European Commission

Monthly Highlights

No. 11/2025

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

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1. GLOBAL HIGHLIGHTS

EU/Fisheries Control: On 12 November 2025, the Commission adopted detailed rules to harmonise, simplify and modernise fisheries control and enforcement across the EU, implementing the revised Fisheries Control Regulation (in force since January 2024). The package standardises data formats and exchanges (with lighter requirements for small-scale vessels) and rolls out fully digital catch reporting; sets technical requirements for vessel tracking with added flexibility for malfunctions; streamlines inspection protocols via digital inspection reports and a common template; establishes national registration of penalty points for masters; and introduces more flexible gear-marking rules, notably for vessels <15 m using passive gear close to shore. The Delegated[1] and Implementing[2] Acts, published on 12 November 2025, apply from 10 January 2026 with phased provisions to 2028, and repeal Implementing Regulation (EU) No 404/2011.[3]

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EU/Fisheries Governance: On 14 November 2025, the Commission issued guidelines to help Member States support small-scale coastal fishers (SSCF) and improve transparency in allocating fishing opportunities. The document urges use of clear environmental, social and economic criteria, greater openness in national allocation systems, and incentives for selective, more sustainable gears. Given the scale of the SSCF —about 75% of EU vessels and nearly half of fishery employment—the guidelines respond to pressures from energy costs, climate impacts, competition for space, IUU fishing and stock variability. Framed within the European Ocean Pact, they clarify the two-step system: TACs set at EU level, then national allocation with transparent, objective methods.[4]

EU/Outermost Regions: On 17 November 2025, the Commission announced that Executive Vice-President for Cohesion and Reform Raffaele Fitto will host the High-Level Forum of the Outermost Regions in Brussels to discuss resilience, competitiveness, and adding value to the unique assets of these regions. Outcomes will feed into a new Outermost Regions strategy and a set of regulatory simplification measures to be presented in the first half of 2026. A call for evidence has been launched to gather input. The Forum will be opened by EVP Fitto and Commissioners Christopher Hansen (Agriculture and Food), Costas Kadis (Fisheries and Oceans), and Apostolos Tzitzikostas (Sustainable Transport and Tourism), with participation from EP Vice-President Younous Ormajee, French/Portuguese/Spanish government representatives, Ary Chalus (Guadeloupe), the nine OR Presidents, national authorities, Members of the European Parliament, and the Committee of the Regions.[5]

EU/Indo-Pacific (South China Sea): On 20 November 2025, at the fourth EU-Indo-Pacific Ministerial in Brussels, the Philippines urged stronger maritime cooperation with the EU amid ongoing tensions with China over the South China Sea. Foreign Secretary Theresa Lazaro welcomed EU statements, frigate transits, and potential EU Member State observer roles in maritime exercises, and framed the forum, focused on resilience, prosperity, and security as a push for multilateralism. Manila, which will chair the Association of Southeast Asian Nations in 2026, highlighted recent incidents at sea and pressed for a clearer EU role in the Indo-Pacific.[6]

EU/Small-Scale Fisheries: On 24 November 2025, Commissioner Costas Kadis hosted an Implementation Dialogue in Brussels focused on small-scale and coastal fisheries (SSCF), bringing together fishers, FLAGs, Advisory Councils, NGOs, Member States, industry and social partners to discuss practical implementation of EU fisheries policies. The meeting addressed key SSCF challenges: competition for maritime space, access to opportunities, climate pressure, rising costs, invasive species and market volatility, alongside recent Commission guidelines to support small-scale fishers, and explored new technologies and income diversification. Part of the Commission's Implementation Dialogues initiative, this was Kadis's second such dialogue in 2025, following one on maritime spatial planning in July.[7]

[1] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L_202501766
[2] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=OJ:L_202502196
[3] https://oceans-and-fisheries.ec.europa.eu/news/fisheries-control-commission-simplifies-and-harmonises-rules-eu-2025-11-12_en
[4] https://oceans-and-fisheries.ec.europa.eu/news/commission-publishes-guidelines-help-eu-countries-support-small-scale-fishers-and-enhance-2025-11-14_en
[5] https://ec.europa.eu/regional_policy/whats-new/newsroom/17-11-2025-commission-meets-with-eu-s-outermost-regions-to-discuss-future-strategy_en
[6] https://www.euronews.com/2025/11/20/philippines-wants-to-strengthen-cooperation-with-the-eu-in-south-china-sea
[7] https://oceans-and-fisheries.ec.europa.eu/news/commissioner-kadis-hosts-implementation-dialogue-small-scale-and-coastal-fisheries-2025-11-24_en

2. MACROECONOMIC CONTEXT

2. 1. Marine fuel

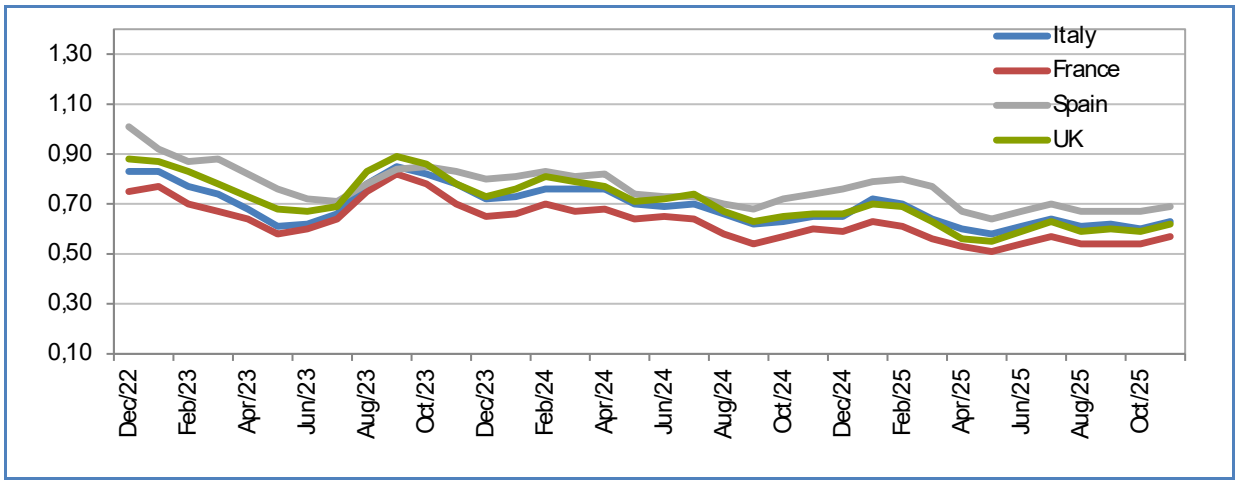
Average prices for marine fuel in **November 2025** ranged between 0,57 and 0,69 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 4,6% compared with the previous month and decreased by an average of 5,3% compared with the same month in 2024.

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

Country	Nov 2025	Change from Oct 2025	Change from Nov 2024
France *(ports of Lorient and Boulogne)*	0,57	6%	-5%
Italy *(ports of Ravenna and Livorno)*	0,63	5%	-3%
Spain *(ports of A Coruña and Vigo)*	0,69	3%	-7%
The UK *(ports of Grimsby and Aberdeen)*	0,62	5%	-6%

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 October 2025 the EU annual inflation rate was 2,5%, down from 2,6% compared to September 2025. A year earlier, the rate was 2,3%.

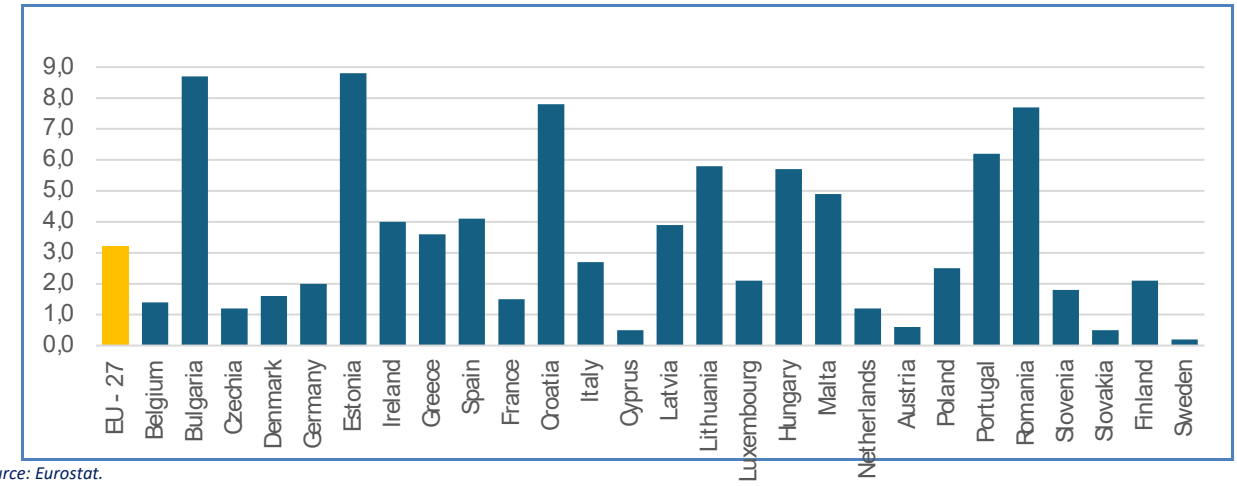
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR OCTOBER 2025, COMPARED WITH OCTOBER 2024**

Lowest inflation rates		Highest inflation rates	
Cyprus	+0,2%	Romania	+8,4%
France	+0,8%	Estonia	+4,5%
Italy	+1,3%	Latvia	+4,3%

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 SEPTEMBER 2025 (value expressed in percentage)**



Source: Eurostat.

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

	Oct 2023	Oct 2024	Sept 2025	Oct 2025	Change from Sept 2025	Change from Oct 2024
Food and non-alcoholic beverages	140,73	144,41	148,41	148,72	0,2%	3,0%
Fish and seafood	138,92	141,45	145,95	145,95	0,0%	3,2%
Fresh or chilled fish	130,43	134,11	140,15	140,14	0,0%	4,5%
Frozen fish	138,32	138,58	143,96	144,28	0,2%	4,1%
Fresh or chilled seafood	125,84	129,73	135,81	133,74	-1,5%	3,1%
Frozen seafood	119,53	118,40	120,46	119,90	-0,5%	1,3%
Dried, smoked or salted fish and seafood	140,13	142,02	148,02	148,67	0,4%	4,7%
Other preserved or processed fish and seafood and fish and seafood preparations	135,71	138,16	138,96	139,28	0,2%	0,8%

Source: Eurostat.

2.4. Exchange rates

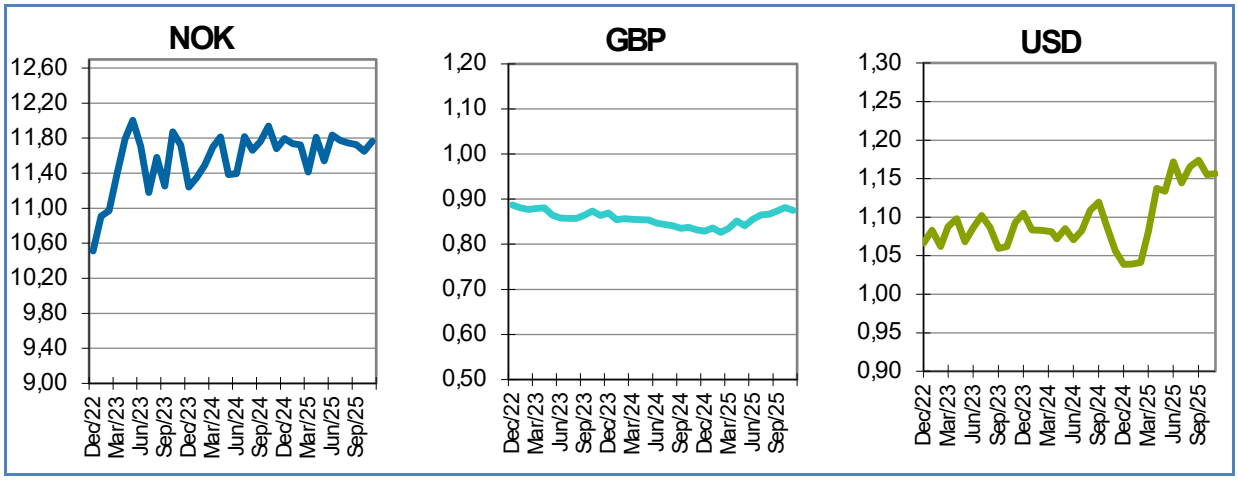
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Nov 2023	Nov 2024	Oct 2025	Nov 2025
NOK	11,7200	11,6805	11,6485	11,7645
GBP	0,8637	0,8321	0,8816	0,8752
USD	1,0931	1,0562	1,1554	1,1566

Source: European Central Bank.

In November 2025, the euro appreciated against the Norwegian krone (1,0%) and depreciated against the US dollar (0,1%) and the British pound sterling (0,7%), relative to the previous month. For the past six months, the euro has fluctuated around 1,1614 against the US dollar, 11,7491 against the Norwegian krone and 0,8696 against the British pound sterling. Compared with November 2024, the euro has appreciated 9,5% against the US dollar and 5,2% against the British pound sterling and 0,7% against the Norwegian krone.

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



Source: European Central Bank.

3. FIRST SALES IN EUROPE[8]

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

Increases in value and volume (Jan - Sep 2025 vs Jan - Sep 2024): Finland, France, Ireland and Portugal recorded increases in both first-sales value and volume. The highest increase in volume was observed in Finland due mainly 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 - Sep 2025 vs Jan - Sep 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-SEPTEMBER OVERVIEW OF FIRST SALES FROM THE REPORTING COUNTRIES (volume in tonnes and value in million EUR) ***

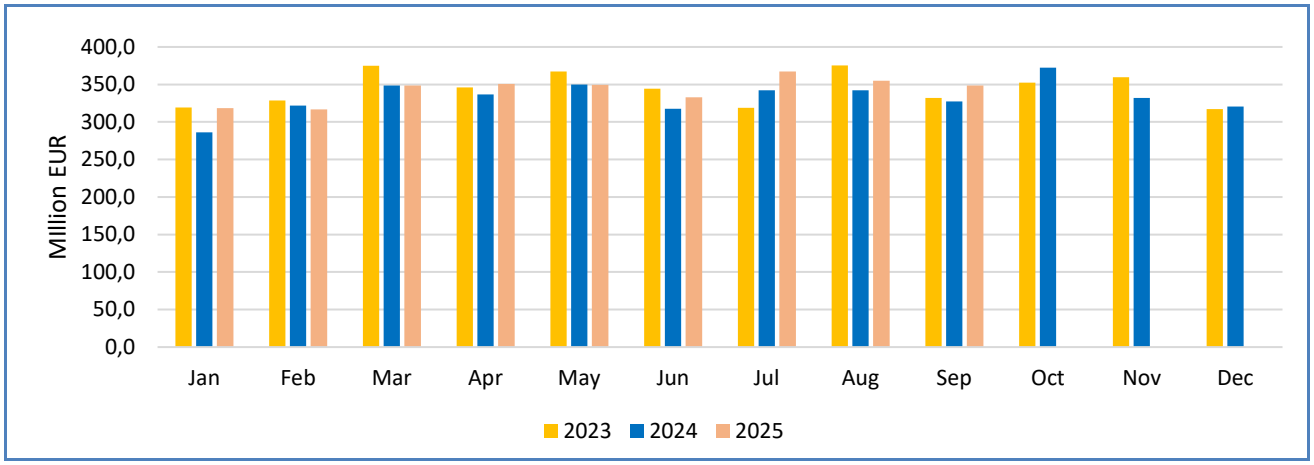
	January – September 2023		January – September 2024		January – September 2025		Change from January – September 2024	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	10.632	65,90	8.446	51,33	8.477	54,91	0%	7%
Bulgaria	2.338	1,16	2.724	1,74	2.684	1,94	-1%	12%
Croatia	39.091	45,94	28.183	38,81	24.647	38,04	-13%	-2%
Cyprus	578	2,67	501	2,40	495	2,12	-1%	-12%
Denmark	610.782	405,41	593.380	391,02	593.155	413,16	0%	6%
Estonia	49.682	18,56	44.873	22,28	34.305	16,67	-24%	-25%
Finland	43.480	12,58	35.190	13,29	44.443	13,66	26%	3%
France	192.823	526,40	181.912	503,05	185.779	542,71	2%	8%
Germany	23.324	44,43	22.745	44,83	7.395	39,48	-67%	-12%
Ireland	150.608	196,29	152.716	190,62	163.082	223,58	7%	17%
Italy	54.870	247,01	43.051	196,13	37.733	189,53	-12%	-3%
Latvia	30.474	8,44	27.526	9,72	25.758	9,97	-6%	3%
Lithuania	290	0,61	301	0,42	200	0,27	-34%	-36%
Netherlands	46.618	102,53	18.104	114,57	16.545	104,22	-9%	-9%
Poland	52.870	20,80	43.959	23,50	41.170	21,00	-6%	-11%
Portugal	94.251	231,88	82.796	213,82	88.705	240,50	7%	12%
Spain	334.648	1.097,55	317.467	1.082,39	295.830	1.109,72	-7%	3%
Sweden	114.090	78,61	93.819	72,92	76.590	65,66	-18%	-10%
Norway	2.278.417	2.364,73	2.227.746	2.387,25	2.015.120	2.683,59	-10%	12%
United Kingdom	250.772	492,62	259.365	478,82	258.658	512,82	0%	7%

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.*

[8] During January–September 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 - September in 2025 was EUR 3,09 billion, a 4% increase compared to 2024, and a 1% decrease compared to 2023. Overall volume was 1,6 million tonnes, a 3% decrease compared to 2024, and an 11% decrease compared to 2023.

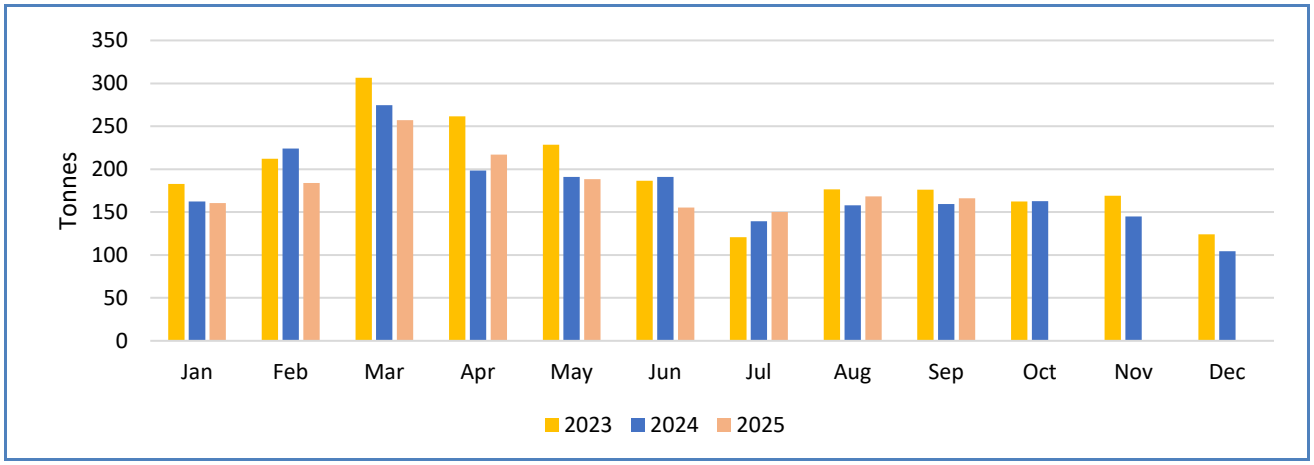
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VALUE FROM THE REPORTING COUNTRIES[9] (value in million EUR)**



In the first nine months of 2025, monthly first-sales value was higher in most months compared to 2024 except in February, March and May. Compared to 2023, values were generally lower except in April, July and September. Between January and September 2025, first-sales volume decreased compared to the same period in both 2024 and 2023, except in April, July, August and September in 2024 and July 2023 when volumes exceeded 2025 levels.

The increase in first-sales value compared to 2024 was mainly driven by groundfish (+4%). Compared to 2023, first-sales value in 2025 decreased by 1%, mainly due to the sharp decrease in flatfish (-22%). Similarly, in the same period in 2025, the decrease in first-sales volume was mainly due to small pelagics and groundfish, which fell by -18% and -12% respectively in comparison to 2024 and by -35% and -16% in comparison to 2023.

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



[9] During January–September 2025, 18 EU Member States (MS), reported first-sales data on value and volume.

3. 2. First-sales evolution at commodity group (CG) level[10,11]

Bivalves and other molluscs and aquatic invertebrates

In January-September 2025, first-sales value of "Bivalves and other molluscs and aquatic invertebrates" amounted to EUR 171,1 million, a 5% increase compared to the same period in 2024. First-sales volume reached 63.936 tonnes, an increase of 4% compared to 2024. Scallop, whelk and purple dye murex[12] were the main commercial species driving the increase in value of the commodity group (+16%, +9%, and +2%, respectively), while the increase in volume was mainly due to scallop (+25%).

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

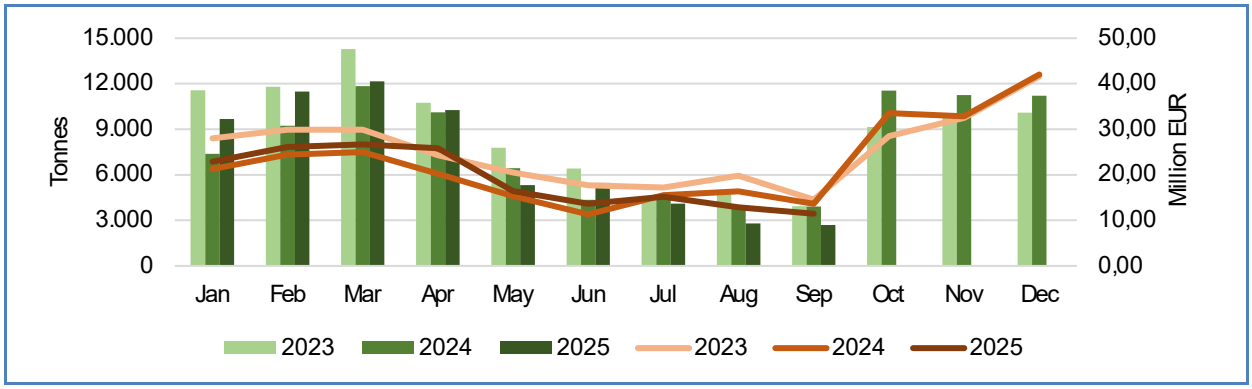


Table 6. **FIRST SALES PRICES OF BIVALVES MAIN COMMERTIAL SPECIES (MCS) (JAN- SEP 2024 AND JAN- SEP 2025)**

Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
France	Scallop	2,20 EUR/kg	2,03 EUR/kg	-7%
France	Other molluscs and aquatic invertebrates*	2,81 EUR/kg	3,54 EUR/kg	+26%
Portugal	Other molluscs and aquatic invertebrates**	8,97 EUR/kg	14,54 EUR/kg	+62%

*Of the main commercial species other molluscs and aquatic invertebrates in France, whelk represents 92% of total first-sales volume and 86% of the total first-sales value.
** Of the main commercial species other molluscs and aquatic invertebrates in Portugal, rough limpet represents 73% of total first-sales volume and 89% of the total first-sales value.

Cephalopods

In 2025, first-sales value of "Cephalopods" totalled EUR 232,1 million, an 8% increase compared to 2024. First-sales volume totalled 32.557 tonnes, a decrease of 6% compared to 2024. Octopus (+35%) was the main commercial species driving the growth in first-sales value, while squid and cuttlefish were the main species (-19% and -13%) driving the decrease in first-sales volume.

[10] 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

[11] 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

[12] Whelk and purple dye murex belong to the species group „other molluscs and aquatic invertebrate". Of total first-sales value in 2025, whelk represents 70% of total first-sales value followed by purple dye murex with 11%.

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

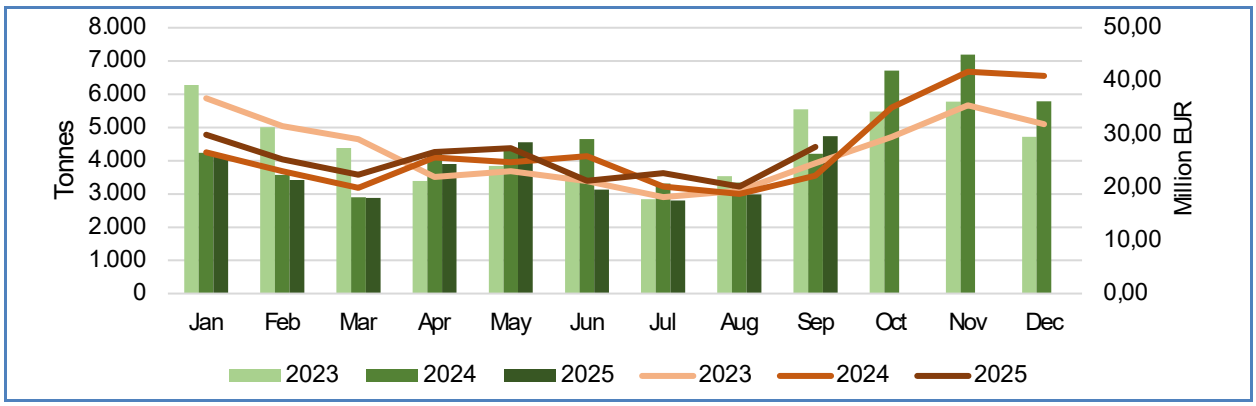


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN- SEP 2024 AND JAN- SEP 2025)**

Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
France	Octopus	6,95 EUR/kg	7,45 EUR/kg	+7%
Spain	Octopus	7,09 EUR/kg	7,96 EUR/kg	+12%
Portugal	Octopus	7,88 EUR/kg	8,90 EUR/kg	+13%

Crustaceans

In 2025, first-sales value of "Crustaceans" totalled EUR 494,4 million, a 3% increase in value compared to 2024. First-sales volume amounted to 51.559 tonnes, a decrease of 2% compared to 2024. Miscellaneous shrimp and deep water rose shrimp (+11% and +9%) were the two main products responsible for the increase in first-sales value, while shrimp *Crangon* spp., cold-water shrimp and Norway lobster (-9%, -43% and -5% respectively) were mainly responsible for the decrease in first-sales volume.

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

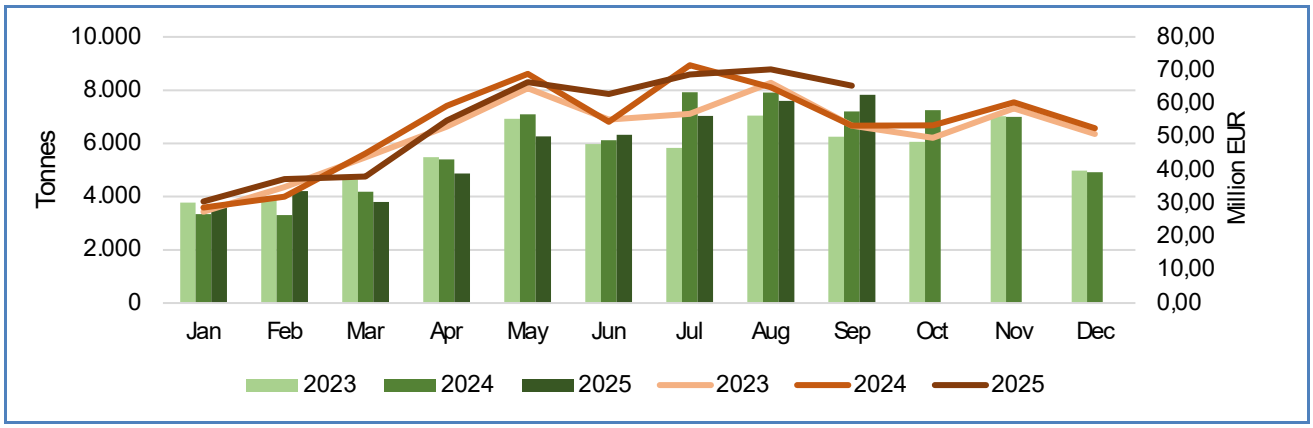


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN- SEP 2024 AND JAN- SEP 2025)**

Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
Germany	Shrimp *Crangon* spp.	7,94 EUR/kg	8,03 EUR/kg	+1%
Spain	Miscellaneous shrimp	21,53 EUR/kg	27,61 EUR/kg	+28%
Ireland	Norway lobster	10,02 EUR/kg	11,51 EUR/kg	+15%

Flatfish

In 2025, first-sales value of "Flatfish" totalled EUR 251,0 million, a 2% decrease compared to 2024. First-sales volume amounted to 35.689 tonnes, a decrease of 10% compared to 2024. European plaice (-24% and -12%) and European flounder (-39% 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 – SEP 2025**

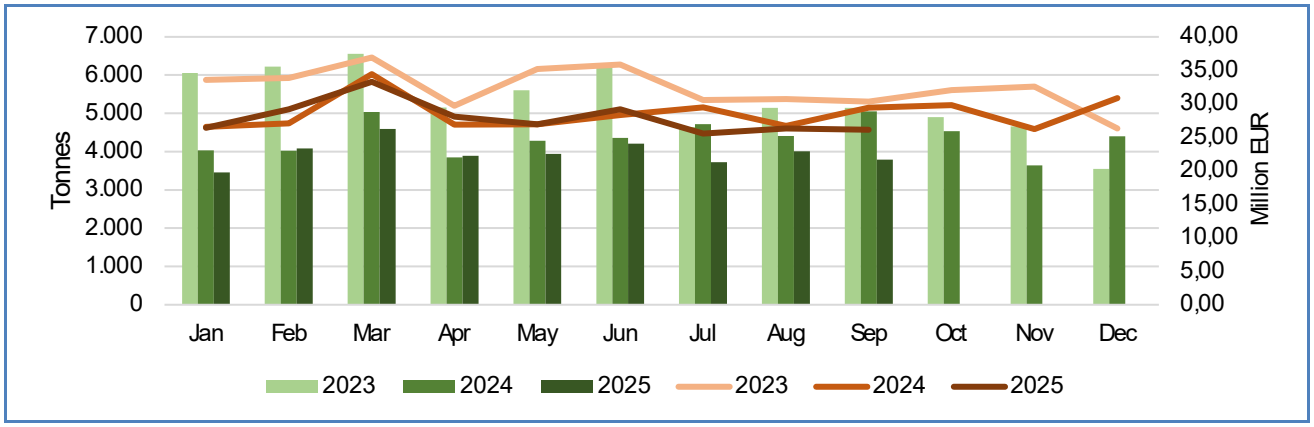


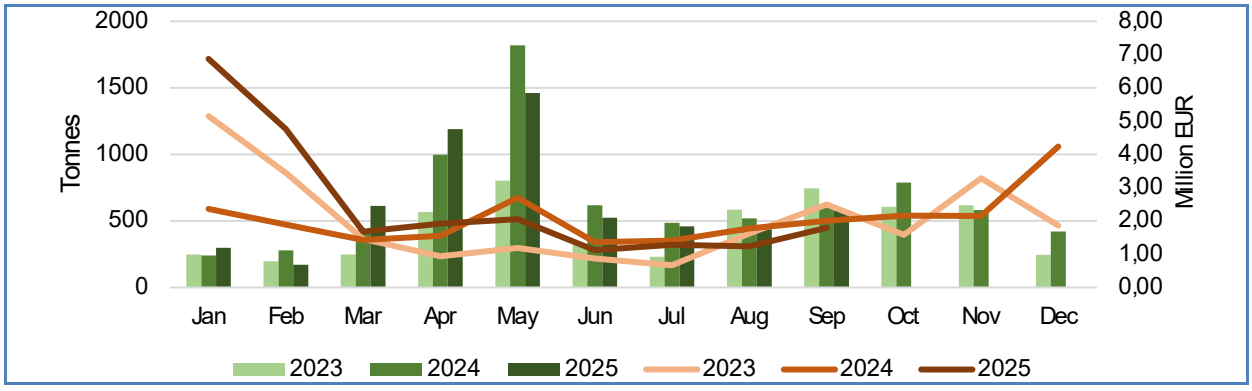
Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN-SEP 2024 AND JAN-SEP 2025)**

Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
Denmark	European plaice	2,72 EUR/kg	2,45 EUR/kg	-10%
Netherlands	European plaice	2,57 EUR/kg	2,02 EUR/kg	-22%
France	Turbot	22,78 EUR/kg	25,74 EUR/kg	+13%

Freshwater fish

In 2025, first-sales value of "Freshwater fish" reached EUR 22,7 million, marking a 38% increase compared to 2024. First-sales volume amounted to 5.722 tonnes, a decrease of 5% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+85%), while the category "other freshwater fish"[13] was the main contributor to the decrease in first-sales volume (-5%).

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



[13] „Other freshwater fish" comprises 31 products, and together round goby, freshwater bream and European perch represent 70% of first-sales volume.

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

Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
France	Eel*	30,75 EUR/kg	83,69 EUR/kg	+172%
Estonia	Pike-perch	4,17 EUR/kg	4,19 EUR/kg	0%
Denmark	Eel	9,62 EUR/kg	9,33 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 533,6 million, an increase of 4% compared to 2024. First-sales volume amounted to 500.937 tonnes, a decrease of 8% compared to 2024. The category "other groundfish"[14] (+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 – SEP 2025**

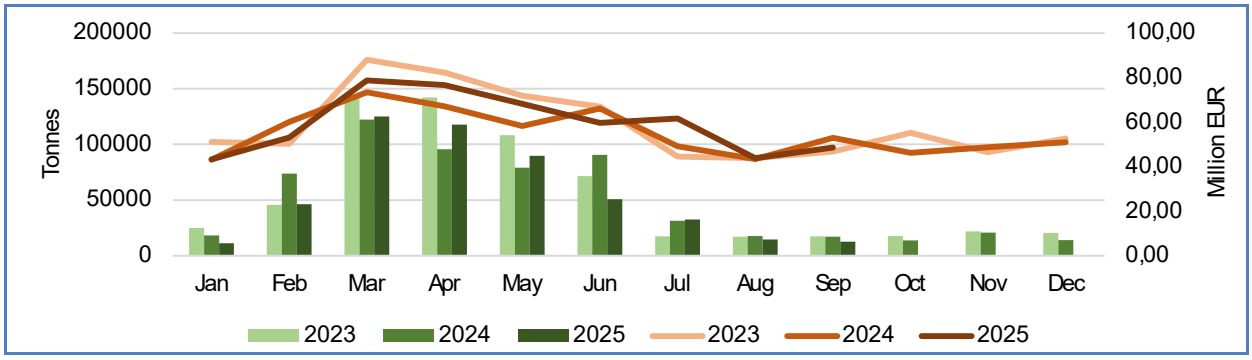


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-SEP 2024 AND JAN-SEP 2025)**

Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
Denmark	Other groundfish[15]	0,29 EUR/kg	0,40 EUR/kg	+36%
Denmark	Blue whiting	0,30 EUR/kg	0,34 EUR/kg	+15%
Denmark	Haddock	1,34 EUR/kg	1,91 EUR/kg	+42%

Other marine fish[16]

In 2025, first-sales value of the category "other marine fish" totalled EUR 438,7 million, an increase of 1% compared to 2024. First-sales volume amounted to 110.990 tonnes, a stable volume compared to 2024. "Other marine fish" (+6%) and monk (+3%) were the main commercial species contributing to the rise in first-sales value, while the category "other marine fish"[17] was behind the increase in first-sales volume (+21%).

[14] In 2025 „Other goundfish" comprised 43 species of which sandeel nei and European conger together account for 74% of total first-sales value.
[15] „Other goundfish" in Denmark comprised 7 species of which sandeel nei accounts for 96% of total first-sales value and almost 100% of total first-sales volume.
[16] Seventeen Main Commertial Species are included in the Commmodity Group „Other Marine Fish" with monk representing more than 25% of the total value and almost 20% of total volume.
[17] Of the „Other marine fish" Main Commercial Species (MCS), meagre, greater amberjack, and red scorpionfish represent 31% of total first sale value, while boarfish and boarfishes nei together represent 66% of the total first-sales volume.

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

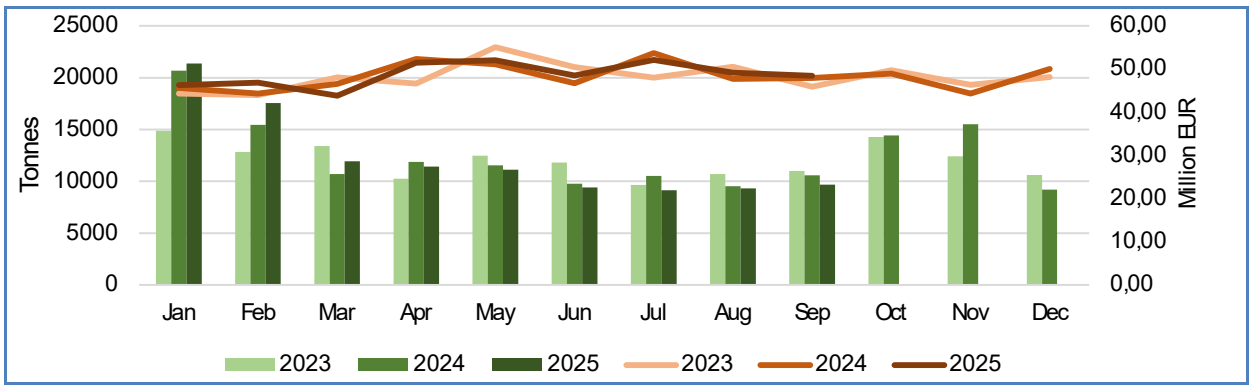


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-SEP 2024 AND JAN-SEP 2025)**

Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
Spain	Red mullet	7,40 EUR/kg	8,93 EUR/kg	+21%
France	Other marine fish[18]	5,58 EUR/kg	5,50 EUR/kg	-2%
Spain	Monk	5,88 EUR/kg	6,48 EUR/kg	+10%

Salmonids

In 2025, first-sales value of "Salmonids" totalled EUR 1,8 million, a decrease of 16% compared to 2024, while first-sales volume amounted to 211.129 kg, a decrease of 13% compared to 2024. Salmon (-42% and -39%) 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 – SEP 2025**

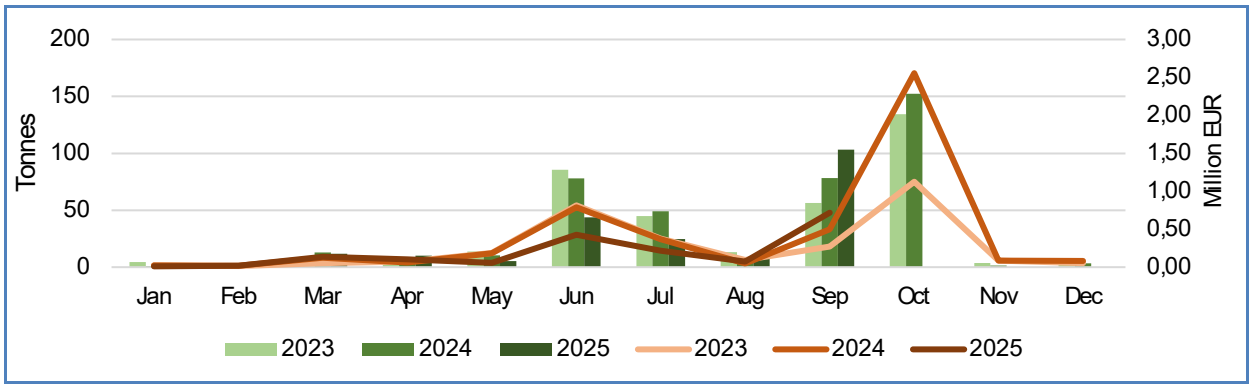


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-SEP 2024 AND JAN-SEP 2025)**

Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
Sweden	Salmon	8,18 EUR/kg	8,87 EUR/kg	+8%
Finland	Salmon	9,80 EUR/kg	10,58 EUR/kg	+8%

Small pelagics

In 2025, first-sales value of "Small pelagics" amounted to EUR 668,7 million, an increase of 9% compared to 2024. First-sales volume amounted to 723.810 tonnes, an increase of 1% compared to 2024. Mackerel and sardine (+17% and +24%) were the

[18] „Other marine fish" MCS in France comprises 186 species in the period analysed of which meagre and thicklip grey mullet together represented 67% of the total value and 50% of volume.

commercial species contributing most to the increase in first-sales value, while Atlantic horse mackerel (+70%) 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 – SEP 2025**

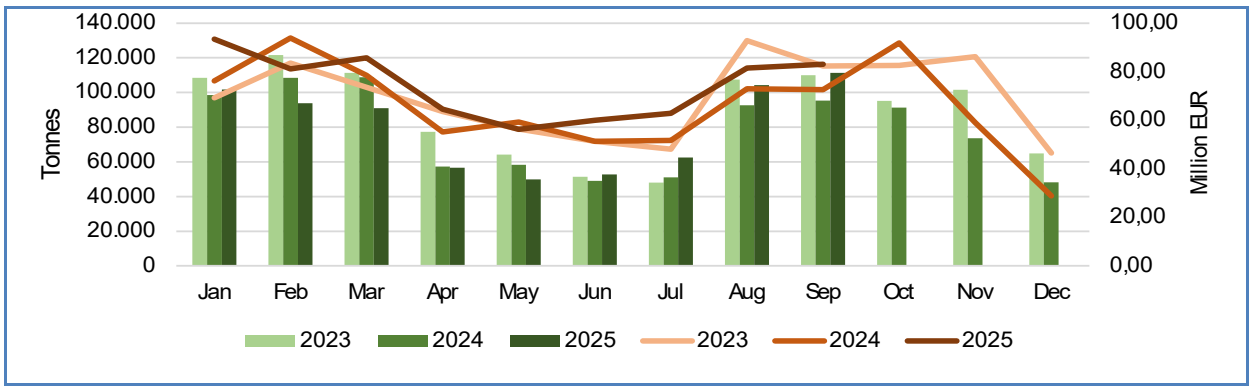


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-SEP 2024 AND JAN-SEP 2025)**

Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
Ireland	Mackerel	1,61 EUR/kg	2,14 EUR/kg	+33%
Denmark	Sprat	0,44 EUR/kg	0,46 EUR/kg	+6%
Ireland	Atlantic horse mackerel	1,17 EUR/kg	1,18 EUR/kg	+1%

Tuna and tuna-like species

In 2025, first-sales value of "Tuna and tuna-like species" totalled EUR 278,9 million, a decrease of 2% compared to 2024. First-sales volume totalled 75.568 tonnes, a decrease of 1% compared to 2024. Yellowfin tuna (-32% and -29%), and swordfish (-10% and -7%) 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 – SEP 2025**

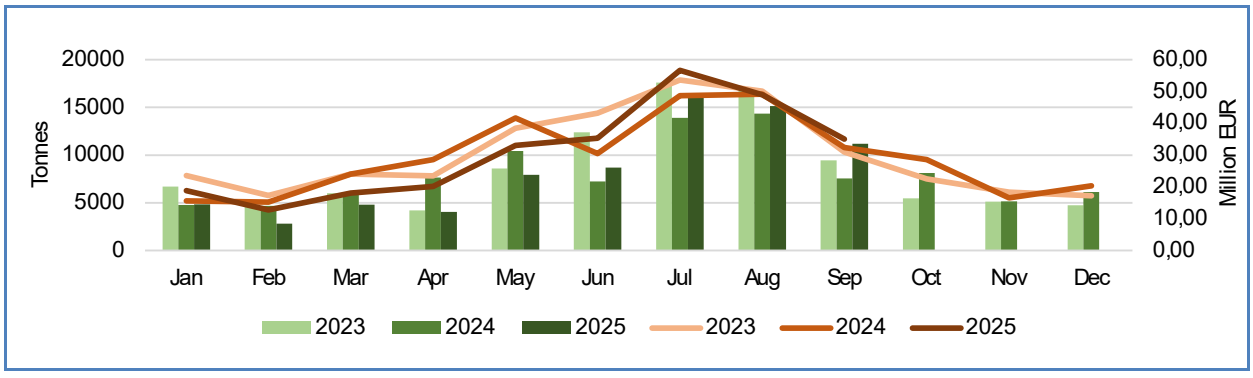


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-SEP 2024 AND JAN-SEP 2025)**

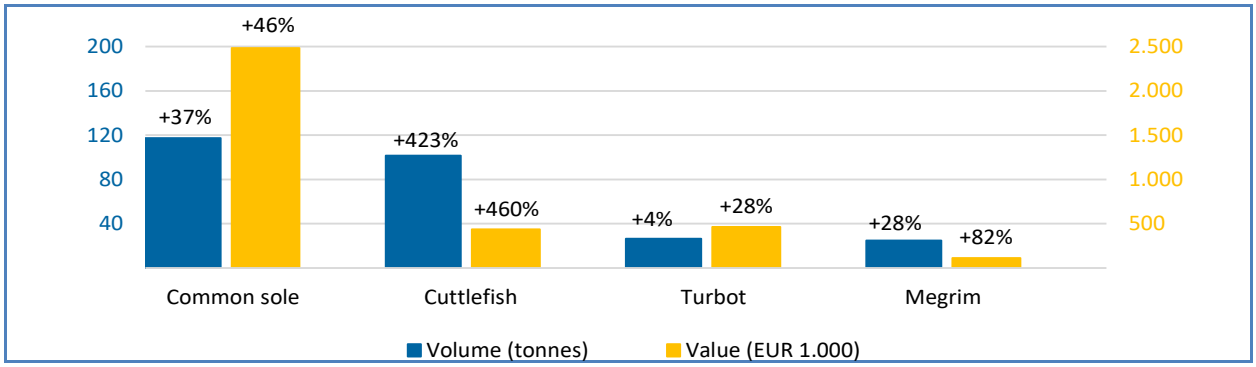
Country	Main Commercial Species	First-sales average price Jan-Sep 2024	First-sales average Price Jan- Sep 2025	Trend (Jan- Sep 2025 vs Jan-Sep 2024 %)
Spain	Yellowfin tuna	2,72 EUR/kg	2,53 EUR/kg	-7%
Spain	Swordfish	5,03 EUR/kg	4,81 EUR/kg	-4%
Spain	Skipjack tuna	1,61 EUR/kg	1,55 EUR/kg	-4%

3.3. First sales in reporting countries[19]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 54,9 million, +7%	8.477 tonnes, 0%	**Value**: octopus, common sole, cuttlefish. **Volume**: common sole, cuttlefish, ray.
Sep 2025 vs Sep 2024	EUR 5,9 million, +26%	859 tonnes, +9%	Common sole, cuttlefish, turbot, megrim.

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

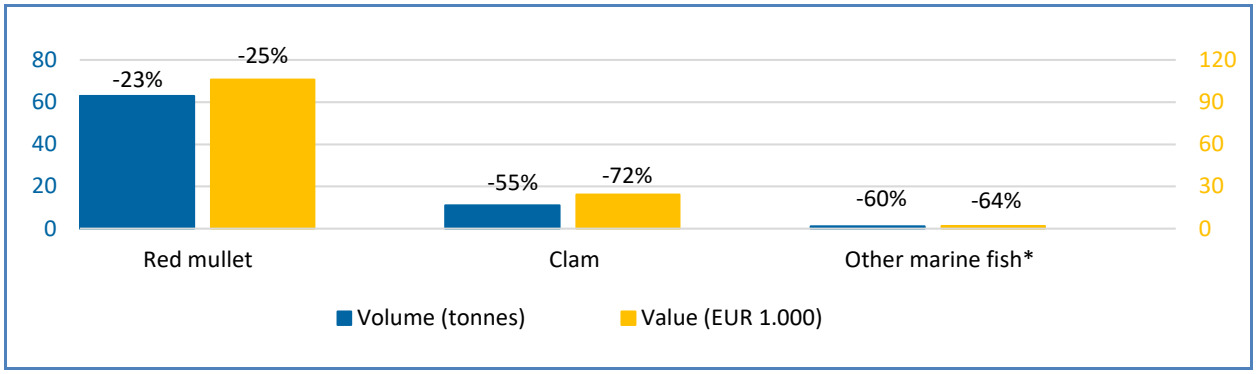


Percentages show change from the previous year.

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 1,9 million, +12%	2.684 tonnes, -1%	**Value**: sprat, clam **Volume**: Other molluscs and aquatic invertebrates*, red mullet.
Sep 2025 vs Sep 2024	EUR 0,2 million, -13%	212 tonnes, +50%	**Value**: red mullet, clam, other marine fish*. **Volume**: sprat.

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



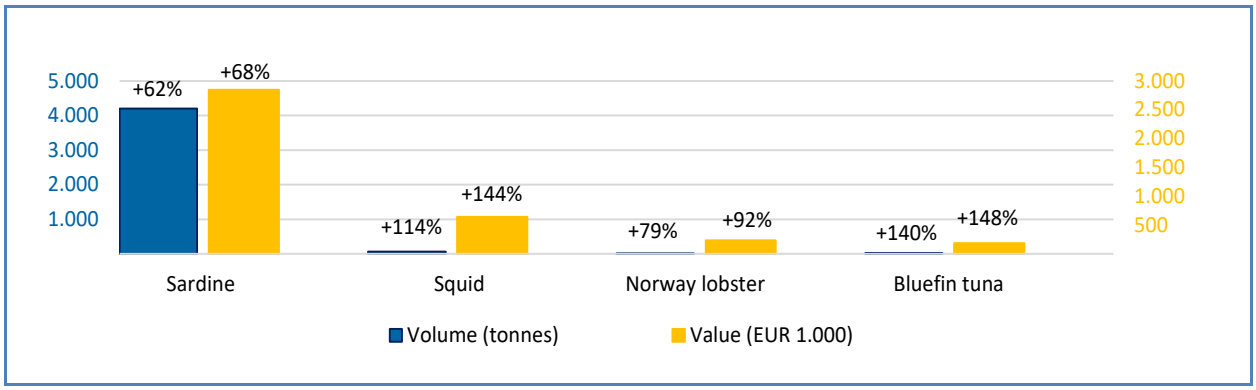
*Percentages show change from the previous year. *EUMOFA aggregation for species.*[20]

[19] First-sales data updated on 20. 11. 2025. This section covers all countries for which data are available on the date of extraction from the EUMOFA database and analysis.
[20] 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	Notes
Jan-Sep 2025 vs Jan-Sep 2024	EUR 38 million, -2%	24.647 tonnes, -13%	Anchovy, hake, red mullet, bluefin tuna.	In Croatia, first sales of squid in September 2025 were more than double those of September 2024, and this increase occurred across many ports rather than from a single landing event. This widespread rise fits the known biology of short-lived, fast-growing, semelparous squids like *Loligo vulgaris* and *Illex coindetii*, whose populations are rebuilt each year from a single cohort. Such species naturally show strong "boom–bust" fluctuations driven by recruitment success. The data therefore point to a strong, coast-wide 2025 recruitment pulse (rather than changes in fleet activity or a local anomaly) as the most plausible explanation.
Sep 2025 vs Sep 2024	EUR 6,1 million, +51%	5,4 tonnes, +37%	Sardine, squid, Norway lobster, bluefin tuna.	

Figure 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CROATIA, SEPTEMBER 2025**

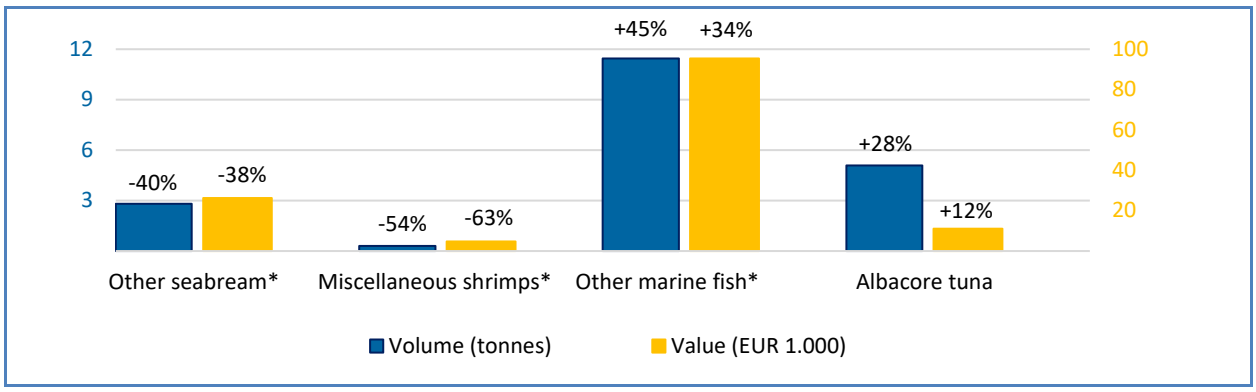


Percentages show change from the previous year.

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 2,1 million, -12%	495 tonnes, -1%	Other seabream*, red mullet, albacore tuna.
Sep 2025 vs Sep 2024	EUR 0,2 million, -8%	26 tonnes, +2%	**Value**: Other seabream*, miscellaneous shrimps*. **Volume**: Other marine fish*, albacore tuna.

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



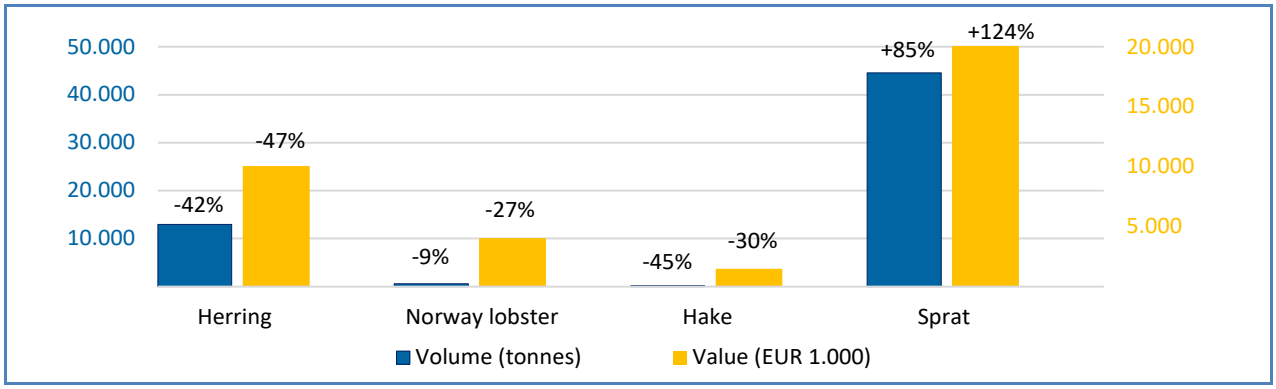
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 413,2 million, +6%	593.155 tonnes, 0%	**Value**: sprat, other groundfish*, blue whiting. **Volume**: blue whiting, sprat, herring.
Sep 2025 vs Sep 2024	EUR 50,8 million, -3%	64.742 tonnes, +19%	**Value**: herring, Norway lobster, hake. **Volume**: sprat.

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

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



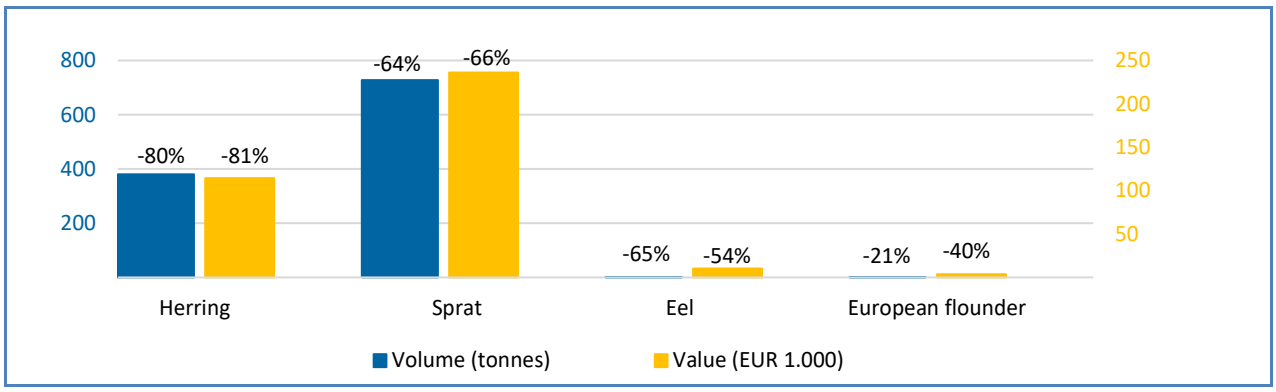
Percentages show change from the previous year.

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 16,7 million, -25%	34.305 tonnes, -24%	Herring, sprat, smelt, European flounder.
Sep 2025 vs Sep 2024	EUR 1,1 million, -38%	1.390 tonnes, -66%	Herring, sprat, eel, European flounder.

Percentages show change from the previous year.

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

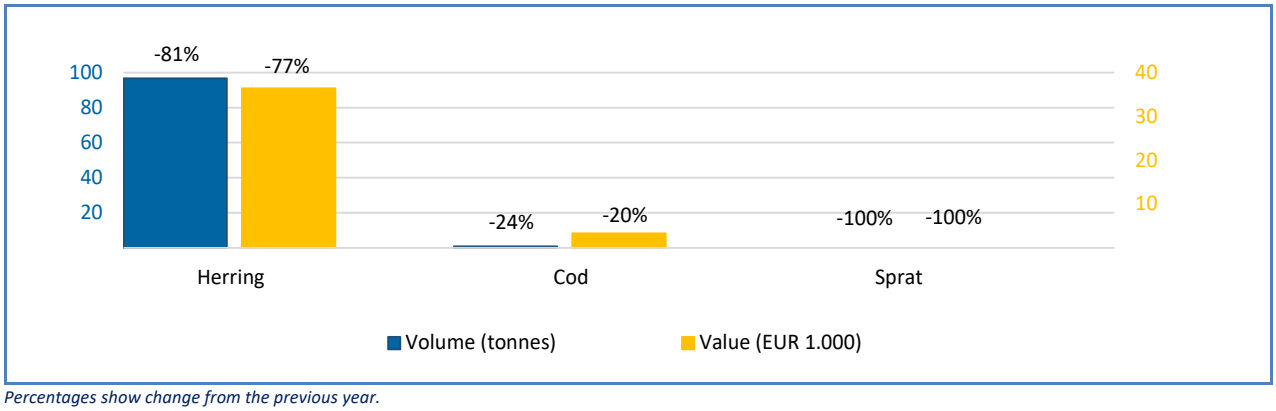


Percentages show change from the previous year.

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 13,7 million, +3%	44.443 tonnes, +26%	Herring.
Sep 2025 vs Sep 2024	EUR 0,05 million, -73%	98 tonnes, -82%	Herring, cod, sprat.

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



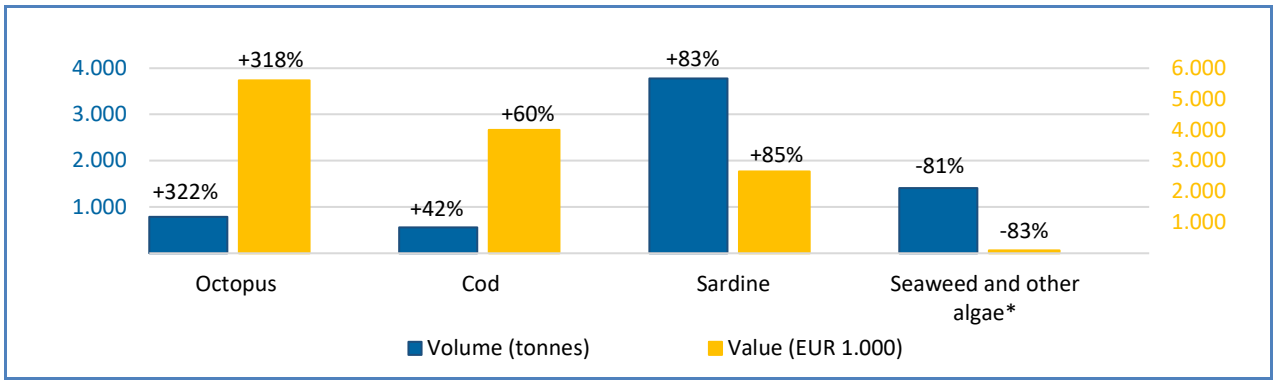
Percentages show change from the previous year.

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Sep 2025 vs Jan-Sep 2024	EUR 542,7 million, +8%	185.779 tonnes, +2%	Octopus, eel, scallop, sardine.	In September 2025, octopus experienced a remarkable increase in terms of value (318%) and volume (322%) compared to September 2024. France and Belgium have been reporting more octopus landings in the English Channel area since 2019. Such an evolution is primarily explained by a change in migratory patterns, with the octopus population moving north due to climate change. In both countries, the octopus fishery has recently become a targeted fishery,
Sep 2025 vs Sep 2024	EUR 61,4 million, +7%	15.802 tonnes, -29%	**Value**: monk, cod, sardine. **Volume**: Seaweed and other algae*.	

				principally dedicated to export. September 2025 was marked by the reopening of the octopus fishing season, with populations remaining abundant which, in addition to the proliferation of this cephalopod in Finistère Nord as well as in the Normandy bays, is causing an increase in first sales.[21]

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



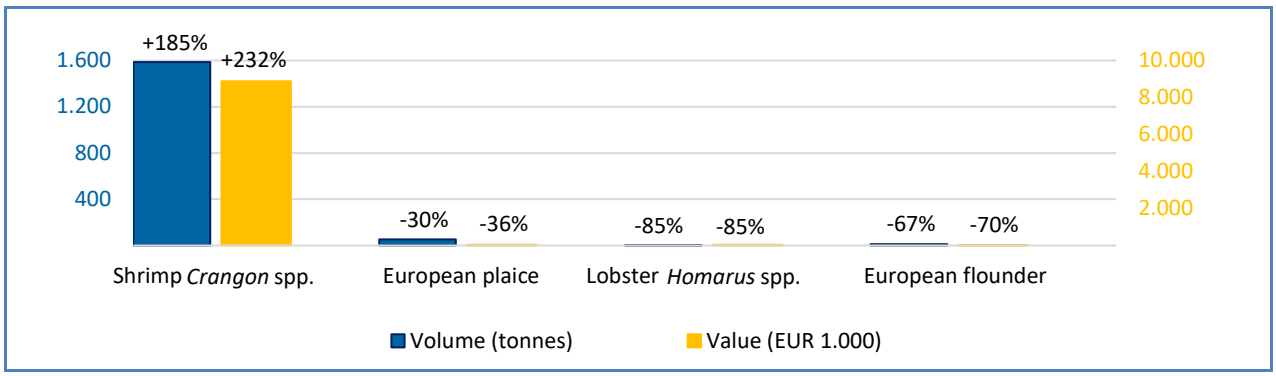
*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Sep 2025 vs Jan-Sep 2024	EUR 39,4 million, -12%	7.395 tonnes, -67%	Greenland halibut, mackerel, blue whiting.	In September 2025, German landings of shrimp *Crangon* spp. rose sharply: value up 232% and volume up 185% compared with September 2024. Since North Sea shrimp *Crangon* spp. stocks are currently above precautionary reference levels and are known to recover quickly, this increase is more likely driven by external conditions that depressed the 2024 fishery (e.g., weather and high energy costs) rather than by unusual stock dynamics. The rise in value is further amplified by a 16% increase in ex-vessel prices.
Sep 2025 vs Sep 2024	EUR 9,0 million, +72%	1.662 tonnes, +18%	Shrimp *Crangon* spp., European plaice, Lobster *Homarus* spp., European flounder.	

[21] https://www.franceagrimer.fr/chiffre-et-analyses-economiques/note-de-conjoncture-mensuelle-peche-et-aquaculture, https://lemarin.ouest-france.fr/peche/apres-les-bretons-les-pecheurs-normands-sinquietent-de-larrivee-du-poulpe-f387c03a-899a-11f0-86eb-dac26b435301

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

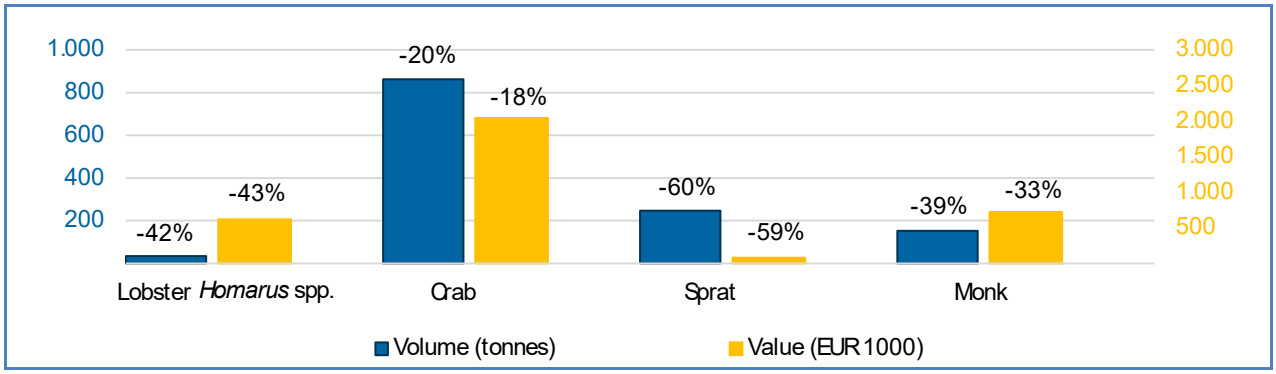


Percentages show change from the previous year.

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

Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 223,6 million, +17%	163.082 tonnes, +7%	Mackerel, Atlantic horse mackerel, Norway lobster, crab.
Sep 2025 vs Sep 2024	EUR 9,3 million, -27%	2.557 tonnes, -34%	Lobster *Homarus* spp., crab, sprat, monk

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

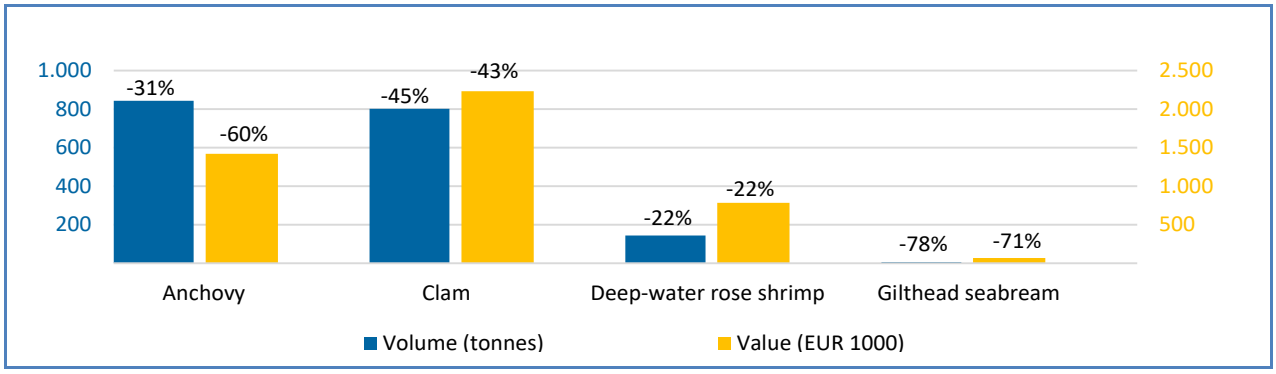


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 189,6 million, -3%	37.733 tonnes, -12%	Swordfish, sardine, cuttlefish, warmwater shrimps*, clam.
Sep 2025 vs Sep 2024	EUR 21,3 million, -2%	4.856 tonnes, -11%	Anchovy, clam, deep-water rose shrimp, gilthead seabream.

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

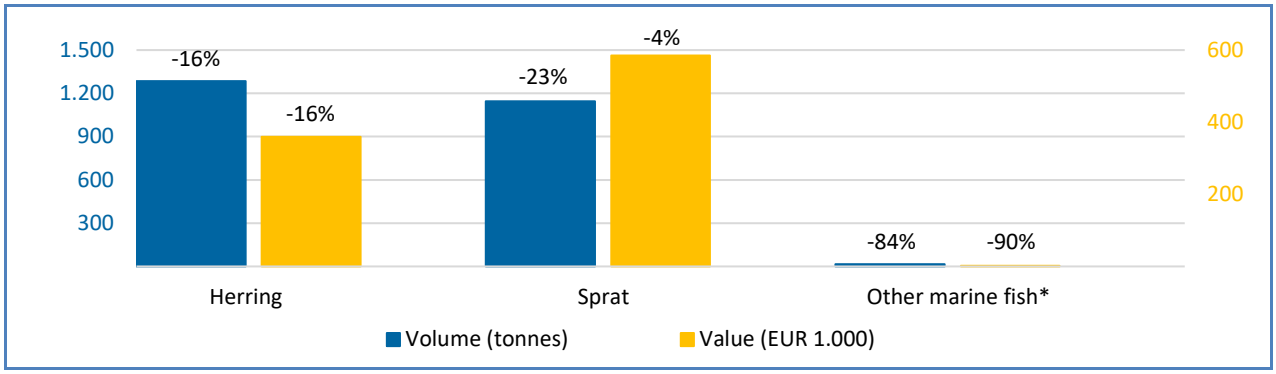


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 9,7 million, +3%	25.758 tonnes, -6%	**Value**: sprat, herring. **Volume**: sprat, other marine fish*, other freshwater fish*.
Sep 2025 vs Sep 2024	EUR 1,0 million, -9%	2.489 tonnes, -21%	herring, sprat, smelt, Other marine fish*.

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

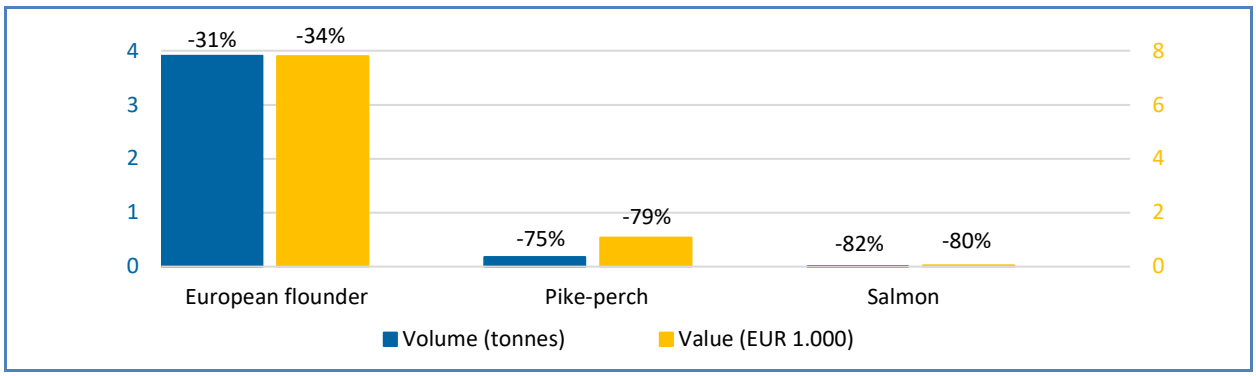


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 0,3 million, -36%	200 tonnes, -34%	Smelt, turbot, other groundfish*, other freshwater fish*.
Sep 2025 vs Sep 2024	EUR 0,02 million, -19%	11 tonnes, -9%	European flounder, pike-perch, salmon.

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

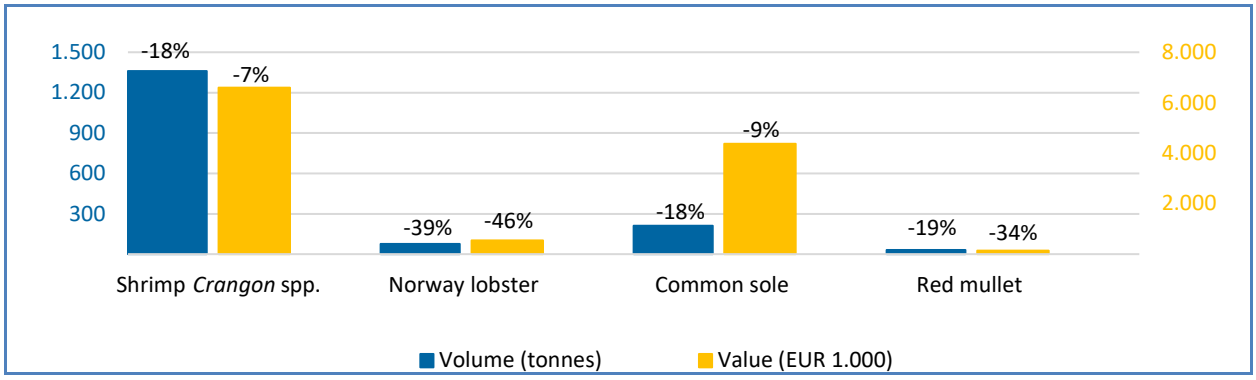


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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-Sep 2025 vs Jan-Sep 2024	EUR 104,2 million, -9%	16.545 tonnes, -9%	Shrimp *Crangon* spp., Norway lobster, European plaice, gurnard, squid.
Sep 2025 vs Sep 2024	EUR 15,2 million, -7%	2.654 tonnes, -11%	Shrimp *Crangon* spp., Norway lobster, common sole, red mullet.

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

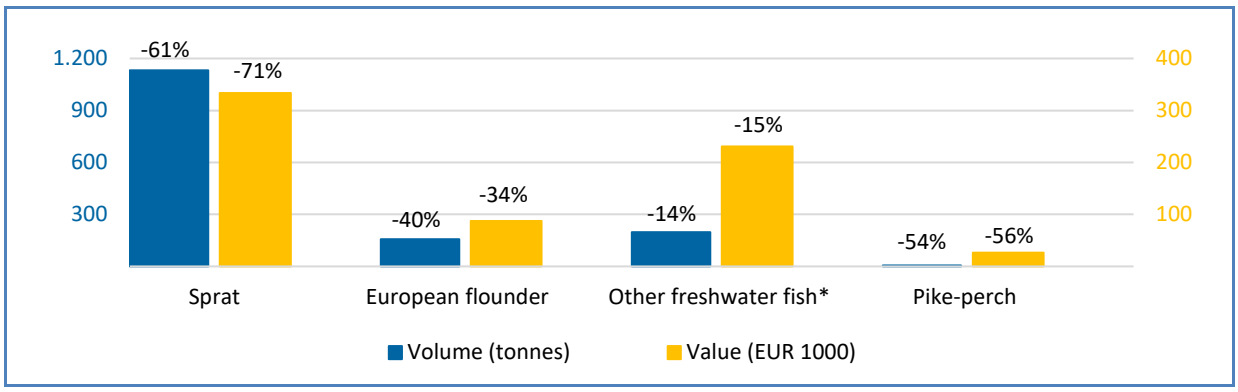


Percentages show change from the previous year.

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

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 21,0 million, -11%	41.170 tonnes, -6%	Sprat, European flounder, eel, other freshwater fish*.
Sep 2025 vs Sep 2024	EUR 2,2 million, -22%	3.938 tonnes, -28%	Sprat, European flounder, other freshwater fish*, pike-perch.

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

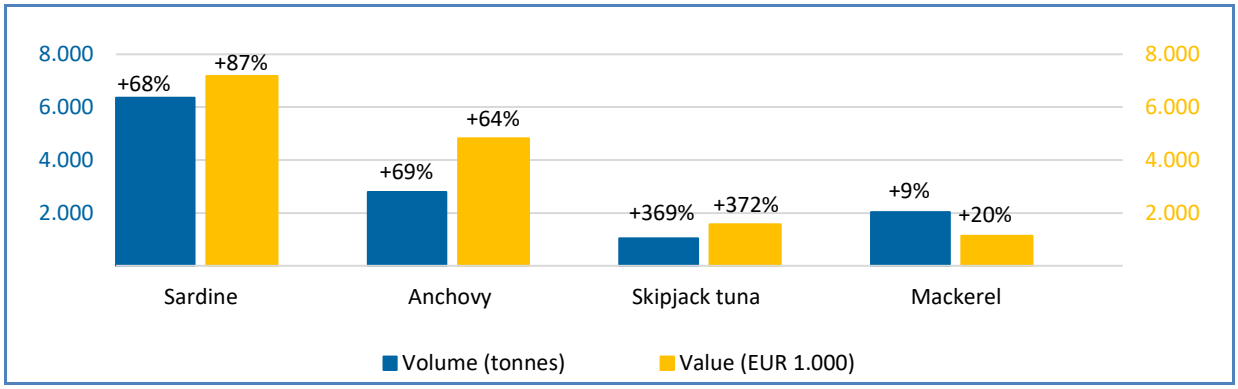


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 240,5 million, +12%	88.705 tonnes, +3%	Sardine, skipjack tuna, anchovy, octopus.
Sep 2025 vs Sep 2024	EUR 32,4 million, +21%	15.949 tonnes, +29%	Sardine, anchovy, skipjack tuna, mackerel.

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

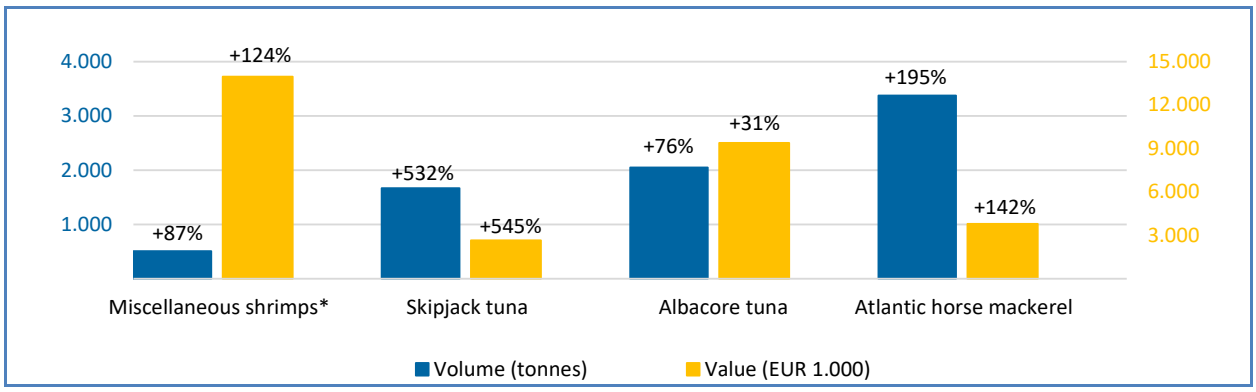


Percentages show change from the previous year.

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 1.109,7 million, +3%	295.830 tonnes, -7%	**Value**: albacore tuna, miscellaneous shrimps*, mackerel. **Volume**: anchovy, blue whiting, yellowfin tuna.
Sep 2025 vs Sep 2024	EUR 118,3 million +10%	31.306 tonnes, +14%	Miscellaneous shrimps*, skipjack tuna, albacore tuna, Atlantic horse mackerel.

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

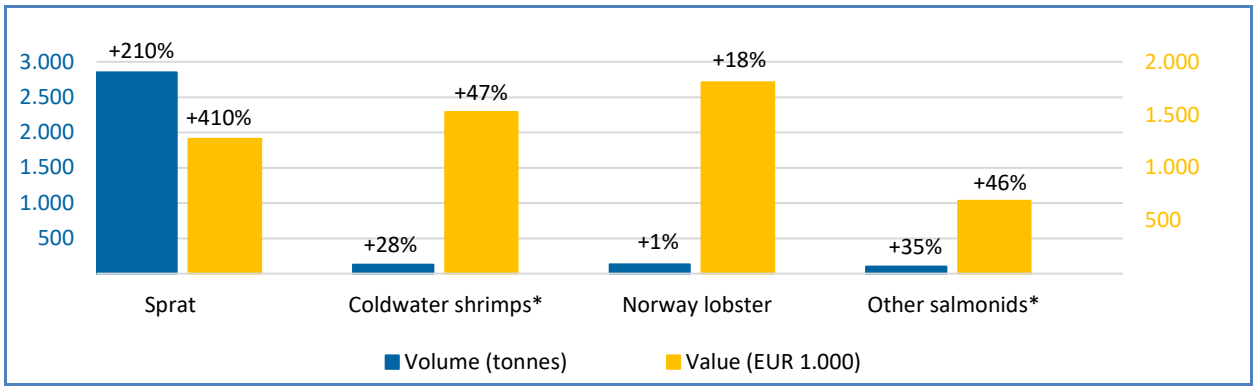


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 65,7 million, -10%	76.590 tonnes, -18%	Sprat, herring, eel, other groundfish*, coldwater shrimps.
Sep 2025 vs Sep 2024	EUR 14,2 million, +14%	12.157 tonnes, +10%	Sprat, coldwater shrimps*, Norway lobster, other salmonids*.

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

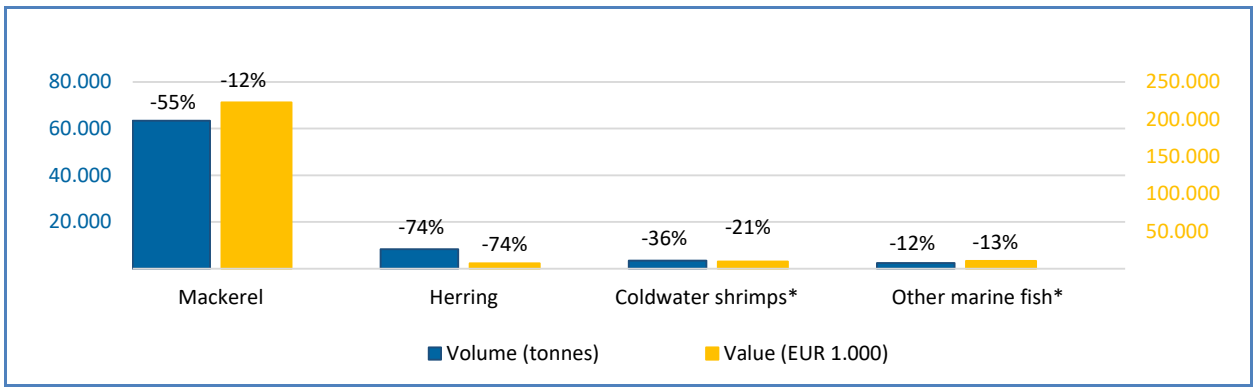


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2025 vs Jan-Sep 2024	EUR 2,7 billion, +12%	2.015.120 tonnes, -10%	**Value**: crab, mackerel, saithe. **Volume**: mackerel, other crustaceans*, herring.
Sep 2025 vs Sep 2024	EUR 349,9 million -5%	154.359 tonnes, -41%	Mackerel, herring, coldwater shrimps*, other marine fish*.

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

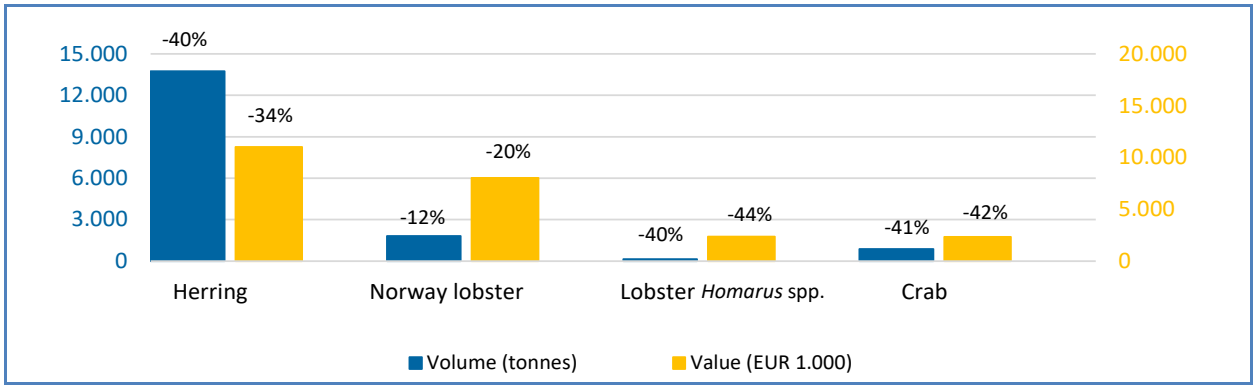


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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-Sep 2025 vs Jan-Sep 2024	EUR 512,8 million, +7%	258.658 tonnes, 0%	Value: saithe, Norway lobster, haddock. Volume: mackerel, herring, blue whiting.
Sep 2025 vs Sep 2024	EUR 55,0 million -16%	30.367 tonnes, -26%	Herring, Norway lobster, lobster *Homarus* spp., crab.

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



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

From January to September 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 (+23%) and octopus (+30%), while salmon (+8%) and Alaska pollock (+31%) contributed most to the increase in volume.

Increases in value and volume: Belgium, Bulgaria, Croatia, Cyprus, Czechia, Estonia, France, Germany, Greece, Ireland, Italy, Malta, 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 (+159%) and bluefin tuna (+21%). The highest increases in volume occurred in Croatia, driven by sardine (+1.836%) and mackerel (+2.217%).

Decreases in value and volume: Lithuania, 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 (-55% and -53%), and cod (-96% and -97%).

Table 36. **JANUARY - SEPTEMBER OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)**[22]

	January - September 2024			January - September 2025			Change from January - September 2024		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	8.913	55,19	6,19	8.265	55,38	6,70	-7%	0%	8%
Belgium	104.414	639,89	6,13	116.785	739,80	6,33	12%	16%	3%
Bulgaria	9.212	24,53	2,66	10.370	30,45	2,94	13%	24%	10%
Croatia	6.408	29,00	4,53	18.330	36,06	1,97	186%	24%	-57%
Cyprus	5.418	34,23	6,32	5.953	36,12	6,07	10%	6%	-4%
Czechia	10.569	48,82	4,62	11.878	54,42	4,58	12%	11%	-1%
Denmark	638.221	2.445,69	3,83	756.576	2.377,04	3,14	19%	-3%	-18%
Estonia	7.395	40,87	5,53	8.309	43,94	5,29	12%	8%	-4%
Finland	31.864	215,48	6,76	34.370	209,11	6,08	8%	-3%	-10%
France	432.216	2.351,26	5,44	450.775	2.363,46	5,24	4%	1%	-4%
Germany	244.245	1.121,25	4,59	325.415	1.368,24	4,20	33%	22%	-8%
Greece	102.644	401,48	3,91	118.211	466,19	3,94	15%	16%	1%
Hungary	2.023	8,25	4,08	1.952	8,71	4,46	-4%	6%	9%
Ireland	132.521	159,50	1,20	196.328	192,55	0,98	48%	21%	-19%
Italy	351.742	2.042,02	5,81	376.126	2.238,80	5,95	7%	10%	3%
Latvia	19.138	43,88	2,29	16.028	47,75	2,98	-16%	9%	30%
Lithuania	37.861	129,48	3,42	33.400	103,14	3,09	-12%	-20%	-10%
Luxembourg	15	0,44	30,02	9	0,46	49,38	-36%	5%	64%
Malta	11.531	28,99	2,51	20.515	38,36	1,87	78%	32%	-26%
Netherlands	513.686	2.632,62	5,12	516.172	2.851,39	5,52	0%	8%	8%
Poland	179.355	775,81	4,33	183.971	810,41	4,41	3%	4%	2%
Portugal	127.148	559,77	4,40	150.055	704,68	4,70	18%	26%	7%

[22] During January -September 2025, the 27 EU Member States (MS), reported 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	14.849	65,65	4,42	17.260	78,87	4,57	16%	20%	3%
Slovakia	3.993	12,58	3,15	3.768	12,37	3,28	-6%	-2%	4%
Slovenia	5.461	22,32	4,09	5.131	21,71	4,23	-6%	-3%	4%
Spain	901.725	4.199,24	4,66	971.907	4.683,57	4,82	8%	12%	3%
Sweden	503.370	3.846,32	7,64	556.006	3.816,71	6,86	10%	-1%	-10%
EU-27	4.405.937	21.934,57	4,98	4.913.866	23.389,69	4,76	**12%**	**7%**	-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 those commodity groups recording an increase in both value and volume of extra-EU imports. Highest increases in value were observed for cephalopods, with octopus and other cephalopods (+30% and +56%, respectively) driving the increase. In terms of volume the increase in small pelagics was driven by sardine (+66%).

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

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

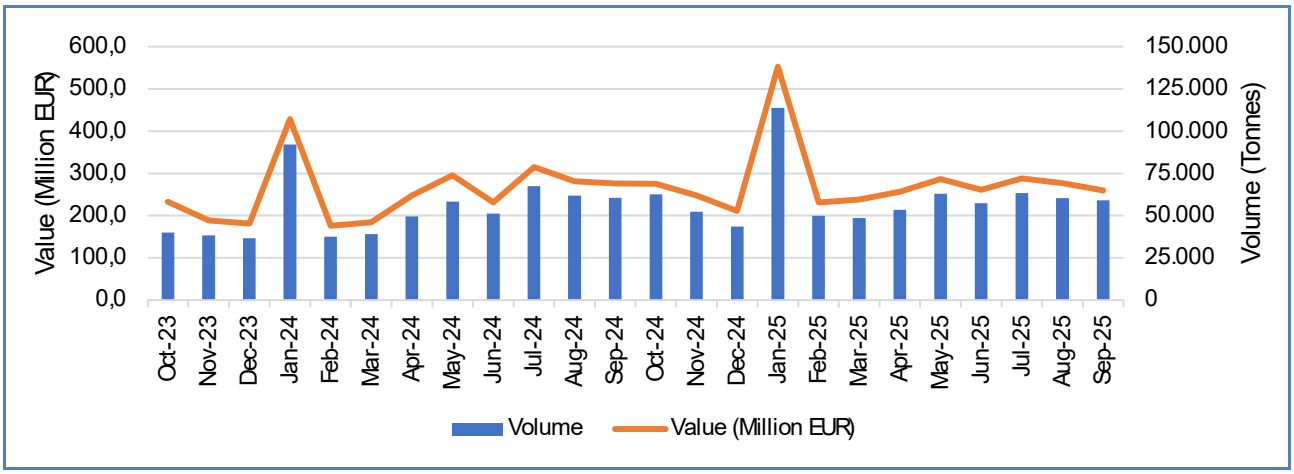
	January - September 2024			January - September 2025			Change from January - September 2024			
Commodity group	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	487,9	104.658	4,66	534,4	116.333	4,59	10%	11%	-1%	Other mussel, clam.
Cephalopods	2.200,7	400.485	5,50	2.663,1	430.826	6,18	21%	8%	12%	Octopus, other cephalopods.
Crustaceans	3.251,5	483.567	6,72	3.594,2	515.935	6,97	11%	7%	4%	Warmwater shrimp, lobster *Homarus* spp..
Flatfish	351,1	67.673	5,19	360,3	69.325	5,20	3%	2%	0%	Greenland halibut, other flatfish.
Freshwater fish	413,1	104.398	3,96	441,6	114.117	3,87	7%	9%	-2%	Tilapia, freshwater catfish.
Groundfish	3.257,3	815.109	4,00	3.680,1	867.340	4,24	13%	6%	6%	Cod, Alaska pollock.
Other marine fish	1.306,7	233.470	5,60	1.440,6	237.411	6,07	10%	2%	8%	Other marine fish, monk.
Salmonids	6.244,5	751.776	8,31	5.826,7	811.368	7,18	-7%	8%	-14%	Salmon.
Small pelagics	719,3	294.247	2,44	830,3	328.159	2,53	15%	12%	3%	Mackerel, herring.
Tuna and tuna-like species	2.435,5	517.467	4,71	2.651,6	568.716	4,66	9%	10%	-1%	Skipjack tuna, miscellaneous tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of tuna and tuna-like species in EU Member States

In January – September 2025, extra-EU imports of tuna and tuna-like species accounted for a total value of EUR 2,7 million and a total volume of 568.716 tonnes, marking a 9% increase in value and 10% increase in volume compared to the same period in 2024.

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



Source: EUMOFA elaboration of Eurostat COMEXT

Extra-EU imports of tuna and tuna-like species peak January, both in terms of value and volume, while lowest falls are December and February and March.

Between January and September 2025, Spain, Italy and France were the main importers of tuna and tuna-like species in the EU and together imported from extra-EU countries about 64% of the total volume of tuna and tuna-like species, Spain (39%), Italy (15%) and France (10%) respectively.

Table 38. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR TUNA AND TUNA-LIKE SPECIES**

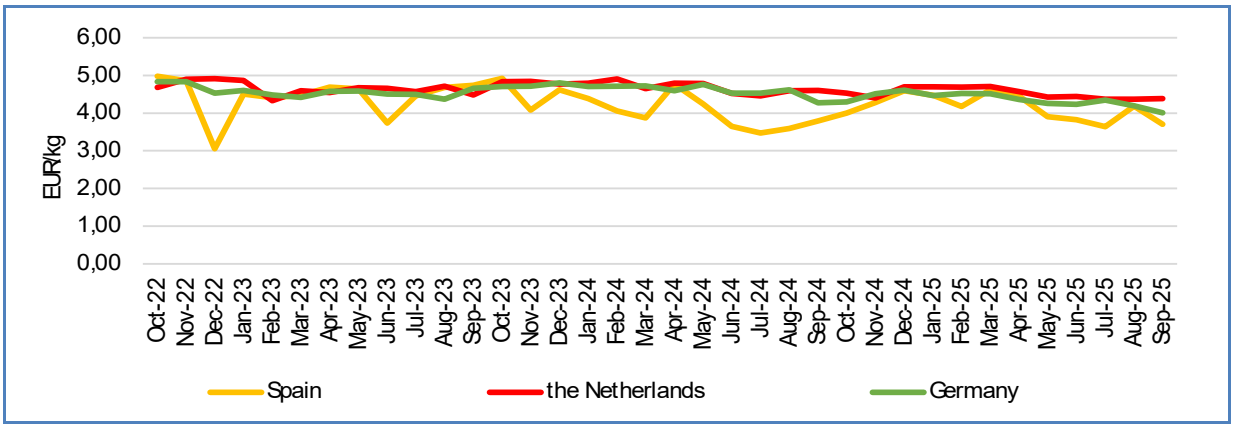
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan–Sep 2024	Jan-Sep 2025	Trend (%)	Jan–Sep 2024	Jan-Sep 2025	Trend (%)	
Spain	883,0	938	219.502	223.437	6%	2%	Skipjack tuna
Italy	499,9	497	83.670	87.641	-1%	5%	Skipjack tuna
France	297,4	312	51.390	55.683	5%	8%	Skipjack tuna

4.2. Extra-EU imports of skipjack tuna in EU Member States

In terms of value, skipjack tuna was the main imported species within the "tuna and tuna-like species" commodity group, accounting for 57% of the total volume, followed by yellowfin tuna with 26%.

The price analysis below focuses on the main EU importers of skipjack tuna from non-EU countries, namely Spain, the Netherlands and Germany.

Figure 37. **EXTRA-EU IMPORT PRICE OF SKIPJACK TUNA IN SPAIN, THE NETHERANDS AND GERMANY (OCT 2022 – SEP 2025)**



Between October 2022 and September 2025, the price of skipjack tuna fluctuated and decreased in the three countries analysed: Spain (-10%), the Netherlands (-2%) and Germany (-6%). Between January and September 2025, the volume of skipjack tuna imported to Spain was 99.105 tonnes, 8% less compared with the same period in 2024, while the price increased by 5%. Most imports, in volume, came from Ecuador (42%), followed by China (24%).

During the same period, 55.069 tonnes of skipjack tuna were imported to the Netherlands, 30% more compared to 2024, with a price decrease of 3% compared to 2024. Ecuador accounted for almost 51% of the total imported volume of skipjack tuna in 2025 followed by Mauritius at 16%.

In Germany, 50.240 tonnes were imported in 2025, of which almost 54% came from Ecuador and Papua New Guinea, 27% respectively. Import volumes increased by 21% while prices decreased by 6%.

In Spain, import volumes peak in January, reaching values that are almost three times the average of the periods. No clear seasonal pattern was observed in the Netherlands or Germany.

Figure 38. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SKIPJACK TUNA IN SPAIN, OCT 2022 – SEP 2025 (volume in tonnes, price in EUR/kg)**

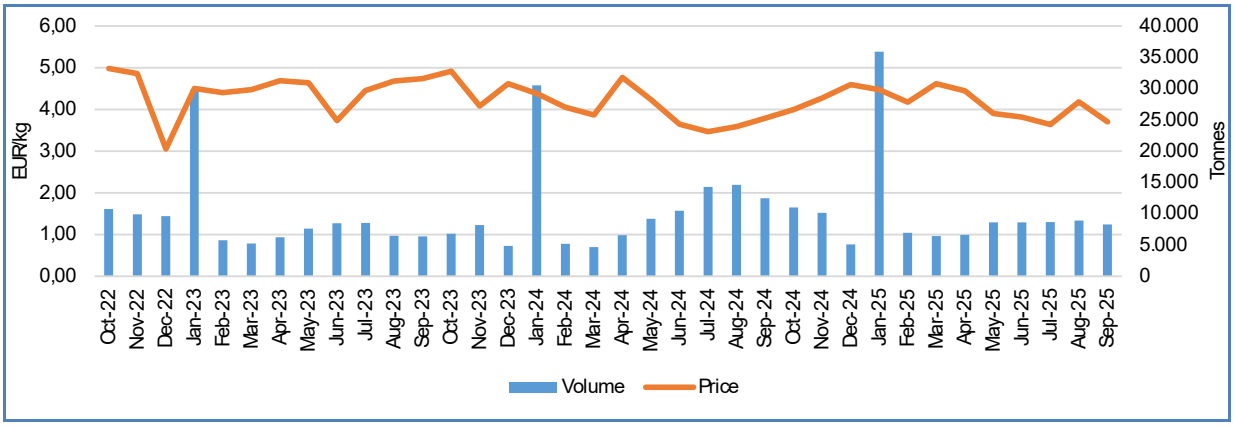


Figure 39. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SKIPJACK TUNA IN THE NETHERLANDS, OCT 2022 – SEP 2025 (volume in tonnes and price in EUR/kg)**

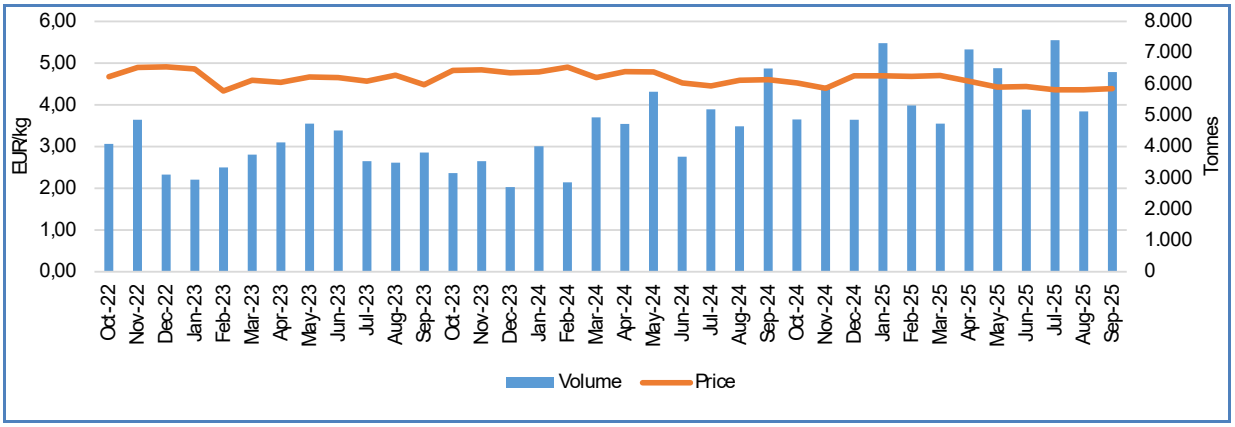
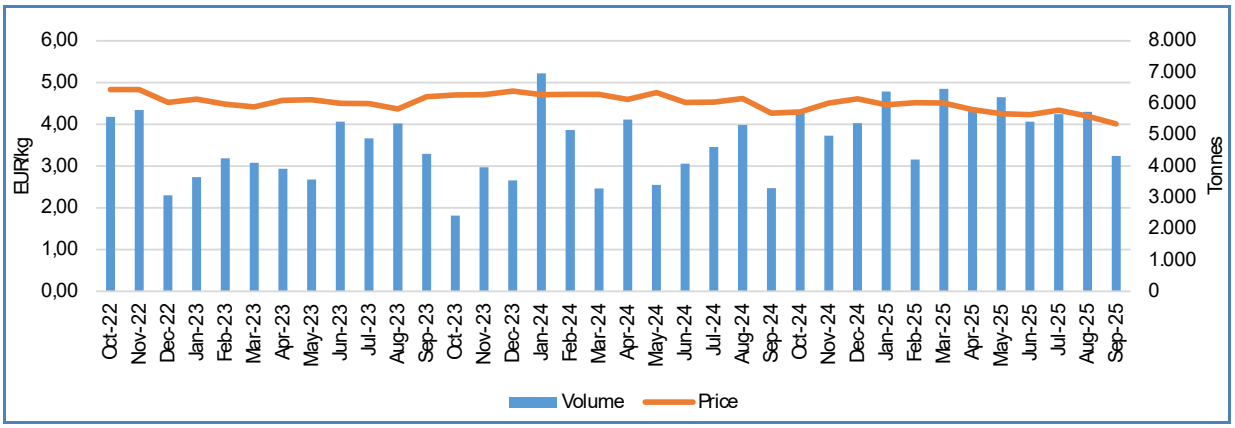


Figure 40. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SKIPJACK TUNA IN GERMANY, OCT 2022 – SEP 2025 (volume in tonnes and price in EUR/kg)**



4.3. Extra-EU imports of skipjack tuna by origin

Between January and September 2025, EU imports of skipjack tuna[23] recorded an increasing trend in volume (+9%) and in value (+10%) compared with the same period in 2024. In 2025, the EU imported 321.729 tonnes of skipjack tuna for a value of EUR 1.438 million. The main extra-EU countries supplying skipjack tuna to the EU in 2025 were Ecuador (40%), followed by China (10%) and the Philippines (8%). Compared to the same period in 2024, imports increased from all of these countries, except China. Over the same period, imports also increased from Papua New Guinea (+40%), Mauritius (+4%) and Vietnam (+28%).

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

Country	Jan – Sep 2023		Jan – Sep 2024		Jan – Sep 2025		Jan – Sep 2025/2024	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Ecuador	352,6	71.792	509,8	112.399	586,5	127.977	15%	14%
China	99,4	22.720	137,9	34.326	123,5	31.319	-10%	-9%
Philippines	99,1	21.527	96,4	20.993	116,4	27.106	21%	29%
Papua New Guinea	101,2	21.185	81,2	16.746	103,6	23.515	28%	40%
Others	539,3	114.730	491,1	108.950	507,7	111.812	3%	3%
Total	**1.191,5**	**251.955**	**1.316,4**	**293.414**	**1.437,7**	**321.729**	**9%**	**10%**

[23] 03023390 - Fresh or chilled skipjack or stripe-bellied bonito "*Katsuwonus pelamis*" (excl. for industrial processing or preservation)
03034310 - Frozen skipjack or stripe-bellied bonito "*Katsuwonus- pelamis*" for industrial processing or preservation
03034390 - Frozen skipjack or stripe-bellied bonito "*Katsuwonus pelamis*" (excl. for industrial processing or preservation)
16041421 - Prepared or preserved skipjack, whole or in pieces, in vegetable oil (excl. minced)
16041426 - Fillets known as "loins" of skipjack, prepared or preserved, whole or in pieces (excl. such products in vegetable oil or minced)
16041428 - Prepared or preserved skipjack, whole or in pieces (excl. minced, fillets known as "loins" and such products in vegetable oil)

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 September 2024, household consumption of fresh fishery and aquaculture products in September 2025 increased in both volume and value in Hungary, Italy and Sweden. In contrast, Germany and Ireland recorded decreases in both value and volume. Denmark, France, Poland, Portugal and Spain registered decreases in volume and increases in value.

The most notable increases were in Sweden and Hungary where consumption increased in volume by 13% and 7% respectively, and in value by 14% in both countries compared to 2024. Germany recorded the most notable decrease in volume (-9%) and in value (-11%).

Table 40. **MONTHLY OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita consumption 2023* (live weight equivalent, LWE) kg/capita/year	September 2023		September 2024		September 2025		Change from September 2024 to September 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	951	18,16	1.160	21,46	1.075	21,87	-7%	2%
France	32,14	16.930	207,62	17.014	182,05	15.719	196,10	-8%	8%
Germany	12,08	4.331	73,02	3.938	69,35	3.580	61,69	-9%	-11%
Hungary	5,83	275	2,52	206	1,99	220	2,28	7%	14%
Ireland*	20,00	723	13,23	988	17,60	915	16,94	-7%	-4%
Italy	30,38	24.260	291,06	22.929	298,48	23.086	302,60	1%	1%
Netherlands*	19,90	3.180	55,48	2.979	55,68	2.972	54,92	0%	-1%
Poland	13,67	3.085	31,49	3.277	37,17	3.132	39,49	-4%	6%
Portugal	53,61	5.341	38,46	4.698	37,78	4.494	39,83	-4%	5%
Spain	40,68	41.944	405,18	39.125	392,32	37.751	396,17	-4%	1%
Sweden	10,00	507	8,23	675	10,23	762	11,63	13%	14%

** The methodologies for estimating apparent consumption at EU and Member State levels are different, the first based on data and estimates, 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 * in the Table above: Hungary: Institute of Agricultural Economics; Netherlands: Dutch Fish Marketing; Poland: Institute of Agricultural and Food Economics - National Research Institute; Denmark: the Danish Fisheries Agency could not provide any estimates but, according to estimates made by the University of Copenhagen for the latest years, per capita apparent consumption has been between 20,00-25,00 kg LWE; Ireland: the Sea Fisheries Protection Authority could not provide estimates, but EUMOFA has estimated that the average per capita apparent consumption over the last three years has been around 20,00 kg LWE; Sweden: the Swedish Board of Agriculture could not provide estimates but as reported by the Swedish research institute RISE, the consumption in 2023 was 10 kg LWE/per person per year or 1,6 portions person per week.*

[24] Last update: 15.12.2025.

5. 2. Overview of household consumption[25] of tuna and tuna-like species consumed in the EU

In the household consumption data used by EUMOFA, consumption of tuna and tuna-like species is monitored in ten[26] Member States of which Italy and Spain are the main consumers. At species level, Italy monitors swordfish (Xiphias gladius) and Spain monitors different species of tuna.

Figure 41. **HOUSEHOLD PURCHASES (in value) OF TUNA AND TUNA-LIKE SPECIES IN ITALY AND SPAIN SEP 2022 – SEP 2025**

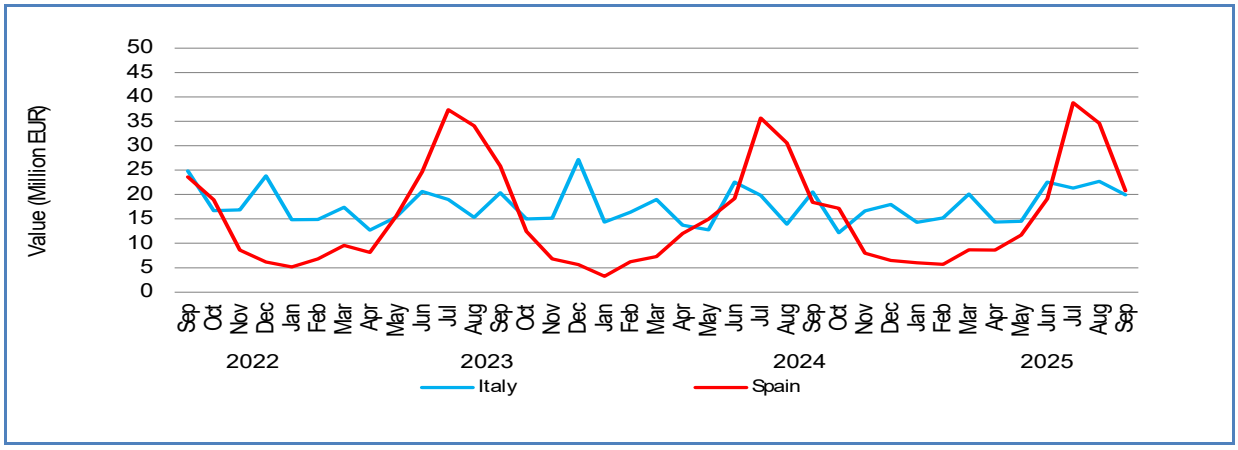
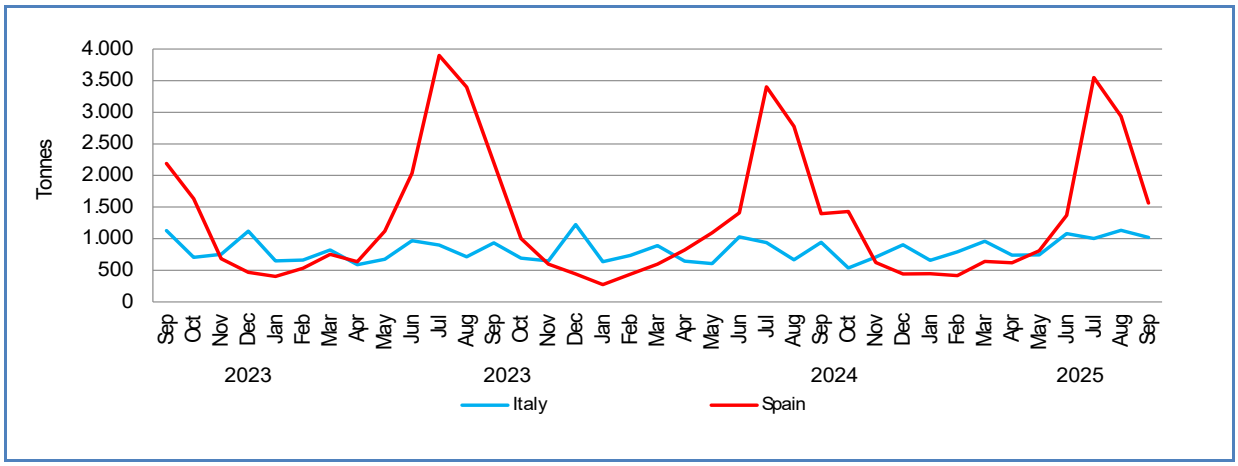


Figure 42. **HOUSEHOLD PURCHASES (in volume) OF TUNA AND TUNA-LIKE SPECIES IN ITALY AND SPAIN SEP 2022 – SEP 2025**

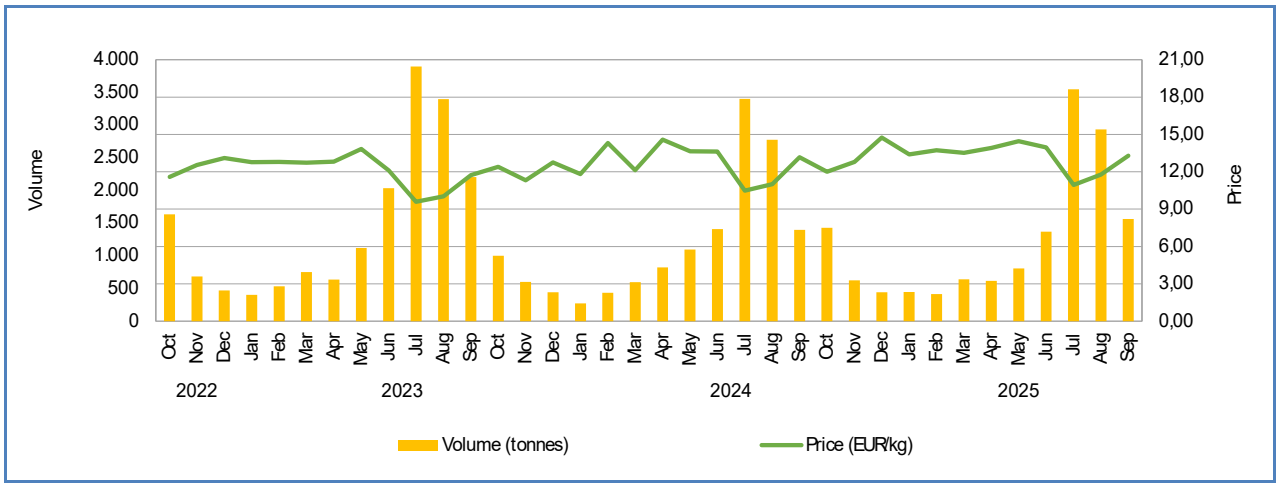


[25] The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the available data and does 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 miscellaneous tunas - the main species of tuna and tuna-like species in reporting countries

Long-term trend (Oct 2022 to Sep 2025): Slightly upward trend in volume and in price.
Yearly average retail price (Jan – Sep): 12,05 EUR/kg (2023), 12,75 EUR/kg (2024), 13,22 EUR/kg (2025)
Yearly consumption (Jan – Sep): 14.984 tonnes (2023), 12.208 tonnes (2024), 12.351 tonnes (2025)
Short-term trend (Oct 2024 to Sep 2025): Slightly downward trend in price and upward trend in volume.
Average retail price (Oct 2024 to Sep 2025): 13,21 EUR/kg.
Consumption (Oct 2024 to Sep 2025): 14.846 tonnes.

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



Consumption of miscellaneous tunas in the reporting countries shows a seasonal fluctuation with a peak in July due to higher summer catches. Prices showed higher peaks between February and April while they decreased between June and August. Between October 2022 and September 2025, consumption volumes and prices showed a slight upward trend.

6. CASE STUDY: Organic aquaculture in Europe and the EU

In 2023 EU consumption of organic aquaculture products was estimated at about 100.000 tonnes (3% of apparent consumption of aquaculture products). Most of these products were produced in the EU (86%, 85.860 tonnes) and 14% were imported. Member States principally involved in organic aquaculture production are the Netherlands, Ireland, Italy, Germany and Denmark, and the species produced under the organic scheme in the EU are mainly mussels (predominantly from the Netherlands, Italy, Ireland and Germany), followed by salmon (from Ireland). In addition, the EU imports organic salmon (from the UK), shrimps and prawns (mainly from Ecuador and Madagascar) and mussels (from the UK and Chile).

6. 1. Overview of the organic sector in the EU

Organic production in the EU is governed by Regulation (EU) 2018/848[27] on organic production and labelling of organic products. In 2023, the EU had 17,7 million hectares (ha) under an organic scheme, with the largest shares in Spain, France, Italy and Germany[28]. This accounted for 10,9% of the EU's agricultural land. The highest shares of organic production were recorded in Austria, Estonia and Portugal (with over 20% each). The organic sector has expanded over the last 20 years, and land area used for production in 2023 was almost five times larger compared to 2000 (3,7 million ha in 2000) and 34% larger than in 2018 (13,2 million ha).

EU retail sales of organic products accounted for EUR 46,5 billion in 2023, representing 34% of the global organic market. After experiencing steady growth until 2021, organic sales decreased for the first time in 2022 due to high inflation on organic products, which dampened demand, before increasing again in 2023 (2,9%), reaching levels seen in 2021. Germany was the largest EU market for organic products in 2023 with EUR 16,1 billion, making it the second largest market in the world after the USA. France followed at EU level with EUR 12,1 billion. Organic products accounted for over 10% of retail food in Denmark (11,8%) and Austria (11,0%). Sweden, Germany and France also record notable shares reaching 7,8%, 6,3% and 5,6%, respectively.

The organic sector covers all food commodities, including beverages. Key products differ between Member States, but typically include fruit and vegetables, dairy products, baby food, wine, etc. Although organic aquaculture products represent a limited share of the market compared to other products, they play a significant role in the markets of several Member States. The organic scheme applies solely to farmed products; as wild caught products are by definition excluded.

6. 2. Organic aquaculture production in the EU

Organic aquaculture production by Member States

In 2023, organic aquaculture production in the EU reached 85.860 tonnes, representing 8% of the total aquaculture production. EU production has increased significantly compared to 2020 (74.032 tonnes, 6% of the total EU aquaculture production[29]) although a significant decrease (11%) was observed compared to 2022 (96.868 tonnes). This decrease is mainly related to a lower organic production in Ireland, of both salmon and mussel, and to a lesser extent to a decrease in organic mussel production in Italy and Denmark.

Some Member States have already reported data for 2024 (see table below). However, this is not sufficient to provide a comprehensive EU-wide overview.

The largest producers of organic aquaculture products are the Netherlands, Ireland and Italy, with each accounting for at least 20% of the EU organic production in 2023. Germany, Denmark and Spain followed, contributing to 9%, 6% and 5%, respectively.

While organic aquaculture production represents a significant share of total national production in the Netherlands and Ireland (respectively 47% and 57%), it remains proportionally smaller in Germany and Italy (13% and 23% respectively) and negligeable in the largest aquaculture producers such as Spain, France and Greece (2% each). In most Member States, organic aquaculture production is dominated by mussel production, which is the largest organic species in the EU (Netherlands, Italy, Germany, Denmark, etc.). Organic seabass and seabream are mainly produced in Mediterranean countries such as Greece and Croatia,

[27] Regulation (EU) 2018/848 of the European Parliament and of the Council of 30 May 2018 on organic production and labelling of organic products and repealing Council Regulation (EC) No 834/2007
[28] The economic data from this paragraph are based on FiBL yearbook 2025 - https://orgprints.org/id/eprint/54617/1/1797-organic-world-2025.pdf
[29] Organic aquaculture in the EU, EUMOFA, 2022 - https://eumofa.eu/documents/20178/432372/Organic+aquaculture+in+the+EU_final+report_ONLINE.pdf?

while organic pond fish production is concentrated in central and western EU Member States. Ireland is notable for having all its salmon production as organic, even though not all producers are certified.

Table 41. **EU ORGANIC AQUACULTURE PRODUCTION BY MS (volume in tonnes LWE)**

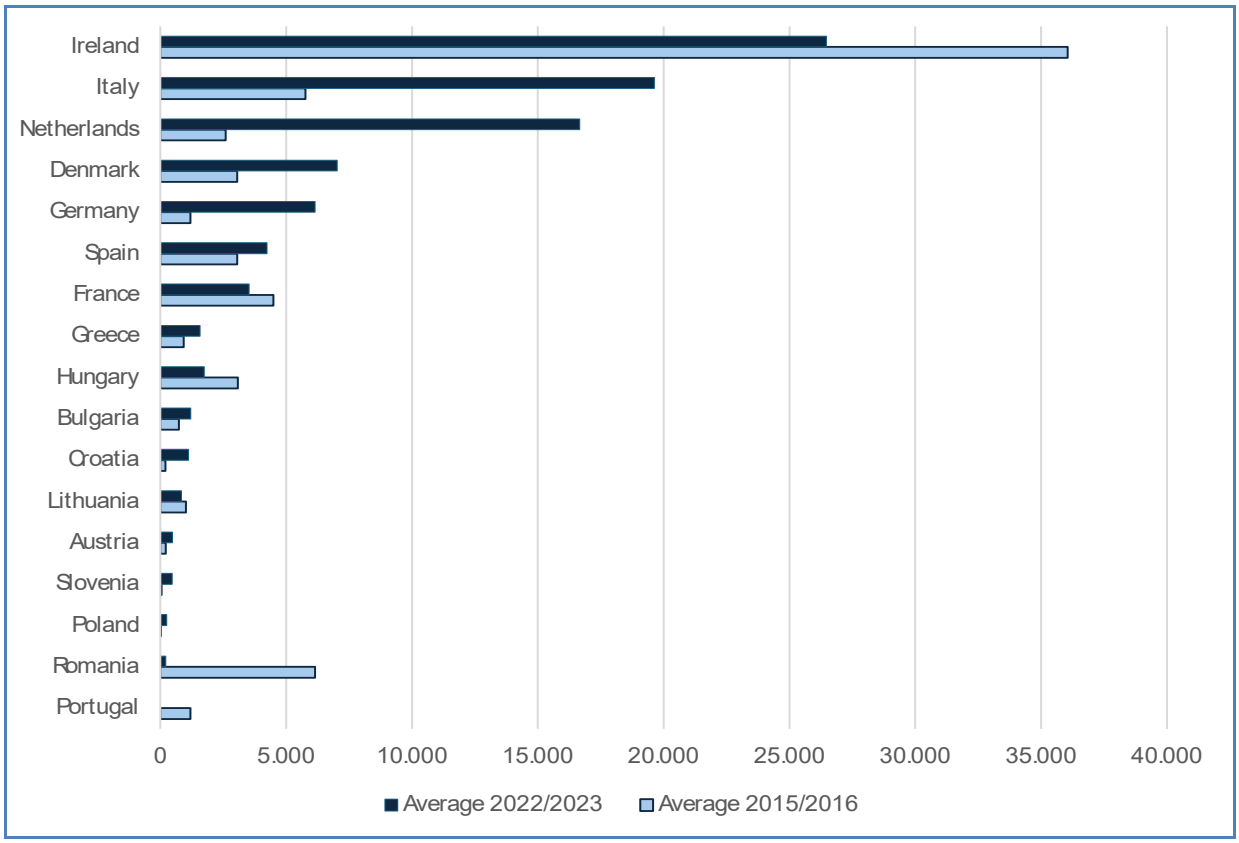
Member State	2022	2023	2024	Share in total aquaculture (2023)	Main produced species (2023)
Netherlands	13.912	19.406	14.860	47%	100% mussels
Ireland	34.366	18.578	16.643	57%	9.277 t of mussels and 9.301 t of Atlantic salmon (100% of Irish salmon production)
Italy	22.187	17.069	11.340	13%	97% mussels (15.463 t), smaller volumes of seabass (224 t), rainbow trout (160 t) and sea trout (130 t)
Germany*	4.361	7.940	11.519	23%	Mainly mussels (96% of organic production), smaller volumes of rainbow trout and carps
Denmark*	8.552	5.503	4.820	24%	96% mussels (7.603 t), smaller volumes of rainbow trout (282 t) and Carps (18 t)
Spain	4.176	4.307	3.175	2%	40% mussels.
France*	3.715	3.339	n.a.	2%	47% mussels (1.559 t), 26% rainbow trout (856 t), 27% oysters (894 t) and 1% diversified pond species (30 t)
Greece	-	3.148	n.a.	2%	Mainly seabass and seabream (735 t)
Hungary	1.740	1.740		10%	100% pond fish (mainly carps)
Croatia	744	1500	1648	6%	Mainly seabass, seabream and mussels
Lithuania	556	1.126	1.169	30%	100% pond fish
Bulgaria	1.600	805	493	8%	100% mussels
Slovenia	440	501	n.a.	45%	Mainly mussels
Austria		483	n.a.	9%	70% pond fish and 25% rainbow trout
Poland	275	225	263	1%	100% pond fish
Romania	243	181	174	2%	61% pond fish (111 t), 19% rainbow trout (34 t)
Slovakia		9	10	0%	100% rainbow trout
Others	1	-	n.a.	-	/
Total EU	**96.868**	**85.860**	**n.a.**	**8%**	

*Source: based on Eurostat and national sources. n.a.: not available. *Note: Data for Denmark in 2023 and 2024 and for France in 2023 are from national statistics (Danish Fisheries Agency and Agreste); data for Germany in 2023 is an estimate based on the average production for 2022 and 2024.*

Evolution over the last decade

Comparison between the average production levels in 2015/2016 and 2022/2023 shows that organic production has increased overall by around 30%, corresponding to over 20.000 tonnes. Italy, the Netherlands, Denmark, Germany, Spain, Greece, Bulgaria, Croatia and some other Member States recorded increases, whereas Ireland, France, Hungary, Lithuania, Romania and Portugal saw a decline in their organic production. Overall, the increase observed in the largest producers such as Italy, the Netherlands, Germany and Denmark was driven by an increase in organic mussel production. Over the past decade, organic mussel production has increased sharply: by 162% in Italy, by 221% in the Netherlands and by 394% in Denmark (before decreasing in all these countries in 2024). The long-term decrease in Ireland is correlated to a sharp decrease in organic salmon production which halved over the last decade.

Figure 44. **EVOLUTION OF ORGANIC AQUACULTURE PRODUCTION BY MEMBER STATE: COMPARISON BETWEEN 2022/2023 AND 2015/2016**



Source: based on Eurostat. Data for Denmark in 2023 and 2024 and for France in 2023 are from national statistics (Danish Fisheries Agency and Agreste, because of lack of data in Eurostat); data for Germany in 2023 is an estimate based on the average production for 2022 and 2024. Note: for France, due to lack of data for 2015 and 2016, the comparison is made between 2022/2023 and 2018/2019.

EU organic aquaculture production by species

Organic production accounts for 8% of total aquaculture production at EU level. However, the share varies widely by species. Organic production represents a significant proportion of overall mussel production and the entire production of Atlantic salmon. By contrast, the organic share remains very limited for other species such as trout, seabass and seabream, oysters or even carps.

Table 42. **EU ORGANIC AQUACULTURE PRODUCTION FOR THE MAIN SPECIES (volume in tonnes LWE)**

Species	2022	2023	Evol. 2022-2023	Share in total aquaculture * (2023)
Mussels	62.880	62.181	-1%	17%
Atlantic salmon	13.312	9.321	-30%	100%
Carps, barbels and other cyprinids	2.787	3.533	27%	4%
Rainbow trout	2.834	2.427	-14%	1%
Seabream and seabass	998	2.274	128%	1%
Oysters	1.087	894	-18%	1%

*Source: Eurostat: data by Member State and by Species are very limited. These were completed by national sources (Danish fisheries agency in Denmark, MAPA in Spain, SINAB for Italy, Agreste in France, HAPO in Greece, EUMOFA study on organic aquaculture in Germany). In some cases, even national data were incomplete due to statistical constraints. In those cases, some estimations were carried out to fill gaps (example: when no data were available, the data of the year after or before was considered). For these reasons, data in the table above should be considered with caution. They provide a reliable order of magnitude but should not be taken as precise absolute values. *This represents the share of organic aquaculture production in the total aquaculture production for each species.*

Data on organic production by species provide some interesting insights:

- **Mussels** are the largest species produced under an organic scheme, with an estimated production of over 62.000 tonnes in 2023 (72% of EU organic production). The Netherlands is the leading producer, accounting for about 30% of the EU organic mussel production in 2023, with more than 19.000 tonnes. Italy, Ireland and Germany followed, accounting for 25%, 15% and 12% respectively of EU organic production, each producing over 7.500 tonnes. While organic production represented a significant share of national production of mussels in these Member States, it remained marginal in the largest mussel producers, such as Spain and France, where the organic share does not exceed 3%. Because of limited data by Member States and by species, it is difficult to estimate precisely the evolution of EU organic mussel production over the last decade. However, evidence suggests that there has been a significant upward trend, followed by a decline in 2023 and 2024, especially due to decreased production in the Netherlands, Italy, Ireland and Denmark in 2024.
- **Atlantic salmon** is the second largest species produced under an organic scheme, with around 9.300 tonnes, representing 11% of EU organic production in 2023. Organic salmon is exclusively produced in Ireland, where the entire salmon production is organic., even though not all producers are certified. Production has decreased significantly by 57% between 2015 and 2023 and continued to decrease between 2022 and 2023 (by 22%). The Irish Seafood Agency explained the recent decrease through biological issues in salmon production, offset by maintaining strong export prices[30].
- **Carps, barbels and other cyprinids** is the third largest group of species produced under the organic scheme in the EU. Hungary and Lithuania together totalled 80% of the EU organic production of these species in 2023. Other producers included Austria, Portugal and Romania. The organic production of this group of species has decreased over the past decade, falling by 52% between 2015 and 2023. This decrease was driven mainly by the sharp decrease in Romanian production, which fell by 97% over the same period.
- The main producing countries for organic **rainbow trout** are France, Spain, Denmark and Germany, each producing less than 1.000 tonnes. Production has generally fluctuated over the past decade and has slightly decreased between 2022 and 2023. This variability could be attributed to the small number of companies involved in organic trout farming, which makes organic production dependent on individual company strategies rather than sector-wide dynamics.
- **Seabass** and **seabream** followed, representing only 3% of EU organic production. Production is mainly concentrated in three Member States: Croatia (58% of total EU organic production of these species), Greece (32%) and Italy (10%). Very small volumes are also recorded in Spain and France (less than 100 tonnes each). The share of organic production is very small for both species.

Organic **oysters** are almost exclusively produced in France (around 900 tonnes). Organic production has remained stable between 2018 and 2023.

Organic aquaculture production in the UK and Norway

Organic production in the UK is concentrated in Scotland and Northern Ireland and consists mainly of salmon. Organic trout and mussels are also produced in the UK. Production of organic salmon in the UK reached 14.130 tonnes in 2023, including 13.530 tonnes in Scotland[31] and 600 tonnes in Northern Ireland[32]. Scottish production progressed strongly between 2014 and 2023 (by 277%, from 3.588 tonnes in 2014). However, it suffered a sharp decrease of 24% between 2022 and 2023. Organic trout production is unknown, but is estimated to be significant, with 49 enterprises involved in organic rainbow trout farming in 2023 in Scotland[33].

According to Eurostat, Norwegian organic production reached 25.163 tonnes in 2024. It consisted mainly of salmon (22.324 tonnes) and mussels (2.196 tonnes). Organic salmon production progressed by 40% between 2015 and 2024 but decreased by 30% between 2022 and 2024. Organic mussel production has increased both over the past decade (266%, from 600 tonnes in 2015) and between 2022 and 2024 (71%).

[30] https://bim.ie/wp-content/uploads/2024/09/BIM-The-Business-of-Seafood-2023-WEB.pdf
[31] https://www.gov.scot/publications/scottish-fish-farm-production-survey-2023/pages/5/
[32] https://glenarmorganicsalmon.com/
[33] https://www.gov.scot/publications/scottish-fish-farm-production-survey-2023/pages/3/

6.3. Extra-EU imports of organic aquaculture products

Imports of organic products reached 25.971 tonnes in 2024. The volumes are decreasing by 15% compared to 2022, but a fall was observed in 2023 (due to salmon, shrimps and prawns). Among the main species imported:

- **Salmon** remains the main species imported, with 25.971 tonnes in 2024, coming from Norway and the UK. The volume imported in 2024 is 15% lower compared to 2022, with a drop in 2023.
- **Shrimps** and **prawns** are the second group of species, with 4.368 tonnes in 2024. There was a strong drop in imports between 2022 and 2024 (28%). The main countries of origin are Ecuador and Madagascar (respectively 1.509 tonnes and 1.107 tonnes in 2024), accounting for 60% of the total volume imported. Imports from these countries have decreased significantly over the last years (respectively 36% and 24%), while imports from Indonesia have increased by 37% and reached 770 tonnes in 2024.
- **Mussel** is the third species imported to the EU, with 2.402 tonnes imported in 2024. It has grown significantly since 2022 (43%) and accounted for 16% of the volume imported (compared to 12% in 2022). This growth was due to increased imports from the UK (82% to reach 1.766 tonnes in 2024), while imports from Chile dropped by 10% (636 tonnes in 2024).

Table 43. **EXTRA-EU IMPORTS BY MAIN SPECIES (in tonnes product weight)**

Species	2022	2023	2024	Evol. 2022-2024
Salmon[1]	22.807	16.147	19.111	-16%
Shrimp and prawns	6.033	4.124	4.368	-28%
Mussels	1.679	2.175	2.402	+43%
Other[2]	191	123	90	-53%
Total	**30.710**	**22.569**	**25.971**	**-15%**

Source: based on TRACES - https://food.ec.europa.eu/horizontal-topics/traces_en.
1. TRACES data do not include imports from Norway. These have been estimated based on organic salmon production in Norway. Specifically, the share of Norwegian salmon production exported to the EU, which accounts for 53% of the weight of total salmon production, was applied to the Norwegian organic production of salmon to estimate the EU imports.
2. TRACES data include wild caught products preserved with other organic food products such as organic oil. These products are considered as organic in TRACES database. These data have not been considered in the present analysis.

A few Member States account for the largest share of imports of organic aquaculture products. The products imported into these countries may be for national consumption, processing (for instance salmon smokeries) or re-export to other Member States. The four following Member States accounted for 93% of the organic volume imported in 2024[34]:

- **France (6.082 tonnes imported)**, mainly fresh and chilled salmon (50%), frozen shrimps (36%) and preserved mussels. Imports of organic frozen shrimps to France have declined over the last years, with 4.469 tonnes in 2021 and 2.217 tonnes in 2024.
- **Poland (3.218 tonnes)**, exclusively fresh and chilled salmon, with imported volume two times higher in 2024 compared to 2023 (3.218 tonnes in 2024).
- **The Netherlands (3.054 tonnes)**, mainly mussels (58%), followed by frozen shrimps (30%) and fresh and chilled salmon (13%).
- **Belgium (669 tonnes)**, mainly frozen shrimps (88%).

[34] Source: based on TRACES, this excludes organic salmon imprted from Norway.

The three following tables provide details on the imports of organic products by species and country of origin over the period 2022-2024. Organic shrimps and prawns are mainly imported to the EU from Ecuador, Madagascar, Indonesia, Honduras and Vietnam, while organic mussels come predominantly from the UK and Chile.

Table 44. **EXTRA-EU IMPORTS OF SALMON PRODUCTS BY COUNTRY OF ORIGIN (in tonnes product weight)**

Country	2022	2023	2024	Evol. 2022-2024
Norway	17.159	11.534	11.945	-30%
UK	5.482	4.412	7.083	+29%
Chile	0	0	73	n.a.
Ukraine	166	201	10	-94%
Total	**22.807**	**16.147**	**19.111**	**-16%**

Source: based on TRACES and estimates for the organic salmon imported from Norway (see note below table 42).

Table 45. **EXTRA-EU IMPORTS OF SHRIMP AND PRAWNS BY COUNTRY OF ORIGIN (in tonnes product weight)**

Country	2022	2023	2024	Evol. 2022-2024
Ecuador	2.369	1.414	1.509	-36%
Madagascar	1.436	1.247	1.107	-23%
Indonesia	563	577	770	+37%
Honduras	428	318	444	+4%
Vietnam	666	425	304	-54%
Costa Rica	223	20	149	-33%
Peru	138	122	85	-38%
Other countries	211	0	0	-100%
Total	**6.033**	**4.124**	**4.368**	**-28%**

Source: based on TRACES.

Table 46. **EXTRA-EU IMPORTS OF MUSSEL PRODUCTS BY COUNTRY OF ORIGIN (in tonnes product weight)**

Country	2022	2023	2024	Evol. 2022-2024
UK	972	1 750	1 766	+82%
Chile	707	425	636	-10%
Total	**1 679**	**2 175**	**2 402**	**+43%**

Source: based on TRACES.

6. 4. Market supply and consumption

In 2023 the EU apparent supply of organic aquaculture products was estimated at 128.401 tonnes (85.860 tonnes LWE of EU production and 42.541 tonnes LWE imported)[35]. EU exports of organic aquaculture products are considered limited, but no information is available on this. Thus, it is estimated that EU apparent supply is comparable to EU apparent consumption[36]. In this context, the consumption of organic aquaculture products is estimated to account for 4% of EU consumption of aquaculture products[37].

Organic products consumed in the EU mainly originates from the EU's own aquaculture production (67%), while 33% is imported. This self-sufficiency rate is higher than that for all aquaculture products at EU level, which was 33% in 2023[38]. At EU level, the main organic species consumed are:

[35] Estimate of the LWE with product weights and conversion factors from EUMOFA Metadata - https://eumofa.eu/metadata
[36] Apparent supply = production + imports; apparent consumption = production + imports - exports
[37] Apparent consumption of farmed products at EU level: 3,04 million tonnes in 2022, source: EUMOFA – EU Fish Market, Edition 2024
[38] EUMOFA – EU Fish Market, Edition 2025 - https://eumofa.eu/documents/20124/210402/EFM2025_EN.pdf/7e142aae-ec07-ec29-dbf4-35c7fc723fa1?t=1764600211543

- mussels (63.754 tonnes LWE), mainly of EU origin,
- salmon (43.342 tonnes LWE), from both EU (Ireland) and extra-EU (Norway and the UK), with both fresh and smoked products,
- shrimps and prawns (5.070 tonnes LWE), exclusively from third countries, in particular Ecuador and Madagascar.

Other species (seabass, carp, oyster, etc.) are of minimal importance to EU consumption of organic aquaculture products.

Limited data are available on the consumption of organic aquaculture products at national level:

- In the Netherlands, organic aquaculture products accounted for 1,9% of the national organic consumption in 2023, while consumption of organic food accounted for 3,3% of total food consumption[39].
- In France, the market for organic aquaculture products primarily consists of imported products, in particular organic salmon and shrimps. The retail sales of organic aquaculture products were EUR 143 million in 2024 (compared to EUR 165 million in 2023, -13,1%). Aquaculture products accounted for only 1% of the retail sales of organic products (which grew by 0,8% in 2024). Organic aquaculture products are mainly sold in large-scale retail (68%) and to a significant extent in specialised organic shops (28%). Other channels (such as fishmongers) play a limited role.[40]

[39] The World of Organic Agriculture - Statistics and Emerging Trends 2025, FiBL - https://orgprints.org/id/eprint/54617/1/1797-organic-world-2025.pdf
[40] Evaluation de la consommation des ménages en produits alimentaires biologiques en 2024, AND International for Agence Bio - https://www.agencebio.org/wp-content/uploads/2025/08/2025-07_Rapport_Eval_marche_bio_VF_complet_clean-1.pdf

7. CASE STUDY: Octopus in the United Kingdom

Source: edmondlafoto, Pixabay

The 2025 surge in the abundance of octopus in UK waters represents a striking ecological anomaly characterised by increased landings, a species-specific proliferation of *Octopus vulgaris*, and a strong seasonal concentration of catches. Fisheries and trade data, as well as environmental indicators show that the event was driven by a convergence of favourable oceanographic conditions, a likely exceptional recruitment year and historically low predator biomass. Unlike trends observed at EU or global level, the UK proliferation appears to have been a distinctly regional phenomenon, carrying significant implications for fishers, markets, emerging policy responses, and short-term trade flows to the EU as surplus volumes were redirected into continental supply chains.

7. 1. Ecology, environmental change and management context

Several octopus species inhabit the northeast Atlantic and UK waters, most notably the common octopus (*Octopus vulgaris*), which is more frequently observed in warmer southern regions, and the curled octopus (*Eledone cirrhosa*), which is more broadly distributed in cooler shelf areas[41]. These species occupy a range of benthic habitats, including rocky, sandy or mixed substrates, and are characterised by short life cycles, rapid growth and high reproductive output[42]. Historically, the abundance of octopus in UK waters has shown substantial temporal variability, consistent with the environmentally driven boom-and-bust population dynamics typical of cephalopods[43]. Although octopus have not traditionally been regarded as abundant across most UK regions, episodic increases in sightings and catches have been recorded in national fisheries data[44] and scientific surveys[45].

Octopus populations are strongly influenced by environmental variables – particularly temperature – which regulate growth, reproductive timing and distribution[42]. The northeast Atlantic and UK shelf seas have experienced substantial warming over recent decades, with pronounced increases in coastal and shallow-water regions[46]. Such warming may enhance habitat suitability for warm-adapted species such as *O. vulgaris*, potentially facilitating northward range expansion[41]. Broader ecological changes, including shifts in availability of prey, changing habitat structure and declines in predatory fish populations, may further influence octopus dynamics. Owing to their short generation times and ecological plasticity, cephalopods are well known for rapid population responses to environmental anomalies[47].

In the UK, octopus fisheries have historically been small-scale and opportunistic, with most individuals landed as bycatch in mixed demersal fisheries[44] In contrast, neighbouring regions – particularly Spain and Portugal – support long-established directed octopus fisheries[48]. Within both UK and EU management frameworks, octopus species generally fall outside species-specific quota systems and are instead regulated via general gear, effort and reporting requirements, reflecting their historically low commercial importance in northern waters [49]. However, increasing market demand and emerging ecological signals have renewed interest in the species[50].

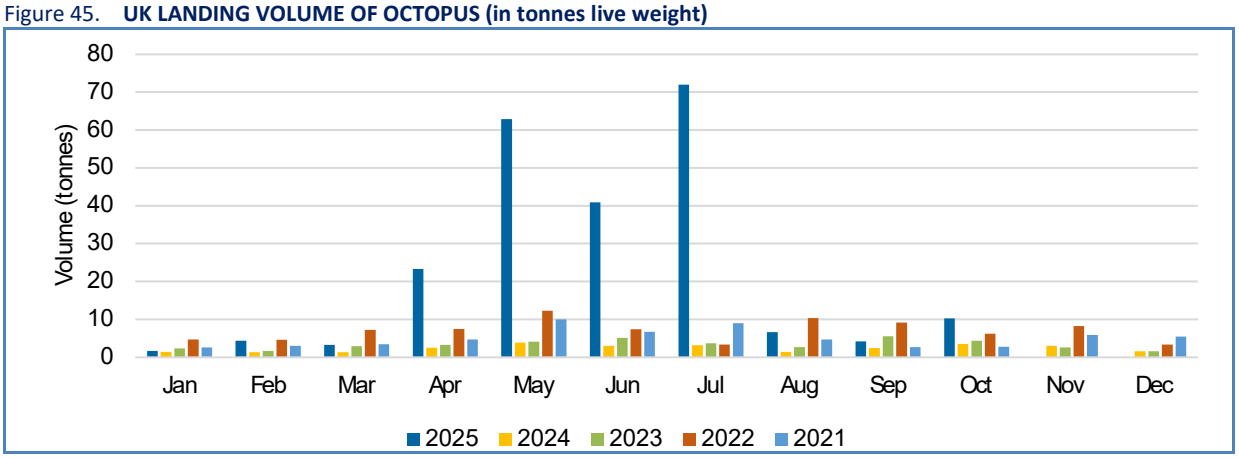
[41] FAO (2016). *Cephalopods of the world: FAO species catalogue*. Fao.org
[42] Boyle, P., Rodhouse, P. (2005). *Cephalopods: ecology and fisheries.* Wiley.com
[43] ICES (2025). *Working group on cephalopod fisheries and life history*. Ices.com
[44] MMO (2025). *Provisional non-quota uptake by UK vessels in EU waters.* Gov.uk
[45] UK fisheries survey records (ICES, CEFAS).
[46] MCCIP (2025). *The impacts of climate change on sea temperature around the UK and Ireland.* Mccip.org.uk
[47] Rodhouse, P.G. (2010). *Effects of environmental variability and change on cephalopod populations.* Academic.oup.com
[48] ICES (2015). *Cephalopod biology and fisheries in Europe: II. Species accounts.* Oceanrep.geomar.de
[49] Pita, C., et al. (2021). *Fisheries for common octopus in Europe.* Sciencedirect.com
[50] MMO (2025). *Feasibility of a potential emergent octopus fishery.* Gov.uk

7. 2. Patterns and drivers of the 2025 octopus proliferation

UK landings: evidence of a localised biological surge

UK landings data have shown a substantial increase in octopus landings during 2025 (Figure 43). In 2025 total landings increased from an average of 53 tonnes annually in 2021-2024 to 229 tonnes, representing an approximate three- to eight-fold increase relative to recent years[51]. Even with this short time series, the 2025 value constitutes a statistical outlier, lying more than seven standard deviations above the mean of the preceding four years – well beyond the range of normal interannual variability.

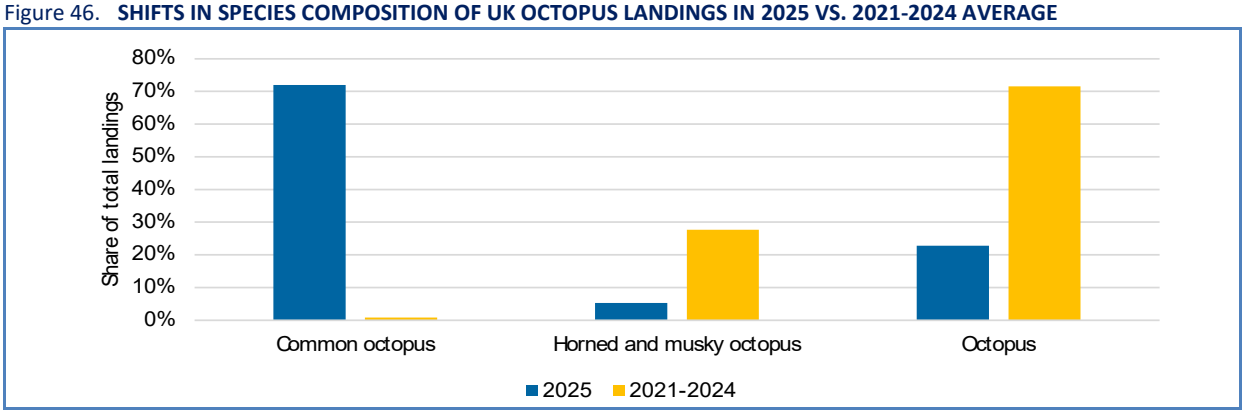
Figure 45. **UK LANDING VOLUME OF OCTOPUS (in tonnes live weight)**



Source: Marine Management Organisation – provisional non-quota uptake by UK vessels in EU waters.

Seasonal patterns provide further insights (Figure 43). In 2025, 88% of all octopus landings occurred between April and July, with catches concentrated in late spring and early summer[51]. Outside this period, landings returned to levels similar to previous years. This narrow seasonal window is consistent with a cohort-driven pulse, a well-known phenomenon in short-lived cephalopods whereby a particularly successful year-class produces a temporary but pronounced increase in observed abundance[52]. The increase in landings was strongly species-specific (Figure 44), driven mainly by common octopus (*O. vulgaris*). Between 2021 and 2024, landings of this species remained below 1 tonne per year, but in 2025 they reached 165 tonnes[51]. Such species-targeted pulses are well documented in cephalopods, which often exhibit highly variable annual recruitment and can expand rapidly under favourable conditions[53]. Landings of horned and musky octopuses (*Eledone* spp.) decreased by 18% compared to the 2021-2024 mean and the generic octopus category[54] rose by 37%. This is probably partly due to reporting inconsistencies, with both *Eledone* spp. and *O. vulgaris* lumped into the generic octopus category.

Figure 46. **SHIFTS IN SPECIES COMPOSITION OF UK OCTOPUS LANDINGS IN 2025 VS. 2021-2024 AVERAGE**



Source: Marine Management Organisation – provisional non-quota uptake by UK vessels in EU waters.

[51] MMO (2025). *Provisional non-quota uptake by UK vessels in EU waters.* Gov.uk
[52] Rodhouse, P.G. (2010). *Effects of environmental variability and change on cephalopod populations.* Academic.oup.com
[53] Boyle, P., Rodhouse, P. (2005). *Cephalopods: ecology and fisheries.* Wiley.com
[54] Not identified to species level.

Trade flows: market signals of a UK-centred octopus boom

UK exports of octopus (Table 46) have historically been modest, but they show a pronounced increase in 2025. From 2016 to 2024, annual export volumes ranged from 24 to 316 tonnes, with most years falling between 100 and 300 tonnes, and export values between EUR 195.000 and EUR 950.000[55]. UK export volumes declined post Brexit, averaging about 75 tonnes annually from 2021-2024. Against this backdrop, the 2025 figure of 1.147 tonnes (Jan-Sep) represents an exceptionally large shift in exported volume. Export value rose accordingly to EUR 10,1 million. When placed into the decade long series, 2025 stands out as by far the highest export level on record and an order-of-magnitude increase relative to 2021-2024.

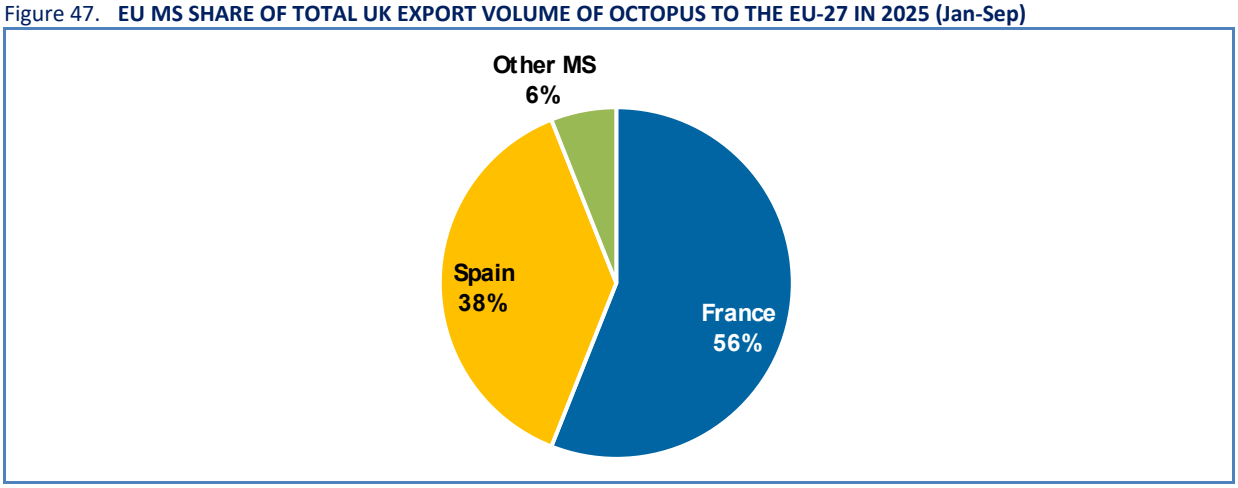
Table 47. **UK EXPORTS OF OCTOPUS BY TRADE PARTNER (in tonnes product weight, 1.000 EUR)**

	2021		2022		2023		2024		2025*	
Trade partner	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
EU-27	89	315	107	430	67	327	23	164	1.098	9.762
Morocco	0	0	0	0	0	0	47	355	47	355
Iceland	0	0	0	5	1	12	1	16	1	16
Other	3	12	4	47	1	18	0	6	0	0
Total	**92**	**327**	**107**	**430**	**71**	**380**	**24**	**195**	**1.147**	**10.133**

*Source: EUMOFA elaboration of Trade Data Monitor data. *Up to and including September.*

The main destination for UK octopus exports remains the EU-27 (96% of total volume), consistent with earlier years, but with much higher volumes. In 2025, France received 56% of UK octopus exports to the EU and Spain 38%, with all other MS together accounting for only 6%[54] (Table 46). Small but noticeable shipments also went to Morocco (47 tonnes) and Iceland (1 tonne), but these remained marginal compared with EU demand. These trade patterns indicate that the additional UK supply in 2025 was channelled primarily into established southern European consumption and processing hubs.

Figure 47. **EU MS SHARE OF TOTAL UK EXPORT VOLUME OF OCTOPUS TO THE EU-27 IN 2025 (Jan-Sep)**

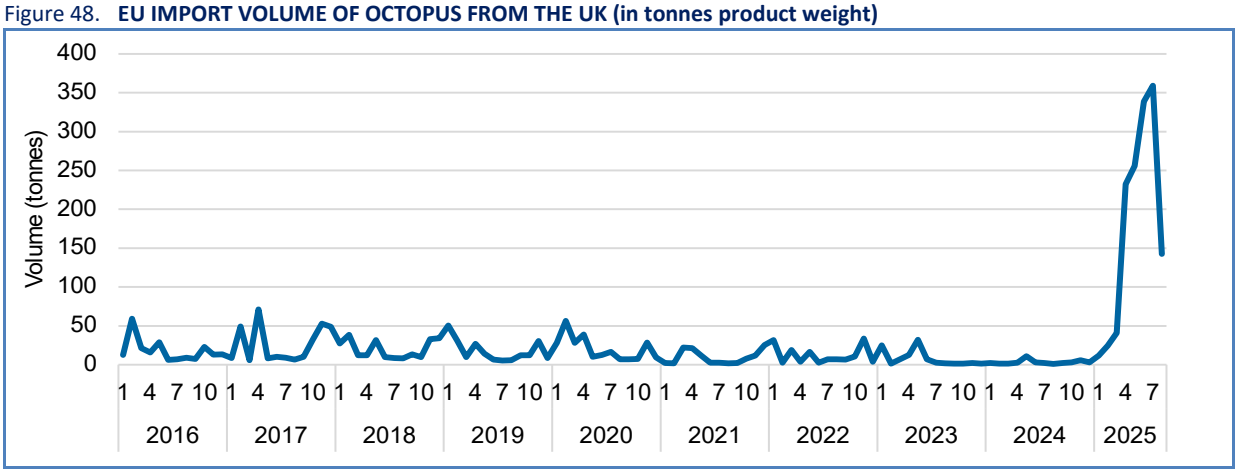


Source: Marine Management Organisation – provisional non-quota uptake by UK vessels in EU waters.

EU import statistics also register increased imports of octopus from the UK in 2025[56] (Figure 46), and the absolute figures are even higher than those reported in UK export data[57]. Thus, both datasets point in the same direction: 2025 marks a clear increase in recorded movement of octopus from the UK into EU markets compared with preceding years.

[55] EUMOFA elaboration of Trade Data Monitor data.
[56] EUMOFA elaboration of Eurostat COMEXT data.
[57] This gap is not unusual in trade statistics and may reflect differences in product coverage, classification, reporting thresholds, timing of customs declarations, or re-exports via intermediary hubs.

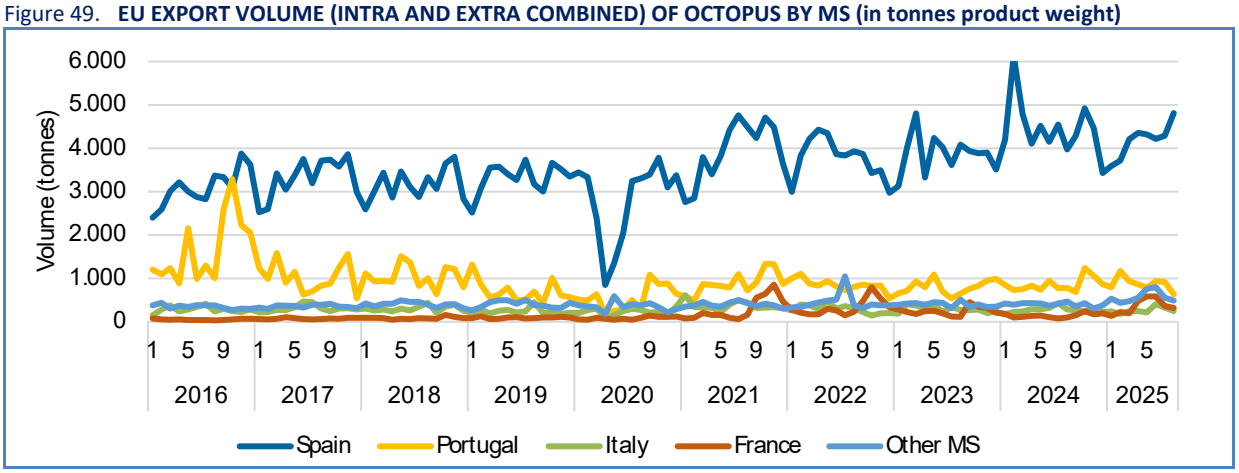
Figure 48. **EU IMPORT VOLUME OF OCTOPUS FROM THE UK (in tonnes product weight)**



Source: EUMOFA elaboration of Eurostat COMEXT data.

More broadly, EU export[55] (Figure 47) and first sales[58] (Figure 48) data for octopus show no obvious EU-wide spike in 2025 that would single out that year as exceptional at European scale. Volumes remain high in key producers such as Spain and Portugal, with fluctuations between years, but 2025 appears to be part of a sustained period of relatively strong octopus trade rather than a singular EU shock.

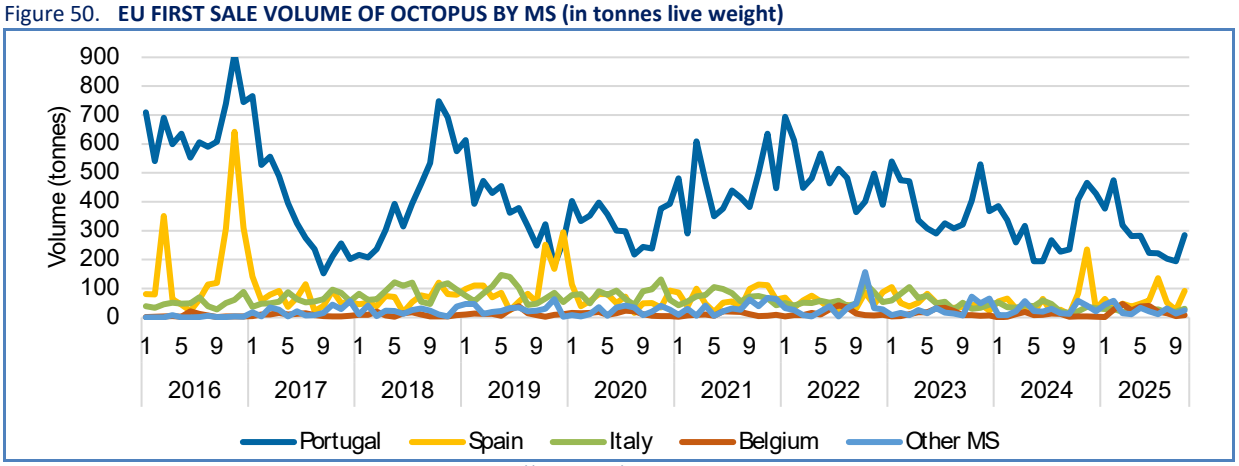
Figure 49. **EU EXPORT VOLUME (INTRA AND EXTRA COMBINED) OF OCTOPUS BY MS (in tonnes product weight)**



Source: EUMOFA elaboration of Eurostat COMEXT data.

[58] EUMOFA, as collected from National Administrations (https://eumofa.eu/sources-of-data).

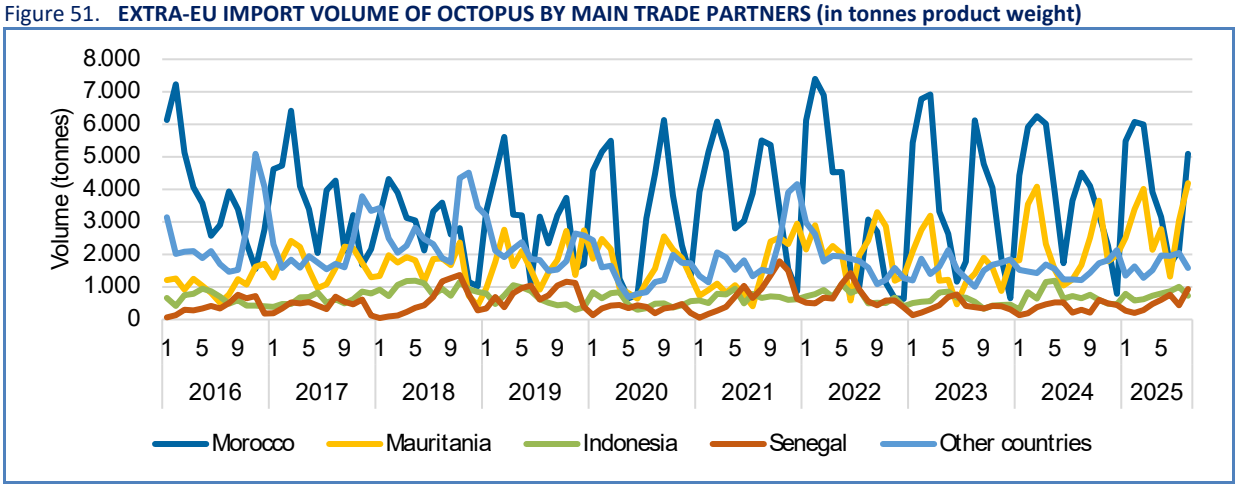
Figure 50. **EU FIRST SALE VOLUME OF OCTOPUS BY MS (in tonnes live weight)**



Source: EUMOFA, as collected from National Administrations (https://eumofa.eu/sources-of-data).

EU import data[55] (Figure 49) help place the UK and EU figures in a wider supply context. Throughout 2016-2024, the EU has consistently imported substantial quantities of octopus from Morocco, Mauritania, Indonesia, Senegal and other west African and Indo-Pacific countries. In 2025, these flows remain high but not uniformly extreme. Some suppliers, such as Morocco and Mauritania, continue to ship large volumes, and there are years where some origins show noticeable increases or decreases, but the pattern is one of ongoing strong supply from traditional exporting regions, rather than a new, sharply defined 2025 anomaly across all partners.

Figure 51. **EXTRA-EU IMPORT VOLUME OF OCTOPUS BY MAIN TRADE PARTNERS (in tonnes product weight)**



Source: EUMOFA elaboration of Eurostat COMEXT data.

Studying global exports of octopus reinforces this picture. Aggregated across major exporting countries, global octopus exports increased from roughly 130.000-150.000 from January to September in 2016-2022 to around 175.000 tonnes in 2023-2024, before easing slightly at about 170.000 tonnes in 2025[55]. In other words, 2025 sits within a recent high-volume phase of the global octopus trade, but it is not the peak year globally. Key exporters such as China, Morocco, Indonesia, India, Thailand, the Philippines, Senegal, Vietnam and Pakistan continue to report substantial exports through 2023-2025, with some regional shifts and year-to-year variability, yet without a single, dramatic global jump in 2025.

Overall, this indicates that the 2025 UK surge is occurring against a backdrop of high but not exceptional global supply and cannot be explained simply by a global production spike. Rather, it appears to be a regional signal, aligning with the UK's own environmental and ecological dynamics.

Environmental conditions and predator pressure as enabling factors

Analysis of the Marine Climate Change Impacts Partnership (MCCIP) climate-ocean indicators shows several environmental changes consistent with conditions known to support cephalopod population booms. UK sea surface temperatures have warmed substantially, with marine heatwaves in 2023-2025 regularly exceeding +3-5 °C, anomalies in parts of the Celtic Sea, western

Channel, and northern North Sea[59]. Seasonal stratification is forming earlier, persisting longer, and intensifying in summer, particularly in the Celtic Sea, western approaches, and parts of the North Sea[60]. These shifts favour rapid-growing species such as octopus by accelerating growth and improving early-life survival in stable, warm upper layers. Mild summer oxygen declines have also been detected in stratified regions[61]; while not severe enough to restrict octopus directly, these reductions may disproportionately impact predatory fish that are more sensitive to low-oxygen conditions. Other indicators, such as increased frequency of extreme wave events in some regions[62] and evolving circulation patterns associated with AMOC[63] weakening[64], could contribute to episodic changes in larval transport or retention, indirectly influencing recruitment success.

A further ecological factor likely to contribute to the 2025 octopus surge is the decline of several key demersal fish predators in UK waters. Recent assessments by the International Council for Exploration of the Sea (ICES) assessments and the 2025 Oceana audit show that many groundfish stocks – including Atlantic cod, haddock, whiting, ling and other gadoids – are at historically low biomass, with several receiving zero-catch or drastically reduced catch advice due to severe overfishing and poor recruitment[65, 66]. These species constitute the principal predators of juvenile and sub-adult octopus on UK shelf ecosystems. Their widespread depletion across the North Sea, Celtic Sea, and western approaches therefore implies substantial reduction in predation while environmental conditions become more favourable for octopus survival and growth. This pattern is reinforced at ecosystem scale: OSPAR[67] assessments indicate that demersal fish communities in UK regional seas no longer reach good environmental status, reflecting longer-term structural decline[68]. In this context, an opportunistic, fast-growing species such as the common octopus can exploit reduced predator density – particularly following a strong recruitment event – allowing population numbers to expand rapidly.

The combined evidence indicates that the marked increase in octopus abundance observed in UK waters in 2025 most likely arose from a convergence of reinforcing ecological drivers. A strong recruitment event, supported by anomalously warm and stable oceanographic conditions, coincided with a period of historically low predator biomass, reducing ecological constraints on early-life survival. Analyses of trade and first-sale datasets indicate that the 2025 proliferation was a distinctly regional phenomenon limited to UK waters, with no corresponding occurrence at EU scale.

7. 3. Implications for the UK fisheries sector

The proliferation of octopus in 2025 generated significant but uneven impacts across the UK fishing industry. In ports such as Brixham, fishers and market operators reported landings of up to 36 tonnes of octopus in a single day, compared with only a few hundred kg the previous year, and export prices reportedly reaching around EUR 8,00-9,00 per kg for high quality product destined mainly for Spain[69]. International reporting referred to some English vessels as having “hit the jackpot” during this period, while also pointing to the role of a prolonged marine heatwave in driving the influx[70]. Alongside the UK mainland, Channel Islands fishers experienced parallel effects: Guernsey boats described a surplus of octopus in 2024 and 2025 and were actively encouraged to promote local consumption to cope with rising catches and predation on other shellfish[71, 72]. Taken together, these accounts show that existing trading relationships and processing capacity were capable of rapidly absorbing substantial additional octopus supply, but that the benefits were concentrated to some gears, ports and regions.

For many inshore shellfishers, the event was as much a disruption as an opportunity. Several media outlets reported octopus entering crab and lobster pots through escape gaps, consuming or damaging the catch and significantly increasing handling time, with some fishers describing pots stripped of shellfish[69]. Similar concerns about octopus predation on shellfish were raised in Guernsey, where local fishers reported ormer (abalone) beds being heavily impacted[72]. These experiences align with stakeholder concerns documented in the Marine Management Organisation’s (MMO) octopus feasibility study and subsequent stakeholder update: while octopus can provide valuable additional revenue in boom years, its predatory behaviour and volatility risk

[59] MCCIP (2025). *The impacts of climate change on sea temperature around the UK and Ireland.* Mccip.org.uk
[60] MCCIP (2025). *Climate change impacts on stratification relevant to the UK and Ireland.* Mccip.org.uk
[61] MCCIP (2025). *Climate change impacts on dissolved oxygen concentration in marine and coastal waters around the UK and Ireland.* Mccip.org.uk
[62] MCCIP (2025). *Climate change impacts on storms and waves relevant to the UK and Ireland.* Mccip.org.uk
[63] The Atlantic Meridional Overturning Circulation is a major system of ocean currents that transports warm, salty surface waters northwards in the Atlantic and returns colder, denser deep waters southwards.
[64] MCCIP (2025). *Climate change impacts on ocean circulation relevant to the UK and Ireland.* Mccip.org.uk
[65] Oceana UK (2025). *Deep decline: the state of UK fish stocks 2025.* Oceana.org
[66] ICES (2025). *Cod and associated demersal stocks: advice and stock assessments 2025.* Ices.com
[67] OSPAR is the mechanism by which 15 governments and the EU cooperate to protect the marine environment of the northeast Atlantic. Named after the original Oslo and Paris Conventions.
[68] OSPAR Commission (2023-2025). *Greater North Sea & Celtic Seas: assessment of demersal fish communities and good environmental status* Ospar.org
[69] The Guardian (2025). *English fishers enjoy surprise octopus boom.* Theguardian.com
[70] Bloomberg via gCaptain (2025). *Octopus invasion in English Channel shows risks from warming seas.* gCaptain.com
[71] ITV News Channel (2024). *Islanders urged to eat more octopuses as surplus suddenly appear in waters* Itv.com
[72] Guernsey Press (2025). *Octopuses are decimating numbers of local ormers.* Guernseypress.com

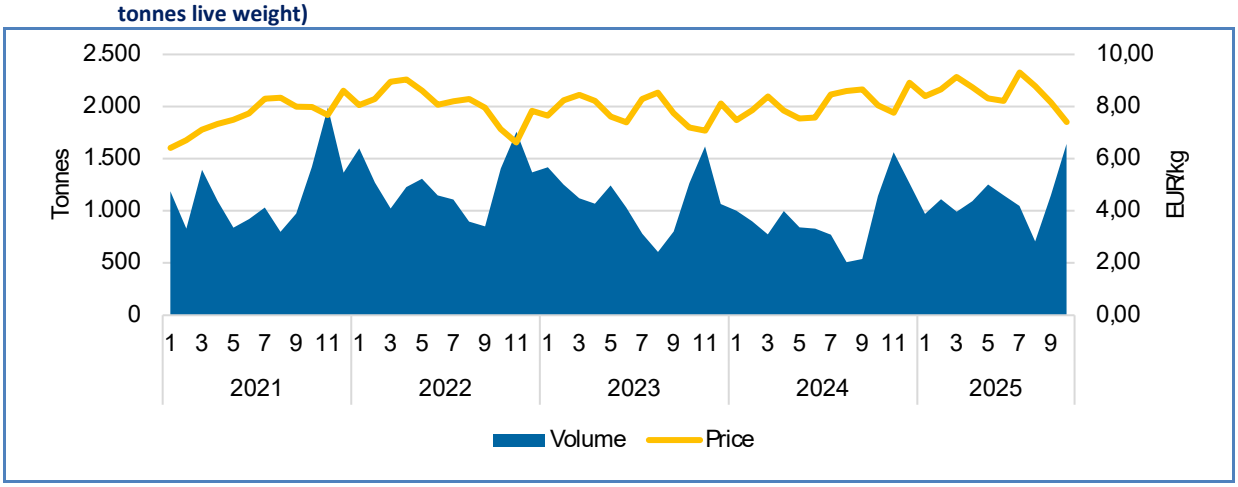
exacerbating economic pressure on already stressed shellfish fleets[73, 74]. At the same time, the absence of species-specific quota limits has so far allowed opportunistic exploitation without dedicated management tools tailored to such short-lived, highly variable species[73, 74].

The proliferation has also acted as a catalyst for new research and policy attention linking fisheries impacts to climate-driven ecosystem change. National and regional media have highlighted the connection between the octopus boom, marine heatwaves and long-term warming of UK shelf seas, characterising the event as a visible symptom of broader species redistributions[70, 75]. In response, the Marine Biological Association and partners launched public surveys and a coordinated research programme to document the scale, timing and implications of the octopus bloom in southwest waters, supported by local and national authorities[76, 77]. Policy communication from Defra and the MMO now explicitly treats the boom as both an economic issue and an ecological signal, emphasising the need for precautionary, adaptive management that can respond to sudden pulses without assuming a stable new fishery[74]. For the UK sector, the key implication is that such events are likely to recur under continued warming: octopus may offer intermittent high-value opportunities, but its volatility, ecological interactions and public visibility mean that any moves towards more formal exploitation will need to balance short-term gains against long-term ecosystem resilience and cross-fleet equity.

7. 4. First sales of common octopus in EU markets

At the EU-level, total first sales volumes of common octopus declined from their 2022 peak to just over 11.000 tonnes in 2024-2025, indicating that the sharp increase in UK waters did not coincide with a generalised expansion of EU supply[78]. Instead, the recovery in total first-sales value to approximately EUR 93,6 million in 2025 point to tightening availability and rising unit prices, consistent with supply constraints in core Mediterranean fisheries.

Figure 52. **FIRST-SALE VOLUME AND AVERAGE PRICE OF COMMON OCTOPUS IN ALL REPORTING COUNTRIES (in tonnes live weight)**



Source: EUMOFA, as collected from National Administrations (https://eumofa.eu/sources-of-data).

This contrast is particularly evident in Spain, Portugal and Italy, where first-sale volumes have declined steadily since 2022 and where seasonal patterns remain broadly consistent with earlier years rather than indicating a resurgence in supply. These reductions align with the broader picture of reduced or stable octopus availability in southern European waters during the same period, reinforcing the conclusion that the 2025 surge documented in UK landings represents a regional anomaly rather than a basin-wide phenomenon. France constitutes a partial exception, with a marked increase in both volume and value in 2025, highlighting the spatially heterogeneous nature of common octopus dynamics within European waters.

[73] MMO (2025). *Feasibility of a potential emergent octopus fishery.* Gov.uk
[74] MMO (2025). *Octopus bloom 2025 – stakeholder updates.* Gov.uk
[75] The Times (2025). *Rising sea temperature is causing an octopus invasion in the UK.* Thetimes.com
[76] MBA (2025). *Public surveys launched to investigate extraordinary octopus bloom in southwest waters.* Mba.ac.uk
[77] Devon County Council (2025). *Unprecedented alliance launches major study into octopus bloom.* Devon.gov.uk
[78] EUMOFA, as collected from National Administrations (https://eumofa.eu/sources-of-data).

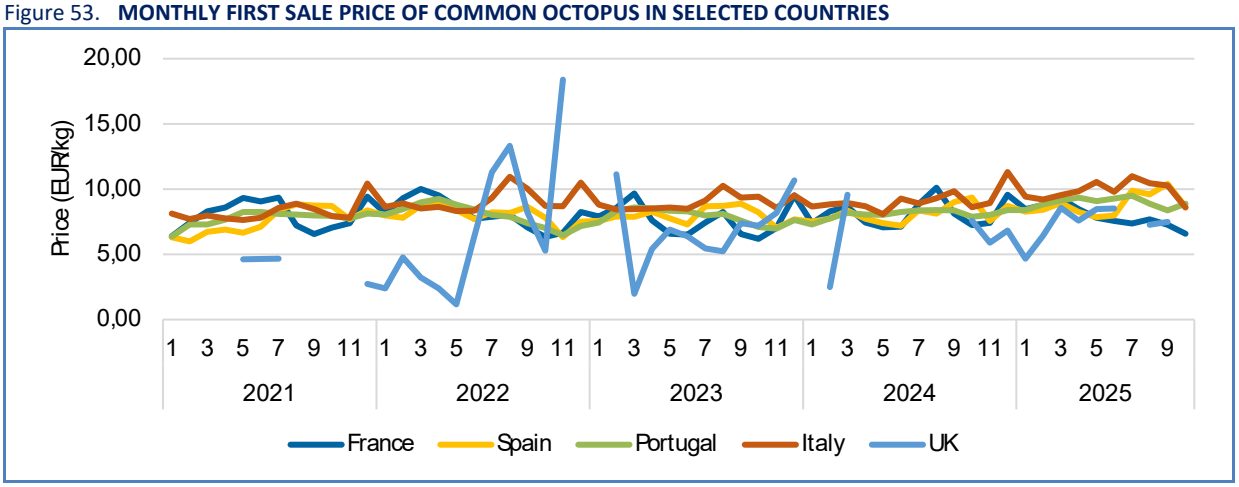
Table 48. **FIRST SALES OF COMMON OCTOPUS BY COUNTRY (in tonnes live weight equivalents, 1.000 EUR)**

	2021		2022		2023		2024		2025*	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
France	1.491	11.437	2.343	17.645	2.993	21.809	2.067	16.232	3.862	29.061
Spain	5.885	44.068	5.809	46.132	4.611	36.113	4.433	35.328	3.466	30.259
Portugal	5.254	40.630	5.743	46.183	4.583	36.052	3.634	29.264	2.826	25.310
Italy	991	8.191	995	9.079	878	7.839	667	6.117	451	4.483
UK	0,04	0,2	0,2	2	1	7	1	5	182	1.468
Belgium	0,3	0,5	-	-	-	-	-	-	141	1.225
Greece	159	976	-	-	104	609	245	1.637	109	886
Croatia	55	470	66	732	87	1.000	80	1.017	67	910
Cyprus	2	11	2	13	2	15	1	10	1	11
Sweden	-	-	0,01	0,1	-	-	0,004	0,1	1	4
Netherlands	1	2	0,3	1	-	-	-	-	-	-
Total	**13.838**	**105.785**	**14.957**	**119.787**	**13.259**	**103.444**	**11.127**	**89.610**	**11.106**	**93.618**

*Source: EUMOFA, as collected from National Administrations (https://eumofa.eu/sources-of-data). *Up to and including October.*

Within this context, the abrupt increase in UK first sales in 2025 takes on a particular significance. UK volumes rose from negligible levels in previous years to approximately 182 tonnes, generating first-sale revenues of around EUR 1,47 million. Monthly data indicate that this increase was highly seasonal, with UK product appearing suddenly and consistently over several consecutive months, mirroring the timing of the landing surge. Importantly, UK first-sale prices during this period remained broadly comparable to those observed in established EU markets, suggesting that the additional supply was absorbed into an already tight market rather than depressing prices. Together, these patterns provide market-based confirmation that a short-lived ecological signal in UK waters translated rapidly into commercial activity and influenced trade flows without altering the overall EU supply balance.

Figure 53. **MONTHLY FIRST SALE PRICE OF COMMON OCTOPUS IN SELECTED COUNTRIES**



Source: EUMOFA, as collected from National Administrations (https://eumofa.eu/sources-of-data)..

Manuscript completed in December 2025

Luxembourg: Publications Office of the European Union, 2025

PDF ISSN 2314-9671 KL-01-25-023-EN-N

ISBN: 978-92-68-24090-8 DOI: 10.2771/1287344

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

Global highlights: EUR-Lex, European Commission, Euronews.

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

First sales: ICES.

Case studies: Eurostat, Traces, Fiskeristatistik, Agreste, Acquacoltura, Estadisticas, Fish from Greece, The World of Organic Agriculture, The Business of Seafood, Scottish Government, Glenarm, AND International, FAO, Wiley, ICES, Gov.uk, CEFAS, Oxford Academic, ScienceDirect, MCCIP, Oceana, Ospar, The Guardian, gCaptain, itvNEWS, Guernsey Press, The Times, MBA, Devon County Council.

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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