AUG 2025**Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-AUG 2024 AND JAN-AUG 2025)**

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan-Aug 2024 %)
Spain	Red mullet	7,71 EUR/kg	9,12 EUR/kg	+18%
Spain	Other marine fish ¹⁶	5,49 EUR/kg	5,67 EUR/kg	+3%
Spain	Monk	5,81 EUR/kg	6,41 EUR/kg	+10%

Salmonids

In 2025, first-sales value of “Salmonids” totalled EUR 1,1 million, a decrease of 35% compared to 2024, while first-sales volume amounted to 107.869 kg, a decrease of 35% compared to 2024. Salmon (-43% and -41%) 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 – AUG 2025**Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-AUG 2024 AND JAN-AUG 2025)**

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan-Aug 2024 %)
Sweden	Salmon	8,18 EUR/kg	8,87 EUR/kg	+8%
Finland	Salmon	9,80 EUR/kg	10,61 EUR/kg	+8%

Small pelagics

In 2025, first-sales value of “Small pelagics” amounted to EUR 586,4 million, an increase of 9% compared to 2024. First-sales volume amounted to 612.980 tonnes, a decrease of 2% compared to 2024. Mackerel and Atlantic horse mackerel (+17% and

¹⁶ „Other marine fish“ MCS in Spain comprises 120 species in the period analysed of which red scorpionfish, greater amberjack and meagre together represented 29% of the total value and 12% of volume.



+62%) were the commercial species contributing most to the increase in first-sales value, while sprat (-11%) and mackerel (-14%) were 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 – AUG 2025**

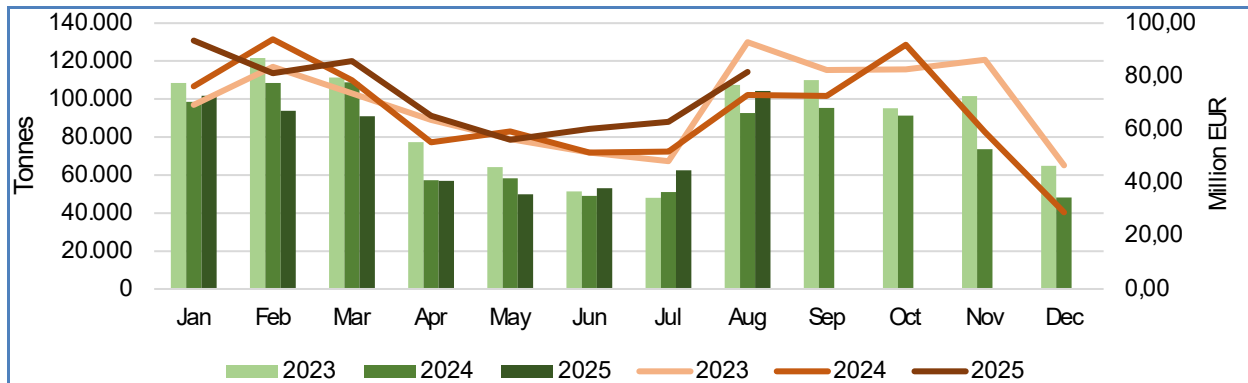


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-AUG 2024 AND JAN-AUG 2025)**

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan-Aug 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	1,29 EUR/kg	1,83 EUR/kg	+42%

Tuna and tuna-like species

In 2025, first-sales value of “Tuna and tuna-like species” totalled EUR 243,5 million, a decrease of 4% compared to 2024. First-sales volume totalled 64.229 tonnes, a decrease of 7% compared to 2024. Yellowfin tuna (-34% and -33%), and swordfish (-9% and -12%) were the 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 – AUG 2025**

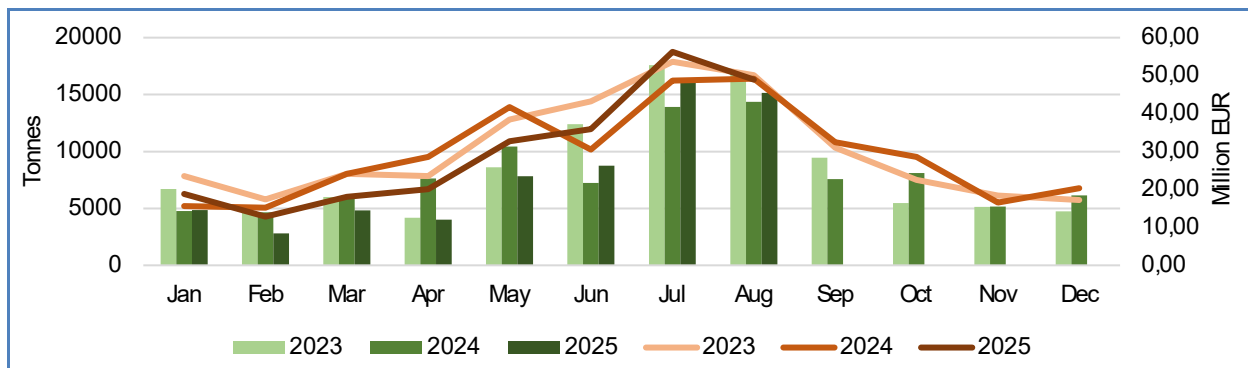


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-AUG 2024 AND JAN-AUG 2025)**

Country	Main Commercial Species	First-sales average price Jan- Aug 2024	First-sales average Price Jan- Aug 2025	Trend (Jan- Aug 2025 vs Jan-Aug 2024 %)
Spain	Yellowfin tuna	2,73 EUR/kg	2,57 EUR/kg	-6%
Spain	Skipjack tuna	1,61 EUR/kg	1,53 EUR/kg	-5%
Spain	Swordfish	5,07 EUR/kg	5,19 EUR/kg	+2%

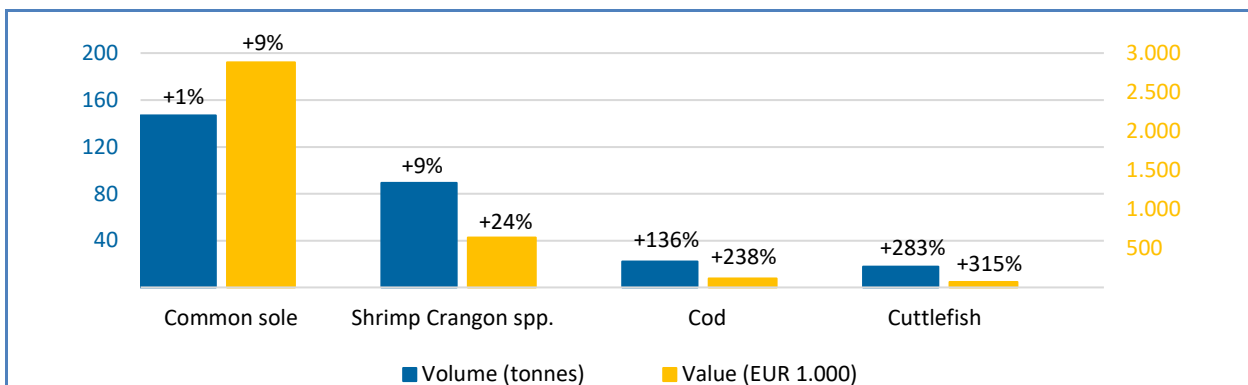


3.3. First sales in reporting countries¹⁷

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

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 48,9 million, +5%	7.618 tonnes, 0%	Value: octopus, cuttlefish, common sole. Volume: common sole, cuttlefish, ray.
Aug 2025 vs Aug 2024	EUR 5,5 million, +11%	772 tonnes, 0%	Value: common sole, shrimp <i>Crangon</i> spp. Volume: cod, cuttlefish.

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

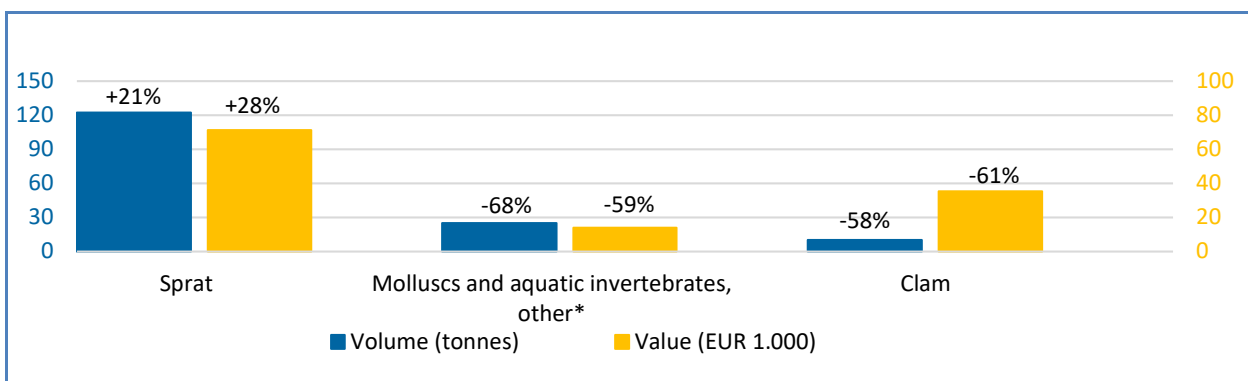


Percentages show change from the previous year.

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

 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 1,7 million, +16%	2.472 tonnes, -4%	Value: sprat, clam, red mullet. Volume: other molluscs and aquatic invertebrates*.
Aug 2025 vs Aug 2024	EUR 0,2 million, -18%	184 tonnes, -18%	sprat, other molluscs and aquatic invertebrates*, clam.

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



Percentages show change from the previous year. *EUMOFA aggregation for species.¹⁸

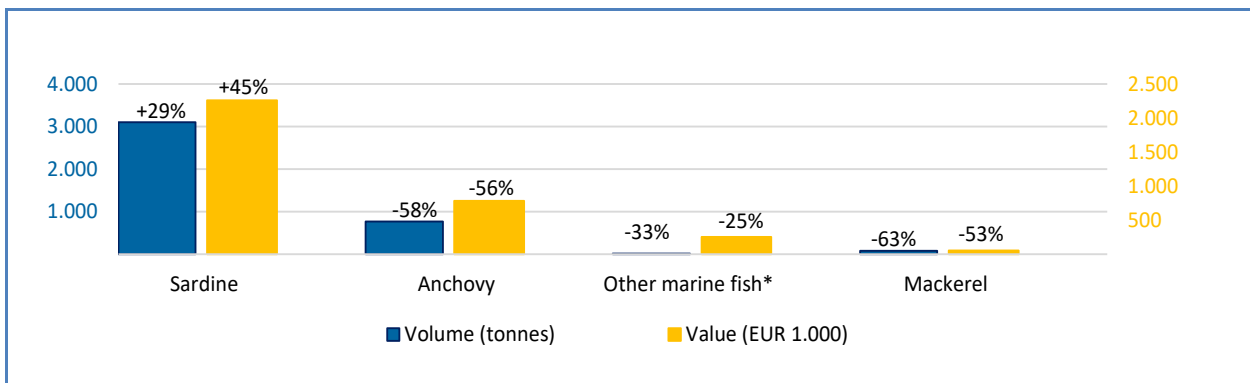
¹⁷ First-sales data updated on 20. 10. 2025. This section covers all countries for which data are available on the date of extraction and analysis.

¹⁸ Metadata 2, Annex 3: <https://eumofa.eu/supply-balance-and-other-methodologies>

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

 Croatia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 31,9 million, -8%	19.220 tonnes, -21%	Anchovy, hake, bluefin tuna, red mullet, sardine.
Aug 2025 vs Aug 2024	EUR 6,1 million, -6%	4.510 tonnes, -10%	Sardine, anchovy, other marine fish*, mackerel.

Figure 18. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, AUGUST 2025

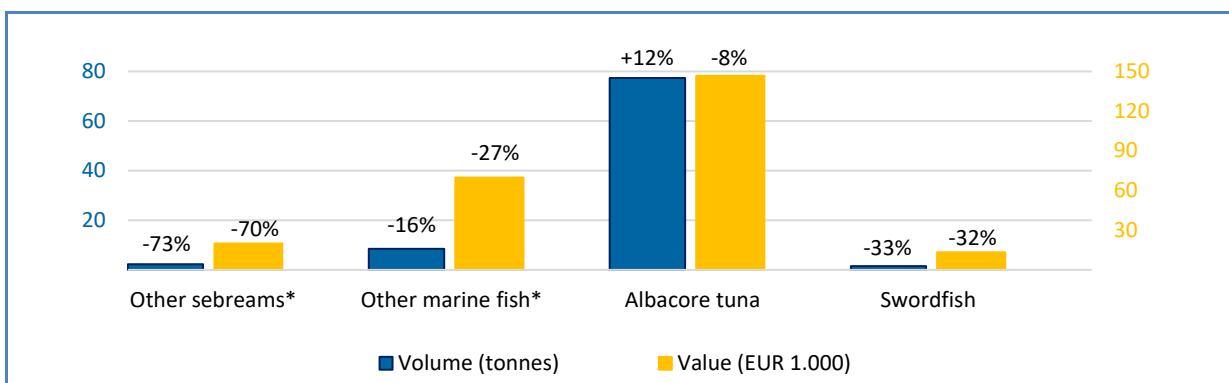


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 1,9 million, -12%	468 tonnes, -2%	Other seabream*, red mullet, picarel.
Aug 2025 vs Aug 2024	EUR 0,3 million, -29%	92 tonnes, -4%	Other seabream*, other marine fish*, albacore tuna, swordfish.

Figure 19. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, AUGUST 2025



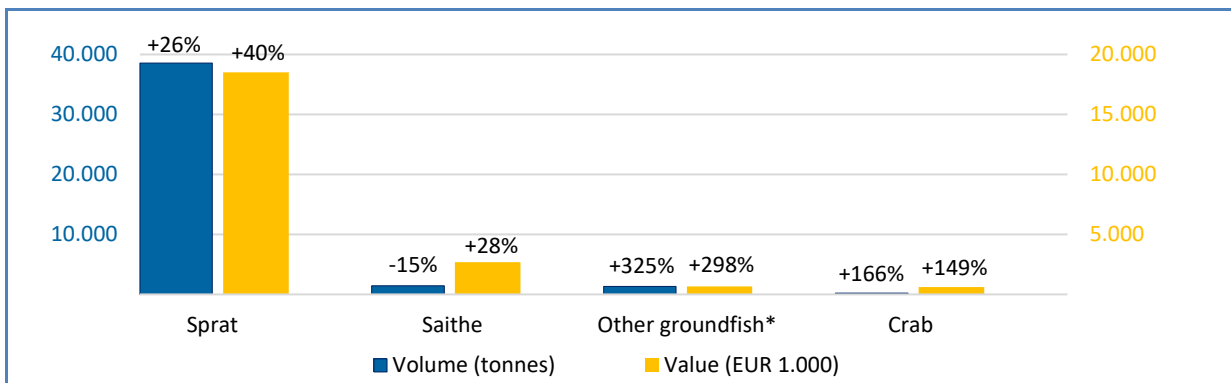
Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 362,9 million, +7%	528.414 tonnes, -2%	Value: Other groundfish*, saithe, blue whiting, haddock. Volume: blue whiting, other groundfish*, sprat.
Aug 2025 vs Aug 2024	EUR 59,8 million, +5%	68.210 tonnes, +10%	Sprat, saithe, other groundfish*, crab.

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

Figure 20. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, AUGUST 2025



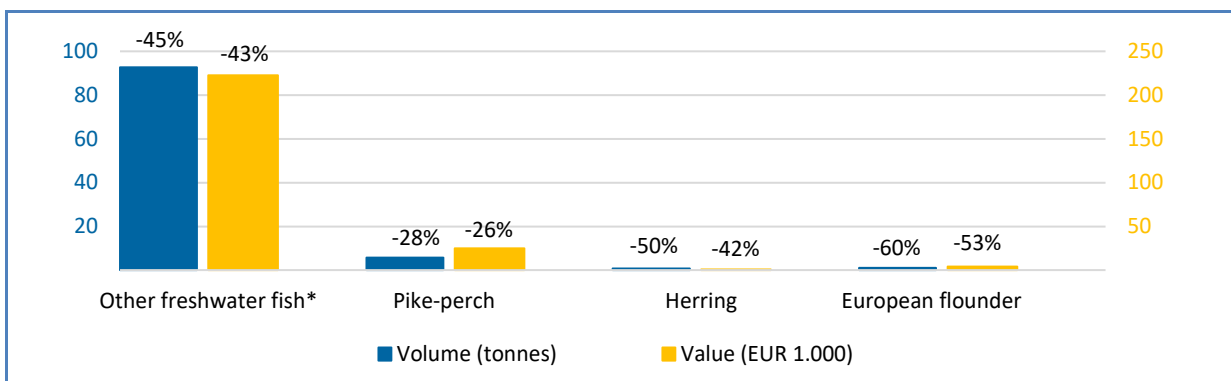
Percentages show change from the previous year. *EUMOFA aggregation for species

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

 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 15,5 million, -24%	32.915 tonnes, -19%	Herring, sprat, smelt, European flounder.
Aug 2025 vs Aug 2024	EUR 0,3 million, -37%	112 tonnes, -41%	Other freshwater fish*, pike-perch, herring, European flounder.

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

Figure 21. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, AUGUST 2025

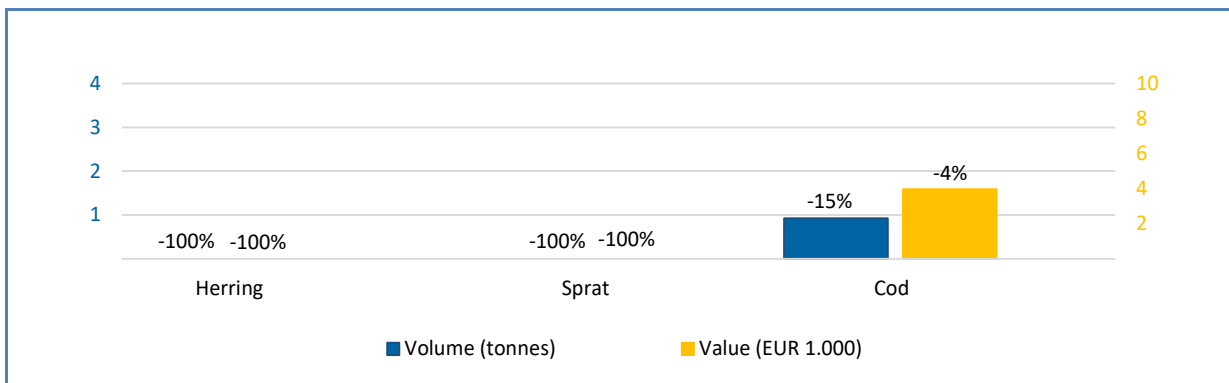


Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 13,6 million, +4%	44.345 tonnes, +28%	Herring.
Aug 2025 vs Aug 2024	EUR 0,03 million, -66%	3 tonnes, -99%	Herring, sprat, cod.

Figure 22. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND, AUGUST 2025

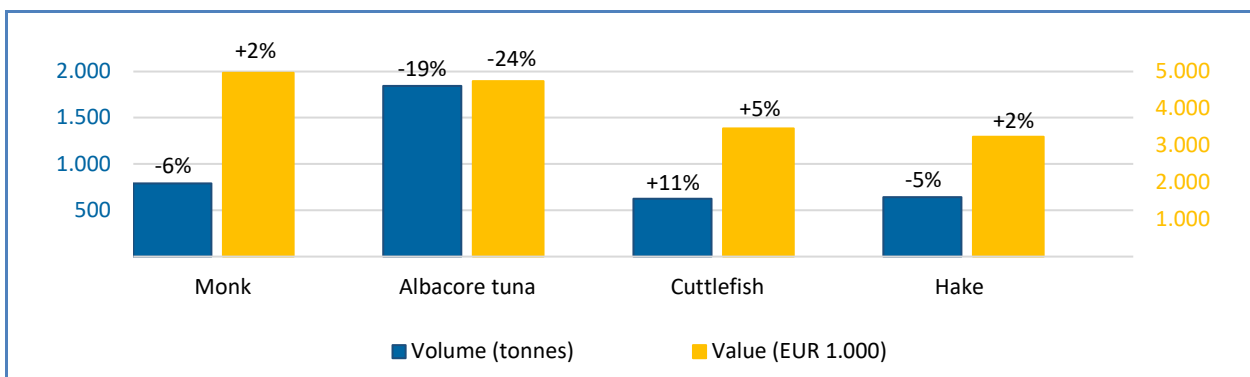


Percentages show change from the previous year.

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

 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 481,4 million, +8%	169.977 tonnes, +6%	Octopus, eel, scallop, sardine, anchovy.
Aug 2025 vs Aug 2024	EUR 58,4 million, 0%	21.901 tonnes, +18%	Monk, albacore tuna, cuttlefish, hake.

Figure 23. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, AUGUST 2025



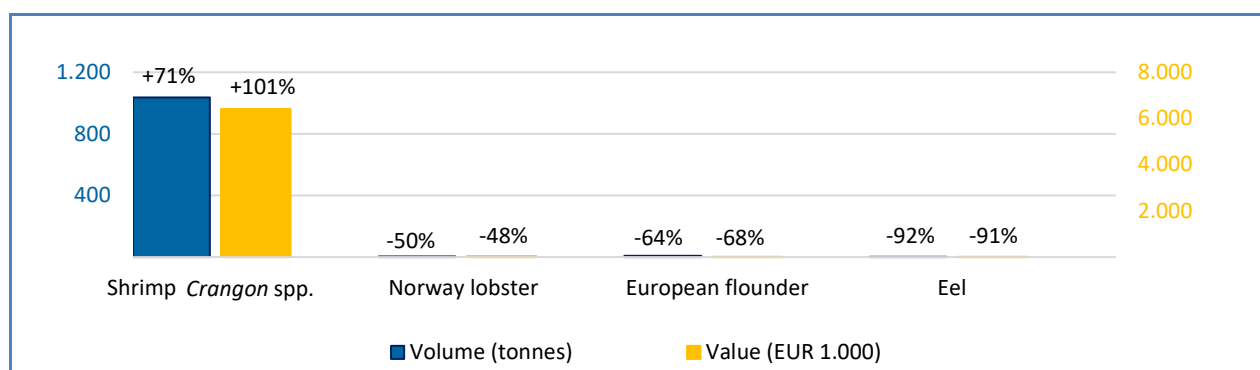
Percentages show change from the previous year.



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

 Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 30,5 million, -23%	5.733 tonnes, -73%	Mackerel, blue whiting, cod, Greenland halibut.
Aug 2025 vs Aug 2024	EUR 6,5 million, +75%	1.067 tonnes, +49%	Shrimp <i>Crangon</i> spp., Norway lobster, European flounder, eel.

Figure 24. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY, AUGUST 2025

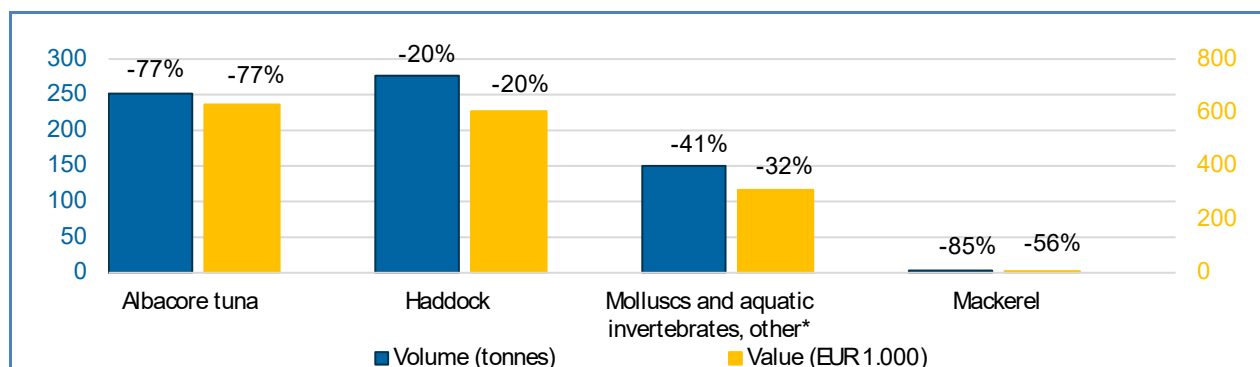


Percentages show change from the previous year.

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

 Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2025 vs Jan-Feb 2024	EUR 214,4 million, +20%	160.525 tonnes, +8%	Mackerel, Atlantic horse mackerel, Norway lobster, sprat.
Aug 2025 vs Aug 2024	EUR 13,5 million, -1%	3.091 tonnes, -18%	Albacore tuna, haddock, other molluscs and aquatic invertebrates*; mackerel.

Figure 25. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND, AUGUST 2025



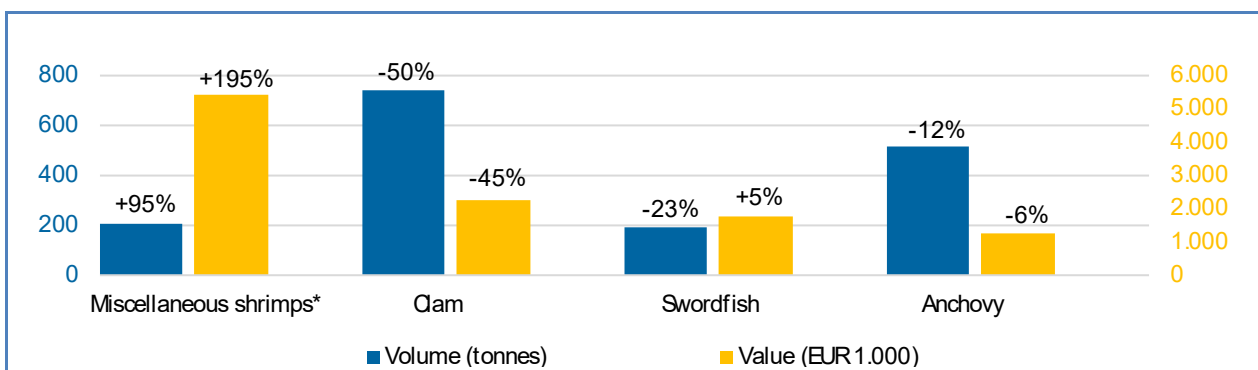
Percentages show change from the previous year. *EUMOFA aggregation for species



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

 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 170,2 million, -2%	32.635 tonnes, -13%	Swordfish, sardine, cuttlefish, warmwater shrimps*, clam.
Aug 2025 vs Aug 2024	EUR 19,4 million, +7%	3.103 tonnes, -28%	Value: Miscellaneous shrimps*. Volume: clam, swordfish, anchovy.

Figure 26. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, AUGUST 2025

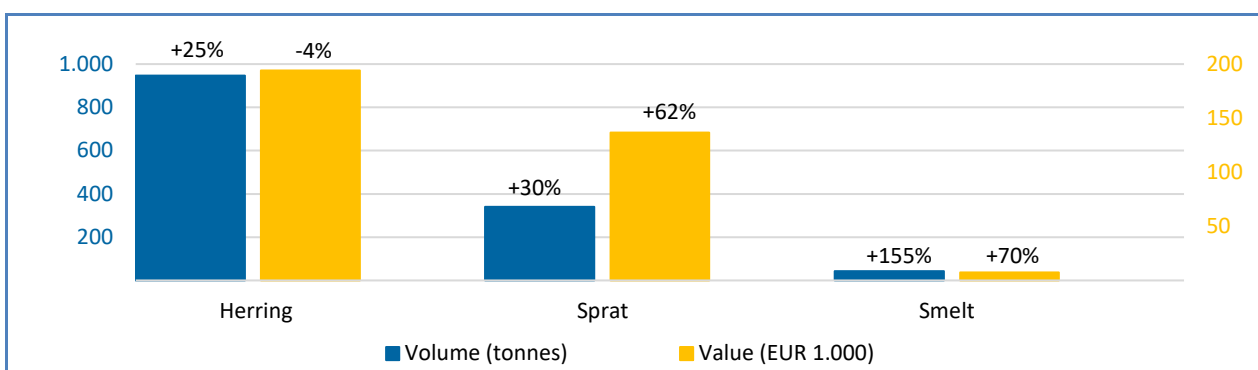


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 27. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA

 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 9,0 million, +4%	23.268 tonnes, -5%	Value: sprat, herring. Volume: sprat, other marine fish*, other freshwater fish*.
Aug 2025 vs Aug 2024	EUR 0,4 million, +3%	1.355 tonnes, +15%	herring, sprat, smelt.

Figure 27. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, AUGUST 2025

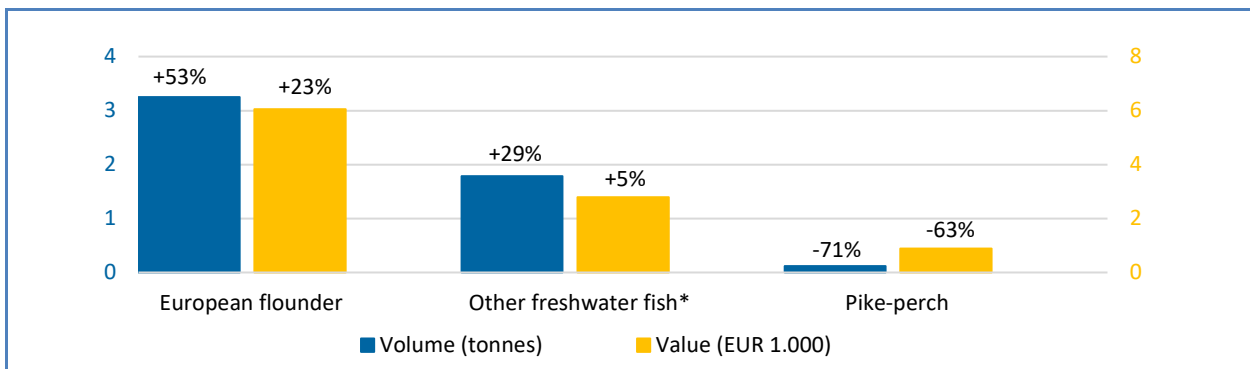


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 28. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA

 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 0,2 million, -37%	190 tonnes, -35%	Smelt, turbot, other groundfish*, other freshwater fish*.
Aug 2025 vs Aug 2024	EUR 0,01 million, +19%	7 tonnes, +69%	European flounder, other freshwater fish*, pike-perch.

Figure 28. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, AUGUST 2025

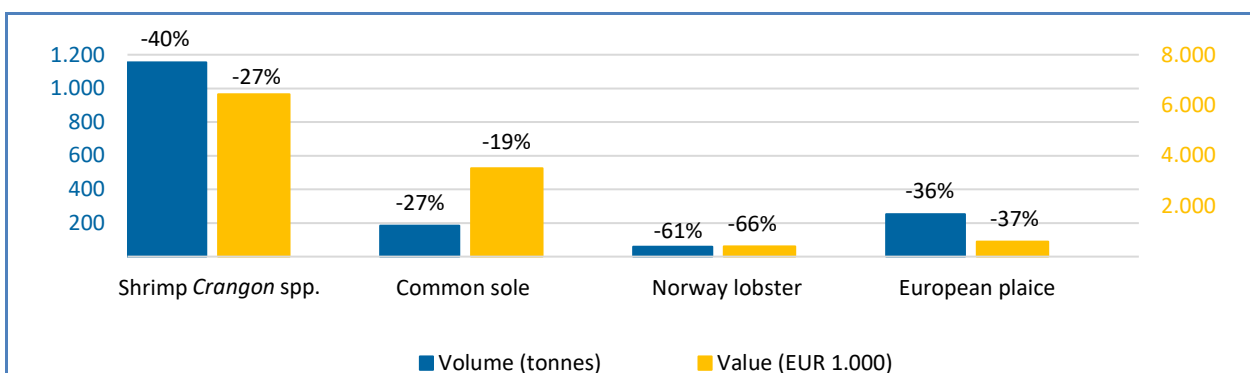


Percentages show change from the previous year. *EUMOFA aggregation for species

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

 The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 89,1 million, -9%	13.891 tonnes, -8%	Shrimp <i>Crangon</i> spp., European plaice, Norway lobster, squid.
Aug 2025 vs Aug 2024	EUR 13,4 million, -24%	2.174 tonnes, -33%	Shrimp <i>Crangon</i> spp., common sole, Norway lobster, European lobster.

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



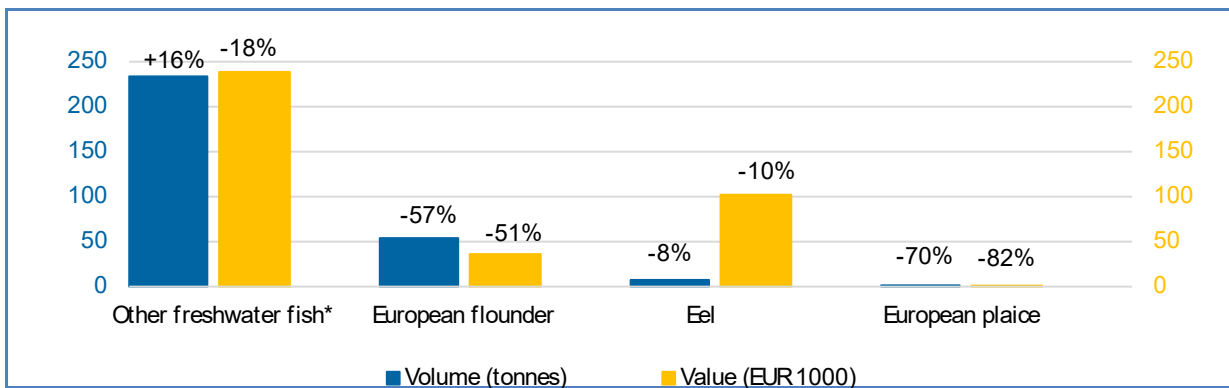
Percentages show change from the previous year.



Table 30. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, AUGUST 2025

 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 18,8 million, -9%	37.220 tonnes, -4%	Sprat, European flounder, eel, turbot.
Aug 2025 vs Aug 2024	EUR 0,6 million, -15%	613 tonnes, -3%	Other freshwater fish*, European flounder, eel, European plaice.

Figure 30. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, AUGUST 2025



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

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

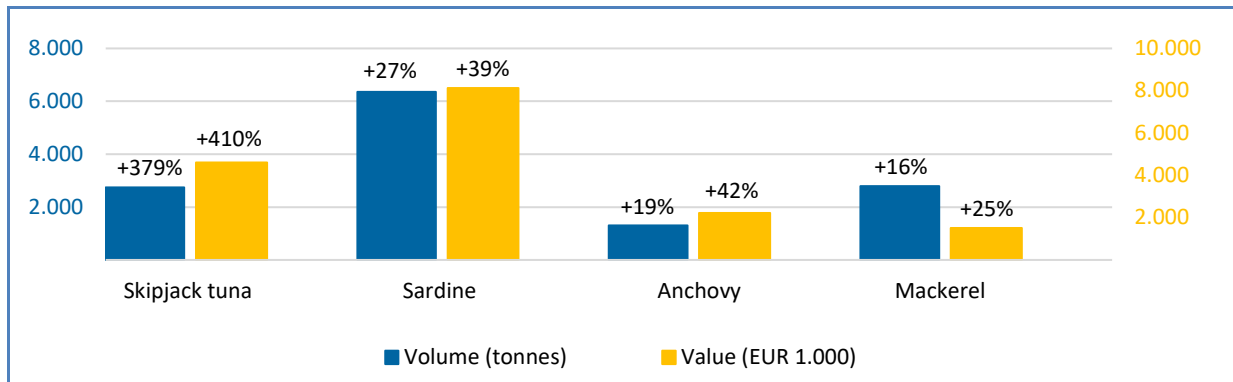
 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Aug 2025 vs Jan-Aug 2024	EUR 208,1 million, +11%	72.752 tonnes, +3%	Sardine, skipjack tuna, anchovy, octopus.	In August 2025, there was an increase of skipjack tuna first sales compared to August 2024. Focusing on data from 2010 to the present, for both annual figures and August alone, the change from 2024 to 2025 has happened before. In previous years, the lowest first-sale peaks were often followed by the highest peaks, causing sudden shifts. The variation in economic value is mainly due to the abundance of product rather than changes in the unit price associated with it. Moreover, according to the technical report of ISSF ¹⁹ , it is estimated that both Eastern and Western Atlantic skipjack stock is not overfished, and overfishing is not occurring, consistent with the latest ICCAT reports ²⁰ . In conclusion, the natural “boom and bust” of this specie is an explanatory factor.
Aug 2025 vs Aug 2024	EUR 34,8 million, +21%	17.010 tonnes, +21%	Skipjack tuna, sardine, anchovy, mackerel.	

¹⁹ ISSF. 2025. Status of the world fisheries for tuna. Mar. 2025. ISSF Technical Report 2025-01. International Seafood Sustainability Foundation, Pittsburgh, PA, USA.

²⁰ https://www.iccat.int/Documents/Meetings/Docs/2024/Reports/2024_SCRS_ENG.pdf



Figure 31. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, AUGUST 2025

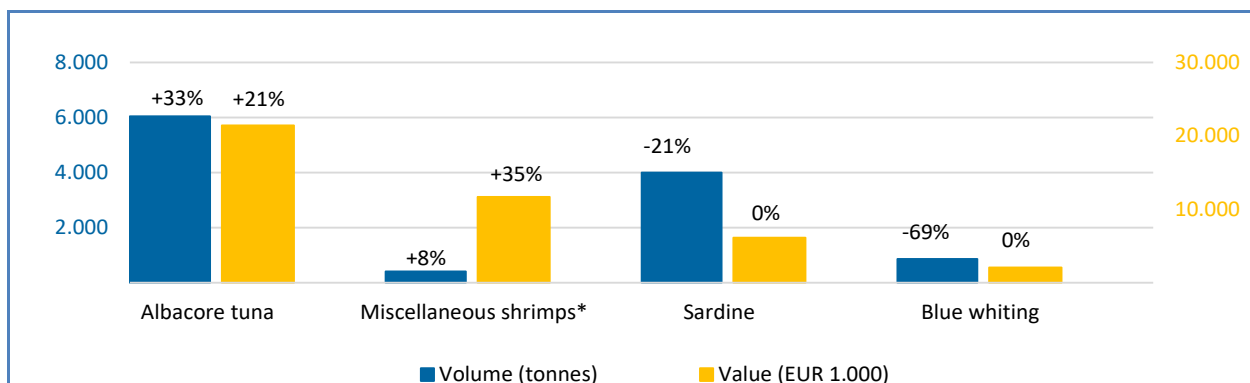


Percentages show change from the previous year.

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

 Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Aug 2025 vs Jan-Aug 2024	EUR 991,4 million, +2%	263,5 tonnes, -9%	Value: albacore tuna, mackerel. Volume: anchovy, blue whiting, yellowfin tuna, skipjack tuna.
Aug 2025 vs Aug 2024	EUR 130,3 million +6%	34.429 tonnes, -4%	Value: albacore tuna, hake. Volume: sardine, blue whiting.

Figure 32. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, AUGUST 2025



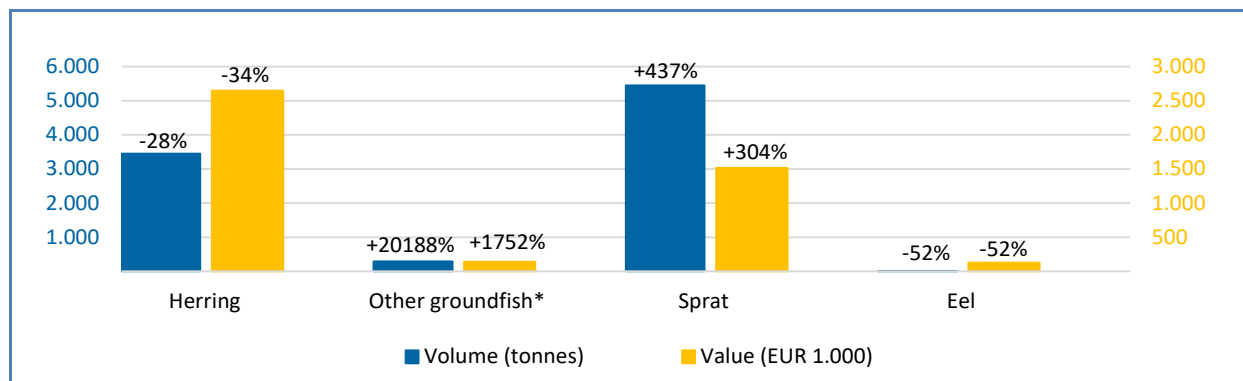
Percentages show change from the previous year.

Table 33. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN

 Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Aug 2025 vs Jan-Aug 2024	EUR 51,5 million, -15%	64.433 tonnes, -22%	Sprat, herring, coldwater shrimps*, Other groundfish.	In August 2025, there was a decrease of blue whiting first sales value and volume compared to August 2024. Catches for blue whiting have been reported in May and September 2025, not in August, explaining the decrease. Moreover, due to the low price of blue whiting in August 2025, about 91% of the sales went to non-human consumption, explaining the drop in value. In addition, the unusually hot weather in August 2025 may have affected fishing activities.
Aug 2025 vs Aug 2024	EUR 8,9 million, -1%	9.863 tonnes, +42%	Value: herring, eel. Volume: sprat, Other groundfish*.	



Figure 33. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, AUGUST 2025

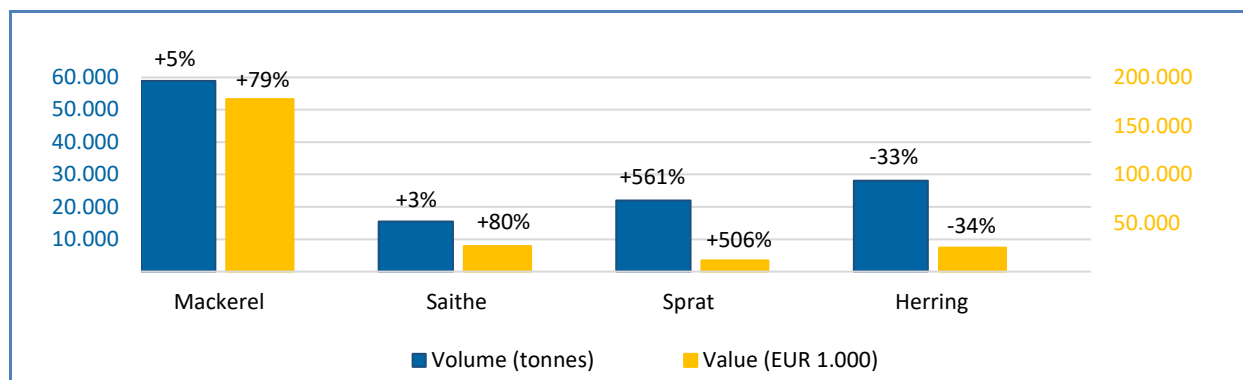


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 34. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY

 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Aug 2025 vs Jan-Aug 2024	EUR 2,4 billion, +15%	1.861.265 tonnes, -5%	Value: mackerel, crab, saithe. Volume: miscellaneous small pelagics*, cod, coldwater shrimps*.	In August 2025, there was an increase of mackerel first sales value and volume compared to August 2024. Pelagic species are highly migratory and volumes can fluctuate widely, especially when comparing month to month. Moreover, the Northeast Atlantic mackerel stock has been overfished over the past decade. In 2025 quotas were reduced by about 200.000 tonnes (about 17%) compared to 2024, which explains why the average unit price has risen considerably compared to August 2024.
Aug 2025 vs Aug 2024	EUR 326,4 million +23%	195.745 tonnes, -5%	Value: mackerel, saithe, sprat. Volume: herring, coldwater shrimps*.	

Figure 34. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, AUGUST 2025

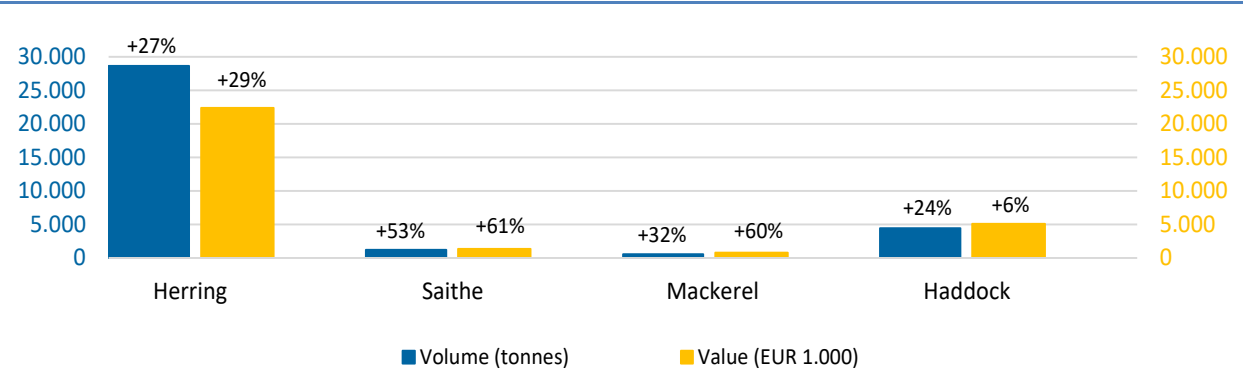


Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 35. 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-Aug 2025 vs Jan-Aug 2024	EUR 457,8 million, +11%	228.291 tonnes, +5%	Norway lobster, herring, saithe, haddock.
Aug 2025 vs Aug 2024	EUR 63,6 million +7%	44.243 tonnes, +17%	Herring, saithe, mackerel, haddock.

Figure 35. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, AUGUST 2025



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

From January to August 2025, the value of extra-EU imports increased by 7% compared to the same period in 2024, while volume increased by 12%. The MCSs contributing most to the increase in import values were warmwater shrimps (+26%) and other cephalopods (+61%), while salmon (+12%) and Alaska pollock (+36%) contributed most to the increase in volume.

Increases in value and volume: Belgium, Bulgaria, Croatia, Cyprus, Czechia, Estonia, Finland, France, Germany, Greece, Ireland, Italy, Malta, 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 Malta driven by an increase in mackerel (+497%) and bluefin tuna (+20%). The highest increase in volume occurred in Croatia, driven by sardine (+1.660%) and mackerel (+2.217%).

Decreases in value and volume: Austria, Hungary, Lithuania, Luxembourg, Slovakia and Slovenia recorded decreases in extra-EU imports in value and volume. Lithuania experienced the most significant decline in absolute terms in value and volume due primarily to lower imports of salmon (-59% and -56%), and cod (-100% and -100%).

Table 36. **JANUARY - AUGUST OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS**
(volume in tonnes and value in million EUR)²¹

	January - August 2024			January - August 2025			Change from January - August 2024		
Country	Volume	Value	Price	Volume	Value	Price	Volume	Value	Price
Austria	7.982	48,89	6,12	6.972	47,04	6,75	-13%	-4%	10%
Belgium	91.945	564,57	6,14	103.777	655,09	6,31	13%	16%	3%
Bulgaria	7.674	20,45	2,66	8.984	26,15	2,91	17%	28%	9%
Croatia	5.867	25,89	4,41	15.261	32,38	2,12	160%	25%	-52%
Cyprus	4.856	30,55	6,29	5.350	32,35	6,05	10%	6%	-4%
Czechia	9.223	43,48	4,71	10.460	48,14	4,60	13%	11%	-2%
Denmark	572.926	2158,93	3,77	656.543	2.049,63	3,12	15%	-5%	-17%
Estonia	6.706	36,79	5,49	7.667	39,64	5,17	14%	8%	-6%
Finland	25.084	176,66	7,04	29.721	181,30	6,10	18%	3%	-13%
France	379.133	2082,21	5,49	396.046	2095,74	5,29	4%	1%	-4%
Germany	215.947	992,77	4,60	288.721	1210,65	4,19	34%	22%	-9%
Greece	89.736	358,52	4,00	105.297	416,05	3,95	17%	16%	-1%
Hungary	1.864	7,51	4,03	1.706	7,30	4,28	-8%	-3%	6%
Ireland	123.282	143,72	1,17	186.233	172,78	0,93	51%	20%	-20%
Italy	311.675	1817,20	5,83	334.844	1993,58	5,95	7%	10%	2%
Latvia	17.835	39,70	2,23	14.145	41,15	2,91	-21%	4%	31%
Lithuania	34.804	120,79	3,47	29.567	90,29	3,05	-15%	-25%	-12%
Luxembourg	14	0,39	28,64	8	0,38	49,45	-43%	-2%	73%
Malta	6.555	20,05	3,06	15.849	28,56	1,80	142%	42%	-41%
Netherlands	447.184	2296,84	5,14	462.645	2540,73	5,49	3%	11%	7%
Poland	153.472	665,54	4,34	159.821	701,05	4,39	4%	5%	1%
Portugal	110.445	481,85	4,36	133.281	617,65	4,63	21%	28%	6%

²¹ 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	13.724	59,78	4,36	15.510	70,13	4,52	13%	17%	4%
Slovakia	3.325	10,59	3,18	3.026	9,99	3,30	-9%	-6%	4%
Slovenia	5.000	20,57	4,11	4.559	19,59	4,30	-9%	-5%	4%
Spain	791.128	3699,51	4,68	867.027	4189,14	4,83	10%	13%	3%
Sweden	430.876	3392,76	7,87	483.689	3332,11	6,89	12%	-2%	-13%
EU-27	3.868.258	19316,51	4,99	4.346.709	20648,56	4,75	12%	7%	-5%

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 of extra-EU imports. Highest increases in value were observed for cephalopods, with other cephalopods and octopus (+61% and +28%, respectively) driving the increase. In terms of volume the increase for bivalves was driven by other mussels and clam (+16% and +18%, respectively).

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

Table 37. **JANUARY – AUGUST OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER CG**
(volume in tonnes and value in million EUR)

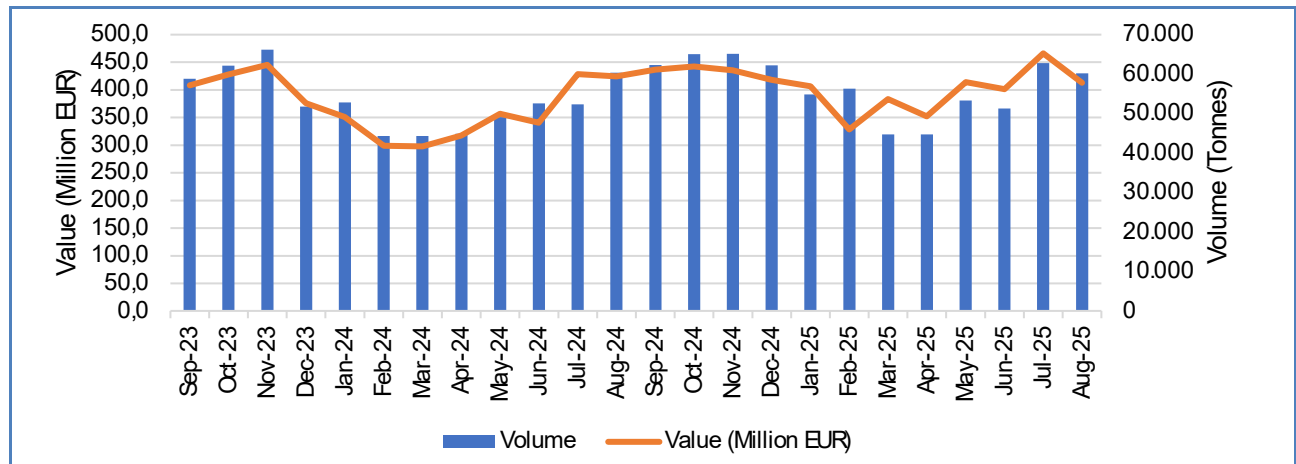
Commodity group	January - August 2024			January - August 2025			Change from January - August 2024			MCS
	Value	Volume	Price	Value	Volume	Price	Value	Volume	Price	
Bivalves	428,3	92.152	4,65	479,2	105.370	4,55	12%	14%	-2%	Other mussels, clam.
Cephalopods	1.962,8	358.167	5,48	2.375,9	386.250	6,15	21%	8%	12%	Other cephalopods, octopus.
Crustaceans	2.815,1	418.553	6,73	3.163,9	455.259	6,95	12%	9%	3%	Warmwater shrimp, lobster <i>Homarus</i> spp.
Flatfish	306,3	58.873	5,20	319,8	61.578	5,19	4%	5%	0%	Greenland halibut, other flatfish.
Freshwater fish	361,4	90.916	3,97	395,9	101.304	3,91	10%	11%	-2%	Tilapia, freshwater catfish.
Groundfish	2.873,8	730.108	3,94	3.267,0	787.476	4,15	14%	8%	5%	Cod, Alaska pollock.
Other marine fish	1.165,6	206.172	5,65	1.279,6	212.032	6,03	10%	3%	7%	Other marine fish, monk.
Salmonids	5.468,6	634.018	8,63	5.081,7	703.687	7,22	-7%	11%	-16%	Salmon, trout.
Small pelagics	630,6	256.511	2,46	707,0	284.463	2,49	12%	11%	1%	Mackerel, herring.
Tuna and tuna-like species	2.158,5	457.025	4,72	2.391,8	509.698	4,69	11%	12%	-1%	Skipjack tuna, miscellaneous tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of crustaceans in EU Member States

In January – August 2025, extra-EU imports of crustaceans accounted for a total value of EUR 3,2 million and a total volume of 455.259 tonnes, marking a 12% increase in value and 9% increase in volume compared to the same period in 2024.

Figure 36. **EXTRA-EU IMPORT VALUE AND VOLUME OF CRUSTACEANS, SEP 2023 – AUG 2025 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

Extra-EU imports of crustaceans' peak between October and November, both in terms of value and volume, while lowest drops are between February and April.

Between January and August 2025, Spain, France and the Netherlands were the main importers of crustaceans in the EU and together imported from extra-EU countries about 54% of the total volume of crustaceans, Spain (24%), France (18%) and the Netherlands (11%) respectively.

Table 38. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR CRUSTACEANS**

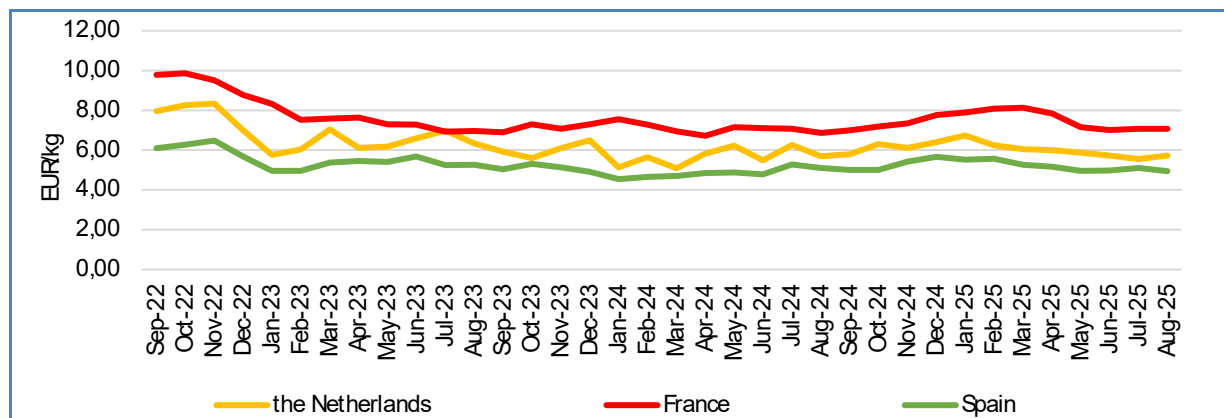
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan-Aug 2024	Jan-Aug 2025	Trend (%)	Jan-Aug 2024	Jan-Aug 2025	Trend (%)	
Spain	674,3	707,5	5%	103.057	107.070	4%	Warmwater shrimp
France	518,2	610,3	18%	72.028	82.861	15%	Warmwater shrimp
The Netherlands	331,0	367,4	11%	48.000	49.993	4%	Warmwater shrimp

4.2. Extra-EU imports of warmwater shrimp in EU Member States

In terms of value, warmwater shrimp was the main imported species of the commodity group “crustaceans”, representing 56% of the total volume, followed by miscellaneous shrimp with 28%.

The price analysis below focuses on the main EU importers of warmwater shrimp from non-EU countries, namely France, the Netherlands and Spain.

Figure 37. **EXTRA-EU IMPORT PRICE OF WARMWATER SHRIMP IN FRANCE, THE NETHERLANDS AND SPAIN (SEP 2022 – AUG 2025)**



Between September 2022 and August 2025, the price of warmwater shrimp fluctuated and decreased in the three countries analysed: France (-10%), the Netherlands (-10%), and Spain (-7%). Between January and August 2025, the volume of warmwater shrimp imported to France was 58.472 tonnes, 19% more compared with the same period in 2024, while the price increased by 4%. In terms of volume, imports came from Ecuador (70%), followed by India (7%).

In the same period, 31.250 tonnes of warmwater shrimp were imported to the Netherlands, 8% more compared to 2024, with a price decrease of 5% compared to 2024. In terms of volume, almost 27% of the total imported warmwater shrimp in 2025 was from Ecuador, 22% from both Venezuela and India.

In 2025, in Spain, 63.246 tonnes entered the country, of which almost 86% came from Ecuador. In 2025, import volumes increased by 21% while prices decreased by 5%.

The three countries display similar seasonal patterns, with import volumes peaking between August and September but also in November in Spain.

Figure 38. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF WARMWATER SHRIMP IN FRANCE, SEP 2022 – AUG 2025 (volume in tonnes, price in EUR/kg)**

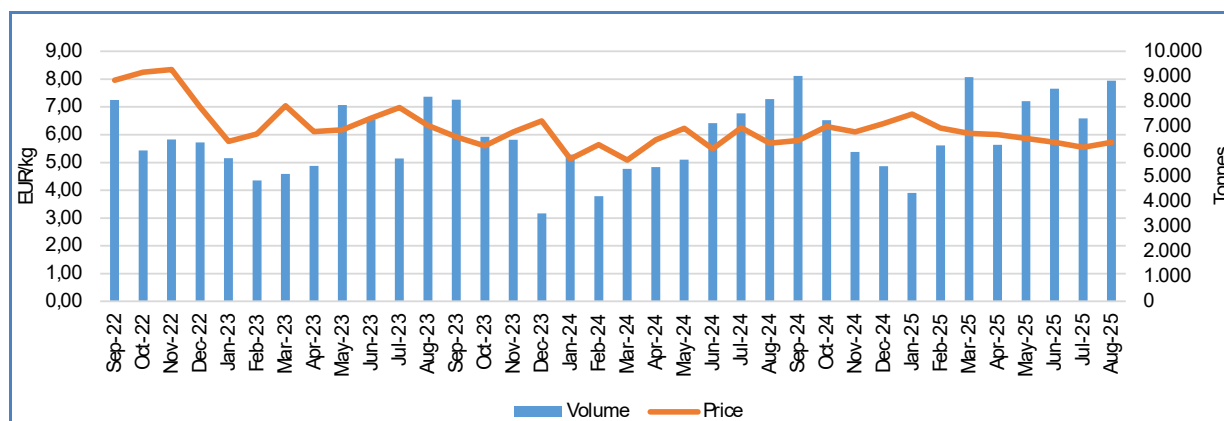


Figure 39. EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF WARMWATER SHRIMP IN THE NETHERLANDS, SEP 2022 – AUG 2025 (volume in tonnes and price in EUR/kg)

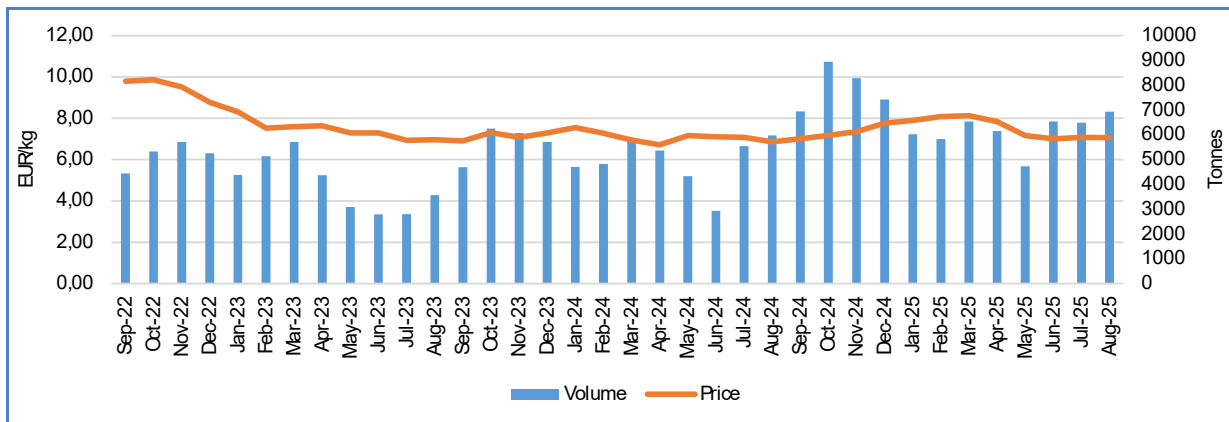
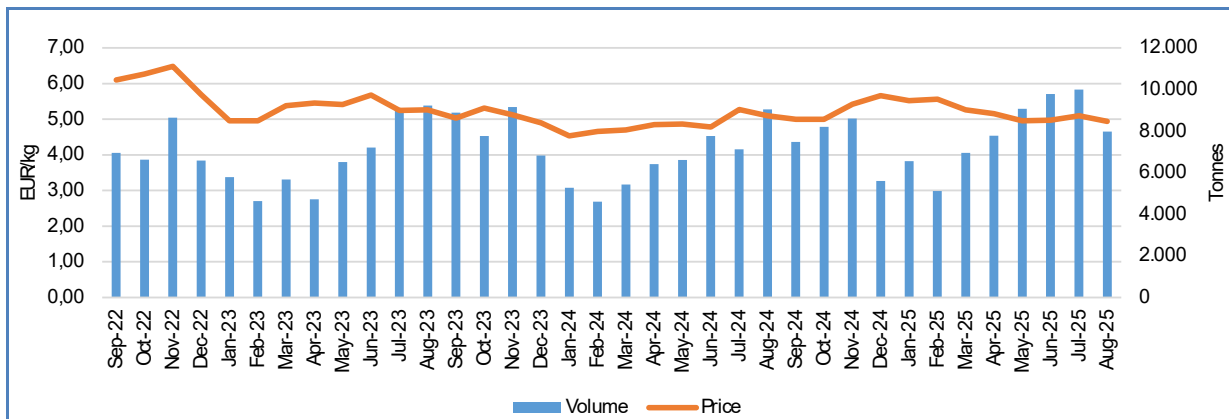


Figure 40. EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF WARMWATER SHRIMP IN SPAIN, SEP 2022 – AUG 2025 (volume in tonnes and price in EUR/kg)



4.3. Extra-EU imports of warmwater shrimp by origin

In the period January - August between 2025 and 2024, EU imports of warmwater shrimp²² experienced an increasing trend in volume (+19%) and in value (+26%). In 2025, the EU imported 253.937 tonnes of warmwater shrimp for a value of EUR 1.586 million. The main extra-EU countries supplying warmwater shrimp to the EU in 2025 were Ecuador (63%), followed by India (13%) and Vietnam (7%). An increase in imports of warmwater shrimp from these countries was observed in 2025 compared to the same period in 2024, while imports decreased from Venezuela (-46%), and Madagascar (-19%).

Table 39. EXTRA-EU IMPORTS OF SHRIMP BY ORIGIN IN 2025 (value in million EUR and volume in tonnes)

Country	Jan – Aug 2023		Jan - Aug 2024		Jan - Aug 2025		Jan - Aug 2025/2024	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Ecuador	591,4	108.995	594,2	117.368	859,8	159.960	45%	36%
India	200,8	26.678	187,0	26.814	250,2	33.982	34%	27%
Vietnam	126,6	14.540	127,5	15.997	142,4	17.254	12%	8%
Venezuela	116,8	24.407	140,2	27.825	86,8	15.042	-38%	-46%
Others	292,2	33.144	214,0	24.904	247,2	27.699	16%	11%
Total	1.327,8	207.764	1.263,0	212.908	1.586,4	253.937	26%	19%

²² 03061792 - Frozen shrimps of the genus "*Penaeus*", even smoked, whether in shell or not, incl. shrimps in shell, cooked by steaming or by boiling in water

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel²³. They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

Compared with August 2024, household consumption of fresh fishery and aquaculture products in August 2025 increased in both volume and value in Hungary, Ireland, Italy and Poland. In contrast, Sweden recorded decreases in both value and volume. Germany recorded a decrease in value (-7%) while Denmark, France, Netherlands and Portugal recorded a decrease in volume. Spain did not experience a change in volume.

The most notable increases were in Ireland and Hungary, where consumption increased in volume by 36% and 10% respectively and in value by 44% and 27% respectively compared to 2024. Sweden recorded a decrease in both volume (-11%) and in value (-7%).

Table 40. 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	August 2023		August 2024		August 2025		Change from August 2024 to August 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	957	18,73	1.111	21,04	1.092	21,27	-2%	1%
France	32,58	16.036	193,74	15.675	189,01	15.498	194,52	-1%	3%
Germany	12,49	3.702	70,13	4.088	73,24	4.315	68,30	6%	-7%
Hungary	6,73	162	1,45	244	2,14	268	2,72	10%	27%
Ireland*	20,00	799	15,01	787	14,19	1.070	20,41	36%	44%
Italy	30,01	16.958	197,61	16.536	205,25	17.152	231,71	4%	13%
Netherlands*	18,88	2.628	45,68	2.655	43,96	2.523	43,85	-5%	0%
Poland	13,68	2.802	29,71	2.970	33,90	3.062	38,71	3%	14%
Portugal	54,54	5.380	39,51	5.380	43,31	5.167	44,41	-4%	3%
Spain	41,92	36.620	350,18	36.975	372,61	37.037	402,54	0%	8%
Sweden	22,46	882	13,30	832	13,16	739	12,19	-11%	-7%

* 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.

²³ Last update: 15.10.2025.

5. 2. Overview of household consumption²⁴ of crustaceans consumed in the EU

In the household consumption data used by EUMOFA, consumption of crustaceans is monitored in ten²⁵ Member States of which Germany, Ireland, the Netherlands and Portugal are the main consumers. At species level, miscellaneous shrimp²⁶ consumption is monitored in all four Member States. The Netherlands also monitors consumption of *Crangon* spp. shrimp.

Figure 41. **HOUSEHOLD PURCHASES (in value) OF CRUSTACEANS IN GERMANY, IRELAND, THE NETHERLANDS AND PORTUGAL SEP 2022 – AUG 2025**

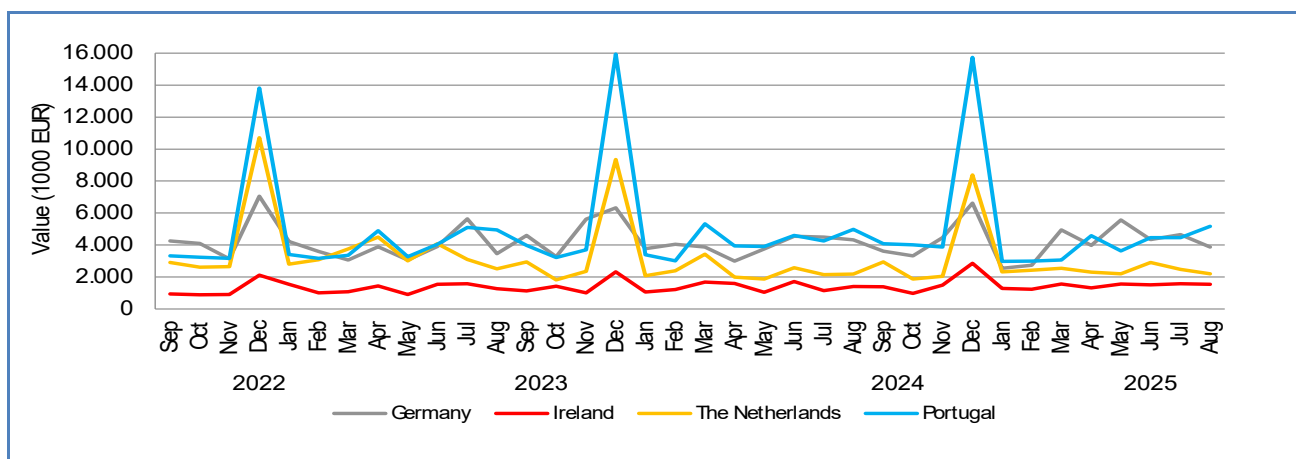
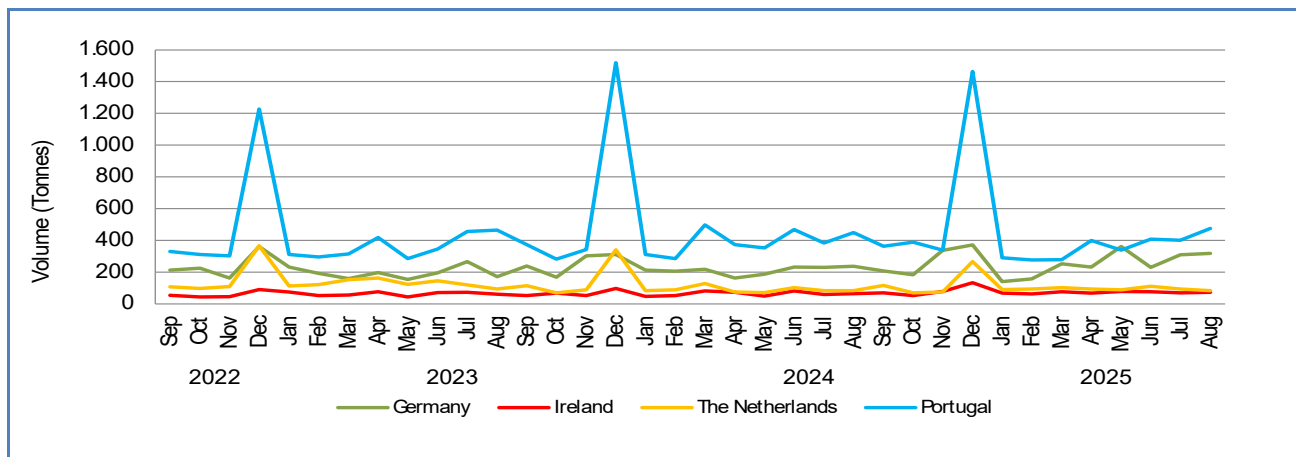


Figure 42. **HOUSEHOLD PURCHASES (in volume) OF CRUSTACEANS IN GERMANY, IRELAND, THE NETHERLANDS AND PORTUGAL SEP 2022 – AUG 2025**



²⁴ 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 do not reflect the full scope of consumption across all Member States.

²⁵ Denmark, France, Germany, Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden.

²⁶ This category includes various shrimp species such as tropical shrimp (mostly *Penaeus* spp.) or coldwater shrimp (mostly *Pandalus borealis*), among others. The main shrimp species consumed may differ significantly among EU countries, as well as the most popular states of preservation/presentation (raw/cooked, whole/peeled, etc.).

5. 3. Household consumption trends of miscellaneous shrimps - the main species of crustacean species in reporting countries

Long-term trend (Sep 2022 to Aug 2025): Slightly upward trend in volume and slightly downward trend in price.

Yearly average retail price (Jan – Aug): 16,17 EUR/kg (2023), 15,39EUR/kg (2024), 15,00 EUR/kg (2025)

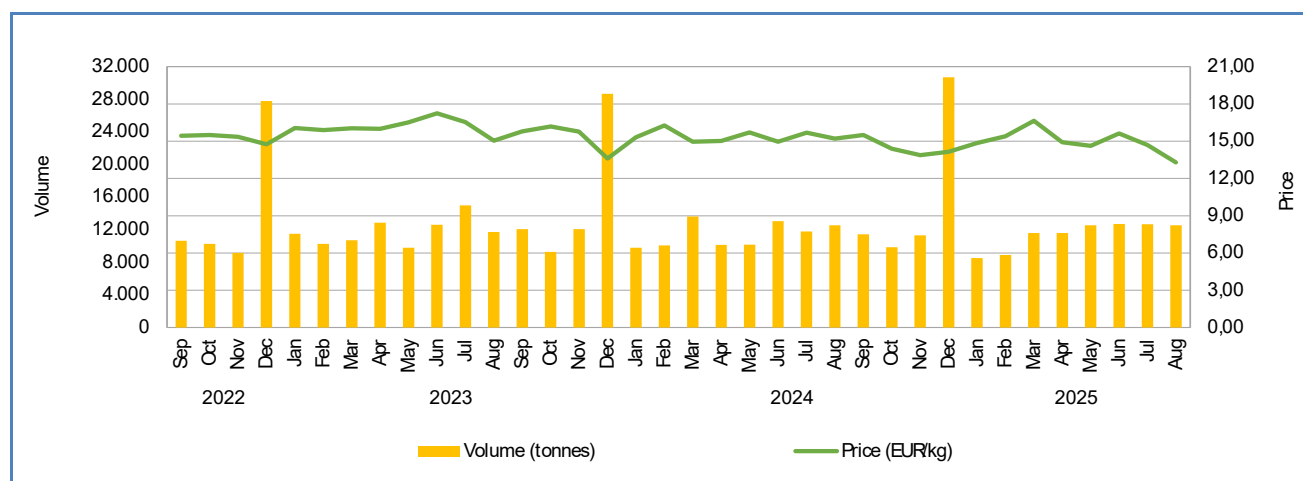
Yearly consumption (Jan – Aug): 5.839 tonnes (2023), 5.939 tonnes (2024), 6.100 tonnes (2025)

Short-term trend (Sep 2024 to Aug 2025): Downward trend in price and slightly downward trend in volume.

Average retail price (Sep 2024 to Aug 2025): 14,83 EUR/kg.

Consumption (Sep 2024 to Aug 2025): 10.506 tonnes.

Figure 43. RETAIL PRICE AND VOLUME OF SHRIMP AND MISCELLANEOUS PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, SEP 2022 – AUG 2025



Consumption of miscellaneous shrimps in the reporting countries shows a seasonal fluctuation with a peak in December due to the traditional consumption of the species at Christmas. Prices showed higher peaks between March and June while they decreased between November and December. Between August 2022 and August 2025, consumption volumes showed a slight upward trend, and prices showed a slight decreasing trend over the same period.

6. CASE STUDY: Sea urchins in the EU

Sea urchins are echinoderms found in all oceans. From a market point of view the main species are the Chilean sea urchin and the stony sea urchin. Over the last three decades, global catches have gradually decreased due to overfishing (47% since 1995). In contrast, EU catches have experienced significant growth, though they only accounted for 2% of global catches in 2023. Both EU imports from third countries and intra-EU trade have increased in recent years. The main EU markets for sea urchins are Italy and France, both of which have experienced a significant increase in their consumption over the last ten years (995% and 64% respectively). Italian supply originates almost exclusively from imports, while the French market gets its supplies from both national catches and imports. First sale prices vary significantly across countries and species, reaching 12,24 EUR/kg in Spain in 2024 against 6,15 EUR/kg in Portugal and 5,00 EUR/kg in France.

6. 1. Biology resource and exploitation

The name “sea urchin” refers to several species of marine invertebrates belonging to the class *Echinoidea*. The most commercially important species include the Chilean sea urchin (*Loxechinus albus*), the stony sea urchin (*Paracentrotus lividus*), the red sea urchin (*Mesocentrotus franciscanus*), and the European edible sea urchin (*Echinus esculentus*).

Sea urchins have spherical bodies covered by spines²⁷. Like all echinoderms they display a pentaradial symmetry (five-fold symmetry). Many sea urchin species are morphologically similar, differing mainly in spine form, length and colour. Sea urchins typically range between 3 and 10 cm (body and spines) with the largest species reaching up to 36 cm²⁸. They have small tubular projections on their bodies allowing them to move.

Sea urchins live in marine environments, usually on rocky grounds and seagrass meadows²⁹. Depending on the species, sea urchins can be found at all depths, from the intertidal zone to deep seas. The most common species are found at depths up to 80 m. Maturity is reached after several months to several years depending on the species³⁰. Some species reach adult size in five years and can live up to 20 years (purple urchin)³¹, other species can live over a hundred years (red sea urchins). However, the average life-span is between seven and ten years. Sea urchins generally have separate sexes, although some hermaphroditic individuals have occasionally been observed³². Reproduction occurs by external fertilisation, the female eggs float in the water column before being fertilised and transforming into a larva. It then sinks to the sea bottom and metamorphoses into a juvenile. Spawning occurs between April and December depending on the species and latitude. Sea urchins feed primarily on algae and seagrass³³ but can also feed on sponges, hydrozoans or copepods. Although their spines protect them from many predators, animals with specific biological adaptations feed on sea urchins (lobsters, crabs, seabream, starfish etc.)³⁴. If left without predators, sea urchins graze on kelp stems and seaweed, destroying kelp forests which creates a devastated environment called an urchin barren. Urchin barrens cause shifts in the composition of species present in the area with a reduction of biodiversity and species richness³⁵.

Sea urchin species can be found worldwide. The Chilean Sea urchin is commonly found in coastal South America from Ecuador to Argentina. The stony sea urchin is found in eastern Atlantic and Mediterranean waters³⁶, while the red sea urchin is usually found in the Northeast Pacific. The European edible sea urchin is found in coastal western Europe. Sea urchins can be harvested offshore by dredgers; they can also be harvested on coastal areas by diving or using rakes. In addition to wild harvesting, some species can be farmed, mostly in China (e.g. *Strongylocentrotus nudus*, *Strongylocentrotus intermedius*)³⁷.



Source: Shutterstock - 311679878- troscha

²⁷ [https://doris.ffesm.fr/Especies/Paracentrotus-lividus-Oursin-violet-1437/\(rOffset\)/0](https://doris.ffesm.fr/Especies/Paracentrotus-lividus-Oursin-violet-1437/(rOffset)/0)

²⁸ Barnes, Robert D. (1982). *Invertebrate Zoology*. Philadelphia, PA: Holt-Saunders International. pp. 961–981

²⁹ <https://waterworlds.info/marine-species/stony-sea-urchin-paracentrotus-lividus/>

³⁰ <https://www.sealifebase.se/summary/Paracentrotus-lividus.html>

³¹ https://animaldiversity.org/accounts/Strongylocentrotus_purpuratus/

³² <https://waterworlds.info/marine-species/stony-sea-urchin-paracentrotus-lividus/>

³³ [https://doris.ffesm.fr/Especies/Paracentrotus-lividus-Oursin-violet-1437/\(rOffset\)/0](https://doris.ffesm.fr/Especies/Paracentrotus-lividus-Oursin-violet-1437/(rOffset)/0)

³⁴ <https://waterworlds.info/marine-species/stony-sea-urchin-paracentrotus-lividus/>

³⁵ Consequences of kelp forest ecosystem shifts and predictors of persistence through multiple stressors, 2016. <https://pmc.ncbi.nlm.nih.gov/articles/PMC10846955/>

³⁶ <https://www.sealifebase.se/summary/Paracentrotus-lividus.html>

³⁷ Blue Growth: Sea Urchin Sustainable Aquaculture, Innovative Approaches, 2020. <https://www.scielo.sa.cr/pdf/rbt/v69s1/0034-7744-rbt-69-s1-474.pdf>

At EU level there is no stock regulation of sea urchin species. However national and regional policies have been implemented for certain species. For example, in France, the harvest of *Paracentrotus lividus* is prohibited from March/April to October/November. National legislation also sets the minimum harvest size (5 cm without spines for *Paracentrotus lividus*³⁸), and a maximum authorized quantity per day for both professional and recreational fisheries³⁹. In Galicia (Spain), sea urchin fisheries are co-managed by the fisheries authority and the local fisheries communities, implementing regulations such as territorially based use privilege, temporary closure (from May to September), minimum size (55 mm without spines) and maximum authorised quantity per vessel per day⁴⁰.

6. 2. Production

In 2023 global production of sea urchins originated mainly from fisheries, accounting for 86% of production, while production from aquaculture represented 14% of production.

World catches

In 2023 global catches of sea urchins amounted to 50.476 tonnes. Chile was the leading producer, representing 49% of global catches, followed by Russia (18%), Japan (14%) and Canada (6%).

Between 2014 and 2023, sea urchin catches decreased for all fleets, resulting in a 29% decrease in overall global catches. Chilean catches decreased by 24%, Russian catches by 26%, and Japanese catches by 11%. A decrease in sea urchin catches started at the beginning of the 90s, following the overexploitation of the species between 1980 and 1990, leading to a 47% decrease since 1995.

Table 41. **TOTAL WORLD CATCHES OF SEA URCHINS (volume in tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2023/2014
Chile	32.343	31.085	29.086	30.108	30.446	33.018	37.464	26.517	26.622	24.528	-24%
Russia	11.915	7.926	8.000	8.143	8.140	8.879	8.041	8.600	8.675	8.848	-26%
Japan	8.053	8.562	7.944	7.612	7.629	7.906	6.650	6.687	6.518	7.200	-11%
Canada	6.231	6.421	5.655	5.194	4.257	4.634	5.181	3.666	3.508	3.194	-49%
Mexico	3.670	4.206	1.883	4.669	2.109	1.470	1.849	1.798	1.885	1.588	-57%
USA	5.893	4.230	3.338	2.492	2.069	1.725	1.299	1.407	1.812	1.432	-76%
EU-27	391	327	346	501	621	1.214	961	1.280	1.335	1.151	+194%
Others	2.367	1.816	1.700	1.236	2.467	5.749	10.890	3.086	3.578	2.336	-1%
Total	71.053	64.768	58.152	60.155	57.938	64.794	72.534	53.241	54.132	50.476	-29%

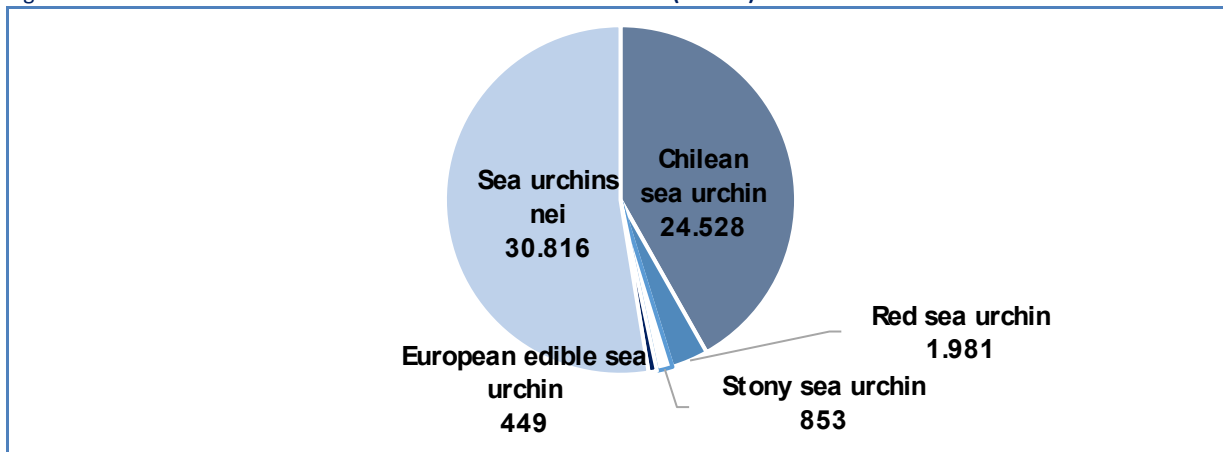
Source: FAO.

Chilean sea urchin is the predominant species in global catches, accounting for 42% of total catches in 2023, originating exclusively from the Southeast Pacific. Other important species include red sea urchin (caught by Canada in the Northeast Pacific), stony sea urchin (caught by European fleets in the Northeast Atlantic and in the Mediterranean and Black Seas) and European edible sea urchin (European fleets in the Northeast Atlantic).

³⁸ [https://doris.ffesmm.fr/Especies/Paracentrotus-lividus-Oursin-violet-1437/\(rOffset\)/0](https://doris.ffesmm.fr/Especies/Paracentrotus-lividus-Oursin-violet-1437/(rOffset)/0)

³⁹ <https://www.guidedesespecies.org/fr/oursins>

⁴⁰ History and management strategies of the sea urchin *Paracentrotus lividus* fishery in Galicia (NW Spain), 2012. <https://doi.org/10.1016/j.ocecoaman.2012.07.032>

Figure 44. **WORLD CATCHES OF SEA URCHINS BY SPECIES IN 2023 (tonnes)**

Source: FAO.

EU catches

In 2023, EU sea urchin catches amounted to 1.151 tonnes, representing 2% of global catches. Five MS reported sea urchin catches over the last decade. The main EU producers were Spain, Croatia and France, representing 51%, 25% and 23% of EU catches, respectively. The other two producers were Italy and Portugal, with fluctuating production over the period.

Between 2014 and 2023, EU catches increased by 194%, driven by the development of Spanish and Croatian catches, as illustrated in the table below. The only decrease in catches in this period was experienced by the French fleet (30%).

Catches of the EU fleet were dominated by stony sea urchins, which accounted for 74% of the catches in 2023.

Table 42. **EU CATCHES OF SEA URCHINS BY MS (volume in tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2014/2023
Spain	0	0	0	0	0	636	527	618	608	588	-
Croatia	13	12	9	28	136	173	149	371	427	284	2.081%
France	371	295	291	329	281	297	269	265	300	260	-30%
Italy	0	0	0	89	78	107	16	26	0	19	-
Portugal	7	19	45	55	126	0	0	0	0	0	-100%
EU-27	391	327	346	501	621	1.214	961	1.280	1.335	1.151	194%

Source: FAO.

Aquaculture

In 2023, global aquaculture production of sea urchins amounted to almost 8.151 tonnes. This production originated exclusively from China and Russia, representing 59% and 41% of global production, respectively. Between 2014 and 2023, global sea urchin production grew by 26%, driven by increased Russian production, while Chinese production decreased by 26% over the same period. *Strongylocentrotus intermedius* is the major sea urchin species farmed in China where it was introduced from Japan⁴¹, while the green sea urchin (*Strongylocentrotus droebachiensis*) is the main species farmed in Russia⁴².

There is no aquaculture production of sea urchins in EU Member States.

⁴¹ Large-scale production of sea urchin (*Strongylocentrotus intermedius*) seed in a hatchery in China, 2018. <https://link.springer.com/article/10.1007/s10499-018-0319-2>

⁴² Aquaculture of green sea urchin in the Barents Sea: a brief review of Russian studies, 2020. <https://onlinelibrary.wiley.com/doi/10.1111/raq.12423>

Table 43. TOTAL AQUACULTURE PRODUCTION OF SEA URCHINS (volume in tonnes)

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2014/2023
China	6.490	6.959	10.040	9.708	8.844	8.243	7.953	13.591	5.155	4.771	-26%
Russia	3	3	66	69	151	1.053	1.439	2.615	3.723	3.380	+112.567%
Total	6.493	6.962	10.106	9.777	8.995	9.296	9.392	16.206	8.878	8.151	26%

Source: FAO.

6. 3. Sea urchin first sales in the EU

In 2024, sea urchin first sales were reported in three EU Member States (France, Portugal and Spain). In 2024, stony sea urchin was the most important species in terms of first-sales volume (91%). The other species landed included species recorded under the category sea urchin nei. (9%), and violet sea urchins (1%).

In 2024, EU first sales of sea urchin amounted to 908 tonnes at a value of EUR 9,0 million and an average price of 9,94 EUR/kg. Between 2016 and 2024, first sales increased by 31% in volume and by 55% in value.

Among the reporting countries, Spain was the largest EU producer, accounting for 64% of first sales volume in 2024, followed by Portugal (28%), and France (9%). While Spain has reported declining volumes since 2015 (11%), Portugal and France recorded significant increases over the same period by 1.355% and 1.714%, respectively. No first sales were reported in Italy in 2024, although they fluctuated around 18 tonnes per year between 2015 and 2023.

First sales of sea urchin show strong seasonality, with most occurring in winter until early spring. This reflects the national and regional regulations for sea urchins that prohibit fishing during the spawning season (generally from April up to November). On average, 79% of first-sales volumes are recorded between November and April. First sale price variations are clearly linked to supply, with price peaks corresponding to supply peaks.

First-sale prices vary significantly depending on the species: 10,41 EUR/kg for stony sea urchin, 5,05 EUR/kg for sea urchin nei., and 4,62 EUR/kg for violet sea urchin in 2024. Average first sale prices increased by 51% between 2020 and 2024. Over the same period, first-sale prices rose by 57% for stony sea urchin, by 27% for the category sea urchin nei, and by 44% for violet sea urchin.

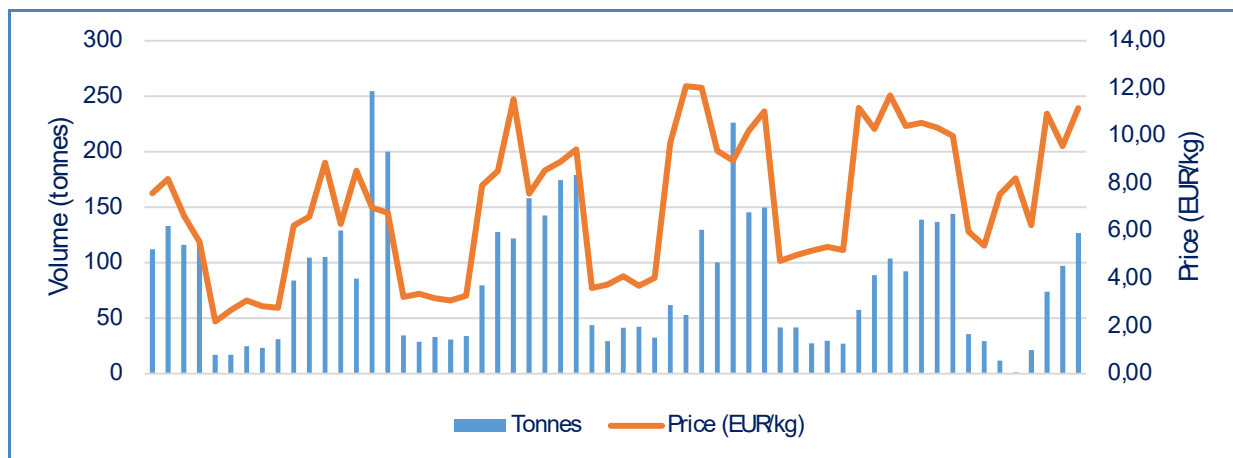
Table 44. FIRST- SALE PRICES OF SEA URCHINS BY SPECIES IN 2024 (price in EUR/kg)

Species	2020	2021	2022	2023	2024	Evol. 2020/2023
Stony sea urchin	6,64	7,28	8,64	9,57	10,41	+57%
Sea urchin nei.	3,99	4,04	4,27	4,33	5,05	+27%
Violet sea urchin	3,20	5,01	6,11	4,31	4,62	+44%
Total	6,57	7,18	8,44	9,36	9,94	+51%

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

In 2024, 57 places of sale across Spain, Portugal and France reported first sales of sea urchin. The most important places of sale in volume terms were in Spain and Portugal, with the main locations being Carreira-aguino in Spain (largest first sale place in the EU with 8% of first-sales volume), followed by Matosinhos (8% in volume) and Viana do Castelo (8%), both in Portugal. First-sale prices reported in Spain between January 2020 and December 2024 (10,5 EUR/kg on average) were significantly higher than prices recorded in Portugal (4,17 EUR/kg) and France (4,33 EUR/kg) over the same period.

Figure 45. SEA URCHIN FIRST-SALES VOLUMES AND PRICES IN THE EU (volume in tonnes, and average price in EUR/kg)



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

6. 4. International trade

There are CN⁴³ codes used for the different preservation types of sea urchins (e.g. fresh, frozen, smoked, salted or in brine, and prepared/preserved)⁴⁴.

The EU is a net importer of sea urchins. In 2024, EU sea urchin imports from third countries amounted to 179 tonnes at EUR 5,1 million, while exports amounted to only 22 tonnes at a value of EUR 498.000. Frozen sea urchins accounted for 71% of the extra-EU import value, fresh sea urchins accounted for 27%, and prepared and preserved for 2% of the value. The main EU suppliers were Iceland, Turkey and Canada, accounting for 41%, 37% and 16% of the total extra-EU import value in 2024. Between 2020 and 2024 EU imports increased by 119% in volume and by 222% in value, mostly driven by the increase of frozen imports (185% in volume and 269% in value over the same period). The main importing MS were Italy (35% of the value, 16% of the volume) and Belgium (22% of the value, 63% of the volume) in 2024. Imports have increased in all MS except France (-12% in value), with a strong increase in Italy (+1.188% in value) between 2020 and 2024.

Extra-EU exports have decreased by 56% since 2020 and amounted to 22 tonnes in 2024, at a value of EUR 498.000. Exports consisted of fresh sea urchins (39% of the total extra-EU export value) and prepared/preserved sea urchins (34%). The main destinations in value terms were the United Kingdom (33%), Switzerland (21%) and the United Arab Emirates 19%). France and Spain were the main exporters of sea urchins to third countries in 2024, accounting for 47% and 33% of the total EU export value.

In 2024 intra-EU exports of sea urchins amounted to 975 tonnes at a value of EUR 13,7 million. They consisted mostly of fresh, frozen and prepared/preserved sea urchins, accounting for 57%, 25% and 18% of the trade value, respectively. Spain is a hub for the intra-EU trade of sea urchins, accounting for 55% of the export trade value in 2024. It is the first exporter and the third destination in value for intra-EU trade. Croatia was the second most important exporter of sea urchin (11% of the trade value), followed by Portugal (10%), and the Netherlands (9%). The main destinations for intra-EU trade were Italy, France and Spain, representing 50%, 26%, and 15% of the traded value in 2024, respectively. Average intra-EU export prices increased by 25% between 2020 and 2024, reaching 14,07 EUR/kg. Frozen and prepared/preserved sea urchins reached the highest prices, reaching 22,56 EUR/kg for frozen products (despite a 47% drop since 2020) and 21,87 EUR/kg for prepared/preserved ones up 58% between 2020 and 2024). Over the same period, the export price of fresh sea urchins rose by 38%, but remained about half as high, reaching 11,08 EUR/kg in 2024.

⁴³ The Combined Nomenclature (CN) is the EU's eight-digit coding system, comprising the Harmonised System (HS) codes with further EU subdivisions. It serves the EU's common customs tariff and provides statistics for trade within the EU and between the EU and the rest of the world.

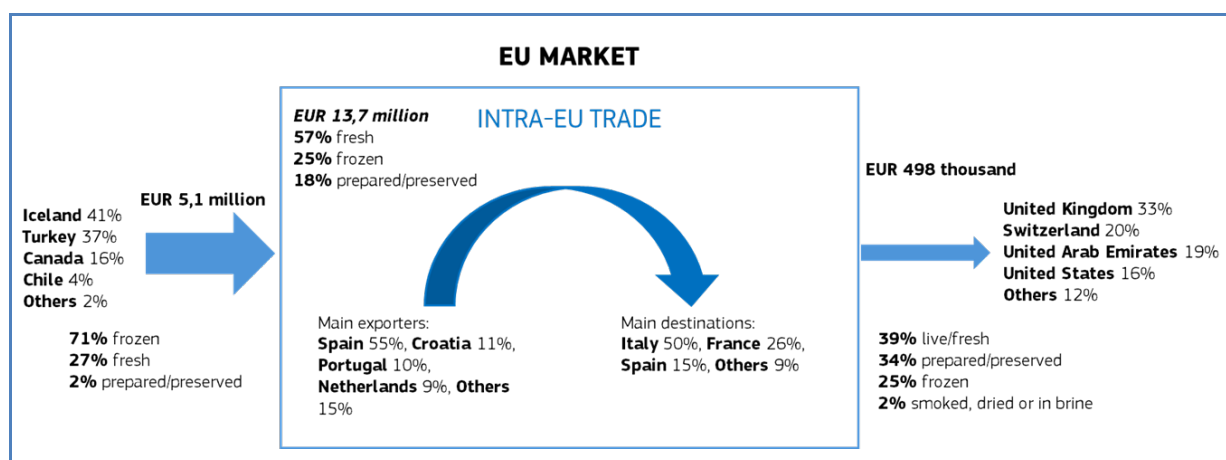
⁴⁴ 03082100 - Live, fresh or chilled, sea urchins "*Strongylocentrotus* spp., *Paracentrotus lividus*, *Loxechinus albus*, *Echichinus esculentus*"

03082200 - Frozen sea urchins "*Strongylocentrotus* spp., *Paracentrotus lividus*, *Loxechinus albus*, *Echinus esculentus*"

03082900 - Smoked, dried, salted or in brine, sea urchins "*Strongylocentrotus* spp., *Paracentrotus lividus*, *Loxechinus albus*, *Echinus esculentus*"

16056200 - Sea urchins, prepared or preserved (excl. smoked) 03077900 - Smoked, dried, salted or in brine, even in shell, sea urchins, cockles and ark shells "families Arcidae, Arctidae, Cardiidae, Donacidae, Hiatellidae, Mactridae, Mesodesmatidae, Myidae, Semelidae, Solecurtidae, Solenidae, Tridacnidae and Veneridae"

Figure 46. THE SEA URCHIN EU-TRADE MARKET IN 2024, IN VALUE



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

6. 5. Consumption

At MS level, the main consumption markets of sea urchins were Italy with a consumption estimated at 449 tonnes LWE in 2023, followed by France (430 tonnes LWE), Spain (271 tonnes LWE), and Croatia (207 tonnes LWE). Between 2014 and 2023 apparent consumption increased significantly in most of these countries (+995% in Italy, +64% in France, and +1.492% in Croatia), while Spain recorded a contrasting trend, with apparent consumption decreasing by 38% over the same period.

France and Italy are the second and third largest markets worldwide after Japan, and the biggest EU markets. Sea urchin is a premium product, whose gonads are delicacies usually consumed in pasta in Italy, and raw or with lemon in France. Being a premium product, sea urchins are often consumed in restaurants. They can also be purchased at fishmongers or specialist shops, but not at large retailers. Sea urchins are available from November to April, during the fishing season. Italian supply originates almost exclusively from imports from Spain. Half of the French supply originates from national catches and half from imports mostly from Spain and Iceland, consisting of stony sea urchins (*Paracentrotus lividus*) and green sea urchins (*Strongylocentrotus droebachiensis*)⁴⁵. In Spain, sea urchins are traditionally consumed in specific regions (Galicia, Catalonia, and Andalusia) and can also be found in markets in large cities where they are sold as delicacies. In Croatia, sea urchin is not a traditional delicacy, but due to the availability of the resource on the Croatian coastline, there is increasing interest in sea urchins, especially among chefs and premium restaurants.

Table 45. APPARENT CONSUMPTION IN THE MAIN EU MARKETS

MS	Catches (tonnes)	Imports (tonnes LWE)	Supply (tonnes LWE)	Exports (tonnes LWE)	Apparent consumption (tonnes LWE)	Per capita consumption (kg LWE)
Italy	19	448	467	18	449	0,008
France	260	231	491	61	430	0,006
Spain	588	150	738	467	271	0,006
Croatia	284	0	284	77	207	0,054

Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

⁴⁵ <https://www.guidedesespeces.org/fr/oursins>

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

Global highlights: European Commission, European Interest, we are aquaculture, The fish site.

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

First sales: ISSF, ICCAT.

Case studies: The Fish Site, FAOSTAT, DORIS, Invertebrate Zoology, Water Worlds, Sealifebase, ADW, National Library of Medicine, Sustainable Aquaculture, guidedespecies, ScienceDirect, Springer Nature, Wiley.

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

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

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

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

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

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