European Commission

Monthly Highlights

No. 1/2026

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

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Contents

Maritime Affairs and Fisheries

1. GLOBAL HIGHLIGHTS

Fishery / EU - Norway: The EU and Norway concluded negotiations on fishing opportunities for 2026, covering shared stocks in the Skagerrak and Kattegat, quota exchanges, and reciprocal access to waters. The EU will receive 9.196 tonnes of Arctic cod and will transfer 47.905 tonnes of blue whiting to Norway, securing key fishing opportunities and access for EU fleets in Norwegian waters, including the North Sea and the Skagerrak. The parties also agreed on catch limits for cod, haddock, plaice, and whiting in the Skagerrak, and will maintain restrictions on herring catches to support the recovery of the western Baltic herring stock, while exploring stronger monitoring, control, and surveillance cooperation[1].

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Fishery / EU - UK: The EU and the UK reached an agreement on fishing opportunities for 2026, covering over 95 shared total allowable catches in the North-East Atlantic. The deal enables EU fleets to fish up to 288.000 tonnes, at a value of more than EUR 1,2 billion, and is based on scientific advice alongside socio-economic considerations to avoid choke situations. Building on the May 2025 decision to grant full reciprocal access to waters until 2038, the agreement focuses on 2026 TACs and technical measures and also guarantees mutual access for albacore tuna fishing until 2030. In response to scientific assessments showing several stocks in the Celtic Sea, Irish Sea, and Channel falling below critical thresholds, the parties agreed on remedial measures to support recovery, alongside precautionary steps for stocks such as spurdog, skates and rays, and seabass, with catch limits to be incorporated into the EU's regulation on fishing opportunities for 2026[2].

EU / Fishing opportunities: On 13 December 2025, EU fisheries ministers agreed on fishing opportunities for 2026 in the Atlantic and North Sea, and in the Mediterranean and Black Sea, although the Commission said it could not support the Mediterranean compromise. In the North-East Atlantic, ministers reached political agreement on 24 EU-managed fishing opportunities (in some cases also for 2027 and 2028), with 81% of Atlantic and Skagerrak–Kattegat fishing opportunities set at sustainable levels in line with maximum sustainable yield advice, and nine multiannual total allowable catches (TACs) adopted to improve predictability. The deal includes targeted increases for some stocks (including anchovy, megrim, and Norway lobster in specific fishing grounds) alongside significant cuts for ailing stocks (including pollack, whiting, and sole) to support rebuilding. For mackerel, no full TAC was agreed, and the EU set a provisional quota for the first six months of 2026 in line with scientific advice[3].

EU / Cook Islands: The EU and the Cook Islands signed a new seven-year protocol (2025–2032) to their sustainable fisheries partnership agreement, granting the EU fleet access to Pacific tuna fisheries for 40 fishing days per year. The EU contribution totals EUR 3,22 million over the period (EUR 460.000/year), including EUR 295.000 annually to support sustainable fisheries management, control and surveillance, and blue economy development, while EU shipowners will also pay fees for fishing authorisations. The protocol will apply provisionally from 9 December 2025, enabling EU vessels to continue operating in waters of the Cook Islands, pending completion of ratification procedures[4].

EU / ICCAT: At the 2025 ICCAT annual meeting in November 2025, parties agreed on a new three-year total allowable catch for bluefin tuna, raising the TAC to 48.403 tonnes per year following an EU-backed proposal. As a result, EU fishing opportunities for eastern Atlantic and Mediterranean bluefin tuna will increase by 3.661 tonnes to 25.164 tonnes per year. ICCAT also agreed to tighten catches of southern shortfin mako sharks, while no consensus was reached on an EU proposal to increase the TAC for bigeye tuna[5].

EU Fleet: In its 2025 annual economic report on the EU fishing fleet, the European Commission projects operating profits of EUR 567 million in 2025, improving on 2023 and 2024 results. The report notes that in 2023 the EU fleet comprised around 53.300 active vessels and 155.200 jobs, landing 3,39 million tonnes worth EUR 6,13 billion. The expected upswing is linked to progress towards sustainably managed stocks, adjustments in fishing capacity, and lower fuel costs and consumption, although challenges remain, including ageing vessels, generational renewal, and regional disparities[6].

[1] https://oceans-and-fisheries.ec.europa.eu/news/eu-and-norway-reach-agreement-fishing-opportunities-2026-2025-12-19_en
[2] https://ec.europa.eu/commission/presscorner/detail/en/ip_25_3009
[3] https://oceans-and-fisheries.ec.europa.eu/news/fisheries-ministers-agree-fishing-opportunities-2026-atlantic-and-north-sea-and-mediterranean-and-2025-12-13_en
[4] https://oceans-and-fisheries.ec.europa.eu/news/eu-and-cook-islands-renew-their-sustainable-fisheries-partnership-2025-12-09_en
[5] https://oceans-and-fisheries.ec.europa.eu/news/eu-secures-17-increase-bluefin-tuna-fishing-quota-iccat-annual-meeting-2025-11-27_en
[6] https://oceans-and-fisheries.ec.europa.eu/news/eu-fishing-fleet-recovers-increased-profits-expected-2025-2025-11-28_en

2. MACROECONOMIC CONTEXT

2. 1. Marine fuel

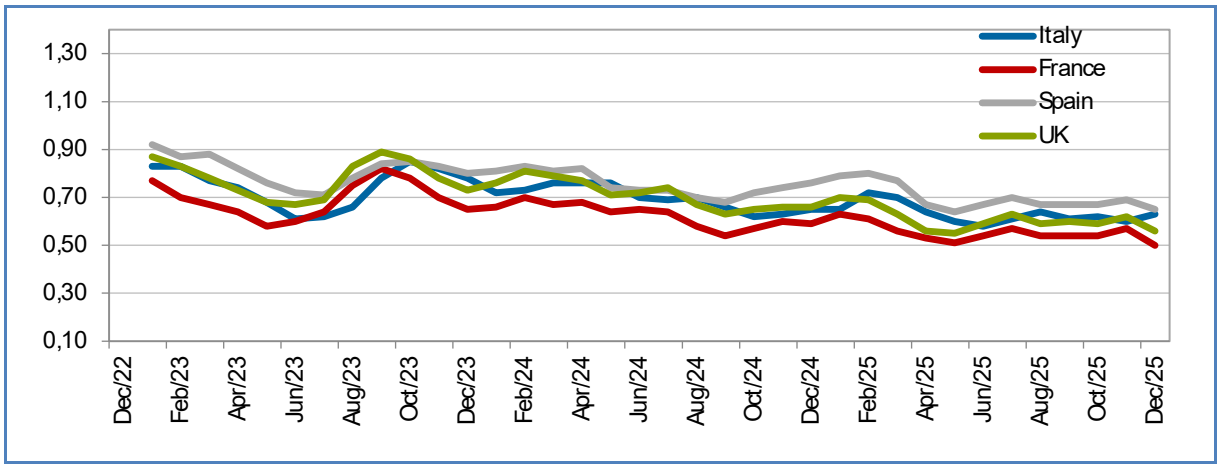
Average prices for marine fuel in **December 2025** ranged between 0,50 and 0,65 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices decreased by an average of about 8,8% compared with the previous month and by an average of 13,9% compared with the same month in 2024.

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

Country	Dec 2025	Change from Nov 2025	Change from Dec 2024
France *(ports of Lorient and Boulogne)*	0,50	-12%	-15%
Italy *(ports of Ravenna and Livorno)*	0,58	-8%	-11%
Spain *(ports of A Coruña and Vigo)*	0,65	-6%	-14%
The UK *(ports of Grimsby and Aberdeen)*	0,56	-10%	-15%

Sources: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

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



Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

2. 2. Consumer prices and inflation

In November 2025 the EU annual inflation rate was 2,4%, down from 2,5% compared to October 2025. A year earlier, the rate was 2,5%.

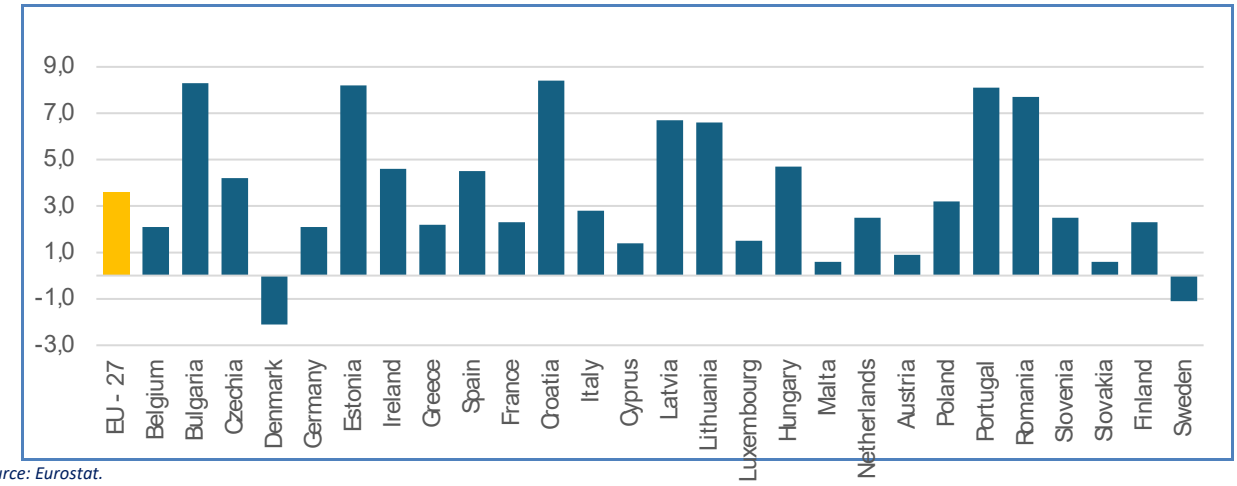
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR NOVEMBER 2025, COMPARED WITH NOVEMBER 2024**

Lowest inflation rates		Highest inflation rates	
Cyprus	+0,1%	Romania	+8,6%
France	+0,8%	Estonia	+4,7%
Italy	+1,1%	Croatia	+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 OCTOBER 2025 (value expressed in percentage)**



Source: Eurostat.

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

	Nov 2023	Nov 2024	Oct 2025	Nov 2025	Change from Oct 2025	Change from Nov 2024
Food and non-alcoholic beverages	141,29	144,82	148,72	148,80	0,1%	2,7%
Fish and seafood	139,33	141,23	145,95	146,31	0,2%	3,6%
Fresh or chilled fish	131,69	133,68	140,14	140,58	0,3%	5,2%
Frozen fish	137,89	137,83	144,28	144,07	-0,1%	4,5%
Fresh or chilled seafood	126,13	128,72	133,74	133,76	0,0%	3,9%
Frozen seafood	119,21	118,21	119,90	120,04	0,1%	1,5%
Dried, smoked or salted fish and seafood	140,43	143,18	148,67	149,94	0,9%	4,7%
Other preserved or processed fish and seafood and fish and seafood preparations	135,62	138,25	139,28	139,60	0,2%	1,0%

Source: Eurostat.

2.4. Exchange rates

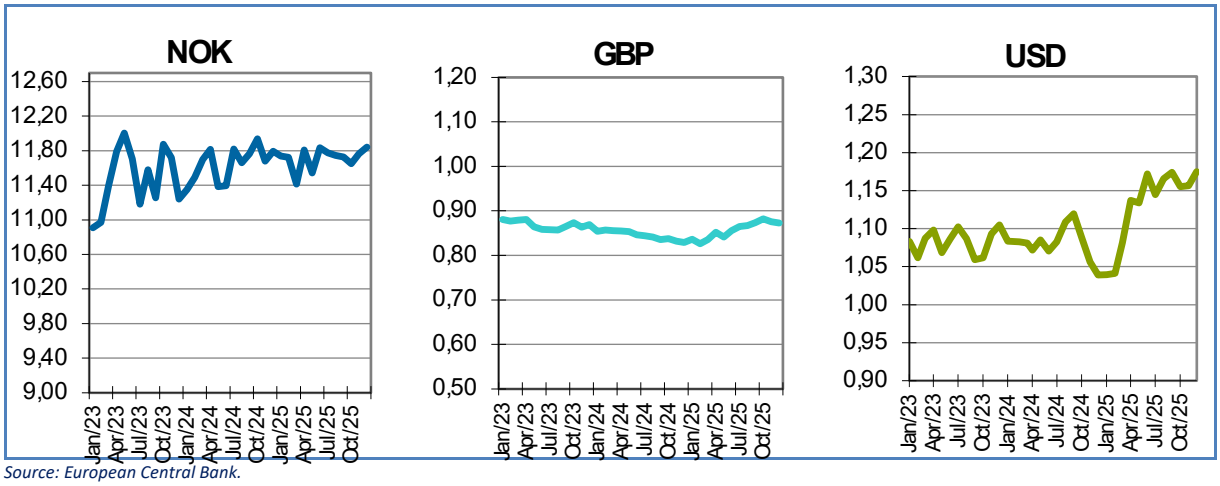
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Dec 2023	Dec 2024	Nov 2025	Dec 2025
NOK	11,2405	11,7950	11,7645	11,8430
GBP	0,8691	0,8292	0,8752	0,8726
USD	1,1050	1,0389	1,1566	1,1750

Source: European Central Bank.

In December 2025, the euro appreciated against the Norwegian krone (0,7%) and the US dollar (1,6%), and depreciated against the British pound sterling (0,3%), relative to the previous month. For the past six months, the euro has fluctuated around 1,1619 against the US dollar, 11,7505 against the Norwegian krone and 0,8724 against the British pound sterling. Compared with December 2024, the euro appreciated 13,1% against the US dollar and 5,2% against the British pound sterling and 0,4% against the Norwegian krone.

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



Source: European Central Bank.

3. FIRST SALES IN EUROPE[7]

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

Increases in value and volume (Jan - Oct 2025 vs Jan - Oct 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 Atlantic horse mackerel, Norway lobster and mackerel, and in Portugal it was due to sardine, skipjack tuna and anchovy.

Decreases in value and volume (Jan - Oct 2025 vs Jan - Oct 2024): Croatia, Cyprus, Estonia, Italy, Lithuania, the Netherlands, Poland and Sweden recorded decreases in first-sales value and volume. Lithuania stood out with the most significant drop both in volume and value in relative terms, due mainly to smelt and turbot.

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

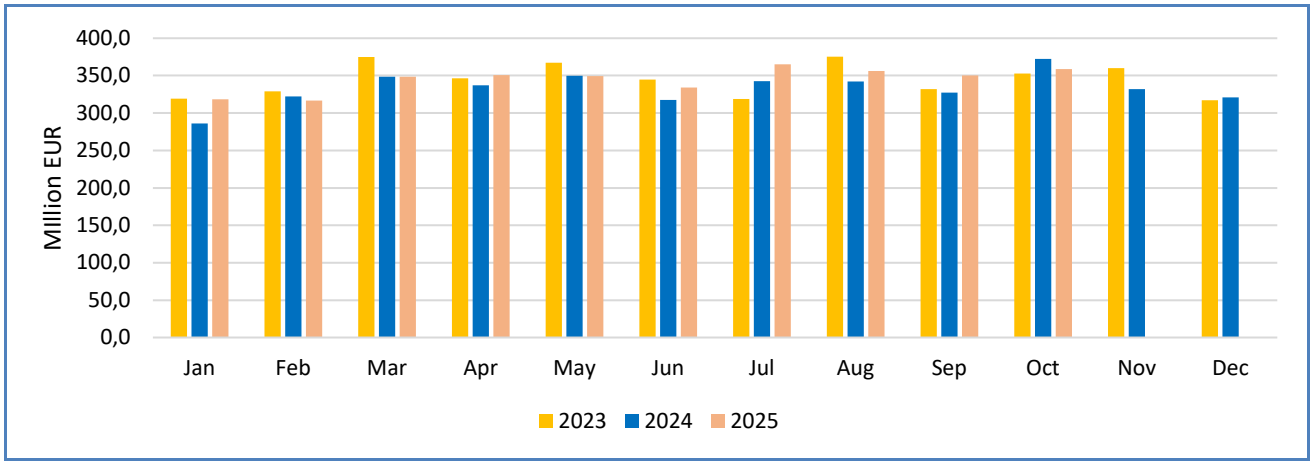
	January – October 2023		January – October 2024		January – October 2025		Change from January – October 2024	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	72.114	11,62	9.477	57,16	9.515	61,72	0%	8%
Bulgaria	1.374	2,63	2.898	2,03	2.845	2,18	-2%	8%
Croatia	51.221	45,26	33.906	44,63	28.384	42,92	-16%	-4%
Cyprus	2.866	0,60	530	2,65	514	2,28	-3%	-14%
Denmark	451.244	653,02	628.967	441,54	630.940	464,16	0%	5%
Estonia	22.641	57,05	50.966	25,54	42.571	20,31	-16%	-20%
Finland	13.575	46,35	37.519	14,05	46.763	14,45	25%	3%
France	591.481	214,36	206.191	576,65	209.293	619,64	2%	7%
Germany	60.147	26,07	23.264	47,38	9.911	51,54	-57%	9%
Ireland	218.947	162,86	166.335	217,71	171.610	240,74	3%	11%
Italy	274.063	61,61	51.597	230,47	42.488	210,60	-18%	-9%
Latvia	9.570	33,89	31.870	11,44	30.462	12,04	-4%	5%
Lithuania	619	0,30	309	0,44	206	0,28	-33%	-35%
Netherlands	115.512	48,60	20.707	130,66	19.329	118,99	-7%	-9%
Poland	23.010	56,98	49.647	26,40	45.818	23,56	-8%	-11%
Portugal	255.542	105,53	97.120	243,42	102.545	269,11	6%	11%
Spain	1.207.987	367,01	349.469	1.190,53	325.637	1.217,97	-7%	2%
Sweden	87.456	120,12	99.578	82,51	80.126	74,70	-20%	-9%
Norway	2.745.481	2.575,75	2.477.351	2.738,13	2.188.079	3.023,98	-12%	10%
United Kingdom	576.314	293,18	303.244	572,24	301.961	654,75	0%	14%

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

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

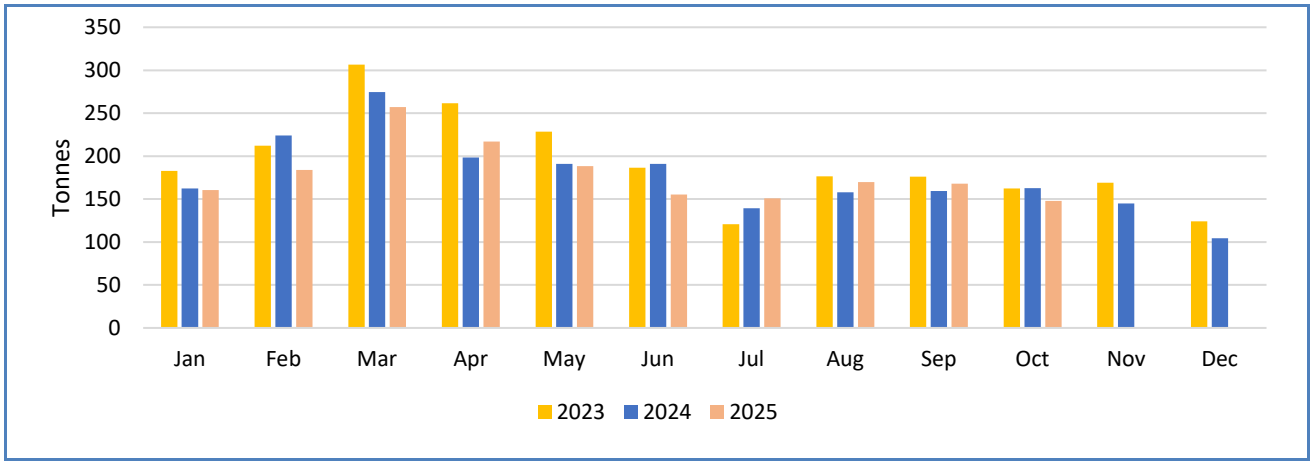
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VALUE FROM THE REPORTING COUNTRIES[8] (value in million EUR)**



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

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

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



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

3. 2. First-sales evolution at commodity group (CG) level[9,10]

Bivalves and other molluscs and aquatic invertebrates

In January-October 2025, first-sales value of "Bivalves and other molluscs and aquatic invertebrates" amounted to EUR 198,9 million, a 1% increase compared to the same period in 2024. First-sales volume reached 72.457 tonnes, a decrease of 1% compared to 2024. Scallop, whelk and rough limpet[11] were the main commercial species driving the increase in value of the commodity group (+14%, +8%, and +88%, respectively), while the decrease in volume was mainly due to clam (-16%).

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

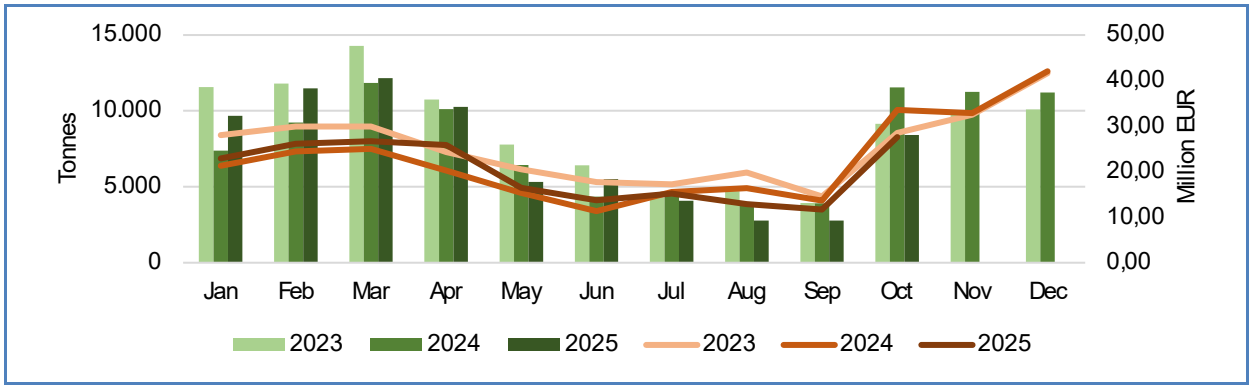


Table 6. **FIRST SALES PRICES OF BIVALVES MAIN COMMERTIAL SPECIES (MCS) (JAN - OCT 2024 AND JAN - OCT 2025)**

Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
France	Scallop	2,28 EUR/kg	2,18 EUR/kg	-5%
France	Other molluscs and aquatic invertebrates*	2,84 EUR/kg	3,57 EUR/kg	+26%
Portugal	Other molluscs and aquatic invertebrates**	8,90 EUR/kg	14,40 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 71% of total first-sales volume and 88% of the total first-sales value.

Cephalopods

In 2025, first-sales value of "Cephalopods" totalled EUR 259,7 million, a 7% increase compared to 2024. First-sales volume totalled 39.724 tonnes, a decrease of 4% compared to 2024. Octopus (+34%) was the main commercial species driving the growth in first-sales value, while squid and cuttlefish were the main species (-17% and -8%) driving the decrease in first-sales volume.

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

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

[11] Whelk and rough limpet 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 6%.

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

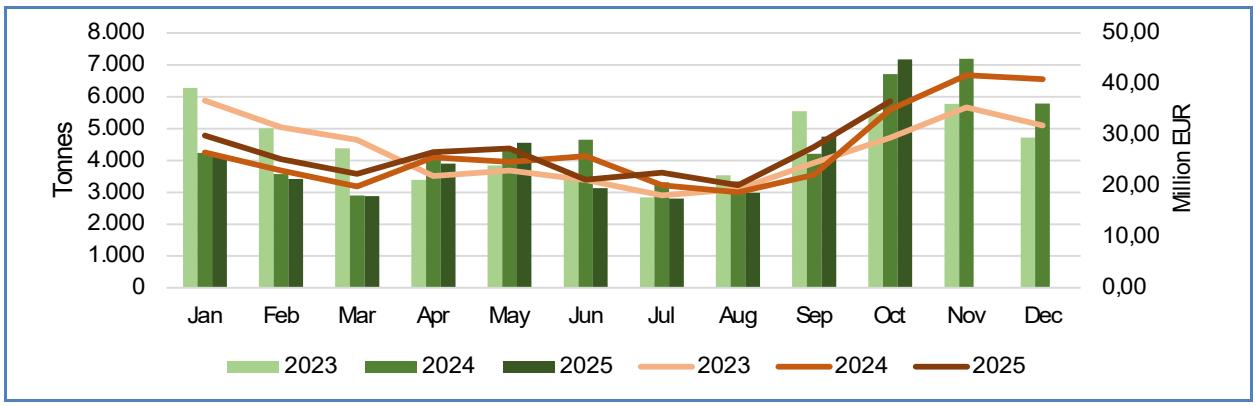


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN- OCT 2024 AND JAN- OCT 2025)**

Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
France	Octopus	6,93 EUR/kg	7,21 EUR/kg	+4%
Spain	Octopus	7,22 EUR/kg	7,97 EUR/kg	+10%
Portugal	Octopus	7,88 EUR/kg	8,89 EUR/kg	+13%

Crustaceans

In 2025, first-sales value of "Crustaceans" totalled EUR 551,6 million, a 4% increase in value compared to 2024. First-sales volume amounted to 60.261 tonnes, an increase of 1% compared to 2024. Shrimp *Crangon* spp. (+10% and +9%) and deep water rose shrimp (+10% and +24%) were the two main products responsible for the increase in first-sales value and volume.

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

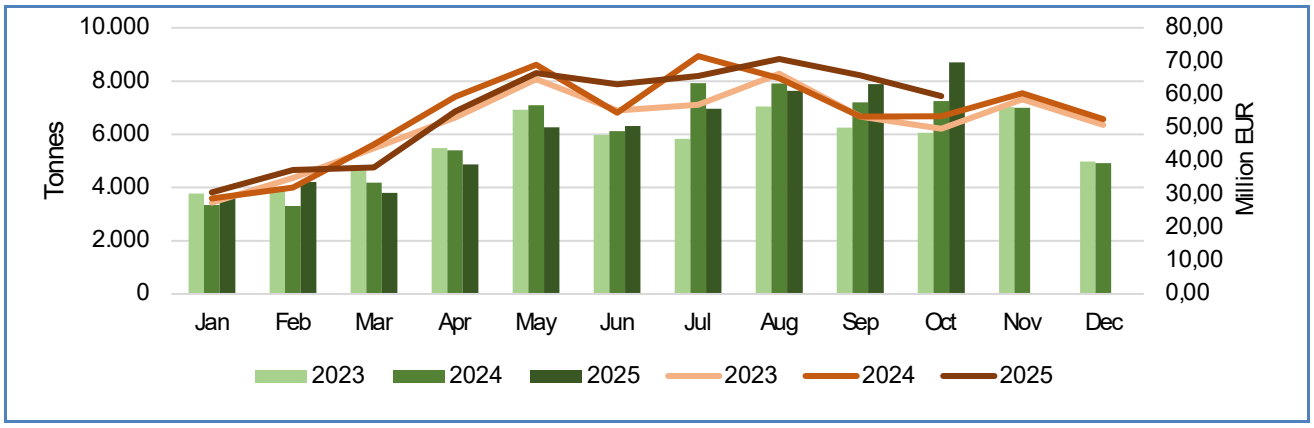


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-OCT 2024 AND JAN-OCT 2025)**

Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
Germany	Shrimp *Crangon* spp.	7,73 EUR/kg	6,93 EUR/kg	-10%
Spain	Miscellaneous shrimp	21,90 EUR/kg	27,38 EUR/kg	+25%
Ireland	Norway lobster	10,03 EUR/kg	11,46 EUR/kg	+14%

Flatfish

In 2025, first-sales value of "Flatfish" totalled EUR 278,5 million, a 2% decrease compared to 2024. First-sales volume amounted to 39.249 tonnes, a decrease of 11% compared to 2024. European plaice (−24% in value and −13% in volume) was the main species driving the decline in first-sales value and, together with European flounder (−32%), also accounted for most of the reduction in first-sales volume.

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

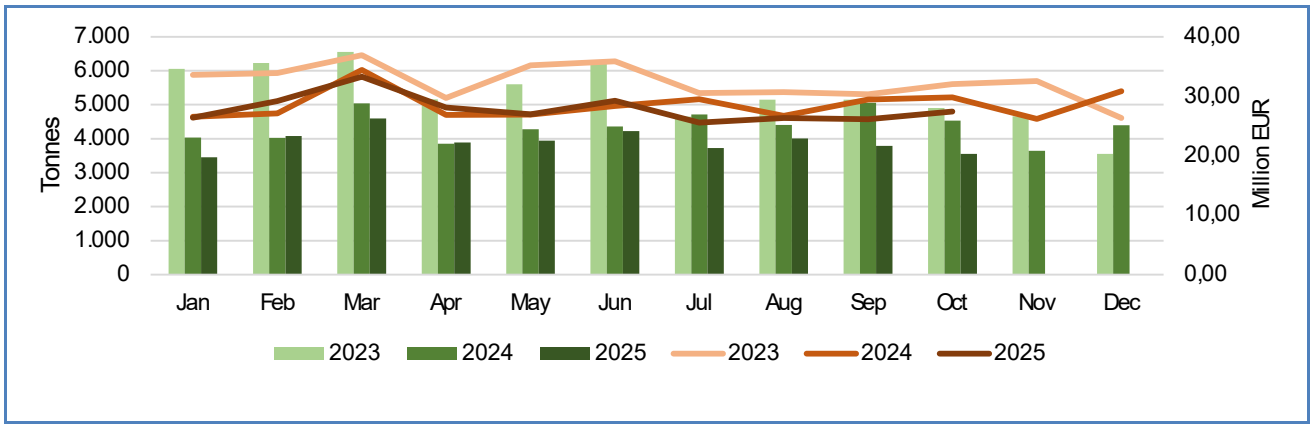


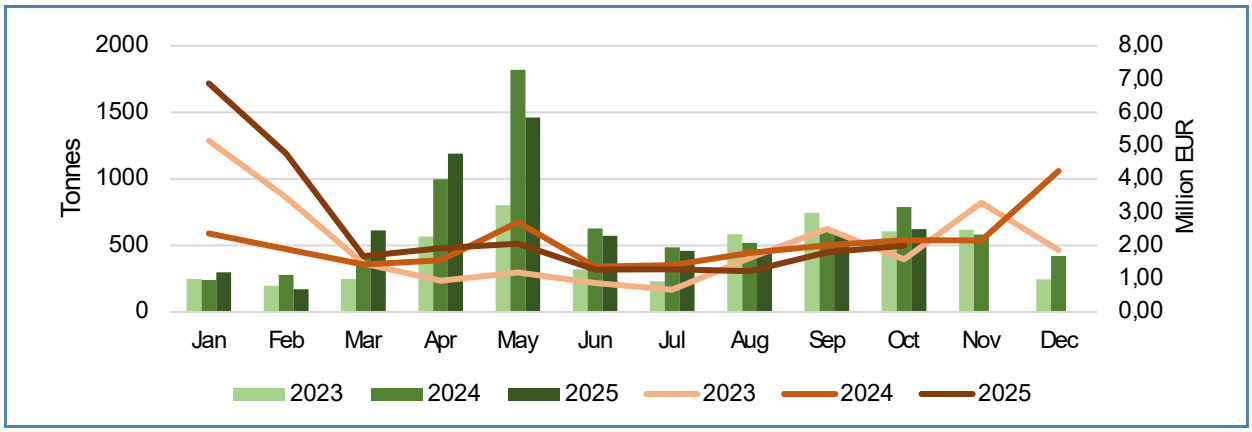
Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN-OCT 2024 AND JAN-OCT 2025)**

Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
Denmark	European plaice	2,70 EUR/kg	2,45 EUR/kg	-9%
Netherlands	European plaice	2,59 EUR/kg	2,06 EUR/kg	-20%
Denmark	Common sole	18,19 EUR/kg	17,34 EUR/kg	-5%

Freshwater fish

In 2025, first-sales value of "Freshwater fish" reached EUR 24,8 million, marking a 34% increase compared to 2024. First-sales volume amounted to 6.392 tonnes, a decrease of 6% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+84%), while the category "other freshwater fish"[12] was the main contributor to the decrease in first-sales volume (-7%).

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



[12] „Other freshwater fish" comprises 30 products, and together round goby, freshwater bream and European perch represent 71% of first-sales volume.

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

Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
France	Eel*	25,76 EUR/kg	61,21 EUR/kg	+138%
Estonia	Pike-perch	3,97 EUR/kg	4,06 EUR/kg	+2%
Denmark	Eel	9,64 EUR/kg	9,35 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 580,6 million, an increase of 4% compared to 2024. First-sales volume amounted to 514.181 tonnes, a decrease of 8% compared to 2024. The category "other groundfish"[13] (+13%) 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 – OCT 2025**

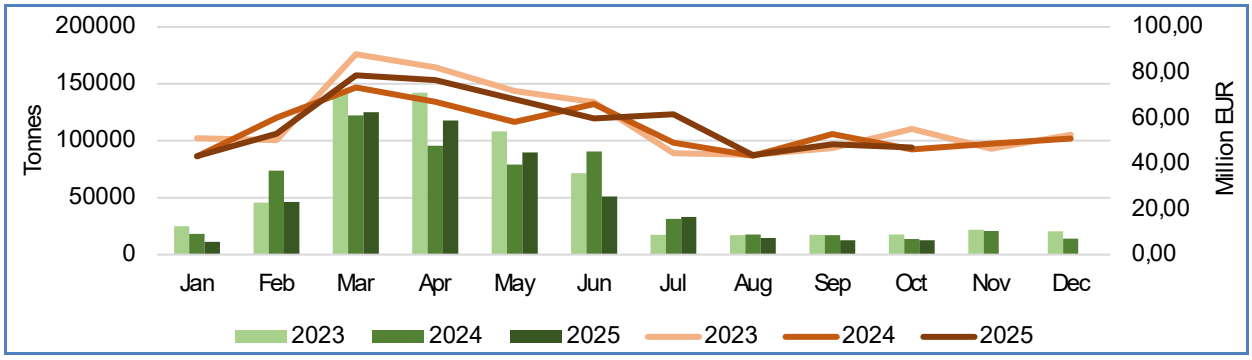


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-OCT 2024 AND JAN-OCT 2025)**

Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
Denmark	Other groundfish[14]	0,30 EUR/kg	0,40 EUR/kg	+36%
Denmark	Haddock	1,34 EUR/kg	1,91 EUR/kg	+43%
Denmark	Blue whiting	0,30 EUR/kg	0,34 EUR/kg	+15%

Other marine fish[15]

In 2025, first-sales value of the category "other marine fish" totalled EUR 488,6 million, an increase of 1% compared to 2024. First-sales volume amounted to 122.907 tonnes, a decrease of 2% compared to 2024. Monk (+4%) was the main commercial species contributing to the rise in first-sales value, while the category "other shark"[16] was behind the decrease in first-sales volume (+21%).

[13] In 2025 „Other goundfish" comprised 50 species of which sandeel nei and European conger together account for 72% of total first-sales value.
[14] „Other goundfish" in Denmark comprised 7 species of which sandeel nei accounting for 96% of total first-sales value and almost 100% of total first-sales volume.
[15] 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.
[16] Of the „Other shark" Main Commercial Species (MCS), blue shark and small-spotted catshark represent 68% of total first-sales volume.

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

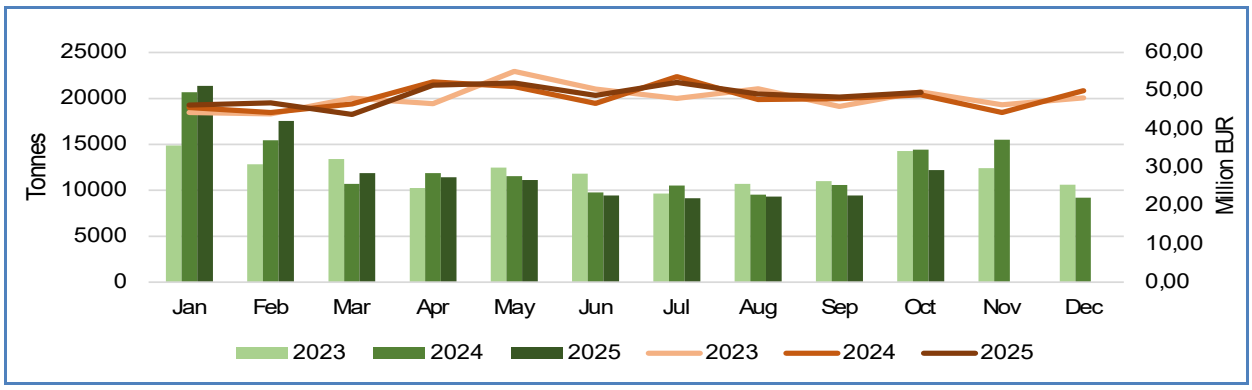


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-OCT 2024 AND JAN-OCT 2025)**

Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
Spain	Red mullet	7,26 EUR/kg	8,72 EUR/kg	+20%
France	Other marine fish[17]	5,29 EUR/kg	5,30 EUR/kg	0
Spain	Monk	5,92 EUR/kg	6,53 EUR/kg	+10%

Salmonids

In 2025, first-sales value of "Salmonids" totalled EUR 4,9 million, an increase of 5% compared to 2024, while first-sales volume amounted to 382.179 kg, a decrease of 4% compared to 2024. Vendace[18] (+22%) was the main commercial species driving the increase in value of the commodity group, while salmon (-39%) was the main species responsible for the decrease in first-sales value and volume of salmonids.

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

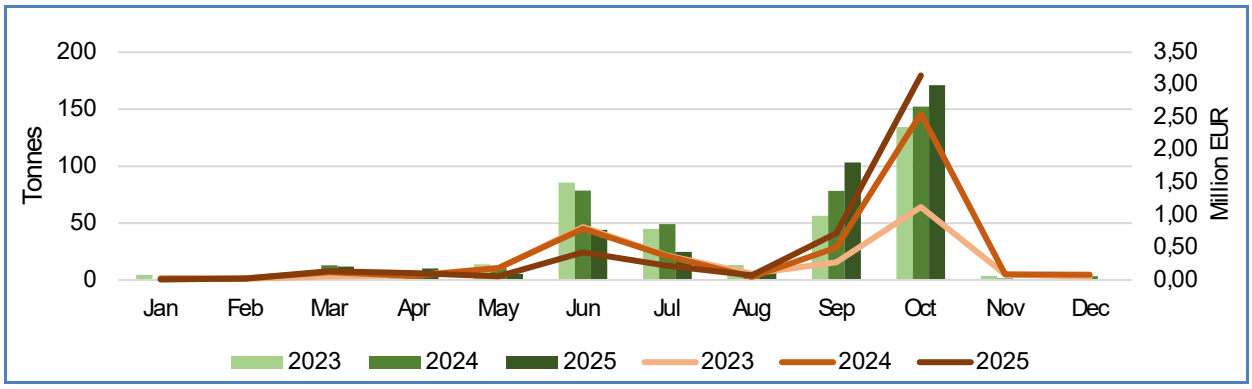


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-OCT 2024 AND JAN-OCT 2025)**

Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
Sweden	Other salmonids[19]	8,18 EUR/kg	8,87 EUR/kg	+8%
Poland	Trout	11,72 EUR/kg	12,54 EUR/kg	+7%
Germany	Trout	9,26 EUR/kg	9,66 EUR/kg	+4%

[17] „Other marine fish" MCS in France comprises 218 species in the period analysed of which meagre and thicklip grey mullet together represented 66% of the total value and 52% of volume.
[18] Of the „other salmonids" main commercial species, vendace represents 95% of the total first-sales value.
[19] Of the „other salmonids" main commercial species in Sweden, vendace represents 98% of the total first-sales value and 87% of the total first-sales volume.

Small pelagics

In 2025, first-sales value of "Small pelagics" amounted to EUR 753,7 million, an increase of 7% compared to 2024. First-sales volume amounted to 812.235 tonnes, a stable value compared to 2024. Sardine and Atlantic horse mackerel (+20% and +55%) were the commercial species contributing most to the increase in first-sales value.

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

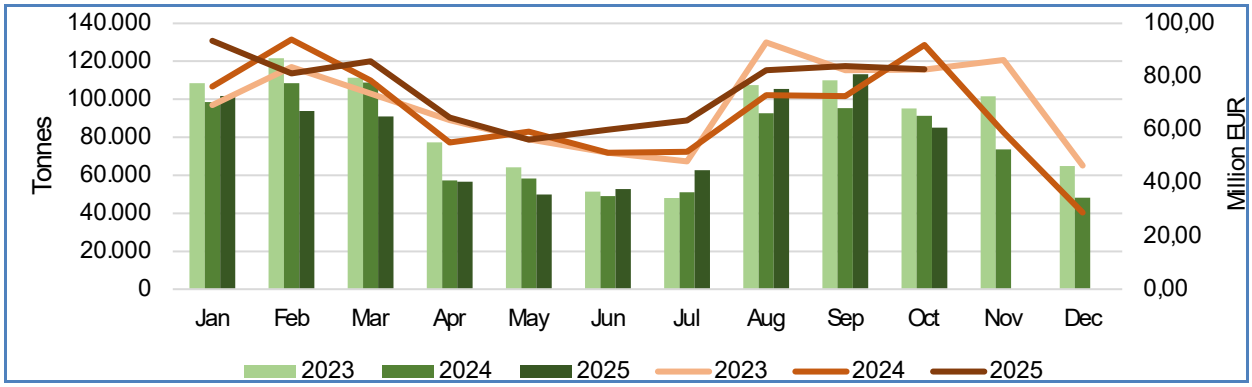


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-OCT 2024 AND JAN-OCT 2025)**

Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
Denmark	Sprat	0,43 EUR/kg	0,46 EUR/kg	+6%
Portugal	Sardine	1,09 EUR/kg	1,23 EUR/kg	+13%
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 302,4 million, a decrease of 4% compared to 2024. First-sales volume totalled 82.076 tonnes, a decrease of 3% compared to 2024. Yellowfin tuna (-34% and -32%), and swordfish (-11% and -10%) 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 – OCT 2025**

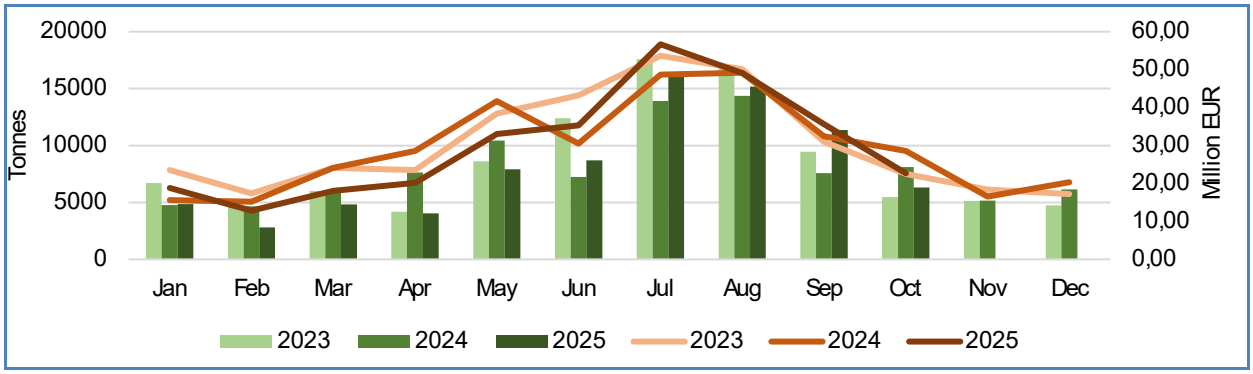


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-OCT 2024 AND JAN-OCT 2025)**

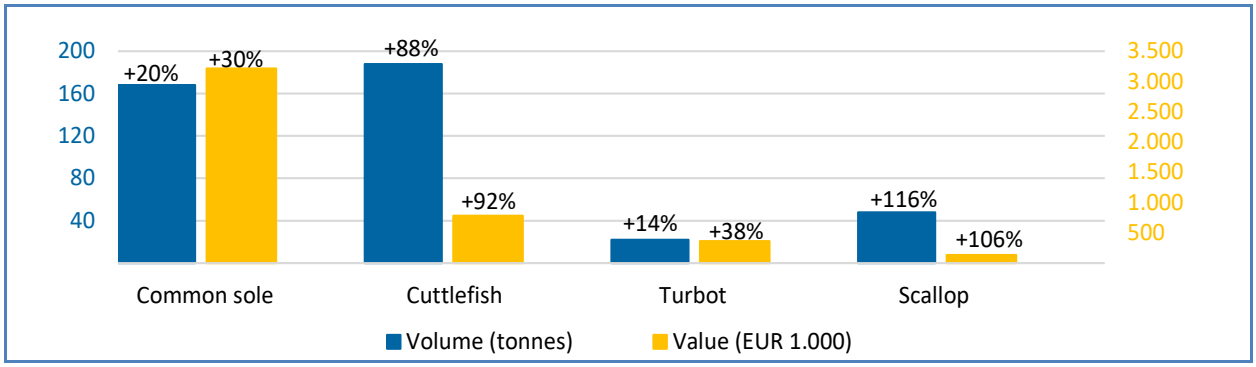
Country	Main Commercial Species	First-sales average price Jan-Oct 2024	First-sales average Price Jan-Oct 2025	Trend (Jan-Oct 2025 vs Jan-Oct 2024 %)
Spain	Yellowfin tuna	2,71 EUR/kg	2,53 EUR/kg	-7%
Spain	Swordfish	5,01 EUR/kg	4,87 EUR/kg	-3%
Spain	Skipjack tuna	1,60 EUR/kg	1,54 EUR/kg	-4%

3.3. First sales in reporting countries[20]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 61,7 million, +8%	9.515 tonnes, 0%	**Value**: common sole, cuttlefish, octopus. **Volume**: common sole, cuttlefish, ray.
Oct 2025 vs Oct 2024	EUR 6,8 million, +17%	1.055 tonnes, +2%	Common sole, cuttlefish, turbot, scallop.

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

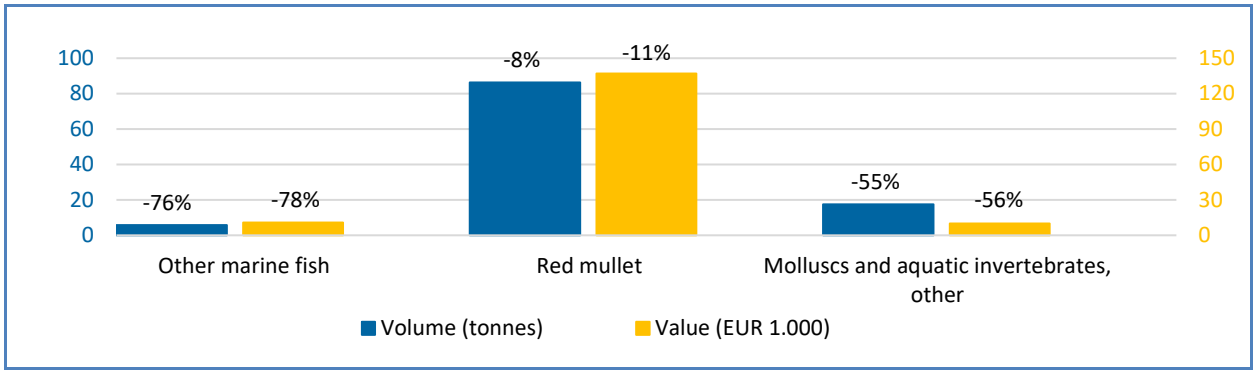


Percentages show change from the previous year.

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 2,2 million, +8%	2.845 tonnes, -2%	**Value**: sprat, clam **Volume**: other molluscs and aquatic invertebrates*, red mullet.
Oct 2025 vs Oct 2024	EUR 0,2 million, -17%	160 tonnes, -8%	Other marine fish*, red mullet, other molluscs and aquatic invertebrates*.

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



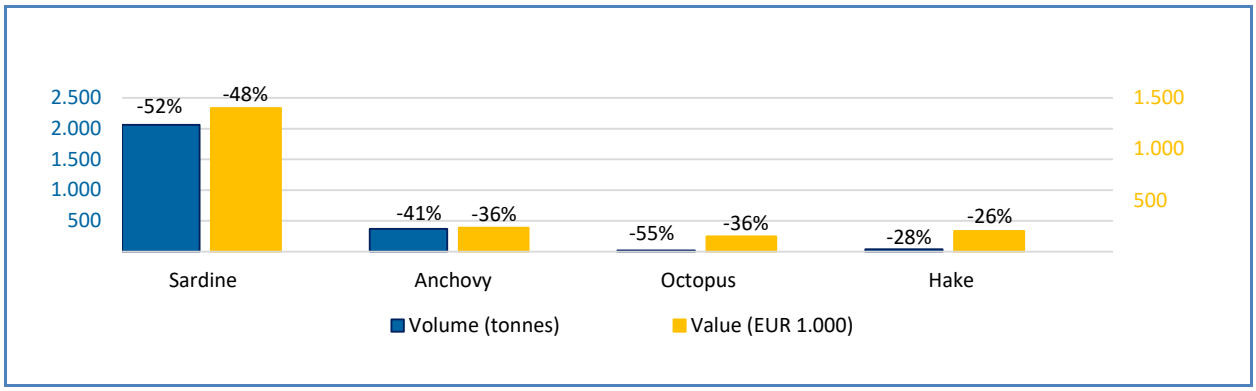
*Percentages show change from the previous year. *EUMOFA aggregation for species.*[21]

[20] 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.
[21] Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies

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

Croatia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 42,9 million, -4%	28.384 tonnes, -16%	Anchovy, hake, red mullet, bluefin tuna.
Oct 2025 vs Oct 2024	EUR 4,2 million, -28%	3.021 tonnes, -47%	Sardine, anchovy, octopus, hake.

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

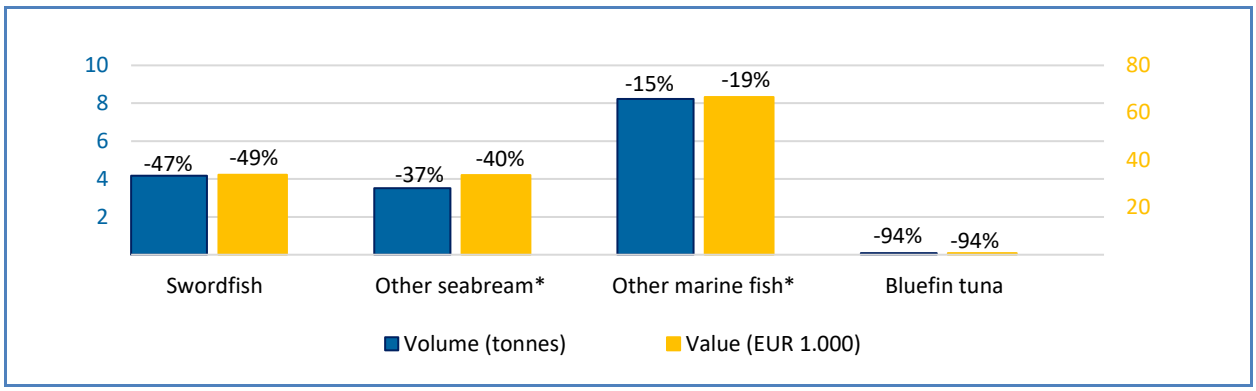


Percentages show change from the previous year.

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 2,3 million, -14%	514 tonnes, -3%	Other seabream*, red mullet, albacore tuna.
Oct 2025 vs Oct 2024	EUR 0,2 million, -36%	20 tonnes, -31%	Swordfish, other seabream*, other marine fish*, bluefin tuna.

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



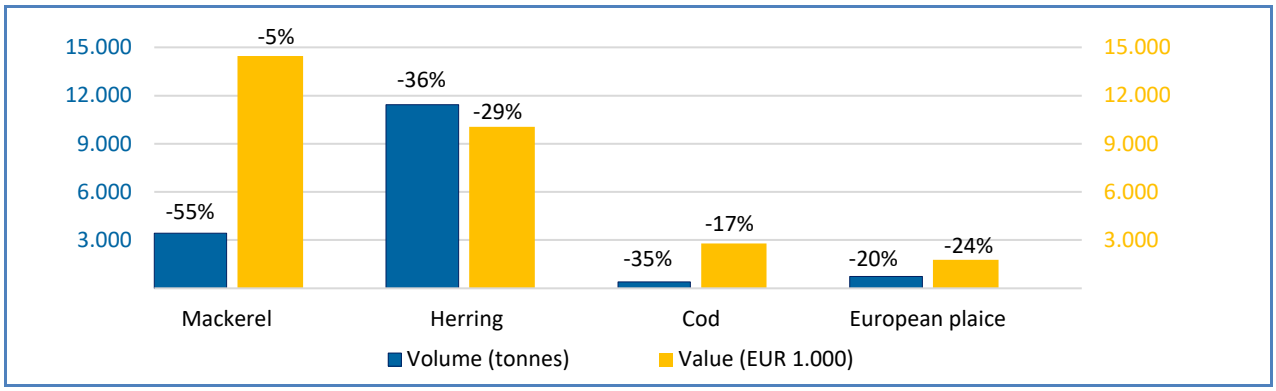
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 464,2 million, +5%	630.940 tonnes, 0%	**Value**: sprat, other groundfish*, haddock. **Volume**: blue whiting, sprat, herring.
Oct 2025 vs Oct 2024	EUR 49,3 million, -2%	34.492 tonnes, -3%	Mackerel, herring, cod, European plaice.

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

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



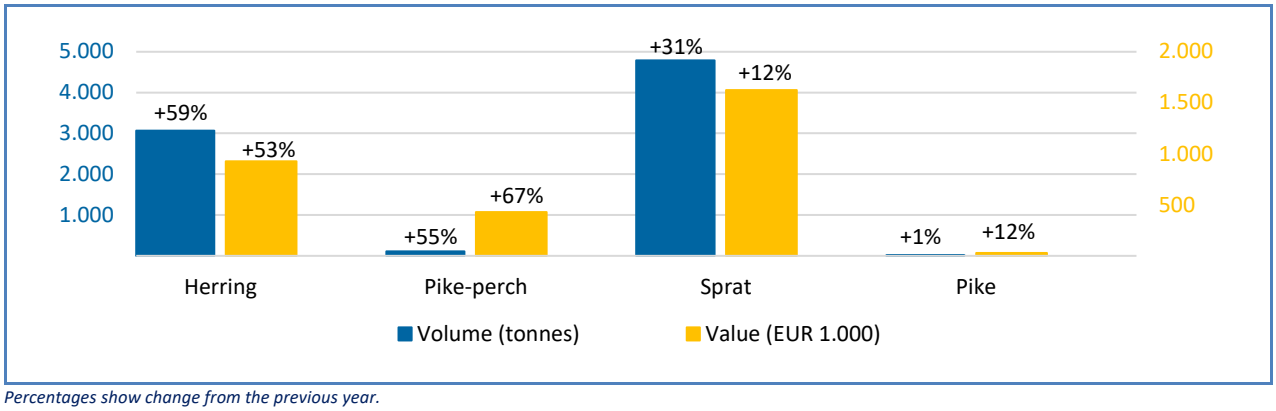
Percentages show change from the previous year.

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 20,3 million, -20%	42.571 tonnes, -16%	Herring, sprat, other freshwater fish*, European flounder.
Oct 2025 vs Oct 2024	EUR 3,6 million, +12%	8.258 tonnes, +66%	Herring, pike-perch, sprat, eel, pike.

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

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

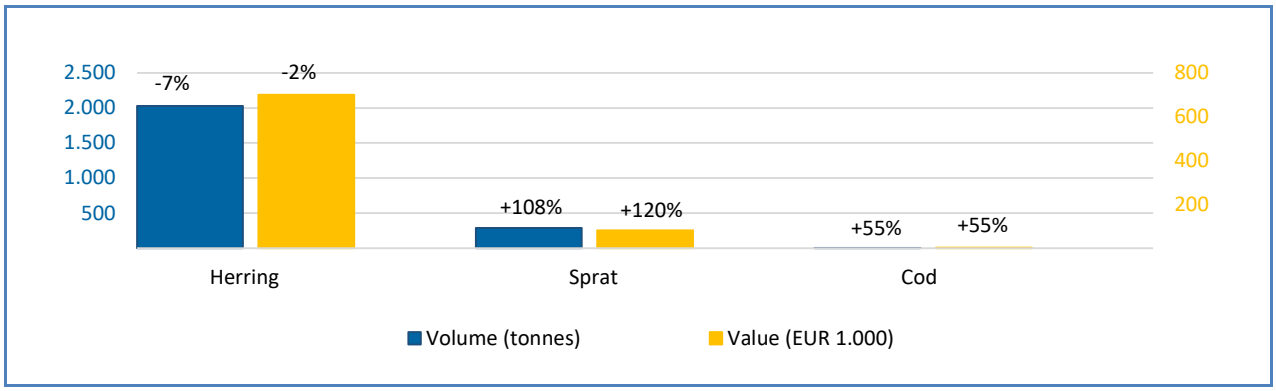


Percentages show change from the previous year.

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 14,4 million, +3%	46.763 tonnes, +25%	Herring.
Oct 2025 vs Oct 2024	EUR 0,8 million, +4%	2.319 tonnes, 0%	Herring, sprat, cod.

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

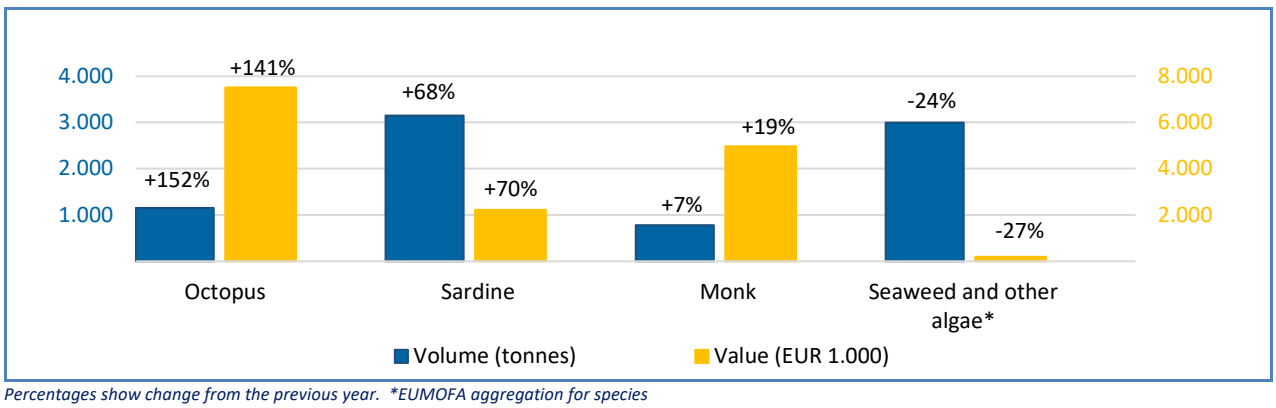


Percentages show change from the previous year.

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 619,6 million, +7%	209.293 tonnes, +2%	Octopus, eel, scallop, sardine.
Oct 2025 vs Oct 2024	EUR 76,0 million, +3%	23.290 tonnes, -4%	**Value**: octopus, sardine, monk. **Volume**: Seaweed and other algae*.

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

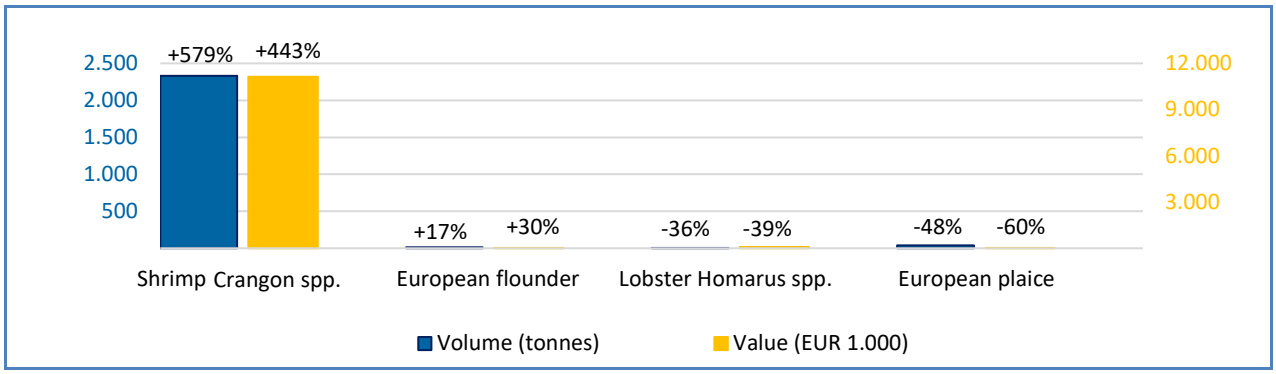


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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-Oct 2025 vs Jan-Oct 2024	EUR 51,5 million, +9%	9.911 tonnes, -57%	**Value**: shrimp *Crangon* spp. **Volume**: blue whiting, mackerel, herring.	In October 2025, there was a remarkable increase in first sales of shrimp *Crangon* spp. compared to October 2024. *Crangon* production showed occasional exceptional peaks (notably October 2024 and autumn 2025), driven by favourable environmental conditions[22]. Overall, the North Sea brown shrimp stock remains resilient, above reference limits for several years.
Oct 2025 vs Oct 2024	EUR 11,4 million, +346%	2.415 tonnes, +365%	Shrimp *Crangon* spp., European flounder, lobster *Homarus* spp., European plaice.	

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

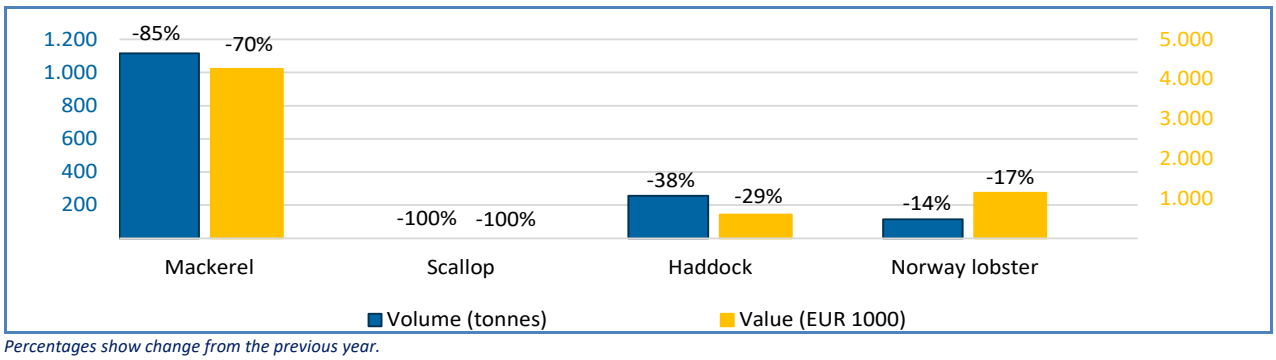


Percentages show change from the previous year.

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

Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 240,7 million, +11%	171.610 tonnes, +3%	Atlantic horse mackerel, Norway lobster, mackerel, crab.
Oct 2025 vs Oct 2024	EUR 17,2 million, -37%	8.528 tonnes, -37%	Mackerel, scallop, haddock, Norway lobster.

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



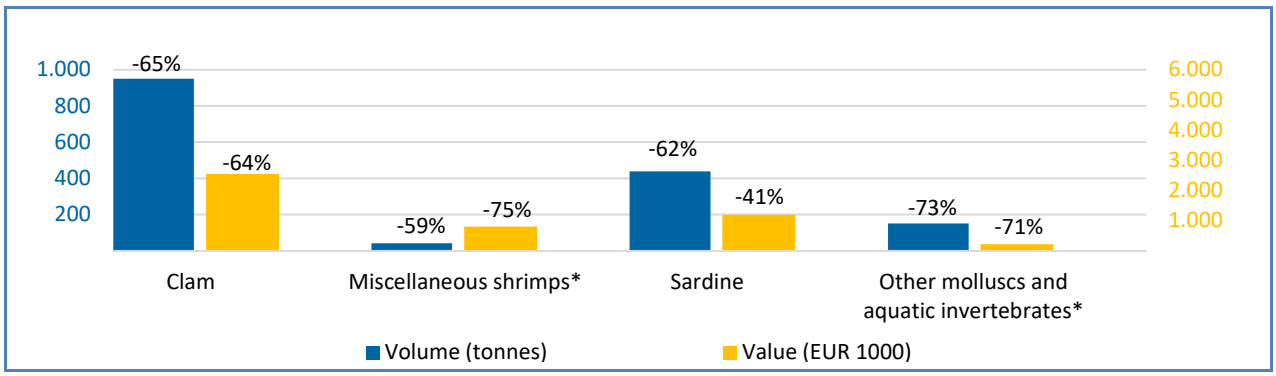
Percentages show change from the previous year.

[22] https://www.thuenen.de/en/institutes/sea-fisheries/service/detail-news/2025-an-exceptional-year-for-north-sea-brown-shrimp

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 210,6 million, -9%	42.488 tonnes, -18%	Miscellaneous shrimps*, clam, swordfish, sardine, anchovy.
Oct 2025 vs Oct 2024	EUR 23,6 million, -31%	5.111 tonnes, -40%	Clam, miscellaneous shrimps*, sardine, other molluscs and aquatic invertebrates*.

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

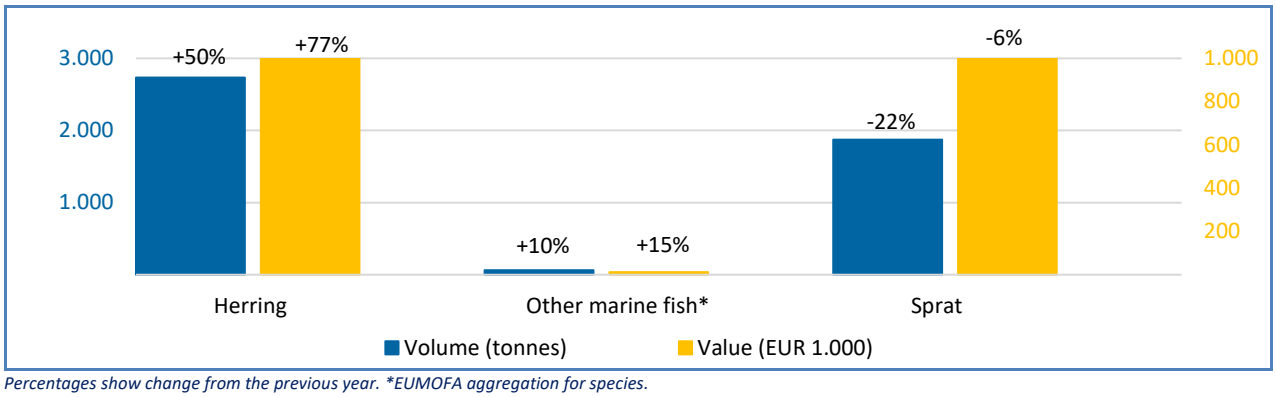


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 12,0 million, +5%	30.462 tonnes, -4%	**Value**: herring, sprat. **Volume**: sprat, other marine fish*, other freshwater fish*.
Oct 2025 vs Oct 2024	EUR 2,1 million, +20%	4.704 tonnes, +8%	Herring, other marine fish*, sprat.

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

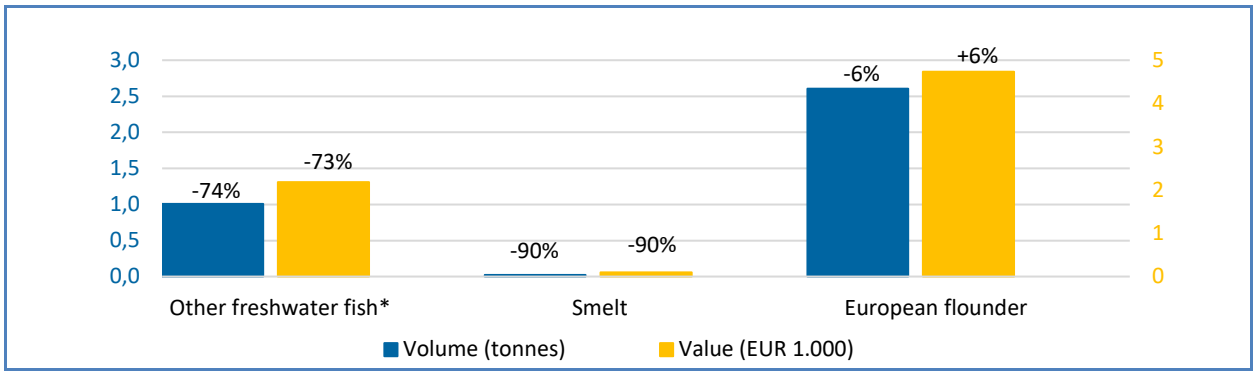


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 0,3 million, -35%	206 tonnes, -33%	Smelt, turbot, other groundfish*, other freshwater fish*.
Oct 2025 vs Oct 2024	EUR 0,01 million, -30%	5 tonnes, -32%	Other freshwater fish*, smelt, European flounder.

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

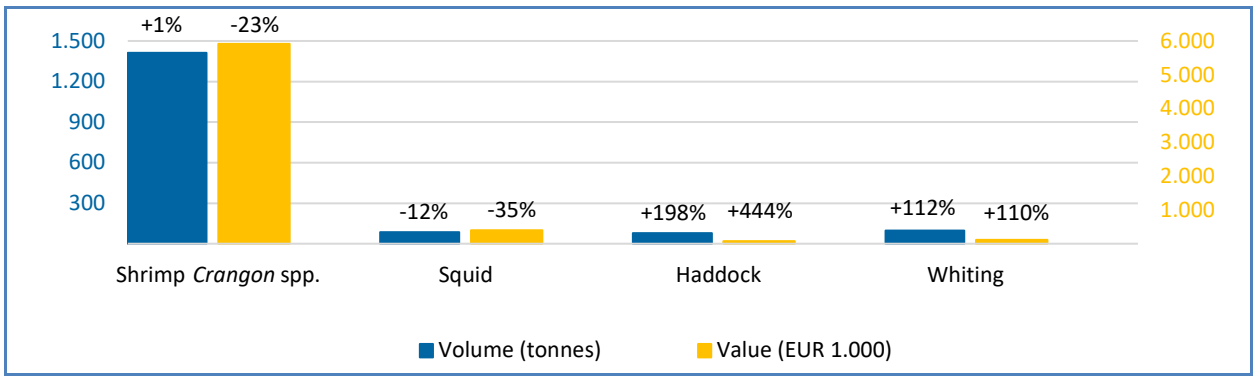


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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-Oct 2025 vs Jan-Oct 2024	EUR 118,9 million, -9%	19.329 tonnes, -7%	Shrimp *Crangon* spp., Norway lobster, European plaice, squid, gurnard.
Oct 2025 vs Oct 2024	EUR 14,8 million, -8%	2.784 tonnes, +7%	Shrimp *Crangon* spp., squid, haddock, whiting.

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

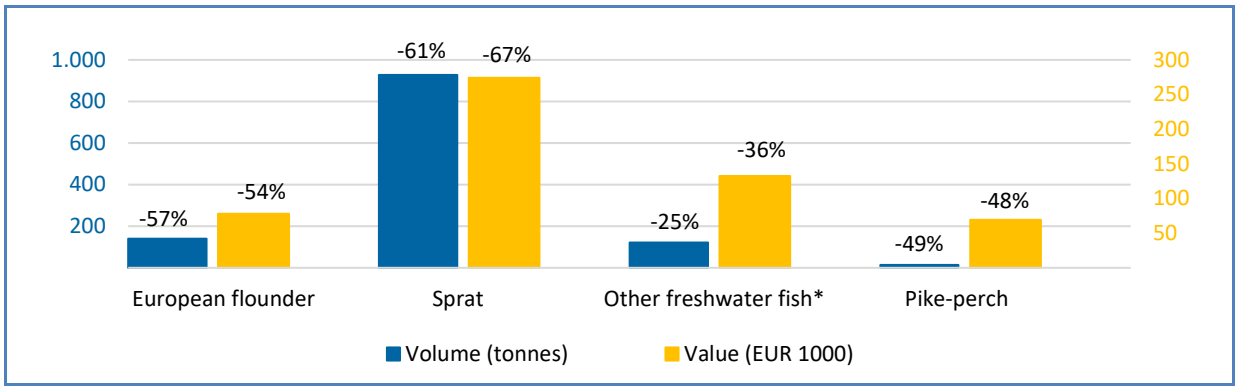


Percentages show change from the previous year.

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

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 23,6 million, -11%	45.818 tonnes, -8%	Sprat, European flounder, eel, other freshwater fish*.
Oct 2025 vs Oct 2024	EUR 2,6 million, -12%	4.648 tonnes, -18%	European flounder, sprat, other freshwater fish*, pike-perch.

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

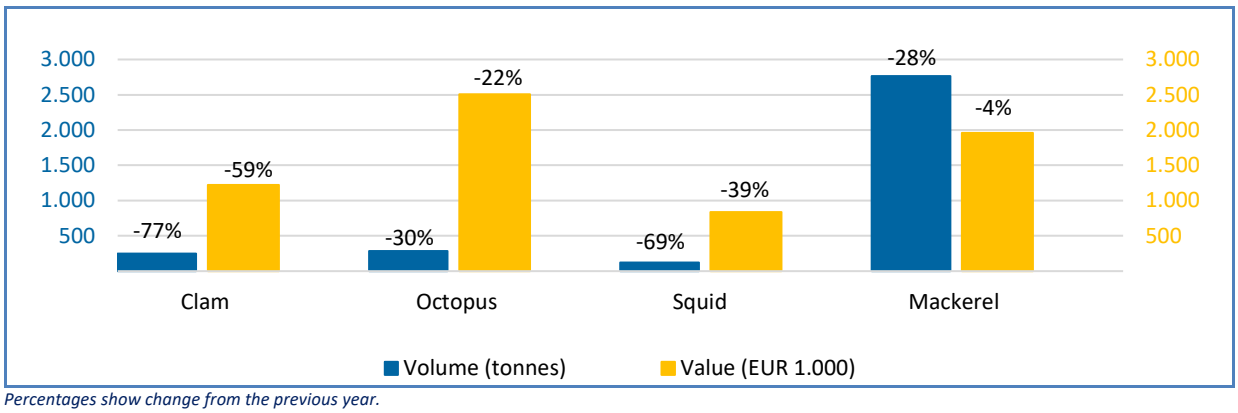


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 269,1 million, +11%	102.545 tonnes, +6%	Sardine, skipjack tuna, anchovy, octopus.
Oct 2025 vs Oct 2024	EUR 28,6 million, -3%	13.839 tonnes, -3%	Clam, octopus, squid, mackerel.

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

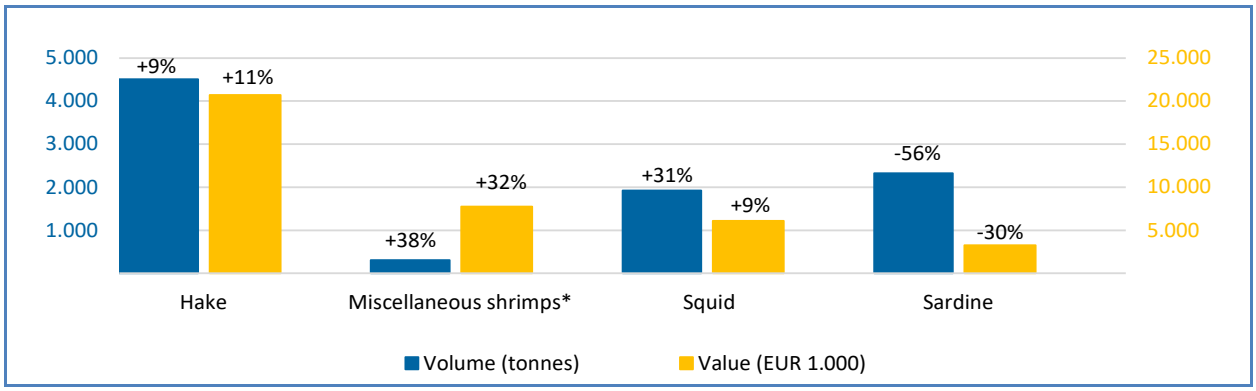


Percentages show change from the previous year.

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 1.217,9 million, +2%	325.637 tonnes, -7%	**Value**: albacore tuna, miscellaneous shrimps*, mackerel. **Volume**: blue whiting, yellowfin tuna, anchovy.
Oct 2025 vs Oct 2024	EUR 108,3 million 0%	29.807 tonnes, -7%	**Value**: hake, miscellaneous shrimps*, squid. **Volume**: sardine.

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

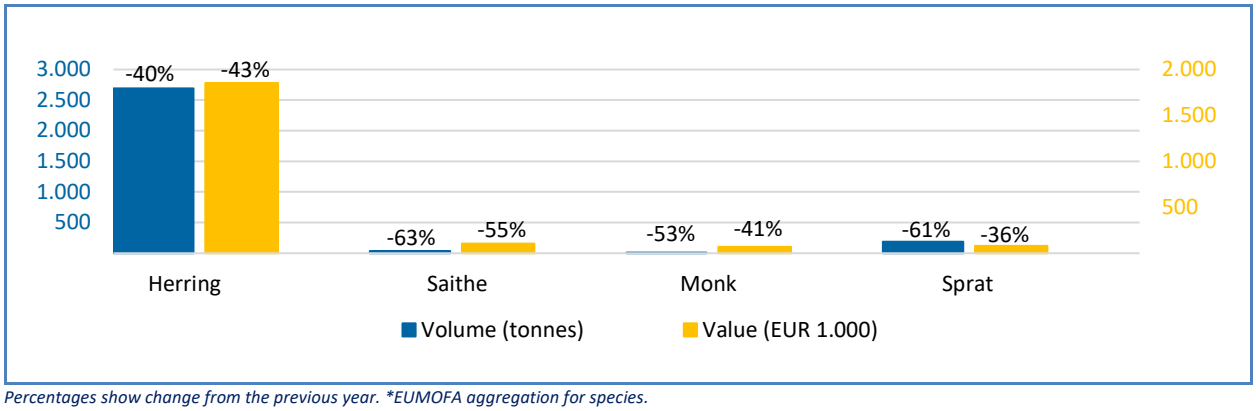


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 74,7 million, -9%	80.126 tonnes, -20%	Sprat, herring, eel, cod, other groundfish*.
Oct 2025 vs Oct 2024	EUR 9,0 million, -6%	3.546 tonnes, -39%	Herring, saithe, monk, sprat.

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

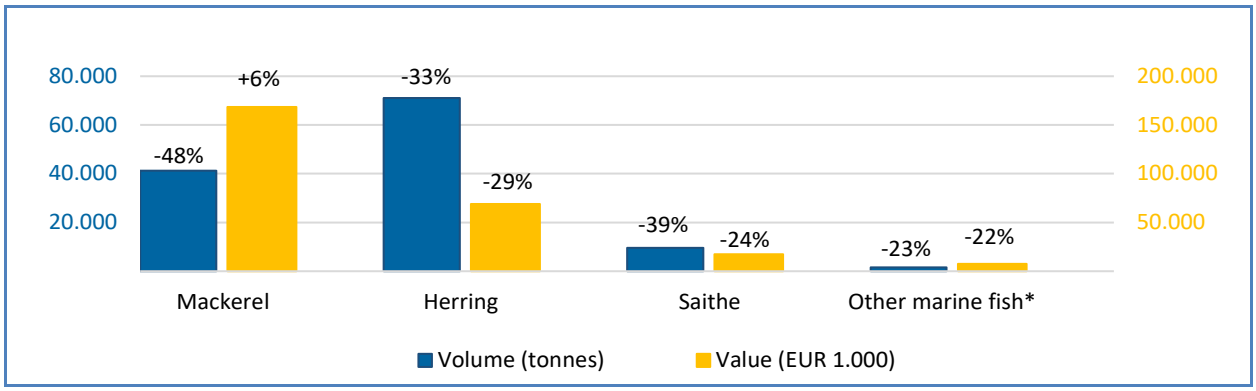


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Oct 2025 vs Jan-Oct 2024	EUR 3,23 billion, +10%	2.188.079 tonnes, -12%	**Value**: crab, mackerel, saithe. **Volume**: miscellaneous small pelagics*, mackerel, cod.
Oct 2025 vs Oct 2024	EUR 339,6 million -3%	171.764 tonnes, -31%	Mackerel, herring, saithe, other marine fish*.

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



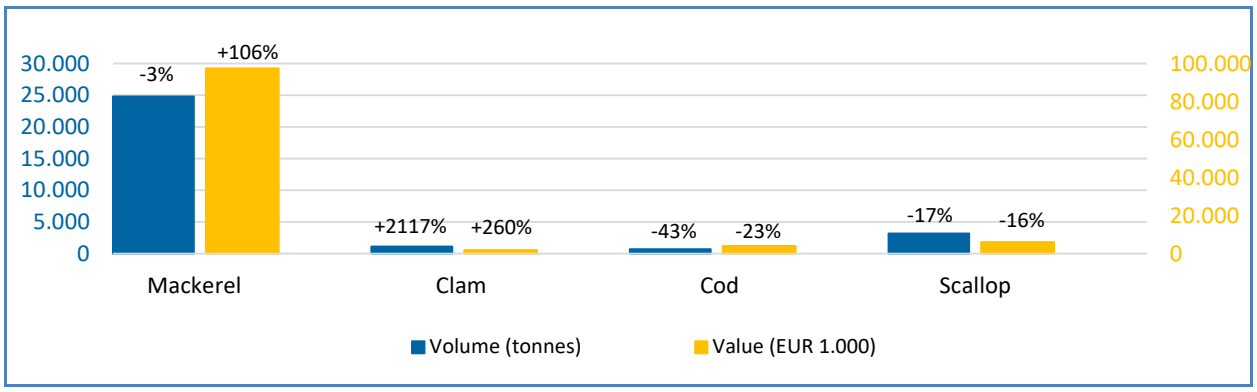
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 35. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, OCTOBER 2025**

The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species	
Jan-Oct 2025 vs Jan-Oct 2024	EUR 654,7,8 million, +14%	301.961 tonnes, 0%	**Value**: mackerel, haddock, saithe. **Volume**: mackerel, herring, blue whiting	In October 2025, there was a remarkable increase in first sales of mackerel compared to October 2024. Due to a lack of cooperation between the countries involved (the EU Member States, the UK, Norway, Iceland and the Faroe Islands[23]) North Sea mackerel production has exceeded ICES advice for several years. As a result, the stock is considered overexploited[24], and overall catches are tending to decline. In a context of strong international demand, especially from Asian countries such as South Korea and Japan, the price of North Sea mackerel increased sharply in the last months of 2025.
Oct 2025 vs Oct 2024	EUR 141,9 million +52%	43.303 tonnes, -1%	**Value**: mackerel, clam. **Volume**: mackerel, scallop, cod.	

[23] For a full description of the dispute regarding Northern pelagic stocks, e.g. see Aranda, M, Oanta, G, Le Gallic, B, Sobrino-Heredia, JM, Arantzamendi, L, Andrés, M, Iriondo, A & G Gabiña. (2024), Research for PECH Committee – *Policy options for strengthening the competitiveness of the EU fisheries and aquaculture sector*, European Parliament, Policy Department for Structural and Cohesion Policies, Brussels.
[24] ICES Advice 2025 – mac.27.nea – https://doi.org/10.17895/ices.advice.27202689

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



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

From January to October 2025, the value of extra-EU imports increased by 6% compared to the same period in 2024, while volume increased by 10%. The MCSs contributing most to the increase in import values were warmwater shrimps (+22%) and octopus (+30%), while salmon (+7%) and Alaska pollock (+27%) contributed most to the increase in volume.

Increases in value and volume: Belgium, Bulgaria, Croatia, Cyprus, Czechia, Estonia, Germany, Greece, Hungary, Ireland, Italy, Malta, Poland, Portugal, Romania, Spain and Sweden recorded an increase in extra-EU imports in both value and volume. The most significant increases in value in absolute terms were recorded in Malta driven by an increase in mackerel (+158%), bluefin tuna (+25%) and sardine (+461%). The highest increase in volume occurred in Croatia, driven by sardine (+2.203%) and mackerel (+2.740%).

Decreases in value and volume: Lithuania and Slovakia 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 (-38% and -41%), and cod (-96% and -97%).

Table 36. **JANUARY - OCTOBER OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)**[25]

	January - October 2024			January - October 2025			Change from January - October 2024		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	9.947	61,72	6,21	9.271	61,84	6,67	-7%	0%	8%
Belgium	116.652	721,50	6,19	128.636	814,67	6,33	10%	13%	2%
Bulgaria	11.578	30,71	2,65	12.056	35,32	2,93	4%	15%	10%
Croatia	7.118	31,95	4,49	21.450	40,43	1,89	201%	27%	-58%
Cyprus	5.884	37,16	6,31	6.387	38,72	6,06	9%	4%	-4%
Czechia	11.863	53,94	4,55	13.688	62,01	4,53	15%	15%	0%
Denmark	711.859	2750,75	3,86	822.438	2665,32	3,24	16%	-3%	-16%
Estonia	8.302	44,92	5,41	9.386	49,55	5,28	13%	10%	-2%
Finland	39.310	257,37	6,55	39.542	240,82	6,09	1%	-6%	-7%
France	491.209	2676,20	5,45	496.817	2620,54	5,27	1%	-2%	-3%
Germany	278.069	1279,73	4,60	368.097	1545,53	4,20	32%	21%	-9%
Greece	113.614	441,92	3,89	129.795	512,18	3,95	14%	16%	1%
Hungary	2.197	8,90	4,05	2.345	10,20	4,35	7%	15%	7%
Ireland	145.151	180,43	1,24	208.003	214,85	1,03	43%	19%	-17%
Italy	390.589	2263,65	5,80	423.083	2524,46	5,97	8%	12%	3%
Latvia	21.174	49,52	2,34	18.040	54,74	3,03	-15%	11%	30%
Lithuania	42.402	144,96	3,42	38.293	123,50	3,23	-10%	-15%	-6%
Luxembourg	15	0,47	30,90	13	0,54	42,36	-15%	16%	37%
Malta	16.724	38,21	2,28	29.306	51,60	1,76	75%	35%	-23%
Netherlands	582.708	2982,32	5,12	581.192	3231,22	5,56	0%	8%	9%
Poland	208.841	891,47	4,27	214.786	959,34	4,47	3%	8%	5%
Portugal	144.015	650,29	4,52	165.096	774,00	4,69	15%	19%	4%

[25] During January -October 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	16.836	74,30	4,41	18.562	85,11	4,59	10%	15%	4%
Slovakia	4.511	13,98	3,10	4.141	13,74	3,32	-8%	-2%	7%
Slovenia	6.109	24,45	4,00	5.876	24,48	4,17	-4%	0%	4%
Spain	1.011.188	4704,70	4,65	1.087.523	5231,38	4,81	8%	11%	3%
Sweden	579.398	4326,69	7,47	635.500	4354,43	6,85	10%	1%	-8%
EU-27	**4.977.264**	**24742,18**	**4,97**	**5.489.321**	**26340,53**	**4,80**	**10%**	**6%**	**-3%**

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: Bivalves, cephalopods, crustaceans, flatfish, freshwater fish, groundfish, small pelagics and tuna and tuna-like species were the 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 +55%, respectively) driving the increase. In terms of volume the increase of small pelagics was driven by sardine (+67%).

Decreases in value: Only salmonids recorded a decline in extra-EU import value, where the largest decline in value was attributed to salmon (-6%).

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

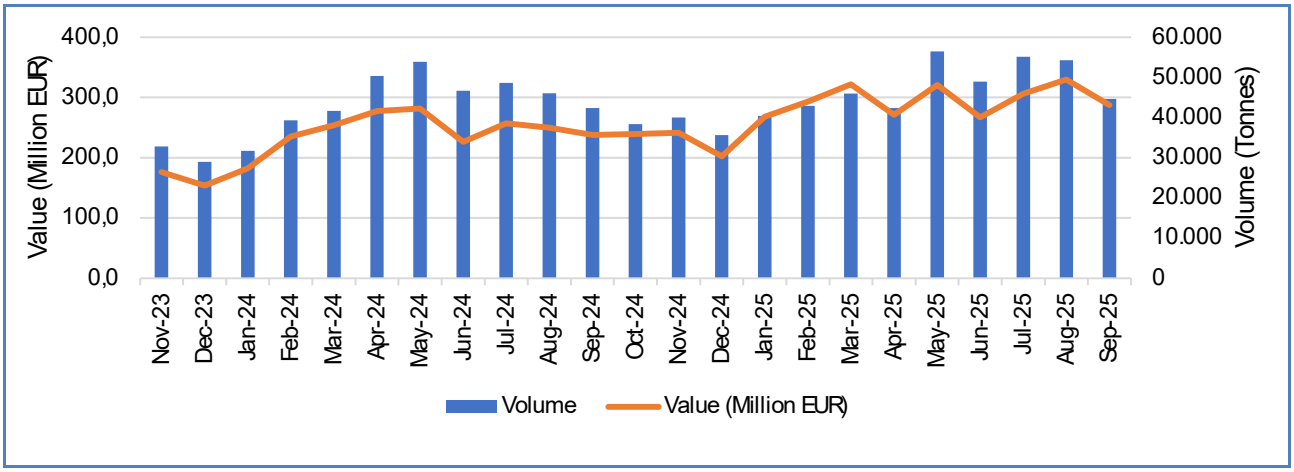
	January - October 2024			January - October 2025			Change from January - October 2024			
Commodity group	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	545,6	115.574	4,72	594,4	126.252	4,71	9%	9%	0%	Other mussel, clam.
Cephalopods	2.440,0	438.857	5,56	2.949,1	475.604	6,20	21%	8%	12%	Octopus, other cephalopods.
Crustaceans	3.693,6	548.715	6,73	4.063,3	587.280	6,92	10%	7%	3%	Warmwater shrimp, Norway lobster.
Flatfish	402,9	77.564	5,19	409,1	78.205	5,23	2%	1%	1%	Greenland halibut, other flatfish.
Freshwater fish	462,4	116.721	3,96	485,6	126.090	3,85	5%	8%	-3%	Tilapia, freshwater catfish.
Groundfish	3.692,4	909.252	4,06	4.171,3	957.511	4,36	13%	5%	7%	Cod, Alaska pollock.
Other marine fish	1.460,5	262.756	5,56	1.603,0	263.406	6,09	10%	0%	9%	Other marine fish, monk.
Salmonids	7.051,2	872.089	8,09	6.677,5	931.903	7,17	-5%	7%	-11%	Salmon.
Small pelagics	849,5	350.498	2,42	974,0	389.503	2,50	15%	11%	3%	Mackerel, herring.
Tuna and tuna-like species	2.710,7	580.037	4,67	2.929,2	629.004	4,66	8%	8%	0%	Skipjack tuna, miscellaneous tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of cephalopods in EU Member States

In January – October 2025, extra-EU imports of cephalopods accounted for a total value of EUR 2,9 million and a total volume of 475.604 tonnes, marking a 21% increase in value and 8% increase in volume compared to the same period in 2024.

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



Source: EUMOFA elaboration of Eurostat COMEXT

Extra-EU imports of cephalopods peak between March and May, both in terms of value and volume, while lowest drops are December and January.

Between January and October 2025, Spain, Italy and Greece were the EU's main importers of cephalopods. Together they accounted for 88% of total extra-EU import volumes of cephalopods, with Spain representing 62%, Italy 21% and Greece 5% of the total impot volume.

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

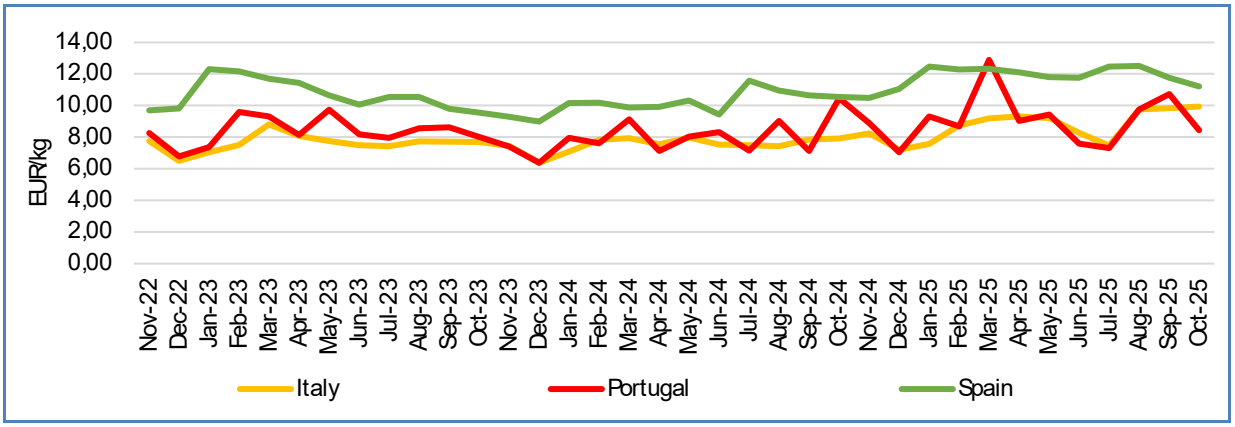
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan–Oct 2024	Jan-Oct 2025	Trend (%)	Jan–Oct 2024	Jan-Oct 2025	Trend (%)	
Spain	1.467,8	1.811,7	23%	270,6	295,0	9%	Octopus
Italy	602,6	691,0	15%	95,7	99,5	4%	Octopus
Greece	118,9	134,3	13%	22,9	23,8	4%	Squid

4.2. Extra-EU imports of octopus in EU Member States

In terms of value, octopus was the main imported species within the "cephalopods" commodity group, accounting for 37% of the total value, followed by squid with 34%.

The price analysis below focuses on the main EU importers of octopus from non-EU countries, namely Spain, Italy and Portugal.

Figure 37. **EXTRA-EU IMPORT PRICE OF OCTOPUS IN SPAIN, ITALY AND PORTUGAL (NOV 2022 – OCT 2025)**



Between November 2022 and October 2025, the price of octopus fluctuated and increased in the three countries analysed: Spain (+5%), Italy (+9%), and Portugal (+1%). Between January and October 2025, the volume of octopus imported to Spain was 55.850 tonnes, 11% more compared with the same period in 2024, while the price increased by 17%. Most imports by volume came from Mauritania (47%), followed by Morocco (43%).

During the same period, 28.420 tonnes of octopus were imported to Italy, 6% more compared to 2024, with a price increase of 18% compared to 2024. Morocco accounted for 45% of the total imported volume of octopus in 2025, followed by Indonesia with 14%.

In Portugal, 6.527 tonnes of octopus were imported in 2025, of which almost 35% came from Mauritania and 16% from Morocco. Import volumes increased by 26% and prices by 13%.

In the three countries, imports showed similar behaviour: in Spain, import volumes peaked in January-February and August-October; in Italy and Portugal volume imports reached their maximum between March and May and October.

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

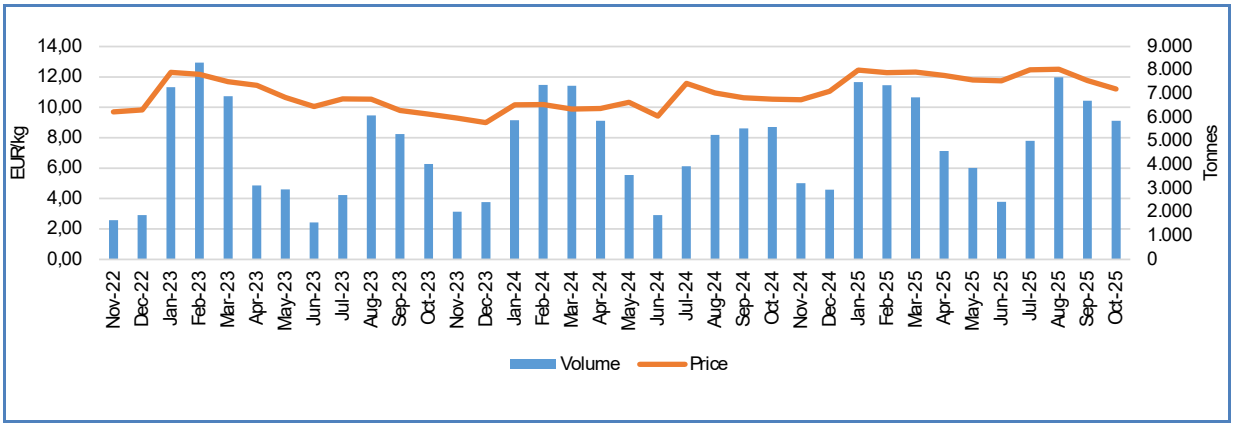


Figure 39. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF OCTOPUS IN ITALY, NOV 2022 – OCT 2025 (volume in tonnes and price in EUR/kg)**

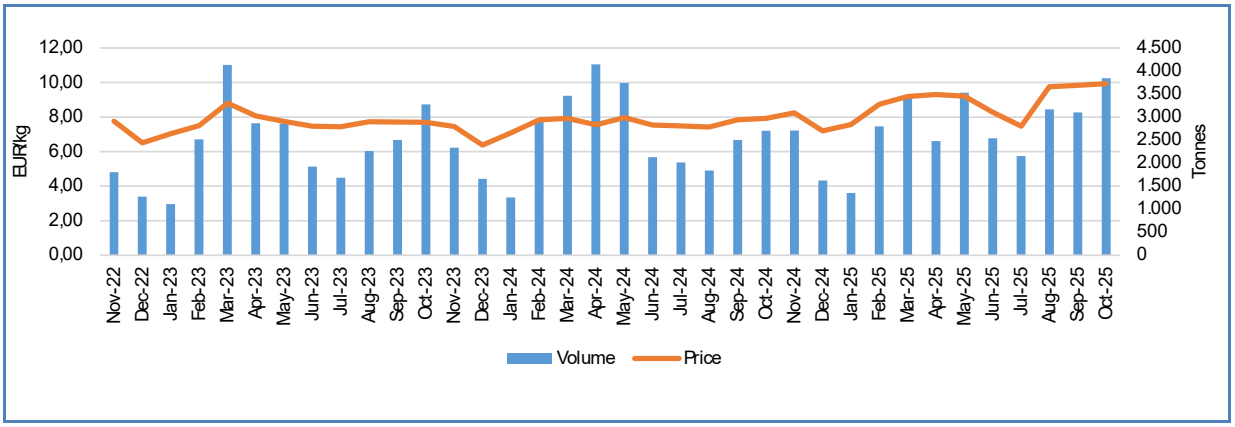
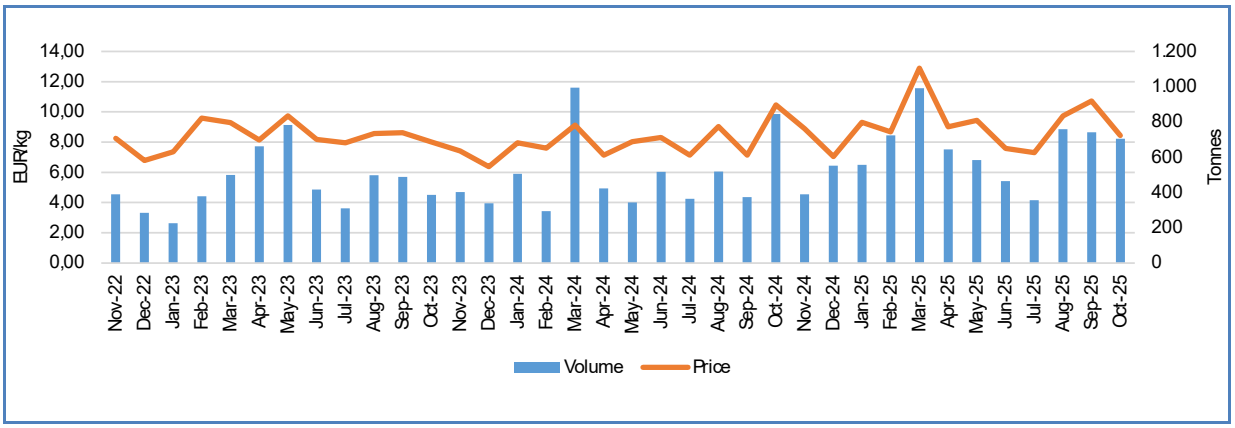


Figure 40. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF OCTOPUS IN PORTUGAL, NOV 2022 – OCT 2025 (volume in tonnes and price in EUR/kg)**



4.3. Extra-EU imports of octopus by origin

Between January and October 2025, EU imports of octopus[26] recorded an increasing trend in volume (+11%) and in value (+30%) compared with the same period in 2024. In 2025, the EU imported 102.678 tonnes of octopus for a value of EUR 1.103 million. The main extra-EU countries supplying octopus to the EU in 2025 were Morocco (39%), followed by Mauritania (31%), Senegal and Indonesia (7% respectively). Compared to the same period in 2024, imports increased from most of these countries, except Morocco (-9%), Indonesia (-4%) and Algeria (-30%). Over the same period, imports also increased from Mauritania (+36%), Senegal (+98%), India (+6%) and the United Kingdom (+5.610%)[27].

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

Country	Jan – Oct 2023		Jan – Oct 2024		Jan – Oct 2025		Jan – Oct 2025/2024	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Morocco	486,9	42.946	457,3	43.641	495,2	39.800	8%	-9%
Mauritania	174,3	16.883	236,5	23.365	383,4	31.887	62%	36%
Senegal	34,7	4.075	30,6	3.475	68,9	6.879	125%	98%
Indonesia	37,1	5.884	42,5	7.461	43,1	7.142	1%	-4%
Others	94,5	15.138	84,1	14.485	112,5	16.971	34%	17%
Total	**827,4**	**84.925**	**851,0**	**92.426**	**1.103,1**	**102.678**	**30%**	**11%**

[26] 03075100 - Octopus "*Octopus* spp.", live, fresh or chilled
03075200 - Octopus "*Octopus* spp.", frozen
03075900 - Octopus "*Octopus* spp.", smoked, dried, salted or in brine
16055500 - Octopus, prepared or preserved (excl. smoked)
[27] EUMOFA MH11/2025 – Case study "Octopus in the UK"

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[28]. They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

Compared with October 2024, household consumption of fresh fishery and aquaculture products in October 2025 increased in both volume and value in Ireland, Italy, Poland and Sweden. In contrast, Denmark, Hungary and the Netherlands recorded decreases in both value and volume. Portugal and Spain registered decreases in volume and increases in value, while Germany recorded a decrease in value.

The most notable increases are in Ireland and Sweden where consumption increased in volume by 38% and 21% respectively and in value by 43% and 22% respectively compared to 2024. Hungary recorded the most notable decrease in volume (-33%) and in value (-12%).

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	October 2023		October 2024		October 2025		Change from October 2024 to October 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	973	18,98	1.111	21,21	968	19,71	-13%	-7%
France	32,14	15.649	200,21	16.102	205,69	15.558	206,48	-3%	0%
Germany	12,08	4.732	74,76	4.452	73,72	4.442	71,88	0%	-2%
Hungary	5,83	272	2,60	408	3,28	273	2,89	-33%	-12%
Ireland*	20,00	1.006	18,09	794	14,48	1.094	20,70	38%	43%
Italy	30,38	18.322	216,89	16.022	208,34	16.143	217,68	1%	4%
Netherlands*	19,90	2.338	43,21	2.271	44,78	2.181	42,65	-4%	-5%
Poland	13,67	3.725	39,11	3.710	42,20	3.936	50,01	6%	19%
Portugal	53,61	4.675	36,13	5.007	40,94	4.901	41,55	-2%	1%
Spain	40,68	39.126	385,58	41.422	432,61	40.930	442,13	-1%	2%
Sweden	10,00	999	14,70	881	12,82	1.066	15,66	21%	22%

** 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.*

[28] Last update: 15.12.2025.

5. 2. Overview of household consumption[29] of cephalopods consumed in the EU

In the household consumption data used by EUMOFA, consumption of cephalopods is monitored in ten[30] Member States of which Italy and Portugal are the main consumers. At species level, Italy monitors octopus (*Octopus vulgaris*) and squid (*Ommastrephidae, Loliginidae)* and Portugal monitors octopus.

Figure 41. **HOUSEHOLD PURCHASES (in value) OF CEPHALOPODS IN ITALY AND PORTUGAL OCT 2022 – OCT 2025**

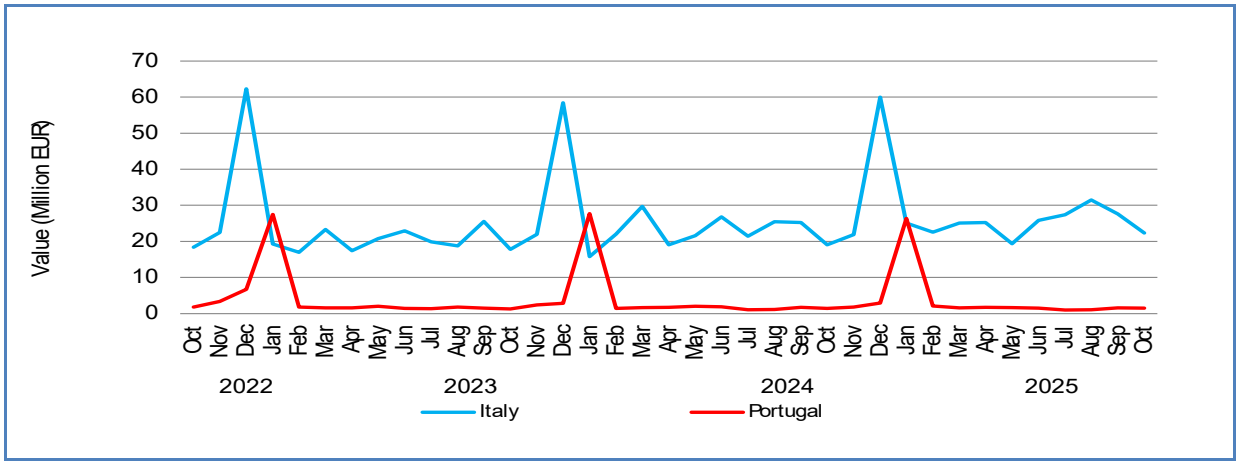
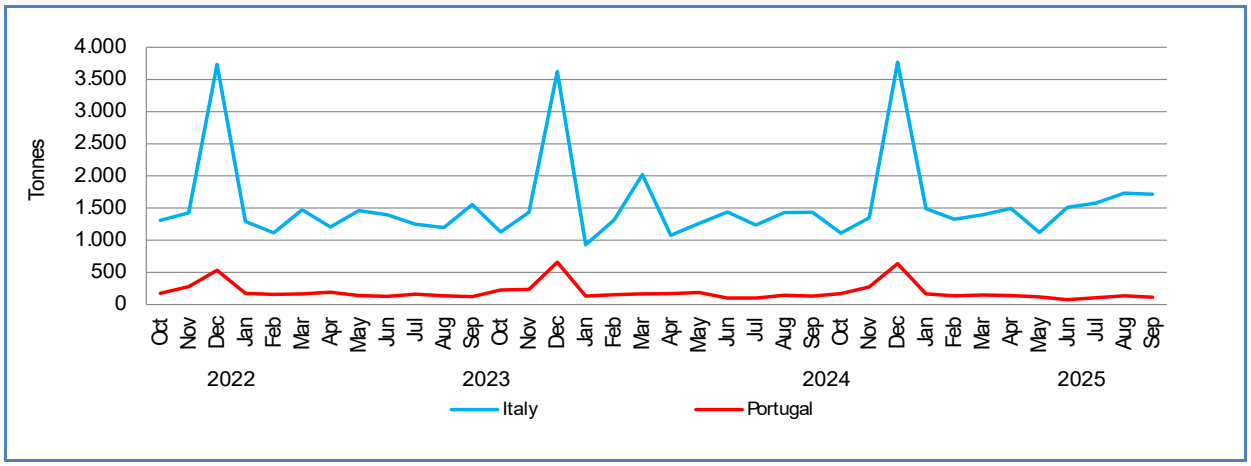


Figure 42. **HOUSEHOLD PURCHASES (in volume) OF CEPHALOPODS IN ITALY AND PORTUGAL OCT 2022 – OCT 2025**

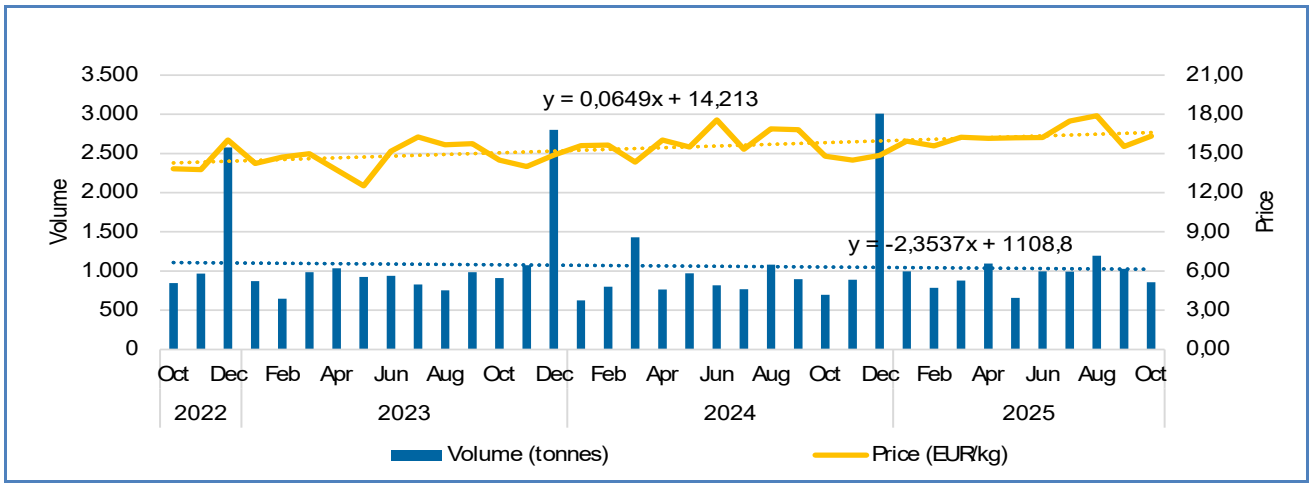


[29] The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the available data and does not reflect the full scope of consumption across all Member States.
[30] Denmark, France, Germany, Ireland, Italy, Netherlands, Poland, Portugal, Spain, Sweden.

5. 3. Household consumption trends of octopus - the main species of cephalopods in reporting countries

Long-term trend (Nov 2022 to Oct 2025): Downward trend in volume and slightly upward trend in price.
Yearly average retail price (Jan – Oct): 14,76 EUR/kg (2023), 15,85 EUR/kg (2024), 16,36 EUR/kg (2025)
Yearly consumption (Jan – Oct): 8.877 tonnes (2023), 8.855 tonnes (2024), 9.479 tonnes (2025)
Short-term trend (Nov 2024 to Oct 2025): Slightly downward trend in price and upward trend in volume.
Average retail price (Nov 2024 to Oct 2025): 16,08 EUR/kg.
Consumption (Nov 2024 to Oct 2025): 13.374 tonnes.

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



Consumption of octopus in the reporting countries fluctuates seasonally, peaking in December driven by higher demand during the Christmas festive period. Prices show a non-seasonal variability related to availability of the resource. Between October 2022 and October 2025, consumption volumes showed a downward trend, while prices showed a slight upward trend.

6. CASE STUDY: Fisheries and aquaculture in the Faroe Islands

The Faroe Islands are an ocean nation located in the Northeast Atlantic halfway between Scotland and Iceland. The archipelago consists of 8 mountainous islands, with a total land area of 1.399 square kilometres and a surrounding sea area of 274.000 square kilometres. The population is approximately 55.000[31].

The Faroe Islands are a self-governing nation under the external sovereignty of the Kingdom of Denmark. Although Denmark is a Member State of the European Union, the Faroe Islands have chosen to remain outside the Union. Accordingly, the Faroe Islands negotiate their own trade and fisheries agreements with the EU and other countries and participate actively in a range of international fisheries management arrangements and organisations[32].

Fishing and aquaculture are one of the cornerstones of the Faroese economy. Seafood products account for more than 90% of the country's exports, making the Faroe Islands one of the largest seafood exporters in the world, with markets across the whole world[33]. The combined direct contribution of fishing and fish farming represents about one-third of the country's GDP. Over the past three decades, aquaculture has grown into a major industry, and today the Faroe Islands rank fifth largest salmon producer globally[34].

During 2023 Faroese landings data showed a substantial increase in catches, reaching 761.000 tonnes, which was a 31% rise compared to the previous year. In 2024, catches declined by 15% to 644.000 tonnes. Aquaculture has also experienced significant growth, reaching 90.000 tonnes in 2024, an 11% increase from the year before and a 35% increase compared to 2015[35].

6. 1. Fisheries and aquaculture

Table 41. **FAROESE FISHERY AND AQUACULTURE PRODUCTION (in 1.000 tonnes)**

Fishery and aquaculture	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Fisheries	560	531	672	634	625	614	508	580	761	644
Aquaculture	66	68	71	65	78	73	95	89	80	90
Total fisheries and aquaculture	**626**	**599**	**743**	**699**	**702**	**687**	**603**	**669**	**841**	**734**

Source: Statistics Faroe Islands.

The Faroese fishing fleet targets both pelagic and demersal species, with pelagic species making up most of the catches. Pelagic fishing is relatively uniform and carried out by large trawlers or combined purse seiners, mainly catching blue whiting, mackerel, and Atlantic-Scandinavian herring. On most vessels, the fish is stored in cooling tanks with chilled seawater before being delivered to processing plants. Some ships have onboard factories for filleting, extracting fish oil, and producing fish meal.

Demersal fishing is more complex. Over the past five years, annual demersal catches have ranged from 80.000 to above 100.000 tonnes. This type of fishing involves a variety of vessels that differ in size, fishing methods, and suitability for specific species and fishing areas[36].

Blue whiting is by far the most significant species, with catches reaching 433.000 tonnes in 2024. This represents an 8% increase from the previous year, and a 27% rise compared to five years ago. Most of the blue whiting is processed into fishmeal and fish oil, which are used as key ingredients in salmon feed. A smaller portion is exported frozen for human consumption.

Atlantic mackerel is the second-largest species, with around 70.000 tonnes landed in 2024. The Faroe Islands hold a substantial share of the Northeast Atlantic mackerel quota. These catches are mainly processed for food, both for domestic use and export.

Atlantic herring, ranks third in volume and fourth in value, with more than 60.000 tonnes landed valued at EUR 62 million in 2024.

[31] https://www.faroeseseafood.com/the-faroe-islands/the-faroe-islands
[32] https://www.government.fo/en/foreign-relations/about-the-faroe-islands
[33] https://www.faroeseseafood.com/the-faroe-islands/the-legacy-a-fishing-nation-with-proud-traditions
[34] https://www.faroeseseafood.com/the-faroe-islands/the-legacy-a-fishing-nation-with-proud-traditions
[35] https://www.globalseafood.org/advocate/all-the-way-back-and-then-some-the-faroe-islands-salmon-comeback-story/
[36] https://trap.fo/en/society-and-business/fiskerierhvervet-pa-faeroerne/

Atlantic cod follows as the fourth largest species by volume and third by value, totalling 19.300 tonnes. Faroese cod fishers operate under quota exchange agreements with Norway and Russia, allowing them to fish in zones such as the Norwegian and Russian Barents Sea areas in addition to Faroese waters.

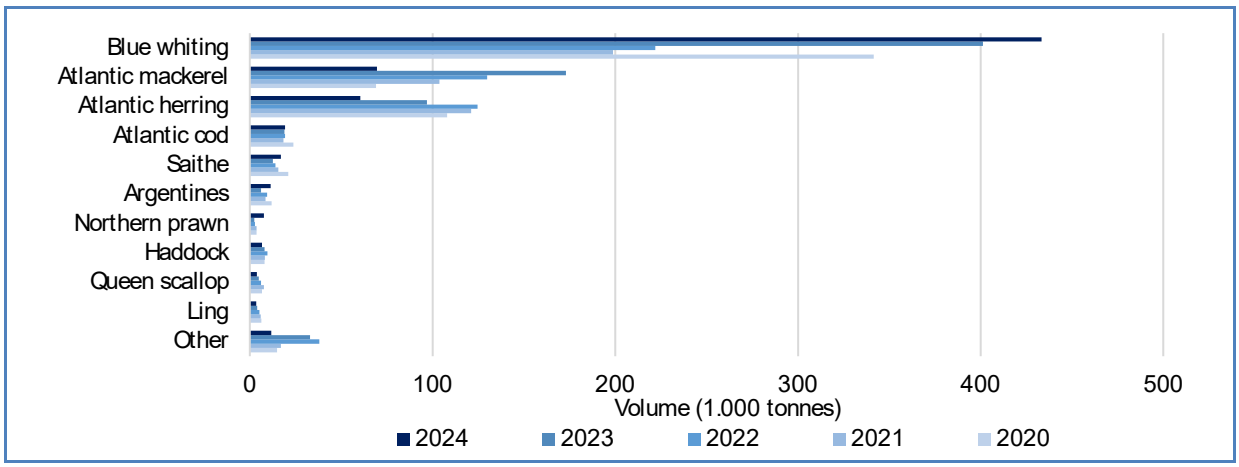
Total Faroese **saithe** catches reached nearly 17.000 tonnes in 2024, making it the fifth largest species by volume.

Argentine catches reached nearly 17.000 tonnes in 2024, making it the fifth largest species by volume.

Northern prawn catches surged by 223 percent in 2024, reaching 7.700 tonnes. In contrast, haddock, queen scallop, and ling all recorded notable decreases in volume.

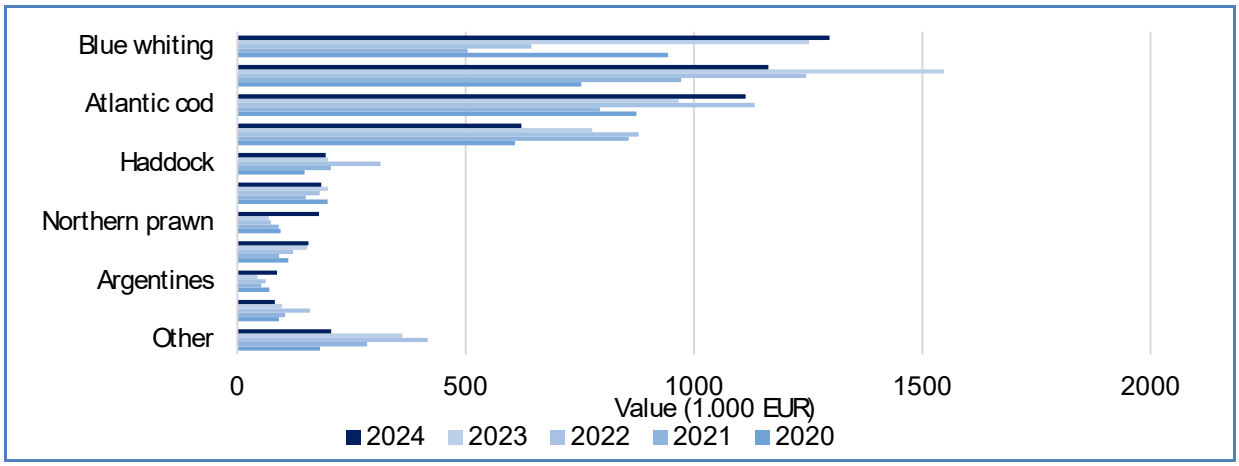
The large blue whiting catch in 2024 also contributed to strong results in terms of value. Blue whiting ranked first, followed by Atlantic mackerel, Atlantic cod, Atlantic herring, haddock, saithe, Northern prawn, Greenland halibut, Argentine, and ling. Together, these species accounted for 96% of the total catch value in 2024.

Figure 44. **FAEROE ISLANDS CAPTURED FISHERIES BY SPECIES – VOLUME (2020-2024)**



Source: Statistics Faroe Islands

Figure 45. **FAEROE ISLANDS CAPTURED FISHERIES BY SPECIES – VALUE (2020-2024)**



Source: Statistics Faroe Islands

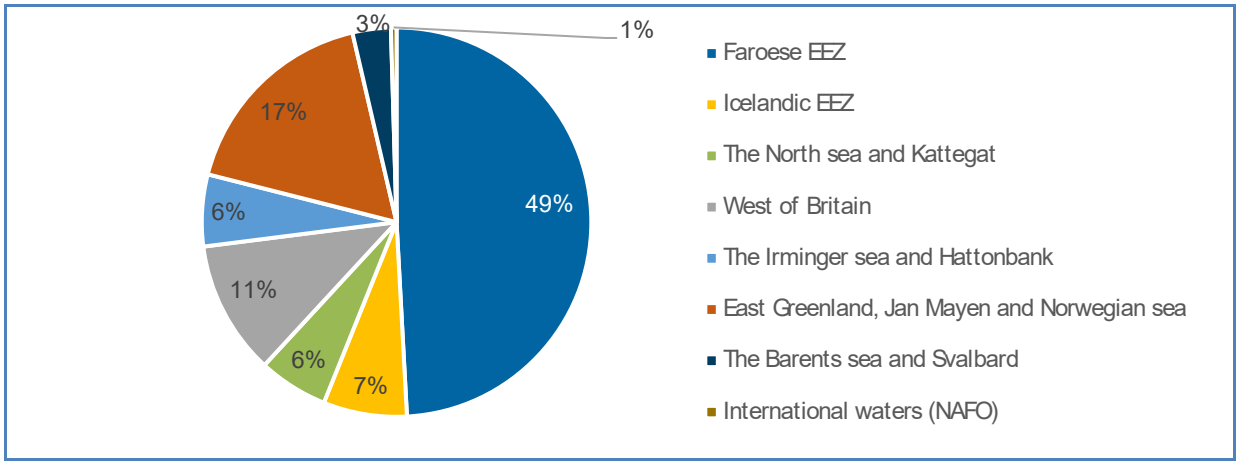
The Faroese fishing fleet operates in a mix of national waters, international zones, and areas covered by bilateral agreements. The core fishing area is the Faroe Islands 200-nautical-mile Exclusive Economic Zone (EEZ), which spans about 300.000 km². In addition, the Faroes have bilateral fisheries agreements with the EU, Iceland, Norway, Greenland, and the Russian Federation.

These agreements give the Faroese fleet flexibility to access distant waters during peak seasons. Such arrangements have long been an important part of Faroese fisheries, dating back to before the introduction of 200-mile limits in the 1970s.

The Faroe Islands also participate as a coastal state in multilateral negotiations on managing shared fish stocks in the Northeast Atlantic, including Atlanto-Scandic herring, mackerel, blue whiting, and redfish.

The Faroes participate together with Greenland (Denmark in respect of the Faroe Islands and Greenland) in the following regional fisheries management organisations: NEAFC – Northeast Atlantic Fisheries Commission; NAFO – North-west Atlantic Fisheries Organization; and NASCO – North Atlantic Salmon Conservation Organization. In addition, the Faroes have independent membership of NAMMCO, the North Atlantic Marine Mammal Commission[37].

Figure 46. **TOTAL CATCH IN LIVE WEIGHT BY FISHING ZONE 2024**



Source: Statistics Faroe Islands

6. 2. Salmon farming

Salmon farming is the most important aquaculture activity in the Faroe Islands. The industry originally focused on sea trout, but in the 1980s it shifted to Atlantic salmon. Today, almost all aquaculture in the Faroes is dedicated to breeding and exporting Atlantic salmon. Three companies dominate salmon production in the Faroe Islands: Bakkafrost, Hiddenfjord, and MOWI. The industry is highly integrated both horizontally and vertically, which means producers control every stage of the process—from roe to final product—ensuring consistent quality.

The Faroese salmon farming sector is strictly regulated. Local authorities have introduced comprehensive rules on feed, medicine, and sea lice treatment to minimize environmental impact[38]. These measures contributed to having no antibiotics are used in salmon farming. The industry also achieves some of the best high-level standards worldwide. This includes low mortality rate, high smolt yield and low biological feed conversion ratio (BFCR). The BFCR is a measurement of how many kilos of feed it takes to produce one kilo of salmon[39].

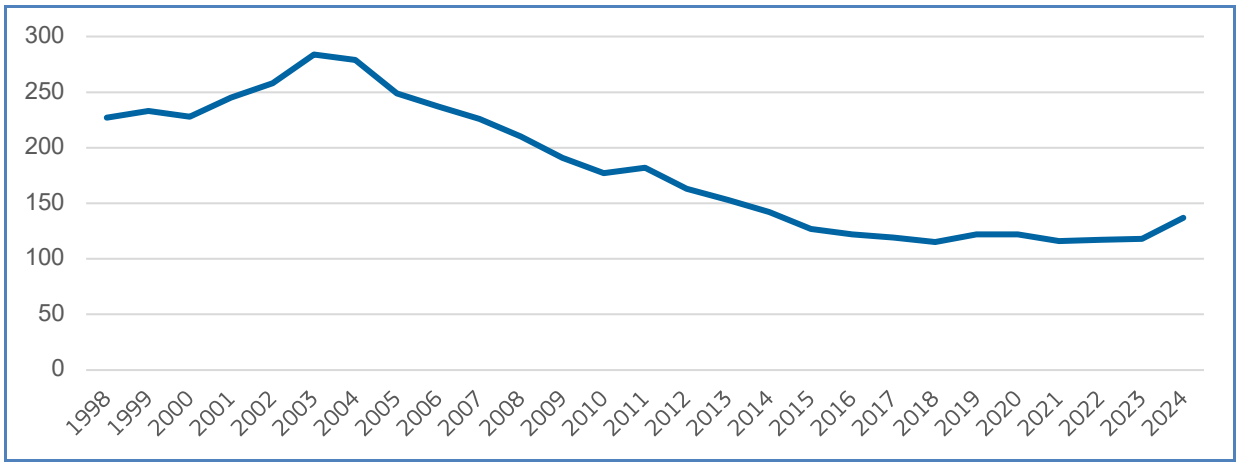
6. 3. Faroese seafood industry

The fishing and aquaculture industries are crucial for income and employment opportunities in the Faroe Islands, although the service sector has become increasingly important in recent years. Fishing and aquaculture accounted for approximately one fifth of the total gross value added in the Faroe Islands in 2022. Around 15% of the labour force is employed by the fishing industry. The value of seafood has accounted for over 90 % of goods exports for several years, and the share of farmed salmon has been increasing since 2006 and accounted for some 52% of the fish export value in 2024[40].

[37] https://www.government.fo/en/foreign-relations/representations-of-the-faroe-islands-abroad/the-mission-of-the-faroe-islands-to-the-european-union/the-faroe-islands-and-the-european-union/fisheries#:~:text=Membership%20in%20this%20arrangement%20is,North%20Atlantic%20Marine%20Mammal%20Commission.
[38] https://guidetofaroeislands.fo/nature-in-faroe-islands/the-faroe-island-salmon-success/#:~:text=The%20salmon%20farming%20industry%20in,welfare%2C%20traceability%2C%20and%20sustainability.
[39] https://www.faroeseseafood.com/species/faroe-islands-salmon#:~:text=This%20was%20done%20to%20ensure,produce%20one%20kilo%20of%20salmon.
[40] https://systemicriskcouncil.dk/Media/638550877165593745/DSRR45%20-%20Henstill.eng.pdf

There are three pelagic production facilities for human consumption: Faroe Pelagic in Kollafjørð, Varðin Pelagic in Tvøroyri and Pelagos in Fuglafjørð[41]. The total number of firms registered has fluctuated over the years. In 2024, 137 firms were registered, indicating a 16% increase from the year before. The number of firms comprises those which Statistics Faroe Islands estimate as active in the year[42].

Figure 47. **NUMBER OF FIRMS IN FAEROE ISLANDS FISHING AND AQUACULTURE**



Source: Income statement | Statistics Faroe Islands

Trade flows

6. 4. Export

In 2024, export volume from the Faroe Islands reached 374.000 tonnes (product weight), a 24% decrease compared to 2023. The total value reached EUR 1,47 billion, down from EUR 1,154 billion in 2023 (-5*%).*

Salmon exports in 2024 were valued at EUR 759 million, up by 7 % compared to 2023. Export volumes amounted to 81.700 tonnes a 22% increase from the year before. Export of salmonids accounted for 22% of the export volume and 52% of the export value of all commercial species in 2024 which was up by 6% in terms of volume and value from the year before. The main export markets for salmon are the United States, the EU and China.

Mackerel exports in 2024 were valued at EUR 171 million, up by 26% compared to 2023. Export volumes amounted to 82.400 tonnes, a 11% decrease from the year before. Exports of mackerel accounted for 22% of the export volumes and 12% of the export values in 2024. Main export destinations were Russia with around 55% of total volumes followed by Poland, China and the Netherlands.

Cod exports in 2024 were valued at EUR 104 million, up by 17 % compared to 2023. Export volumes amounted to 15.000 tonnes a 9% increase from the year before. Exports of cod accounted for 4% of the export volumes and 7% of the export values in 2024. Main export destinations were the UK and the EU.

Other non-food use (fish or marine mammal soluble[43]) exports in 2024 were valued at EUR 78 million, down by 7 % compared to 2023. Export volumes amounted to 38.100 tonnes, a 2% decrease from the year before. Exports of other non-food use accounted for 10% of the export volumes and 5% of the export values in 2024. The main export destination was the UK.

Fishmeal exports in 2024 were valued at EUR 66 million, down by 42% compared to 2023. Export volumes amounted to 39.500 tonnes an 38% decrease from the year before. Exports of fishmeal accounted for 11% of the export volumes and 4% of the export values in 2024. Main export destinations were Norway, Germany and Denmark.

Other groundfish (mostly fish fillets, dried, salted or in brine[44]) exports were valued at EUR 65 million, a decrease by 2% compared to 2023. Export volumes amounted to 11.600 tonnes an 15% decrease from the year before. Exports of other groundfish accounted for 3% of the export volumes and 4% of the export values in 2024. Main export destination was the EU.

[41] https://trap.fo/en/society-and-business/erhverv-og-arbejdsmarked-pa-faeroerne/
[42] https://hagstova.fo/en/business/agriculture-forestry-and-fishing/income-statement
[43] https://www.tariffnumber.com/2025/23099010#google_vignette
[44] https://www.tariffnumber.com/2025/030532

Other marine fish (mostly frozen fishmeat[45]) exports in 2024 were valued at EUR 59 million, a decrease by 34% compared to 2023. Export volumes amounted to 25.800 tonnes, a 50% decrease from the year before. Exports of other marine fish accounted for 7% of the export volumes and 4% of the export values in 2024. Main export destinations were Russia, Norway, China and the EU.

Herring exports in 2024 were valued at EUR 55 million, down by 21% compared to 2023. Export volumes amounted to 41.000 tonnes a 39% decrease from the year before. Exports of herring accounted for 11% of the export volumes and 4% of the export values in 2024. Main export destinations were Russia, the EU and Egypt.

Saithe exports in 2024 were valued at EUR 36 million, an increase by 3% compared to 2023. Export volumes amounted to 10.100 tonnes, 55% increase from the year before. Exports of saithe accounted for 3% of the export volumes and 2% of the export values in 2024. Main export destination was the EU.

Haddock exports in 2024 were valued at EUR 21 million, a decrease by 16% compared to 2023. Export volumes amounted to 6.200 tonnes, a 22% decrease from the year before. Exports of haddock accounted for 2% of the export volumes and 1% of the export values in 2024. Main export destination was the EU.

Halibut exports in 2024 were valued at EUR 19 million, an increase by 2% compared to 2023. Export volumes amounted to 3.300 tonnes an 11% decrease from the year before. Exports of halibut accounted for 1% of the export volumes and 1% of the export values in 2024. Main export destinations were China and the EU.

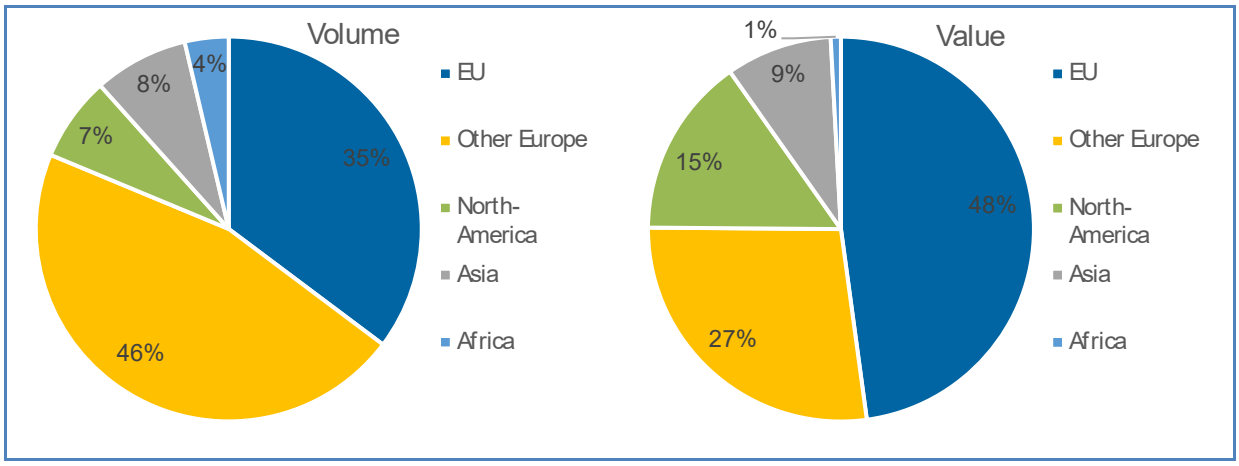
Table 42. **EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM FAROE ISLANDS BY MCS (tonnes, million EUR)**

	2020		2021		2022		2023		2024	
MCS	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Salmon	59.100	442	82.700	603	75.000	745	67.000	707	81.700	759
Mackerel	93.200	132	102.700	138	91.900	149	93.100	136	82.400	171
Cod	16.000	79	13.700	73	15.000	106	13.800	89	15.000	104
Other non-food use	25.300	36	31.000	49	44.000	88	38.700	84	38.100	78
Fishmeal	18.800	26	16.100	21	32.100	59	63.500	113	39.500	66
Other groundfish	12.000	60	15.800	77	13.700	78	13.700	67	11.600	65
Other marine fish	34.200	61	39.500	79	36.600	67	51.700	89	25.800	59
Herring	91.400	67	88.100	82	62.500	73	67.200	70	41.000	55
Saithe	9.200	30	7.600	27	8.000	39	6.500	35	10.100	36
Haddock	6.600	21	7.300	24	8.400	35	7.900	25	6.200	21
Halibut, other	2.800	12	2.400	11	2.700	15	3.700	19	3.300	19
Other	56.600	53	54.800	54	63.600	72	70	127	22.600	53
Total	**422.400**	**1.006**	**459.200**	**1.227**	**451.000**	**1.511**	**492.700**	**1.541**	**374.100**	**1.468**

Source: EUMOFA elaboration of Trade Data Monitor data.

[45] https://www.tariffnumber.com/2025/0304

Figure 48. **EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM FAROE ISLANDS TO MARKETS IN 2024**



Source: EUMOFA elaboration of Trade Data Monitor data.

6. 5. EU imports from the Faroes

EU Member States make up the largest market for Faroese exports. In addition, most goods and services imported to the Faroe Islands come from the European Union. The EU is also a close partner in international and regional fisheries management cooperation, as well as in European research cooperation and cross-border regional cooperation in Northern Europe. Formal relations between the EU and the Faroe Islands are currently based on three separate bilateral agreements dealing with fisheries, trade in goods and technological cooperation[46].

In 2024, EU imports of fishery and aquaculture products from the Faroe Islands amounted to 181.400 tonnes (product weight) valued at EUR 753 million. Compared to 2023 this was an 9% increase in terms of volume and a 3% increase in terms of value. Compared to 2020, import volumes increased by 23% and values increased by 83%. The largest EU importers in 2024 were Denmark (98.500 tonnes), the Netherlands (41.400 tonnes), Poland (12.000 tonnes) and Germany (9.000 tonnes).

The overall largest species in terms of both volume and value was **salmon** amounting to 47.900 tonnes valued at EUR 436 million in 2024. This was a 26% increase in volume and a 12% increase in value from the year before. Fresh whole salmon was the largest product accounting for 88% of the volume and 80% of the value. In 2024, the largest salmon importing EU countries were Denmark, Germany and the Netherlands, together covering 98% salmon import volumes from the Faroes.

In 2024, **cod** ranked second most valuable commercial species exported from the Faroe Islands. Total exports reached 13.100 tonnes, valued at EUR 102 million. This represented a 2% decline in volume compared to the previous year, while the value increased by 6%. The main products were salted dried fillets and frozen gutted cod. The European Union was the dominant market, with the Netherlands, Denmark, and Poland together accounting for 93% of all cod import volumes from the Faroe Islands.

In 2024, **mackerel** ranked third largest species in terms of export value but second in terms of volume. Total exports reached 18.100 tonnes, valued at EUR 40 million. Compared to the previous year, this represented a 5% decrease in volume and a 15% increase in value. Almost all the exports consisted of frozen mackerel, accounting for 99% of the volume and 98% of the value. The main EU destinations for Faroese mackerel were the Netherlands, Poland, and Latvia.

In 2024, **saithe** ranked the fourth largest species in terms of export value. Exports totalled 9.700 tonnes, valued at EUR 39 million. Compared to the previous year, this represented a significant 37% increase in volume and a modest 3% increase in value. Frozen fillets dominated the trade, accounting for 75% of the volume and 88% of the value. The main EU destinations for Faroese saithe were the Netherlands, Denmark, and Germany.

In terms of value, **fishmeal** was the fifth largest in 2024 amounting to 14.700 tonnes valued at EUR 25 million, which was a 54% decrease in volume and a 57% decrease in value. The largest fishmeal importing EU countries were Spain, Germany and Denmark.

[46] https://www.government.fo/en/foreign-relations/relations-with-the-eu/fisheries

In 2024, **other groundfish** ranked sixth largest category in terms of export value. Exports totalled 3.900 tonnes, valued at EUR 20 million. Compared to the previous year, this represented a 7% decrease in volume and an 11% decrease in value. Most of the exports consisted of dried and salted fillets. The main EU destinations for Faroese other groundfish were the Netherlands and Denmark.

In 2024, **cold-water shrimp** ranked seventh among Faroese seafood exports to the EU. Total exports reached 4.300 tonnes, valued at EUR 16 million. This represented a dramatic increase compared to the previous year, with volumes up by 291% and values up by 225%. All exports consisted of frozen shrimp. Denmark was the largest EU destination for Faroese cold-water shrimp.

In 2024, **other marine fish** ranked eighth among Faroese seafood exports. Total exports reached 4.100 tonnes, valued at EUR 14 million. Compared to the previous year, this represented a 17% increase in volume and a 14% increase in value. The products were mainly frozen meat of saltwater fish. The largest EU destinations for these exports were the Netherlands, Germany, and Poland.

Blue whiting ranked ninth in 2024 amounting to 40.300 tonnes valued at EUR 12 million which was a 157% increase in volume and a 131% increase in value. Products were mainly fresh blue whiting. The largest EU destination was Denmark.

Herring ranked tenth in 2024 amounting to 7.100 tonnes valued at EUR 10 million which was a 157% increase in volume and a 131% increase in value. Products were mainly round frozen herring and frozen meat of herring. The largest EU destinations were Poland, Latvia and Lithuania.

Greenland halibut ranked eleventh in 2024 amounting to 1.500 tonnes valued at EUR 9 million, which was a 157% increase in volume and a 131% increase in value. Products were mainly fresh and frozen Greenland halibut. The major EU destinations were Denmark and the Netherlands.

Table 43. **EU IMPORT FROM THE FAEROE ISLANDS BY MCS (volume in tonnes, value in million EUR)**

	2020		2021		2022		2023		2024	
MCS	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Salmon	19.700	179	36.900	281	43.900	422	37.900	389	47.900	436
Cod	13.000	71	13.300	78	13.500	99	13.300	96	13.100	102
Mackerel	16.500	28	15.100	23	26.500	48	19.100	35	18.100	40
Saithe (=Coalfish)	10.200	35	9.000	33	8.600	43	7.100	38	9.700	39
Fishmeal	9.700	14	12.300	16	14.500	27	31.800	58	14.700	25
Other groundfish	3.500	15	5.100	21	4.200	25	4.200	23	3.900	20
Shrimp, coldwater	1.800	7	800	3	900	4	1.100	5	4.300	16
Other marine fish	4.700	11	2.500	7	1.900	7	3.500	12	4.100	14
Blue whiting	19.100	6	48.900	14	0	0	15.700	5	40.300	12
Herring	13.300	11	8.600	9	6.100	7	12.300	12	7.100	10
Halibut, Greenland	1.200	7	1.300	6	900	5	1.400	8	1.500	9
Other	35.100	26	17.000	28	26.600	40	20	49	16.700	29
Total	**147.800**	**410**	**170.600**	**519**	**147.600**	**727**	**166.900**	**730**	**181.400**	**753**

Source: EUMOFA elaboration of Eurostat-Comext data.

In 2024, the average EU import price of Atlantic salmon from the Faroe Islands fell by 11%, reaching EUR 9,10/kg. For comparison, EU import price of Atlantic salmon from Norway fell by 3% to EUR 8,41/kg during the same period. From January to September 2025, the average import price dropped further by 18% compared to the same period in the previous year, down to EUR 7,60/kg, while import price from Norway fell by 15% to EUR 7,11/kg. This decline is likely due to general production growth in the EU which increased supply throughout 2025[47].

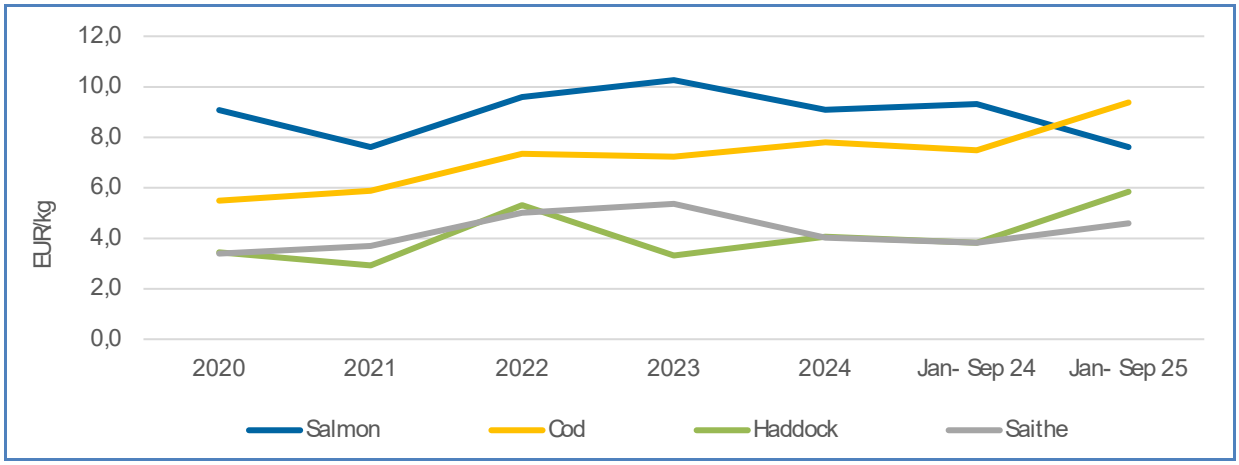
For whitefish, prices moved in the opposite direction. In 2024, the average EU import price of cod and haddock from the Faroe Islands rose by 8% and 22%, reaching EUR 7,80/kg for cod and EUR 4,10/kg for haddock. Meanwhile, the price of saithe decreased by 25%

[47] https://www.fishfarmermagazine.com/fish-farmer-all-content/analyst-sees-salmon-market-slipping-further/

compared to 2023, falling to EUR 4,00/kg. However, during January to September 2025, prices for all three species increased significantly: cod reached EUR 9,40/kg (25%), haddock EUR 5,90/kg (53%), and saithe EUR 4,60/kg (20%).

These price increases were driven by a drop in wild whitefish landings in 2025. Atlantic cod landings fell by approximately 11%, while haddock and hake were somewhat more stable but still affected. This scarcity created strong upward pressure on prices[48].

Figure 49. **AVERAGE EU IMPORT PRICES (EUR/kg)**



Source: EUMOFA elaboration of Eurostat-Comext data.

[48] https://www.intrafish.com/whitefish/low-quotas-and-high-stakes-the-biggest-whitefish-stories-of-2025/2-1-1923189

7. CASE STUDY: Norway lobster in the EU

Norway lobster is a valuable crustacean species, commercially important for several mixed fisheries along the EU coasts, from the North Sea to the Mediterranean. In 2023, EU catches amounted to 19.459 tonnes. Landings are seasonal, with higher volumes in the summer. Complementing the EU production, almost 20.000 tonnes of Norway lobster are imported each year from non-EU countries, mostly from the UK. Italy, France and Spain are the main consumption markets for this species in the EU-27.

7. 1. Biology resource and exploitation

Biology exploitation and management

Norway lobster (*Nephrops norvegicus*) is a crustacean species belonging to the genus Nephrops and is an arthropod in the order Decapoda. Found in the EU's Atlantic waters, from the Azores to the North Sea, it can also be found in the Mediterranean Sea (central and western). It commonly lives in burrows on muddy seabeds at depths ranging from a few metres to 500 m or more. It is nocturnal and its feed is mainly composed of crustaceans, worms, molluscs and echinoderms. Its normal size is between 10 and 20 cm in length, but it can reach up to 25 cm. After mating in summer, Norway lobster spawns in September and carries eggs under its tail until hatching in April–May. The larvae enter a non-swimming stage before becoming juvenile post-larval with a total length of approximately 16 mm. The juveniles settle on the bottom and enter the burrows of adults before creating their own burrows. They remain there for approximately a year, protected from predators, such as cod and haddock.[49]

The most important commercial stocks in European waters are located in the Irish Sea, the North Sea, the Bay of Biscay, and along the Atlantic–Iberian coast. The main gear used is the nephrops trawl, but seine nets and baited traps are also used (mostly in UK). Trawling occurs commonly at dawn and dusk, when the species is not burrowed in the bottom. Norway lobster fisheries occur in mixed fisheries with, for example, hake[50]. Norway lobster is managed under total allowable catches (TAC), and most of the EU quota is taken around the British Isles, the Bay of Biscay, the Norwegian Sea, and the Faroe Islands. In 2025, the agreed EU TAC reached 22.264 tonnes, a 28% decrease compared to 2024. This trend is due to a decreased TAC in the Bay of Biscay (-51% compared to 2024), in the Irish Sea (-25%), in the United Kingdom and Union waters (-47%), and in Skagerrak and Kattegat (-12%).

7. 2. Production

Global production

In 2023 global production of Norway lobster (*Nephrops* species) reached 50.869 tonnes. The main producers were the UK (60% of the global catches) and the EU-27 (38%). Other minor producers were Norway (627 tonnes) and Albania (less than 100 tonnes).

Over the last decade (2014-2023), global production of Norway lobster slightly decreased (8%) though with some interannual fluctuations. 2019 was a – peak year with 60.068 tonnes. Among main producing countries, stable production in the UK contrasted with a decreasing trend in the EU (12%). However, among smaller producers, Norwegian catches more than tripled over the period (217%) whereas Icelandic catches declined (100%).

[49] https://www.sciencedirect.com/topics/agricultural-and-biological-sciences/nephrops-norvegicus
[50] https://fish-commercial-names.ec.europa.eu/fish-names/species/nephrops-norvegicus_en

Table 44. **WORLD CATCHES OF NORWAY LOBSTER (volume in tonnes live weight)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
UK	30.523	25.884	31.439	30.880	25.892	34.567	23.753	32.179	29.041	30.569
EU-27	21.990	21.277	25.347	24.084	22.089	24.523	17.528	20.040	20.015	19.459
Norway	198	219	262	274	394	395	460	486	490	627
Albania	400	405	411	389	257	213	194	211	185	89
Others	2.066	1.588	1.525	1.330	837	370	298	178	91	125
Total	**55.176**	**49.373**	**58.985**	**56.957**	**49.470**	**60.068**	**42.233**	**53.095**	**49.822**	**50.869**

Source: FAO.

EU production

In 2023, EU-27 catches of Norway lobster reached 19.459 tonnes. The main EU producers were Ireland (35% of the total EU catch), Denmark (24%) and France (13%). Other significant producers were Sweden (8%), the Netherlands (4%), Spain (4%), and Italy (4%).

Over the last decade (2014-2023), the EU production of Norway lobster decreased by 12%. However, a ten-year peak was reached in 2016 at 25.347 tonnes. Among major fishing countries, Irish catches strongly decreased over the period (26%), French catches followed a similar trend (25%), whereas Danish catches increased (36%). The strong decline in Irish catches may be linked to reduced fishing opportunities in UK waters following Brexit from 2020 onwards.

Table 45. **EU CATCHES OF NORWAY LOBSTER (volume in tonnes live weight)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Ireland	9.081	8.378	9.364	8.063	7.216	8.172	5.126	6.396	6.235	6.733
Denmark	3.469	2.780	4.190	4.297	5.241	6.047	4.288	5.422	5.021	4.727
France	3.258	3.998	4.683	3.888	2.548	2.574	2.495	3.219	2.656	2.459
Sweden	1.270	1.136	1.370	1.422	1.861	1.904	1.797	1.638	1.446	1.581
Netherlands	1.154	1.160	1.464	1.487	837	1.409	939	5	1.285	872
Spain	574	609	545	556	682	628	508	725	734	727
Italy	1.489	1.355	1.294	1.707	1.781	1.420	713	756	610	710
Others	1.695	1.861	2.437	2.664	1.924	2.369	1.663	1.878	2.029	1.650
Total	**21.990**	**21.277**	**25.347**	**24.084**	**22.089**	**24.523**	**17.528**	**20.040**	**20.015**	**19.459**

Source: FAO.

7. 3. First sales in the EU

Over the 11 first months of 2025, reported first sales of Norway lobster in EU countries[51] amounted to a volume of 12.035 tonnes and a value of EUR 137 million[52]. The main EU countries in terms of first-sales volume and value were by far Denmark (38% of total volume and 26% of the value) and Ireland (31% and 31%), followed by France (14% and 10%). Most of first sales consist of whole fresh (53% of the total volume), frozen (27%) or live (20%) Norway lobster. In 2025, first sales decreased by 21% in volume and 28% in value compared to 2022 over the same period (January to November[53]). This trend was observed in all major producing countries. Declines were particularly sharp between 2024 and 2025, with first sales decreasing by 11% in volume and by 8% in value in one year, while prices increased slightly (3% between 2024 and 2025). French first sales were the most impacted with a 35% decline in volume in one year, and a 21% decline in value, resulting in a 22% increase in price in 2025. This rise was mainly driven by the 26 % price increase in one year of size 4 Norway lobster (smallest category size, equivalent to a minimum of 40 units per kg[54]).

In 2025, the most important places of sale[55] for Norway lobster in volume terms were Göteborg in Sweden (66% of the total volume in Sweden), Clogherhead and Kilmore Quay in Ireland (22% and 15% of the total volume in Ireland, respectively), Lorient, le Guilvinec and

[51] Denmark, France, Ireland, Spain, Sweden,, Italy, Netherlands, Portugal, Belgium, Croatia, Greece, and Germany.
[52] Source: EUMOFA.
[53] Last month available in 2025
[54] https://fish-commercial-names.ec.europa.eu/fish-names/species/nephrops-norvegicus_en#ecl-accordion-header-market-stands
[55] Places of sale for Denmark are not available.

Concarneau in France (27%, 23%, and 22% of the total volume in France, respectively), Urk in the Netherlands (86% of the national first-sale volume) and A Coruña and Ayamonte in Spain (15% each of the national first-sale volume).

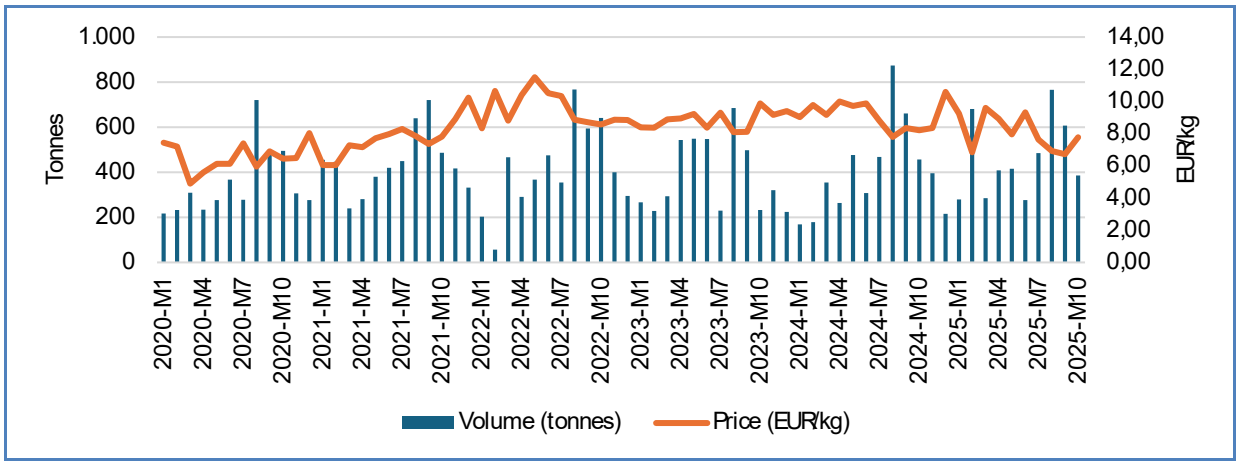
First sales data shows a significant seasonal pattern with higher volumes sold in summer and lesser volumes in winter. Price trends are related to these volume fluctuations with higher prices in winter and lower prices in summer when higher volumes are available. However, this price pattern is not so obvious in Denmark with smaller monthly fluctuations.

In **Denmark**, over the 2020-2025 period, monthly first sales of Norway lobster peaked at 874 tonnes in July 2024 and reached their lowest level at 57 tonnes in February 2022. Monthly prices of Norway lobster fluctuated between 4,90 and 11,51 EUR/kg.

In **Ireland**, over the 2020-2025 period, monthly first sales of Norway lobster peaked at approximately 712 tonnes in May 2025 and reached their lowest level at 84 tonnes in January 2023. Monthly prices of Norway lobster fluctuated between 5,72 and 20,20 EUR/kg. First sale prices in Ireland are an average of different states of preservation and presentation. The Irish fleet for Norway lobster includes freezer trawlers, enabling the landing of tailed frozen products mostly intended for export, reaching higher prices.

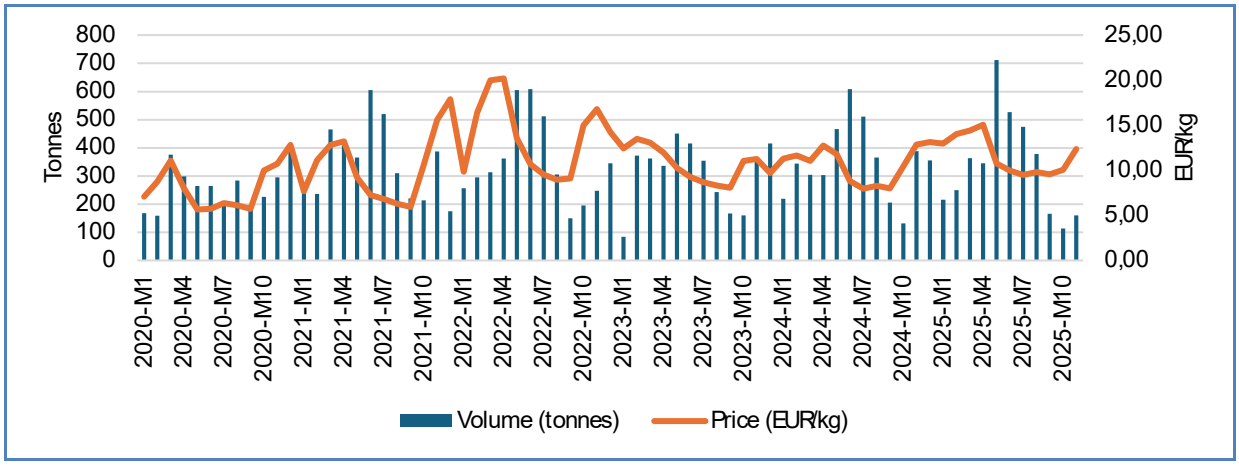
In **France**, over the 2020-2025 period, monthly first sales of Norway lobster peaked at approximately 544 tonnes in June 2021 and reached their lowest level at 20 tonnes in January 2025. Monthly prices of Norway lobster fluctuated between 9,23 and 22,71 EUR/kg.

Figure 50. **FIRST SALES: NORWAY LOBSTER IN DENMARK (volume in tonnes net weight and price in EUR/kg)**



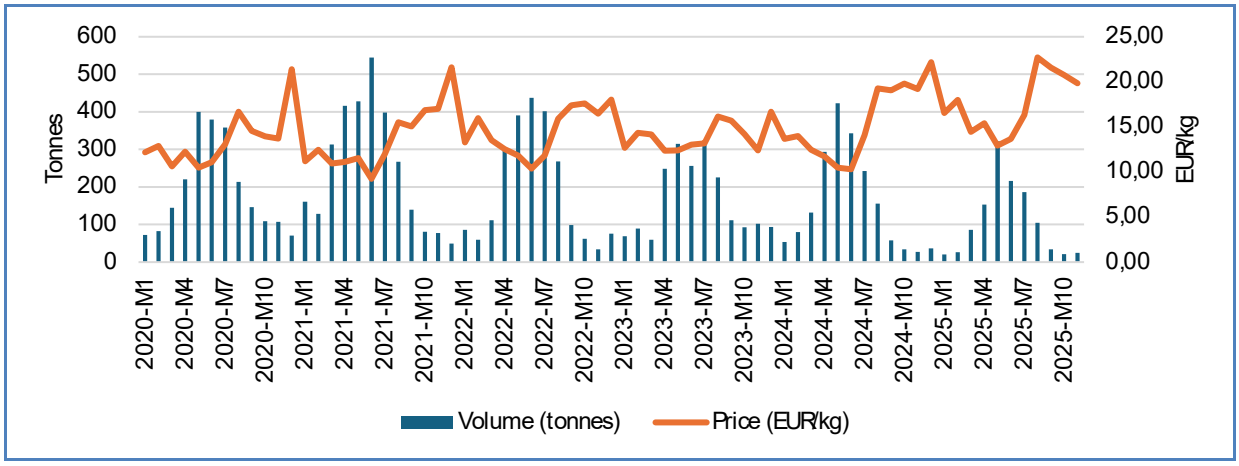
Source: EUMOFA.

Figure 51. **FIRST SALES: NORWAY LOBSTER IN IRELAND (volume in tonnes net weight and price in EUR/kg)**



Source: EUMOFA.

Figure 52. **FIRST SALES: NORWAY LOBSTER IN FRANCE (volume in tonnes net weight and price in EUR/kg)**



Source: EUMOFA.

7. 4. International trade

In the Combined Nomenclature (CN) used for registering EU import-export data, Norway lobster is specifically reported as fresh, frozen and dried/salted/smoked/in brine.[56]

Over the first 10 months of 2025[57], the EU-27 imported 10.254 tonnes of Norway lobster at a value of EUR 138 million, mostly frozen (57% of total value of imports) and fresh (43%). The major provider of Norway lobster to the EU market was by far the UK, accounting for 90% of the extra-EU import value, followed by Norway (7%), and Morocco (2%). France was the main importer accounting for 77% of extra-EU import value of Norway lobster, followed by Spain (9%), Italy and Ireland (4% each), and Denmark (3%). Overall, extra-EU imports of Norway lobster increased significantly in volume (44%) and in value (121%) since 2020 (over the same period, from January to October), resulting in a 53% price rise. Over the last year, imports from third countries increased by 16% in volume and by 15% in value, while prices remained stable. Imports from the United Kingdom more than doubled in value since 2020 (124%), and rose by 43% in volume, driven mainly by the progression of frozen imports (150% in value and 59% in volume). The recent increase of frozen imports of Norway lobster from the United Kingdom results mainly from the impact of the implementation of new custom policies following Brexit, making it difficult to export live or fresh products[58].

Over the same period, EU exports to third countries amounted to 2.528 tonnes at a value of EUR 30 million. Frozen products accounted for 98% of the total extra-EU export value, and fresh Norway lobster accounted for 2% of the total extra-EU export value. The main destinations in value terms were China (41% of the total value), followed by the UK (11%), India (10%), Thailand (10%), and Iceland (9%). Ireland (71% of the extra-Export value), Denmark (12%) and France (7%) were the main EU exporters of Norway lobster to third countries. Extra-EU exports have risen significantly since 2020 (213% in volume and 291% in value over the same period[59]), resulting in a 25% increase in price over the same period.

[56] 03061500 - Frozen Norway lobsters "*Nephrops norvegicus*", even smoked, whether in shell or not, incl. lobsters in shell, cooked by steaming or by boiling in water
03063400 - Norway lobsters "*Nephrops norvegicus*", whether in shell or not, live, fresh or chilled
03069400 - Norway lobsters "*Nephrops norvegicus*", whether in shell or not, dried, salted, smoked or in brine, incl. lobsters in shell, cooked by steaming or by boiling in water

[57] October is the last month available in 2025 for trade data

[58] Langoustine : un marché de plus en plus dépendant de l'import - Produits de la mer

[59] From January to October included

Table 46. **EVOLUTION OF EXTRA-EU TRADE OF NORWAY LOBSTER (tonnes, 1.000 EUR, EUR/kg, evolutions are given for the period from January to October of each year)**

Flow		2020	2021	2022	2023	2024	2025*	Evol. 2025/2020	Evol. 2025/2024
Imports	Volume	8 901	13 953	12 395	10 986	10 736	10.254	44%	16%
	Value	80 875	136 760	156 468	142 944	146 910	138.362	121%	15%
	Price	**9,09**	**9,80**	**12,62**	**13,01**	**13,68**	**13,49**	**53%**	**0%**
Exports	Volume	958	1 303	1 059	1 429	2 021	2.528	213%	47%
	Value	9 384	12 956	15 627	18 087	23 714	29.756	291%	53%
	Price	**9,79**	**9,95**	**14,76**	**12,66**	**11,73**	**11,77**	**25%**	**4%**

EUMOFA elaboration of Eurostat-COMEXT data.
**From January to October.*

From January to October[60] 2025, intra-EU exports of Norway lobster products amounted to 16.185 tonnes at a value of EUR 203 million. Intra-EU trade was dominated by frozen products, which accounted for 75% of the export value, whereas fresh products represented only 22%. The main exporting countries within the EU were France (29% of intra-EU export value), Denmark (25%) and Ireland (22%). Italy was the main destination market, absorbing 48% of intra-EU export value, ahead of Spain (23%) and France (7%).

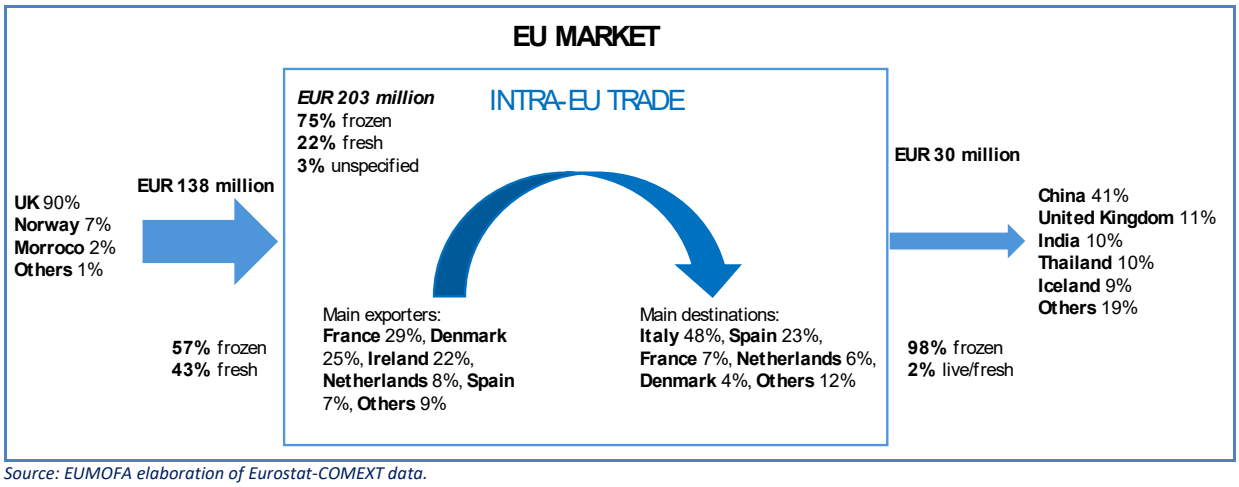
Between 2020 and 2022 (January-October period), intra-EU trade expanded sharply, with export volumes increasing by 99% and export values by 164%, resulting in a 33% increase in average export prices. However, since 2022 intra-EU trade has experienced a notable downturn, with a 17% decline in volume and a 16% decrease in value (January-October comparison). Over the same period, the average intra-EU export price of Norway lobster remained broadly stable (+1%).

Table 47. **EVOLUTION OF INTRA-EU TRADE OF NORWAY LOBSTER (tonnes, 1.000 EUR, EUR/kg, evolutions are given for the period from January to October of each year)**

Flow		2020	2021	2022	2023	2024	2025*	Evol. 2025/2020	Evol. 2025/2024
Exports	Volume	12 491	22 348	23 438	20 063	19 407	16.185	30%	-17%
	Value	118 427	228 533	293 314	248 041	248 538	202.855	71%	-18%
	Price	**9,48**	**10,23**	**12,51**	**12,36**	**12,81**	12,53	32%	-2%

Source: EUMOFA elaboration of Eurostat-COMEXT data.
**From January to October.*

Figure 53. **THE NORWAY LOBSTER TRADE MARKET IN 2025 (from January to October), IN VALUE**



Source: EUMOFA elaboration of Eurostat-COMEXT data.

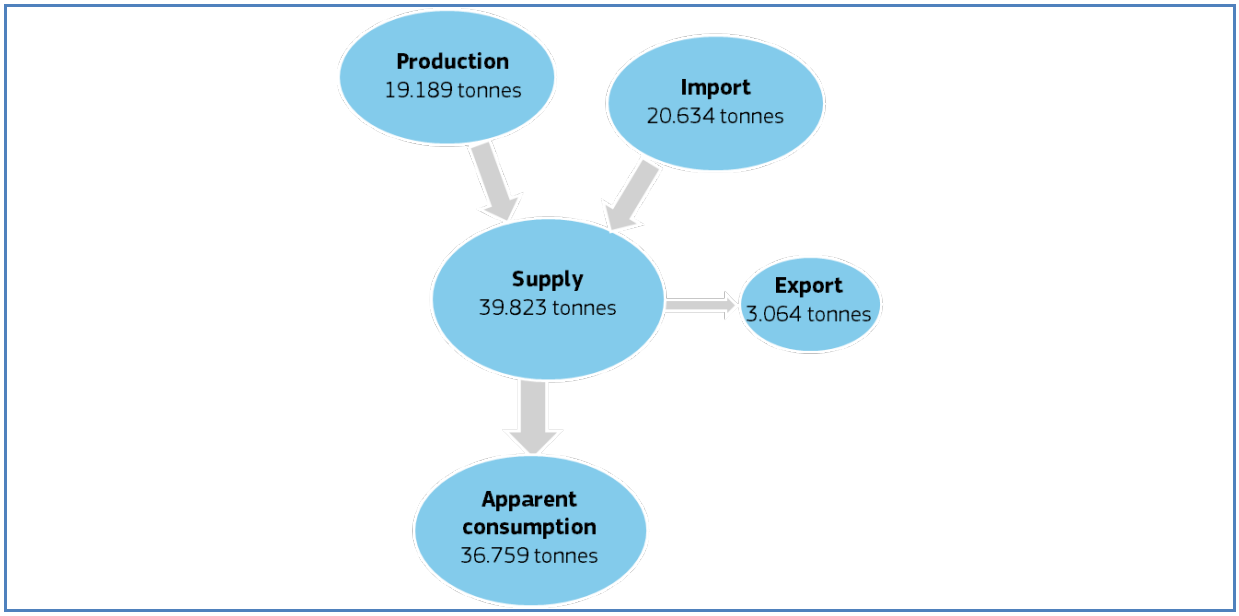
[60] Last month available in 2025

7. 5. Apparent consumption

Apparent consumption of Norway lobster at EU level was estimated at 36.759 tonnes live-weight equivalent (LWE) in 2023 (+34% compared to 2020), equivalent to a per capita consumption of 0,08 kg. Supply reached 39.823 tonnes LWE, originating slightly more from imports (52% of the volume) than from fisheries (48% of the volume). Exports represented only 8% of overall supply. In the same year, apparent consumption accounted for 92%. However, it is worth noting that the calculation of apparent consumption of Norway lobster faces the issue of different presentations of products under the same CN codes: the same code may cover tailed or whole products. The conversion rate applied to calculate the live weight equivalent of frozen Norway lobster is 2,4 based on EUMOFA[61]. The result thus provides a maximum of apparent consumption.

At MS level, the main consumption markets of Norway lobster were Italy with a consumption estimated at 22.353 tonnes in 2023 LWE, equivalent to 0,379 kg per capita, followed by France (10.289 tonnes LWE; 0,151 kg per capita), and Spain (5.837 tonnes LWE; 0,121 kg per capita). While the French and Spanish markets rely to a lesser extent on imports and national catches (respectively 11% and 9% of the supply in 2023), the Italian supply of Norway lobster originates almost exclusively from imports (97%).

Figure 54. **APPARENT CONSUMPTION OF NORWAY LOBSTER IN 2023 (tonnes, LWE)**



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

[61] https://eumofa.eu/documents/20124/35680/Metadata+2+-+DM+-+Annex+7+CF+per+CN8.pdf/7e98ac0c-a8cc-4223-9114-af64ab670532?t=1681387953349

Manuscript completed in January 2026
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Luxembourg: Publications Office of the European Union, 2026

PDF ISSN 2314-9671 KL-01-26-011-EN-N

ISBN: 978-92-68-36336-2 DOI: 10.2771/7599021

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

Global highlights: European Commission

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

First sales: The Thünen Institute, European Parliament, ICES.

Case studies: Faroese Seafood, Tehe Government of the Faroe Islands, Global Seafood, Trap, Guide to Faroe Islands, The Systemic Risk Council, Statistics Faroe Islands, European Customs Portal, Fish Farmer, IntraFish, FAOSTAT, ScienceDirect, European Commission, PDM.

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

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

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

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

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

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

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