European Commission

Monthly Highlights

No. 2/2026

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

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Contents

Global highlights
Global news from fisheries and aquaculture sectors

First sales in Europe
Analysis of first sales in reporting countries

Consumption
Bivalves

Macroeconomic context
Marine fuel, consumer prices and exchange rates

Extra-EU imports
Analysis of extra-EU imports of bivalves in EU Member States

Case studies
1. Shark and rays in the EU
2. Cod in Portugal

Maritime Affairs and Fisheries

1. GLOBAL HIGHLIGHTS

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EU/Ocean Observation: On 19 January 2026, the European Commission launched a call for evidence to shape the European Ocean Observation Initiative, a cornerstone of the European Ocean Pact. The call is open until 27 February 2026. The Initiative aims to improve EU-wide coordination and reliable marine data collection/sharing, bolster Europe's leadership and autonomy across the ocean-knowledge value chain, streamline initiatives, and deliver an operational European Digital Twin of the Ocean. It will advance technologies and governance around assets such as EMODnet, WISE-Marine and Copernicus Marine, develop the European Ocean Observing System, and strengthen public engagement with ocean science.[1]

EU/High Seas Treaty: On 16 January 2026, the Commission announced the entry into force on 17 January 2026 of the Agreement on Biodiversity Beyond National Jurisdiction (BBNJ). The Treaty enables the establishment of high-seas MPAs, regulation of marine genetic resources, environmental impact assessments, and capacity-building/technology transfer for developing countries. It has 81 Parties (including the EU and 16 Member States) and 145 signatories. The EU co-chair of the High Ambition Coalition will help prepare the first COP within a year and support implementation via the EUR 40 million Global Ocean Programme (initial EUR 10 million for technical assistance), while also contributing to the BBNJ Secretariat hosted by UN DOALOS.[2]

EU/Recreational Fisheries: On 12 January 2026, the Commission announced the launch (on 9 January 2026) of RecFishing, an EU-wide digital system to standardise marine recreational catch data under the revamped 2023 Fisheries Control Regulation. Covering 22 coastal Member States, it combines a central EU server for harmonised monthly/annual submissions with a mobile app that 13 countries (BE, CY, DK, FR, DE, IE, IT, MT, NL, PL, PT, RO, SE) will deploy; the remaining nine will use national apps. The phased rollout will require anglers to register, and report catches as apps go live, improving scientific advice, stock management and transparency across sectors.[3]

EU/IUU Control: On 12 January 2026, the Commission announced the entry into force on 10 January 2026 of CATCH, a fully digital catch-certification system for seafood imports. Replacing paper certificates, CATCH harmonises and streamlines import controls across the EU, improving traceability and reducing the risk of illegal, unreported and unregulated (IUU) products entering the market. As part of the European Ocean Pact, it enables faster data exchange between operators and authorities, supports cooperation among Member States, and lowers administrative burden while helping to ensure that all imported fishery products meet EU standards.[4]

EU/Aquaculture: On 30 December 2025, DSM-Firmenich ANH announced the EU authorisation of Hy-D® (25-hydroxycholecalciferol, 25-OH-D3) for salmonids, other fish species, and all animal species. Following EFSA confirmation of its safety and efficacy, Hy-D, produced from *Saccharomyces cerevisiae* CBS 146.008, has been permitted as a nutritional additive in aquafeed across the EU since 31 December 2025. As a bioavailable vitamin D3 metabolite that bypasses hepatic conversion, Hy-D aims to support growth, immunity, welfare, and product quality in aquaculture.[5]

FAO/Market Intelligence: On 24 December 2025, FAO GLOBEFISH reviewed its 2025 milestones, expanding market transparency via 4 GLOBEFISH Highlights, 52 quarterly species reports, 12 European Fish Price Reports, 4 Chinese price reports, and 4 GLOBEFISH Insights, while upgrading digital tools (European price dashboard, HS-code platform, trade-agreement and food-safety resources) and engaging at 33 global events. Capacity-building is advanced on market access, social responsibility and sustainability, supporting FAO's Blue Transformation and SDG 14.7.1. The report also drew on EUMOFA data, which were used as a key source and cited accordingly. For 2026-27, plans include a new GLOBEFISH Market Hub for export requirements (EU/US/China), expanded training (prioritising youth, women, and small-scale actors), a global fish-price monitoring system, contributions to SOFIA 2026, and broadened outreach through major events and a new expert webinar series.[6]

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[1] https://oceans-and-fisheries.ec.europa.eu/news/commission-seeks-feedback-ocean-observation-initiative-2026-01-19_en
[2] https://oceans-and-fisheries.ec.europa.eu/news/high-seas-treaty-enters-force-milestone-ocean-conservation-2026-01-16_en
[3] https://oceans-and-fisheries.ec.europa.eu/news/eu-launches-recfishing-digital-system-simplify-recreational-fishing-data-collection-2026-01-12_en
[4] https://oceans-and-fisheries.ec.europa.eu/news/new-digital-certification-system-tackle-illegal-fishing-2026-01-12_en
[5] https://www.seafoodsource.com/news/aquaculture/eu-confirms-safety-of-hy-d-for-salmonids-authorizes-its-use-in-aquaculture
[6] https://www.fao.org/in-action/globefish/news-events/news/news-detail/2025-milestones--advancing-global-market-intelligence-for-fisheries-and-aquaculture-products/en

2. MACROECONOMIC CONTEXT

2. 1. Marine fuel

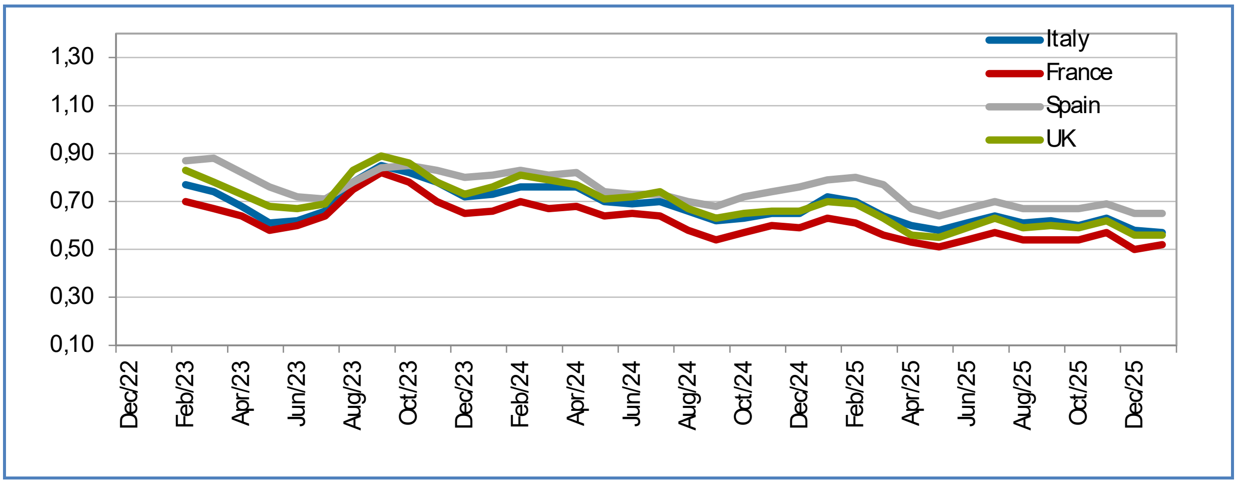
Average prices for marine fuel in **January 2026** ranged between 0,56 and 0,65 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 0,4% compared with the previous month and decreased by an average of 19,0% compared with the same month in 2025.

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)*	0,52	4%	-17%
Italy *(ports of Ravenna and Livorno)*	0,57	-2%	-21%
Spain *(ports of A Coruña and Vigo)*	0,65	0%	-18%
The UK *(ports of Grimsby and Aberdeen)*	0,56	0%	-20%

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 December 2025 the EU annual inflation rate was 2,3%, down from 2,4% compared to November 2025. A year earlier, the rate was 2,7%.

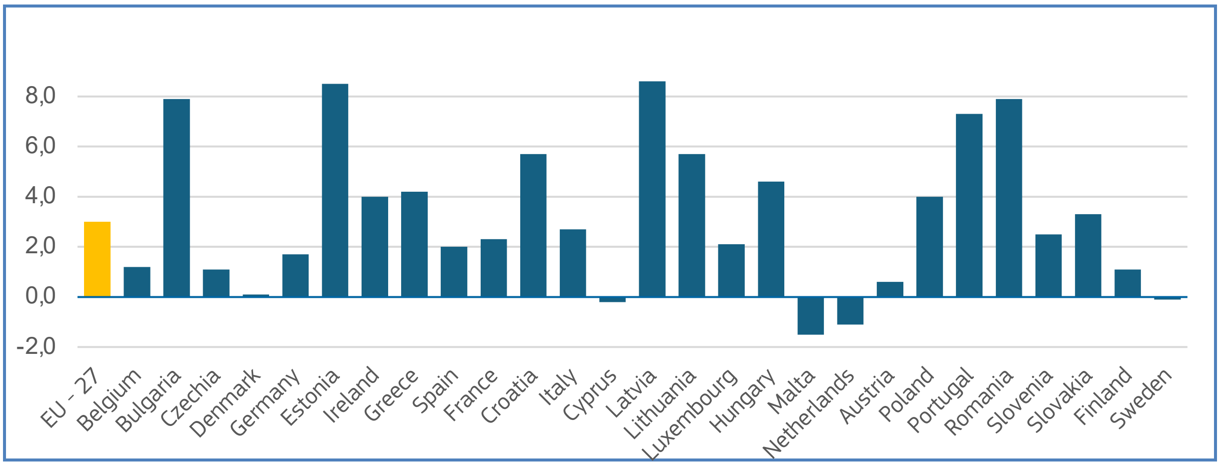
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR DECEMBER 2025, COMPARED WITH DECEMBER 2024**

Lowest inflation rates		Highest inflation rates	
Cyprus	+0,1%	Romania	+8,6%
France	+0,7%	Slovakia	+4,1%
Italy	+1,2%	Estonia	+4,0%

Source: Eurostat.

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

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



Source: Eurostat.

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

	Dec 2023	Dec 2024	Nov 2025	Dec 2025	Change from Nov 2025	Change from Dec 2024
Food and non-alcoholic beverages	141,32	144,70	148,80	148,80	0,0%	2,8%
Fish and seafood	138,83	142,38	146,31	146,59	0,2%	3,0%
Fresh or chilled fish	131,42	137,77	140,58	142,45	1,3%	3,4%
Frozen fish	137,68	137,30	144,07	144,08	0,0%	4,9%
Fresh or chilled seafood	126,91	130,35	133,76	134,23	0,4%	3,0%
Frozen seafood	116,63	115,35	120,04	117,74	-1,9%	2,1%
Dried, smoked or salted fish and seafood	137,02	142,16	149,94	148,53	-0,9%	4,5%
Other preserved or processed fish and seafood and fish and seafood preparations	135,91	137,89	139,60	139,15	-0,3%	0,9%

Source: Eurostat.

2.4. Exchange rates

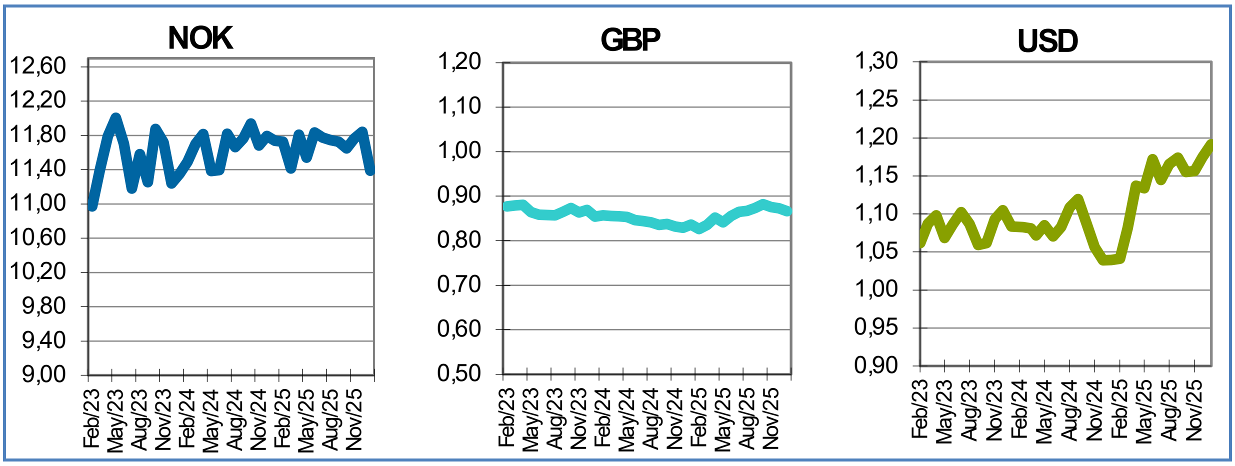
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Jan 2024	Jan 2025	Dec 2025	Jan 2026
NOK	11,3510	11,7373	11,8430	11,3885
GBP	0,8544	0,8361	0,8726	0,8662
USD	1,0837	1,0393	1,1750	1,1919

Source: European Central Bank.

In January 2026, the euro appreciated against the US dollar (1,4%) and depreciated against the Norwegian krone (3,8%) and the British pound sterling (0,7%), relative to the previous month. For the past six months, the euro has fluctuated around 1,1698 against the US dollar, 11,6863 against the Norwegian krone and 0,8726 against the British pound sterling. Compared with January 2025, the euro has appreciated 14,7% against the US dollar and 3,6% against the British pound sterling and depreciated 3,0% 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 - Nov 2025 vs Jan - Nov 2024): Belgium, Finland, France, and Portugal recorded increases in both first-sales value and volume. The highest increase both in volume and value was observed in Finland due mainly to herring,

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

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

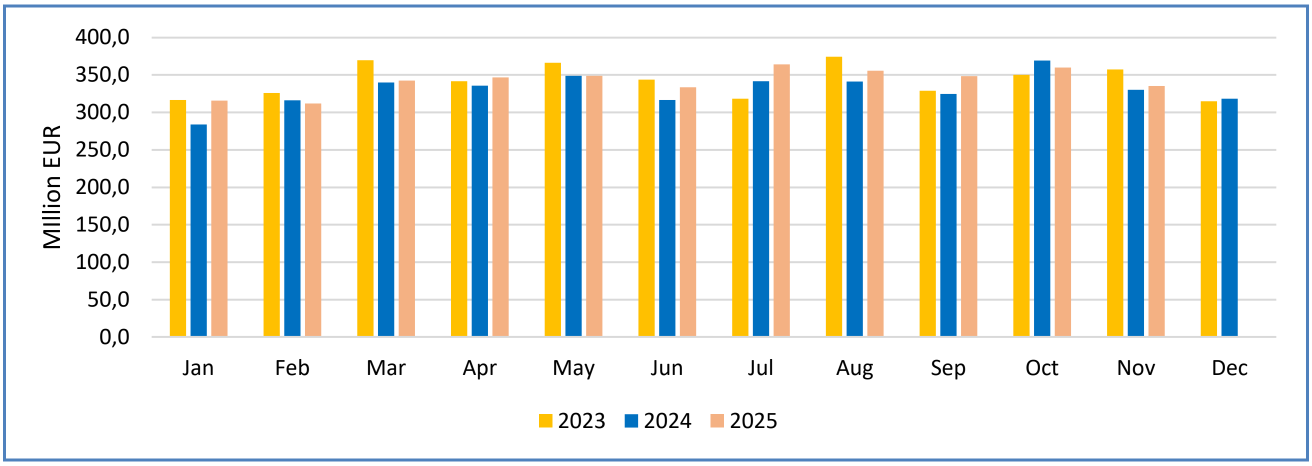
	January – November 2023		January – November 2024		January – November 2025		Change from January – November 2024	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	12.848	78,95	10.898	64,14	11.105	69,48	2%	8%
Bulgaria	2.757	1,45	3.138	2,40	3.009	2,47	-4%	3%
Croatia	48.141	54,86	38.231	49,56	31.422	47,47	-18%	-4%
Cyprus	629	3,08	558	2,87	539	2,46	-3%	-14%
Denmark	699.567	505,56	663.882	481,49	659.992	508,11	-1%	6%
Estonia	66.070	27,49	58.094	28,92	49.722	23,05	-14%	-20%
Finland	52.446	15,88	41.924	15,37	53.744	16,82	28%	9%
France	231.903	658,50	222.990	642,85	227.668	693,00	2%	8%
Germany	29.019	68,29	23.886	50,56	11.749	60,30	-51%	19%
Ireland	170.859	236,00	182.459	237,41	179.043	253,55	-2%	7%
Italy	67.429	299,22	56.845	255,88	47.693	238,17	-16%	-7%
Latvia	40.731	11,80	35.897	13,05	35.799	14,33	0%	10%
Lithuania	301	0,63	313	0,45	211	0,29	-32%	-34%
Netherlands	60.818	135,65	22.286	141,03	25.098	134,56	13%	-5%
Portugal	117.489	281,67	109.690	271,67	110.613	291,05	1%	7%
Spain	395.162	1.321,35	376.751	1.303,44	350.899	1.328,82	-7%	2%
Sweden	125.062	93,42	104.204	88,12	83.089	79,14	-20%	-10%
Norway	2.824.076	3.021,59	2.635.852	2.952,95	2.004.321	2.738,06	-24%	-7%
United Kingdom	340.793	660,43	352.728	673,57	342.405	789,22	-3%	17%

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–November 2025, 17 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section "First sales in Europe" are extracted from EUMOFA.

The overall value of first sales in the period January - November in 2025 was EUR 3,76 billion, a 3% increase compared to 2024, and a 1% decrease compared to 2023. Overall volume was 1,9 million tonnes, a 4% decrease compared to 2024, and an 11% decrease compared to 2023.

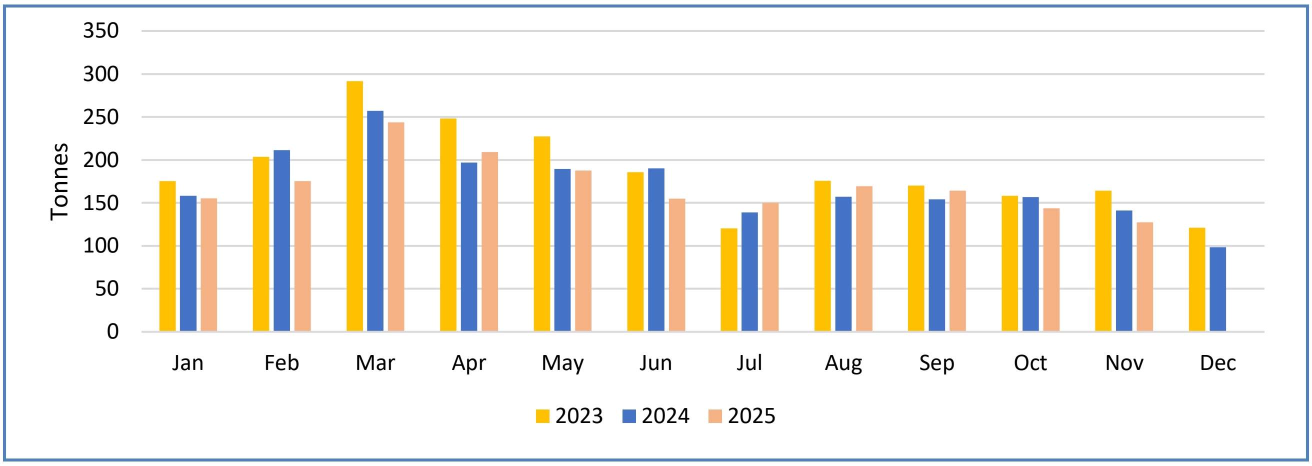
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VALUE FROM THE REPORTING COUNTRIES[8] (value in million EUR)**



Between January and November 2025, monthly first-sales value was higher in most months compared to 2024 except in February and October. Compared to 2023, values were generally lower except in April, July, September and October. In 2025, first-sales volume decreased compared to the same period in both 2024 and 2023, except in April, July, August and September in 2024 and July 2023 when volumes exceeded 2025 levels. Over the three-year period assessed, March was the month showing the highest peaks in first sale volume.

The increase in first-sales value compared to 2024 was mainly driven by small pelagics (+10%). Compared to 2023, first-sales value in 2025 decreased by 1%, due mainly to the sharp decrease in flatfish (-14%). Similarly, in the same period in 2025, the decrease in first-sales volume was mainly due to groundfish, which fell by -9% in comparison to 2024 and by -16% in comparison to 2023.

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



[8] During January–November 2025, 17 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-November 2025, first-sales value of “Bivalves and other molluscs and aquatic invertebrates” amounted to EUR 229,7 million, a stable value compared to the same period in 2024. First-sales volume reached 81.565 tonnes, a decrease of 4% compared to 2024. Scallop and whelk[11] were the main commercial species driving the increase in value of the commodity group (+11%, +6%, respectively), while the decrease in volume was mainly due to clam (-18%).

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

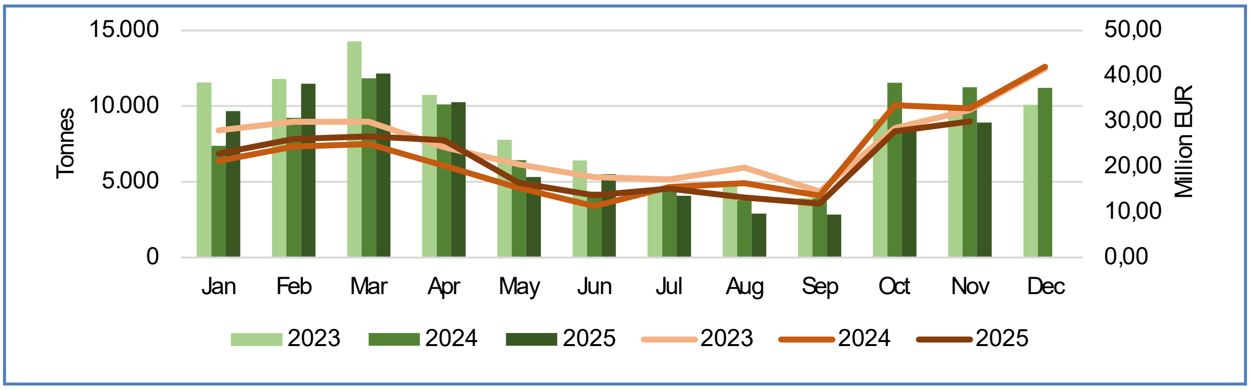


Table 6. **FIRST SALES PRICES OF BIVALVES MAIN COMMERTIAL SPECIES (MCS) (JAN-NOV 2024 AND JAN-NOV 2025)**

Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
France	Scallop	2,37 EUR/kg	2,31 EUR/kg	-3%
France	Other molluscs and aquatic invertebrates*	2,87 EUR/kg	3,62 EUR/kg	+26%
France	Clam	1,67 EUR/kg	1,55 EUR/kg	-7%

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

Cephalopods

In 2025, first-sales value of “Cephalopods” totalled EUR 300,4 million, a 6% increase compared to 2024. First-sales volume totalled 47.247 tonnes, a decrease of 3% compared to 2024. Octopus (+30%) was the main commercial species driving the growth in first-sales value, while squid and cuttlefish were the main species (-15%) 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 belongs to the species group „other molluscs and aquatic invertebrate“. Of total first-sales value in 2025, whelk represents 70% of total first-sales value.

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

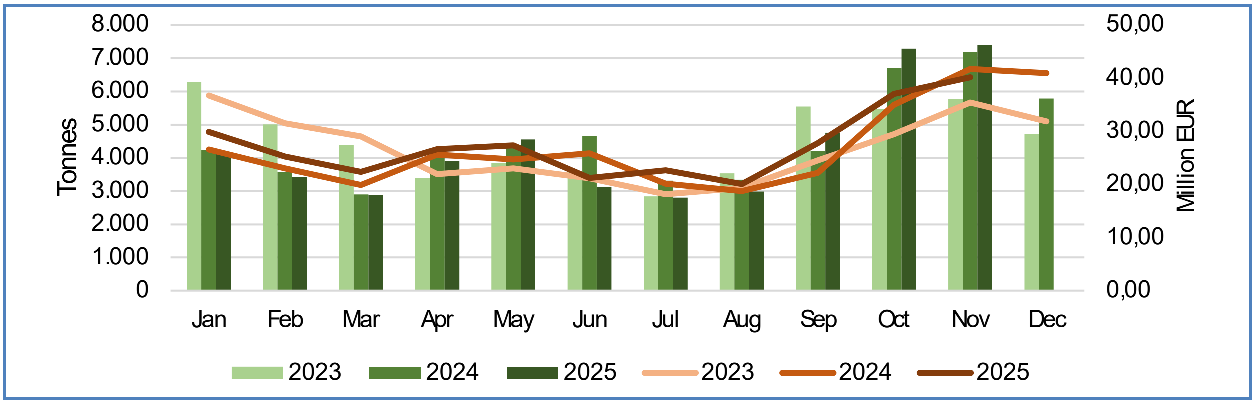


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN-NOV 2024 AND JAN-NOV 2025)**

Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
France	Octopus	6,94 EUR/kg	7,17 EUR/kg	+3%
Spain	Octopus	7,89 EUR/kg	8,86 EUR/kg	+12%
Portugal	Octopus	7,20 EUR/kg	8,00 EUR/kg	+11%

Crustaceans

In 2025, first-sales value of "Crustaceans" totalled EUR 591,9 million, a 4% increase in value compared to 2024. First-sales volume amounted to 68.136 tonnes, an increase of 2% compared to 2024. Shrimp *Crangon* spp. (+21% and +25%) was the main product responsible for the increase in first-sales value and volume.

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

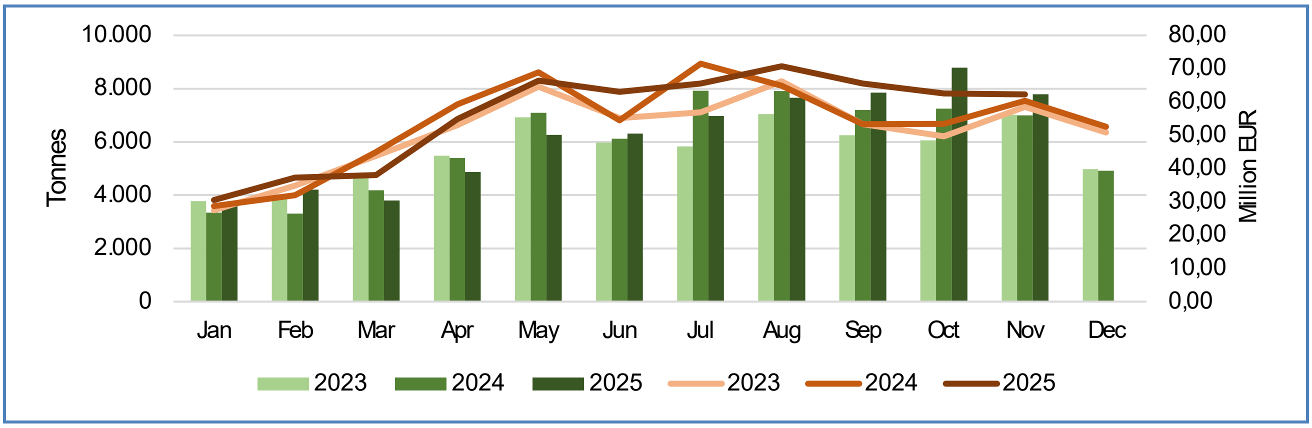


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-NOV 2024 AND JAN-NOV 2025)**

Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
Germany	Shrimp *Crangon* spp.	7,73 EUR/kg	6,51 EUR/kg	-16%
Spain	Miscellaneous shrimp	22,46 EUR/kg	27,14 EUR/kg	+21%
Spain	Deep-water rose shrimp	9,29 EUR/kg	8,23 EUR/kg	-11%

Flatfish

In 2025, first-sales value of "Flatfish" totalled EUR 306,2 million, a 1% decrease compared to 2024. First-sales volume amounted to 41.088 tonnes, a decrease of 8% compared to 2024. European plaice (-23% and -12%) was the main product contributing to the decrease in first-sales value and volume.

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

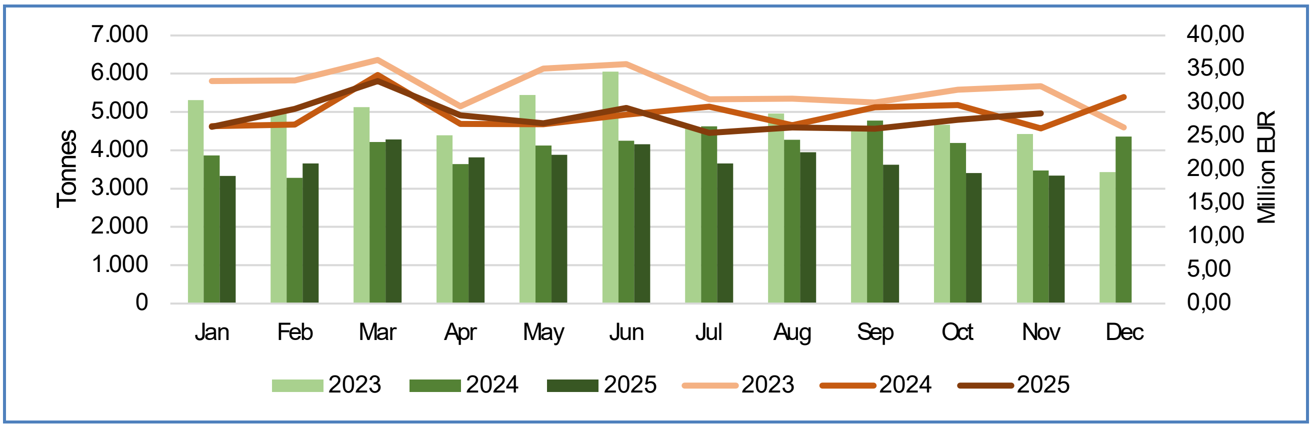


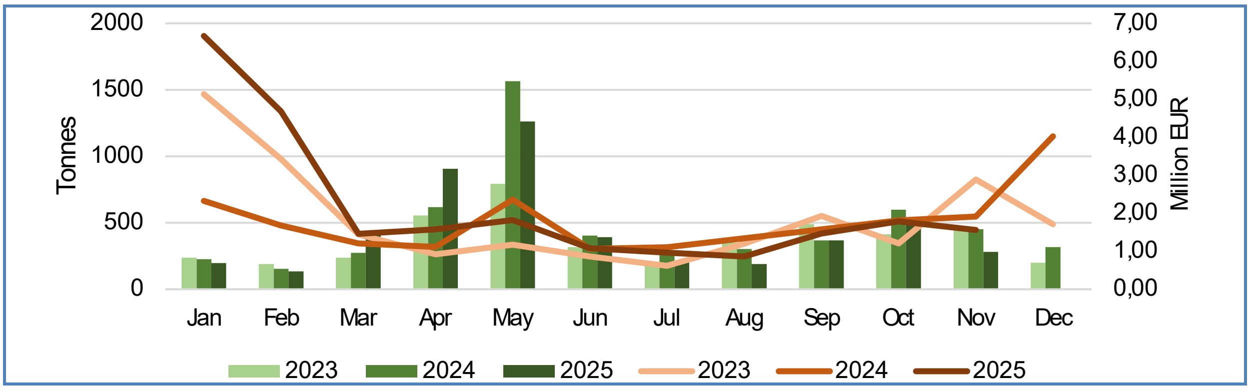
Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN-NOV 2024 AND JAN-NOV 2025)**

Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
Denmark	European plaice	2,73 EUR/kg	2,48 EUR/kg	-9%
Germany	Greenland halibut	3,56 EUR/kg	6,35 EUR/kg	+79%
Netherlands	European plaice	2,61 EUR/kg	2,11 EUR/kg	-19%

Freshwater fish

In 2025, first-sales value of "Freshwater fish" reached EUR 23,9 million, marking a 37% increase compared to 2024. First-sales volume amounted to 4.831 tonnes, a decrease of 7% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+85%), while the category "other freshwater fish"[12] was the main contributor to the decrease in first-sales volume (-10%).

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



[12] „Other freshwater fish" comprises 31 products, and together round goby, European perch and roach represent 73% of first-sales volume.

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

Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
France	Eel*	23,52 EUR/kg	52,07 EUR/kg	+121%
Estonia	Pike-perch	3,90 EUR/kg	4,07 EUR/kg	+4%
Denmark	Eel	9,64 EUR/kg	9,39 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 625,2 million, an increase of 3% compared to 2024. First-sales volume amounted to 525.346 tonnes, a decrease of 10% compared to 2024. The category "other groundfish"[13] (+13%) was mainly responsible for the increase in first-sales value, while blue whiting (-10%) was mainly responsible for the decrease in first-sales volume.

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

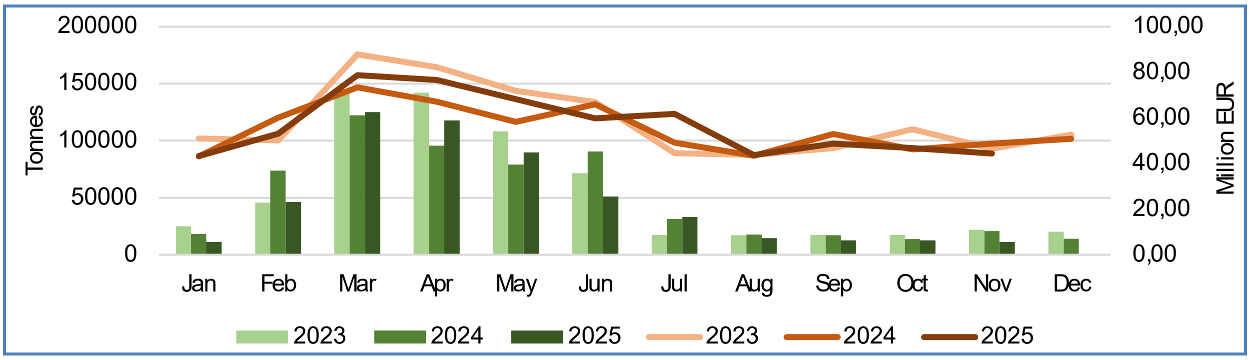


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-NOV 2024 AND JAN-NOV 2025)**

Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
Denmark	Other groundfish[14]	0,30 EUR/kg	0,40 EUR/kg	+36%
Spain	Cod	6,81 EUR/kg	9,34 EUR/kg	+37%
Denmark	Saithe	1,83 EUR/kg	2,26 EUR/kg	+23%

Other marine fish[15]

In 2025, first-sales value of the category "other marine fish" totalled EUR 534,6 million, an increase of 1% compared to 2024. First-sales volume amounted to 136.273 tonnes, a decrease of 3% compared to 2024. Monk (+4%) and "Other marine fish"[16] (+5%) were the main commercial species contributing to the rise in first-sales value, while the category "other shark"[17] was behind the increase in first-sales volume (-11%).

[13] In 2025 „Other goundfish" comprised 50 species of which sandeel nei and European conger together account for 71% of total first-sales value.
[14] „Other goundfish" in Denmark comprised 7 species of which sandeel nei accounts for 96% of total first-sales value and almost 100% of total first-sales volume.
[15] Seventeen Main Commercial 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 marine fish" Main Commercial Species (MCS), meagre, greater amberjack, red scorpionfish and boarfish represent 39% of total first sale value.
[17] Of the „Other sharks" Main Commercial Species (MCS), blue shark, small-spotted catshark and smooth-hound nei represent 86% of total first sale volume.

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

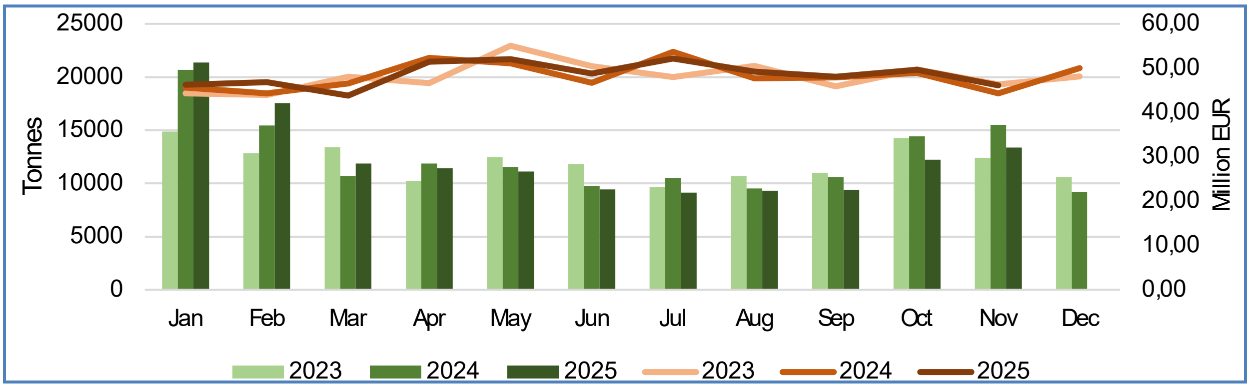


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-NOV 2024 AND JAN-NOV 2025)**

Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
France	Other marine fish[18]	5,25 EUR/kg	5,18 EUR/kg	-1%
Spain	Red mullet	6,98 EUR/kg	8,50 EUR/kg	+22%
France	Monk	5,64 EUR/kg	6,20 EUR/kg	+10%

Salmonids

In 2025, first-sales value of “Salmonids” totalled EUR 4,8 million, an increase of 6% compared to 2024, while first-sales volume amounted to 361.010 kg, a decrease of 4% compared to 2024. “Other salmonids”[19] category was responsible for the increase in first sale value, while salmon (-39%) was the main species responsible for the decrease in first-sales volume of salmonids.

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

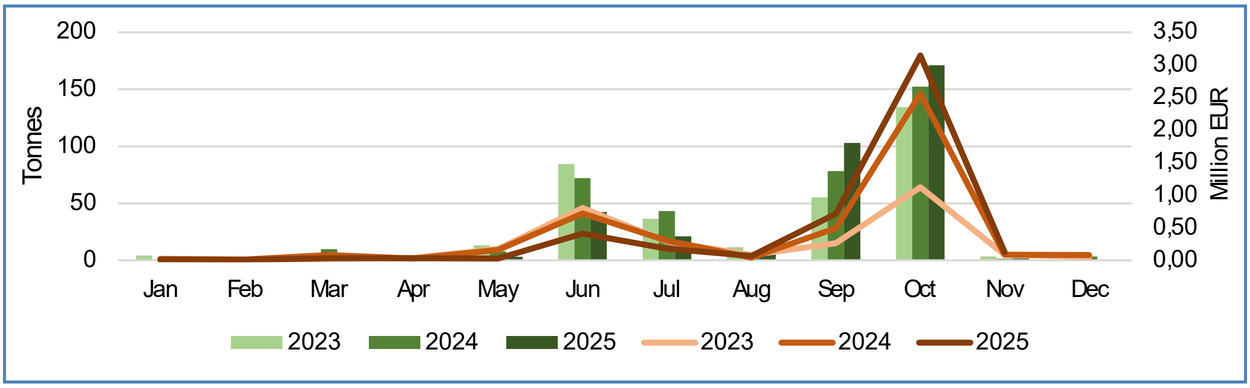


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-NOV 2024 AND JAN-NOV 2025)**

Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
Sweden	Other salmonids[20]	14,02 EUR/kg	14,40 EUR/kg	+3%
Germany	Trout	9,28 EUR/kg	9,78 EUR/kg	+5%
Estonia	Salmon	10,54 EUR/kg	12,77 EUR/kg	+21%

[18] „Other marine fish“ MCS in France comprises 223 species in the period analysed of which meagre and thicklip grey mullet together represented 67% of the total value.
[19] „Other salmonids“ MCS comprises 5 species in the period analysed of which vendace represented 95% of the total value.
[20] „Other salmonids“ MCS in Sweden comprises 4 species in the period analysed of which vendace represented 98% of the total value.

Small pelagics

In 2025, first-sales value of "Small pelagics" amounted to EUR 800,5 million, an increase of 8% compared to 2024. First-sales volume amounted to 840.558 tonnes; a stable amount compared to 2024. Sardine and Atlantic horse mackerel (+18% and +52%) were the commercial species contributing most to the increase in first-sales value, while Atlantic horse mackerel (+59%) and sprat (+6%) were the main commercial species contributing most to the increase in first-sales volume.

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

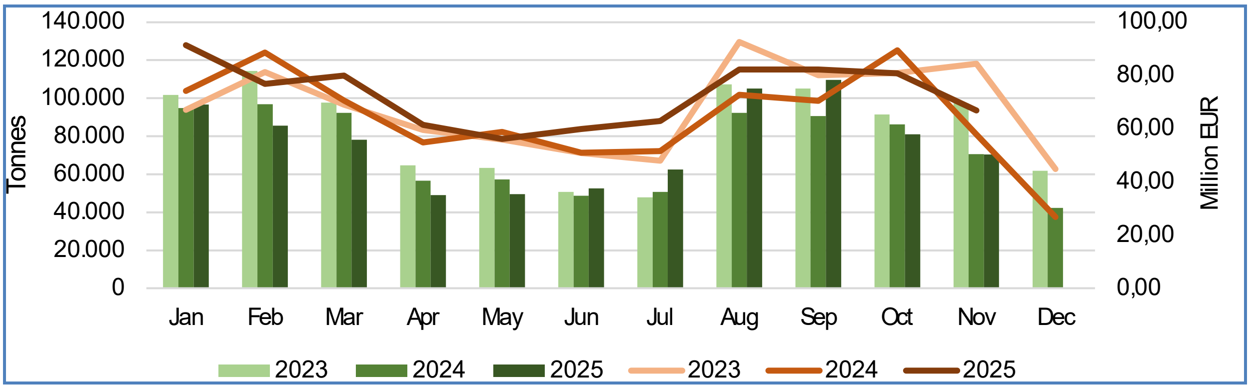


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-NOV 2024 AND JAN-NOV 2025)**

Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
Denmark	Sprat	0,43 EUR/kg	0,46 EUR/kg	+7%
Ireland	Atlantic horse mackerel	1,15 EUR/kg	1,18 EUR/kg	+2%
Portugal	Sardine	1,06 EUR/kg	1,23 EUR/kg	+15%

Tuna and tuna-like species

In 2025, first-sales value of "Tuna and tuna-like species" totalled EUR 317,7 million, a decrease of 4% compared to 2024. First-sales volume totalled 86.706 tonnes, a decrease of 4% compared to 2024. Yellowfin tuna (-37% and -34%), and swordfish (-9% and -8%) 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 – NOV 2025**

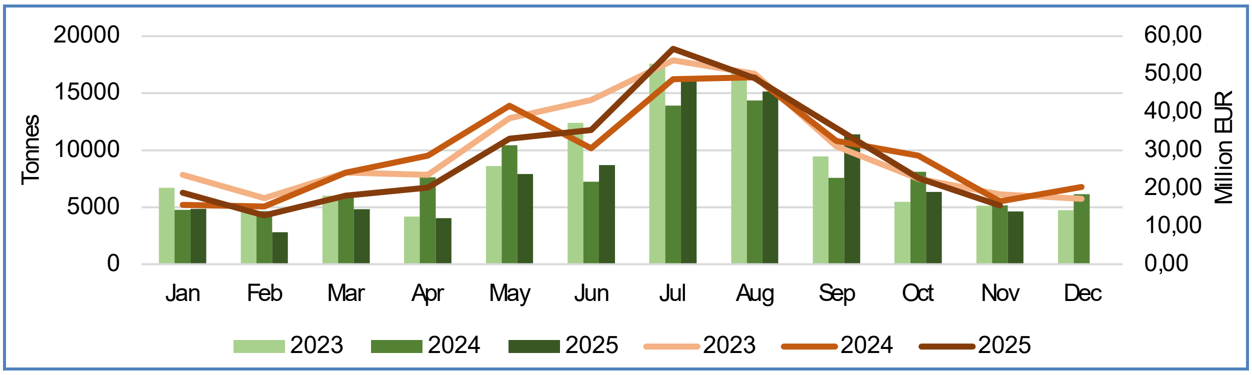


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-NOV 2024 AND JAN-NOV 2025)**

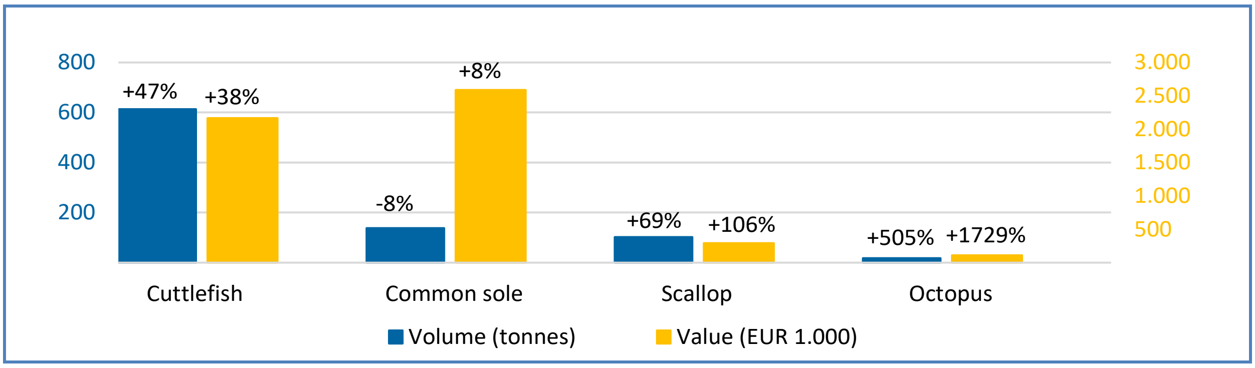
Country	Main Commercial Species	First-sales average price Jan-Nov 2024	First-sales average Price Jan-Nov 2025	Trend (Jan-Nov 2025 vs Jan-Nov 2024 %)
Spain	Yellowfin tuna	2,69 EUR/kg	2,50 EUR/kg	-7%
Spain	Skipjack tuna	1,60 EUR/kg	1,53 EUR/kg	-4%
Spain	Swordfish	5,00 EUR/kg	4,93 EUR/kg	-1%

3.3. First sales in reporting countries[21]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 69,5 million, +8%	11.105 tonnes, +2%	Common sole, cuttlefish, octopus, monk.
Nov 2025 vs Nov 2024	EUR 7,8 million, +11%	1.590 tonnes, +12%	Cuttlefish, common sole, scallop, octopus.

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

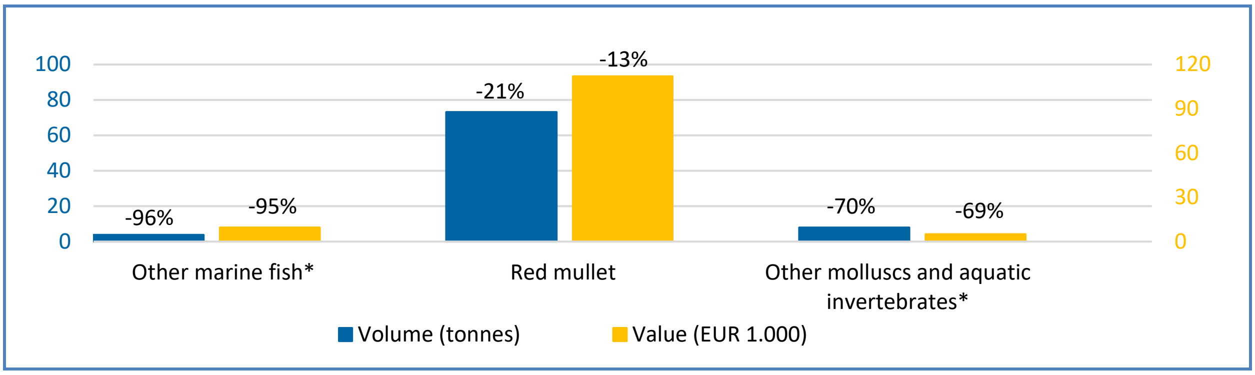


Percentages show change from the previous year.

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 2,5 million, +3%	3.009 tonnes, -4%	**Value**: sprat, clam **Volume**: other molluscs and aquatic invertebrates*, other marine fish*, red mullet.
Nov 2025 vs Nov 2024	EUR 0,3 million, -24%	164 tonnes, -32%	Other marine fish*, red mullet, other molluscs and aquatic invertebrates*.

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



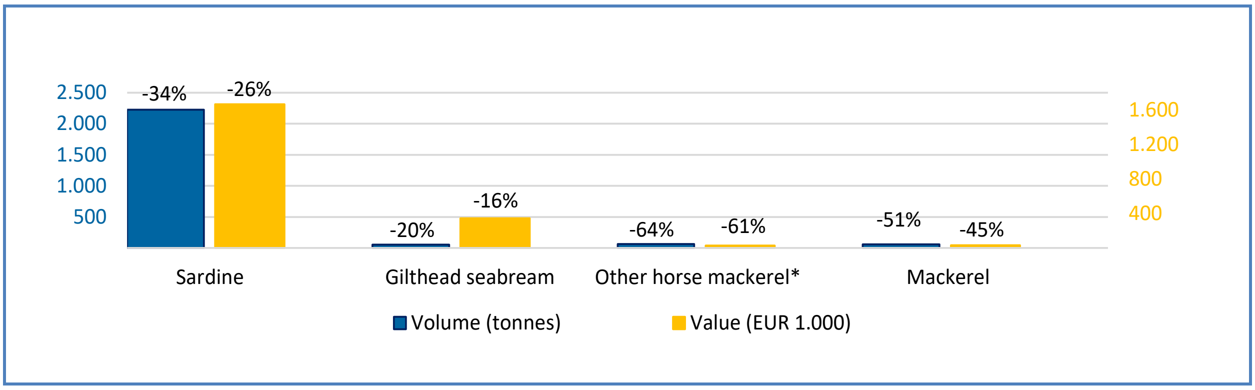
*Percentages show change from the previous year. *EUMOFA aggregation for species.*[22]

[21] First-sales data updated on 20. 01. 2026. This section covers all countries for which data are available on the date of extraction from the EUMOFA database and analysis.
[22] Metadata 2, Annex 3: *https://eumofa.eu/supply-balance-and-other-methodologies*

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

Croatia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Nov 2025 vs Jan-Nov 2024	EUR 47,5 million, -4%	31.422 tonnes, -18%	Anchovy, sardine, hake, red mullet, bluefin tuna.	In November 2025, first sales of **squid** increased sharply compared to November 2024, with higher catches recorded across multiple major ports rather than from a single event. This coast-wide and multi-month pattern is consistent with a strong recruitment pulse in short-lived squid species, whose populations are driven by annual cohorts and typically show pronounced autumn peaks in landings.
Nov 2025 vs Nov 2024	EUR 4,5 million, -8%	3,0 tonnes, -30%	Sardine, gilthead seabream, other horse mackerel*, mackerel.	

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

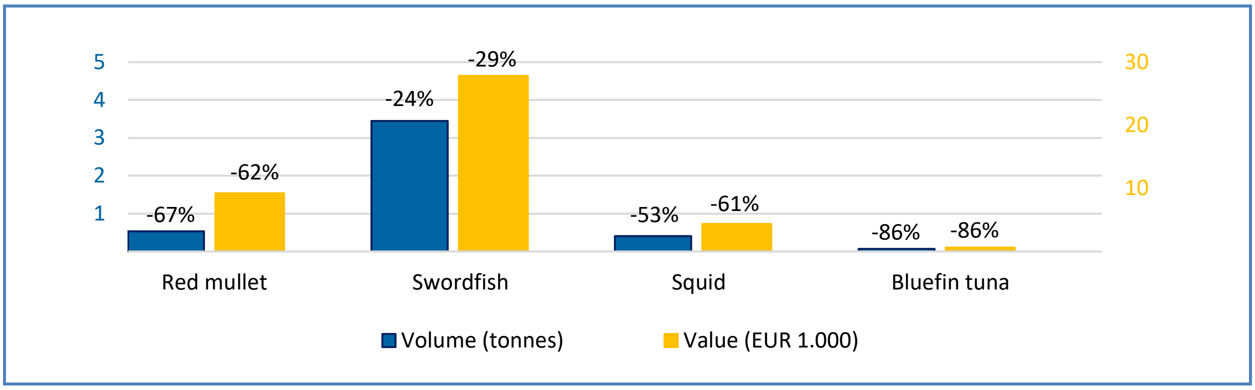


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 2,5 million, -12%	539 tonnes, -3%	Other seabream*, red mullet, albacore tuna, picarel, swordfish.
Nov 2025 vs Nov 2024	EUR 0,2 million, -16%	25 tonnes, -11%	Red mullet, swordfish, squid, bluefin tuna.

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



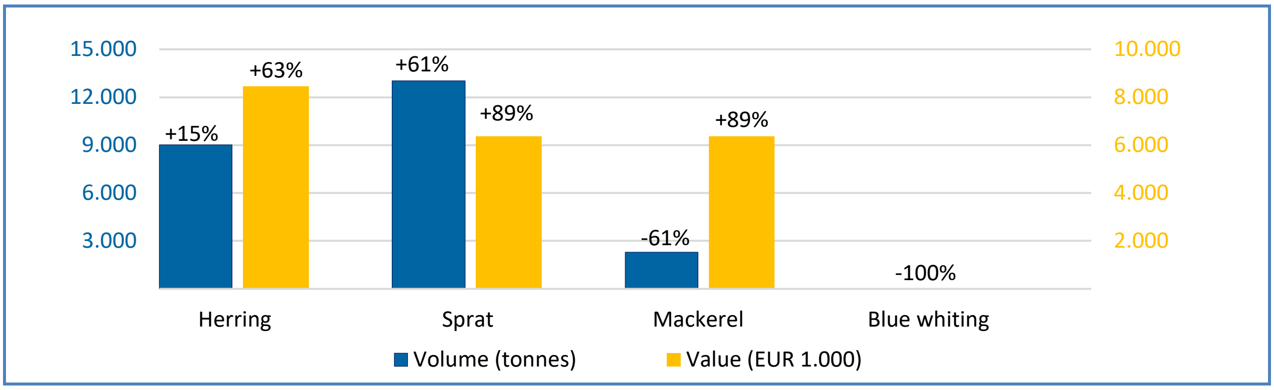
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 508,1 million, +6%	659.992 tonnes, -1%	**Value**: sprat, other groundfish*, saithe. **Volume**: blue whiting, mackerel, other groundfish*.
Nov 2025 vs Nov 2024	EUR 43,7 million, +9%	29.031 tonnes, -17%	**Value**: herring, sprat. **Volume**: blue whiting, mackerel.

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

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



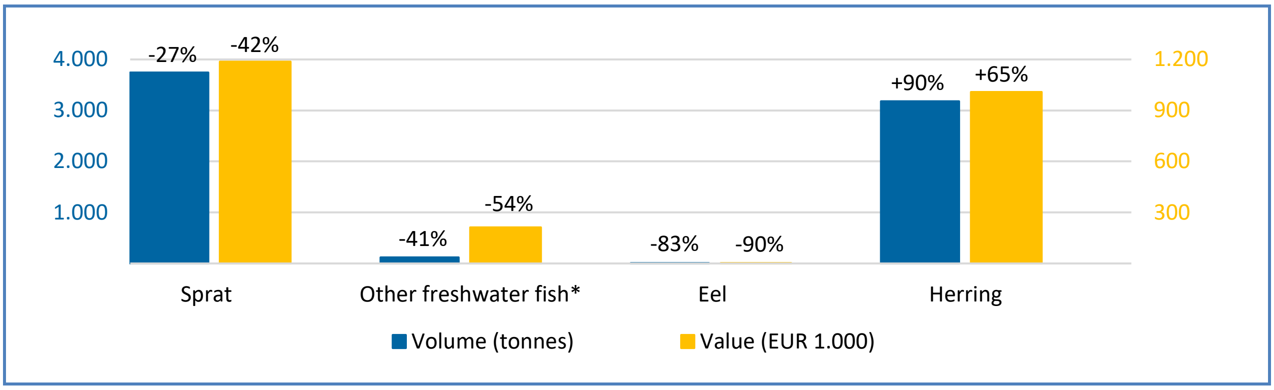
Percentages show change from the previous year.

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 23,0 million, -20%	49.722 tonnes, -14%	Sprat, herring, other freshwater fish*, European flounder.
Nov 2025 vs Nov 2024	EUR 2,7 million, -19%	7.152 tonnes, 0%	**Value**: sprat, other freshwater fish*, eel. **Volume**: sprat, herring,

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

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

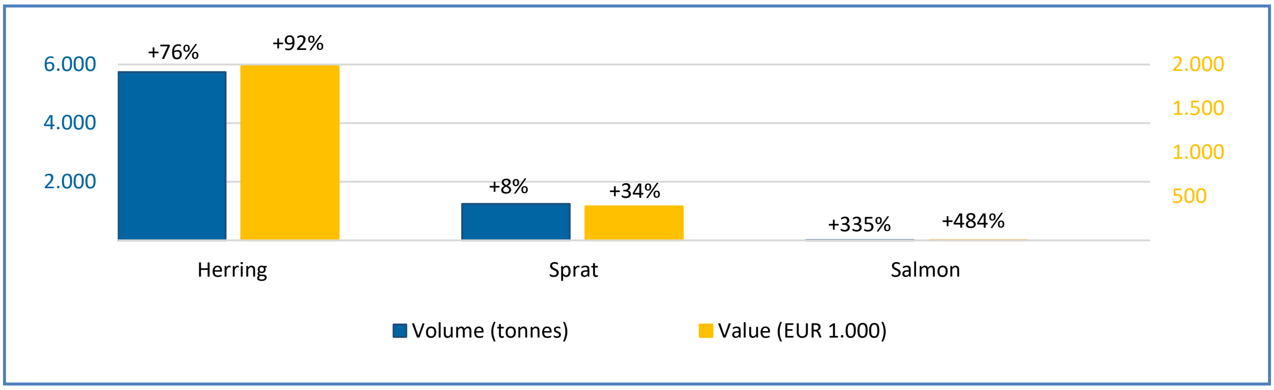


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 16,8 million, +9%	53.744 tonnes, +28%	Herring.
Nov 2025 vs Nov 2024	EUR 2,4 million, +80%	6.982 tonnes, +58%	Herring, sprat, salmon.

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

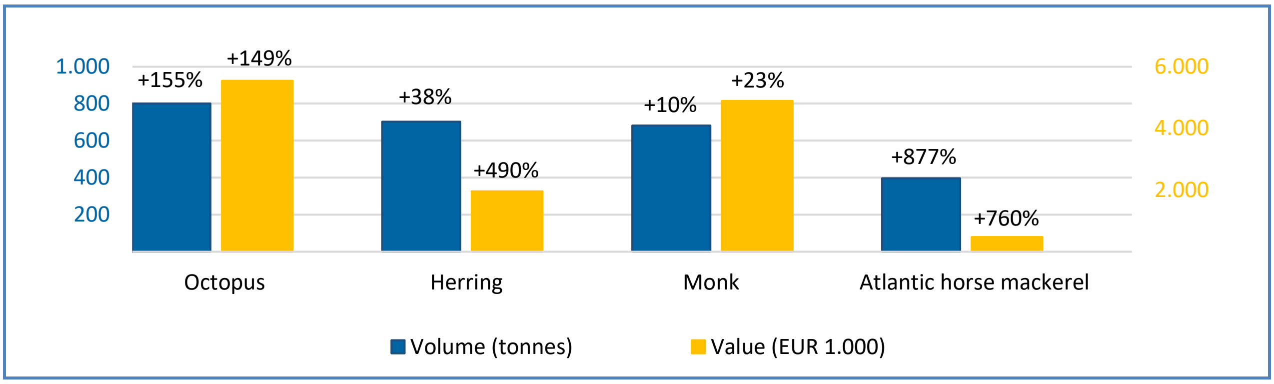


Percentages show change from the previous year.

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Nov 2025 vs Jan-Nov 2024	EUR 693,0 million, +8%	227.668 tonnes, +2%	Octopus, scallop, eel, sardine.	In November 2025, first sales of **herring** increased sharply in value (+490%) while volumes rose only moderately (+38%) compared to November 2024. This was mainly driven by a strong increase in prices rather than higher quantities sold. The ex-vessel price per kilo was almost four times higher than usual, likely reflecting strong international demand for small pelagic species rather than changes in fishing activity or stock conditions.
Nov 2025 vs Nov 2024	EUR 71,4 million, +8%	17.557 tonnes, +5%	Octopus, herring, monk, Atlantic horse mackerel.	

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

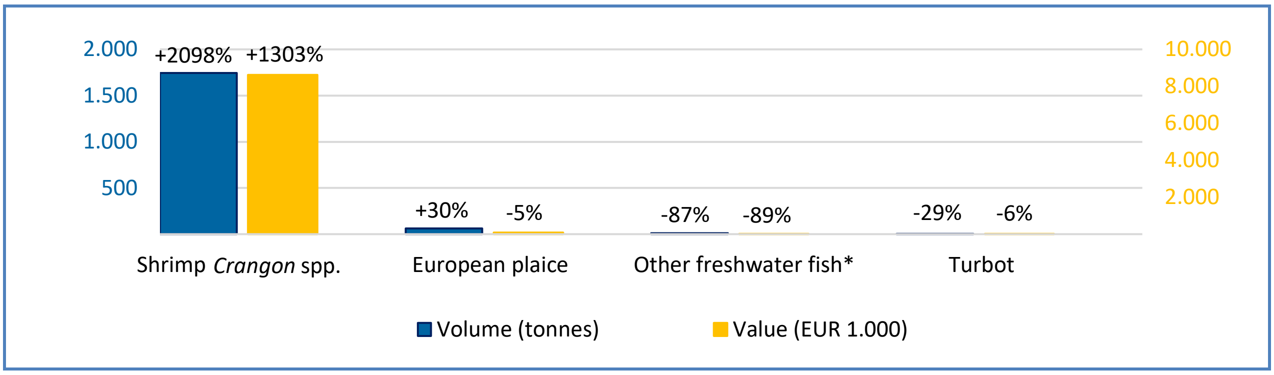


Percentages show change from the previous year.

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Nov 2025 vs Jan-Nov 2024	EUR 60,3 million, +19%	11.749 tonnes, -51%	**Value**: shrimp *Crangon* spp., other marine fish*, brill. **Volume**: blue whiting, mackerel, herring.	In November 2025 in Germany, **total** value and volume increased sharply compared to November 2024, driven mainly by a surge in sales of common shrimp *Crangon* spp., which were 1,945% higher year on year and dominated German fleet landings. At the same time, groundfish production collapsed, from 327 tonnes to less than 1 tonne, due to the severe decline in cod fisheries, particularly in the Baltic Sea, and vulnerable southern North Sea sub-stocks.
Nov 2025 vs Nov 2024	EUR 8,8 million, +176%	1.837,8 tonnes, +196%	Shrimp *Crangon* spp., European plaice, other freshwater fish*, turbot.	

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

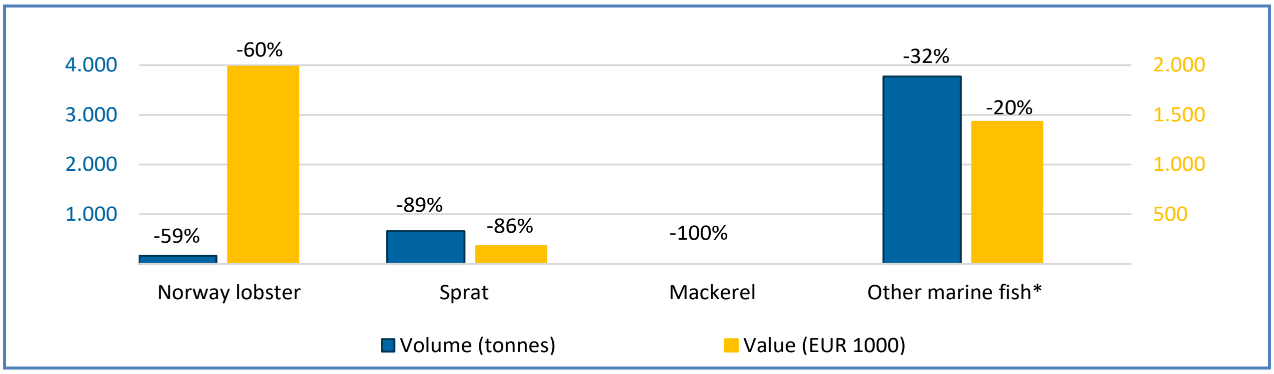


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 253,6 million, +7%	179.043 tonnes, -2%	Value: Atlantic horse mackerel, mackerel, Norway lobster. Volume: mackerel, other molluscs and aquatic invertebrates*, albacore tuna.
Nov 2025 vs Nov 2024	EUR 12,8 million, -35%	7.433 tonnes, -54%	Norway lobster, sprat, mackerel, other marine fish*.

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

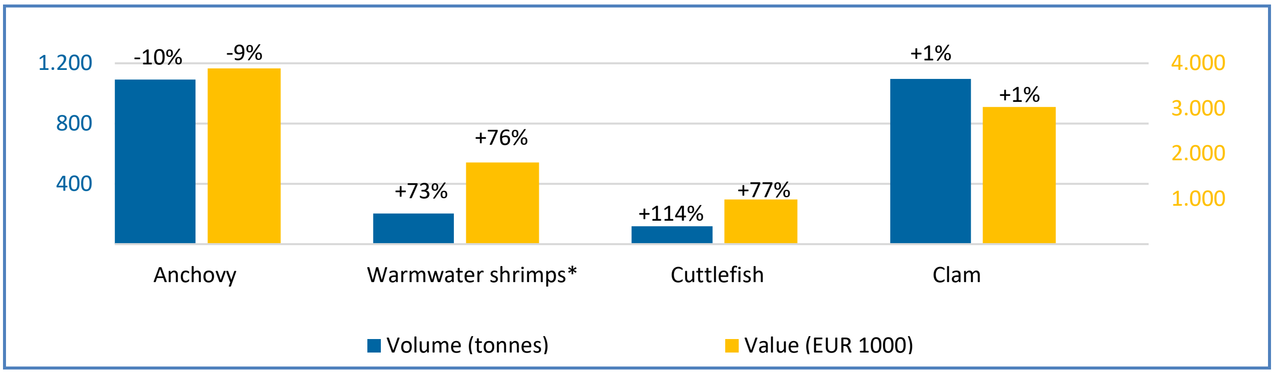


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 238,2 million, -7%	47.693 tonnes, -16%	Clam, miscellaneous shrimps*, sardine.
Nov 2025 vs Nov 2024	EUR 25,6 million, +1%	5.235 tonnes, 0%	**Value**: warmwater shrimps*, cuttlefish **Volume**: anchovy, clam.

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

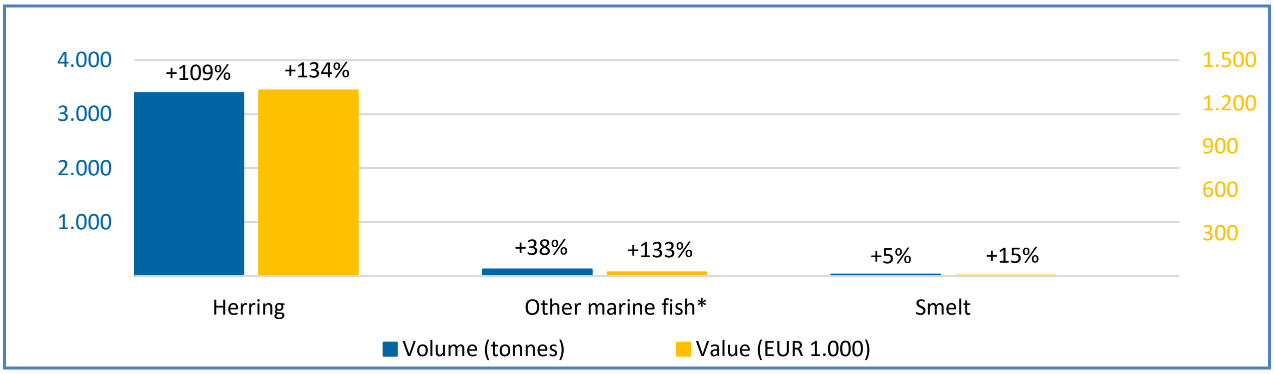


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 14,3 million, +10%	35.799 tonnes, 0%	**Value**: herring, sprat. **Volume**: herring, sprat, other marine fish*.
Nov 2025 vs Nov 2024	EUR 2,3 million, +42%	5.337 tonnes, +33%	Herring, other marine fish*, smelt.

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

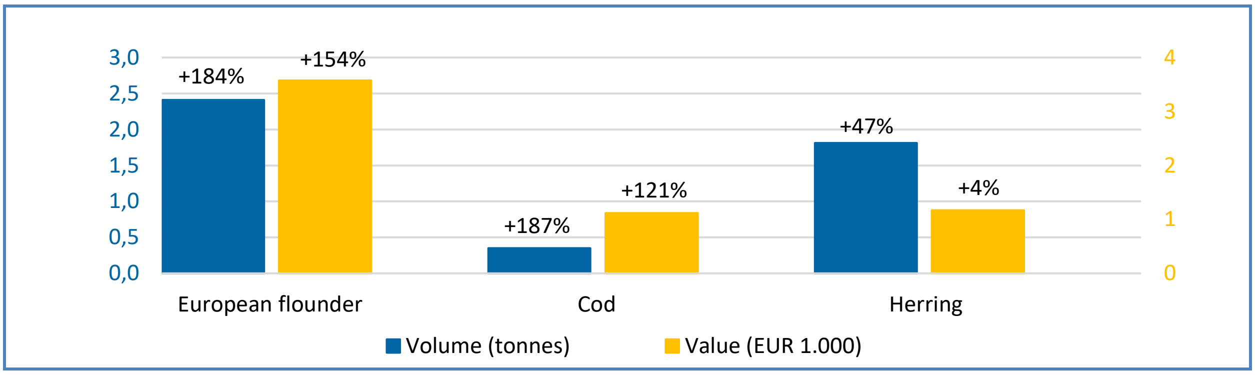


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 0,3 million, -34%	211,2 tonnes, -32%	Smelt, turbot, other groundfish*, other freshwater fish*.
Nov 2025 vs Nov 2024	EUR 0,01 million, +11%	5,4 tonnes, +63%	European flounder, cod, herring.

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

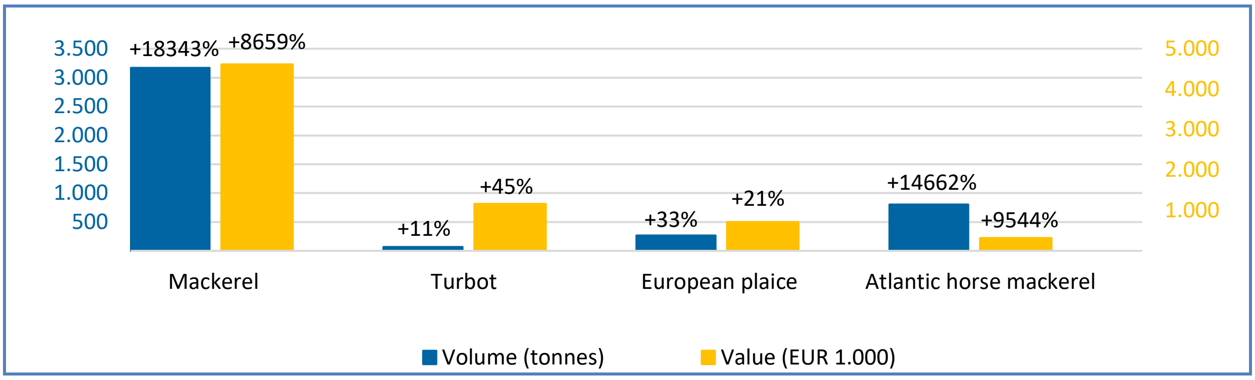


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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	Notes
Jan-Nov 2025 vs Jan-Nov 2024	EUR 134,6 million, -5%	25.098 tonnes, +13%	**Value**: Shrimp *Crangon* spp., Norway lobster, European plaice, **Volume**: mackerel, Atlantic horse mackerel, European flounder.	In November 2025, first sales of **mackerel** increased extremely sharply compared to November 2024, reflecting very low sales in the previous year rather than a structural change. Mackerel is a highly migratory species with strong year-to-year variability, and this spike occurred despite ongoing concerns about fishing patterns and an over-exploited[23] stock that has generally been experiencing declining catches.
Nov 2025 vs Nov 2024	EUR 15,6 million, +50%	5.768 tonnes, +265%	Mackerel, turbot, European plaice, Atlantic horse mackerel.	

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



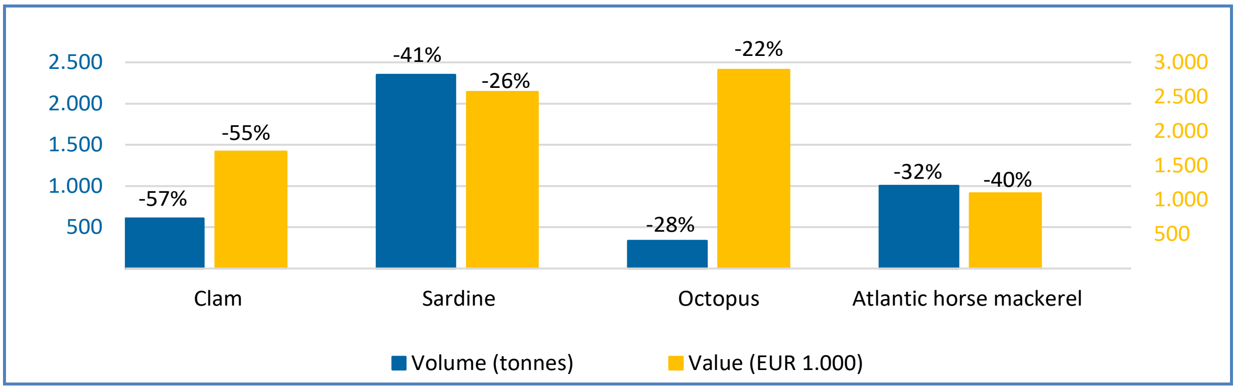
Percentages show change from the previous year.

[23] ICES Advice 2025 – mac.27.nea – https://doi.org/10.17895/ices.advice.27202689

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 291,0 million, +7%	110.613 tonnes, +1%	Sardine, skipjack tuna, anchovy.
Nov 2025 vs Nov 2024	EUR 21,9 million, -22%	8.069 tonnes, -36%	Clam, sardine, octopus, Atlantic horse mackerel.

Figure 30. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, NOVEMBER 2025**

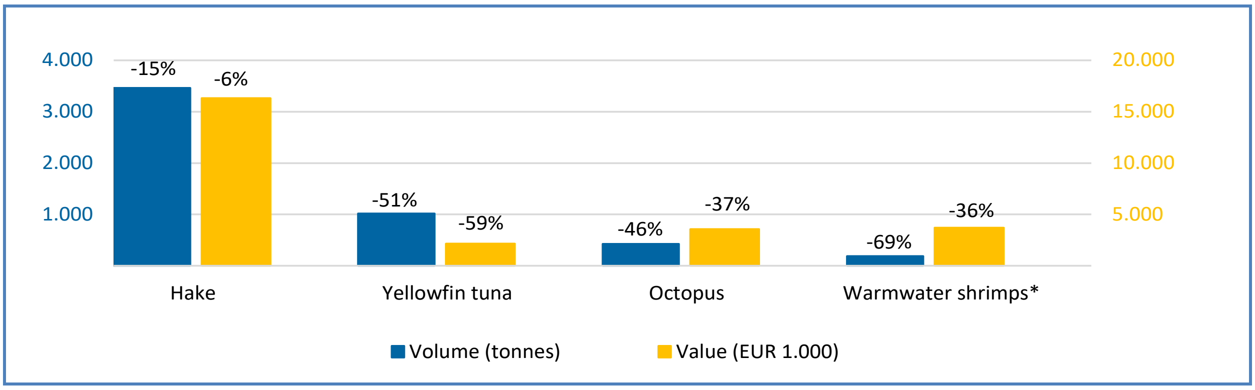


Percentages show change from the previous year.

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 1.328,9 million, +2%	350.899 tonnes, -7%	**Value**: albacore tuna, miscellaneous shrimps*, mackerel. **Volume**: blue whiting, yellowfin tuna, sardine, anchovy.
Nov 2025 vs Nov 2024	EUR 110,8 million -2%	25.253 tonnes, -7%	Hake, yellowfin tuna, octopus, warmwater shrimps*.

Figure 31. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, NOVEMBER 2025**

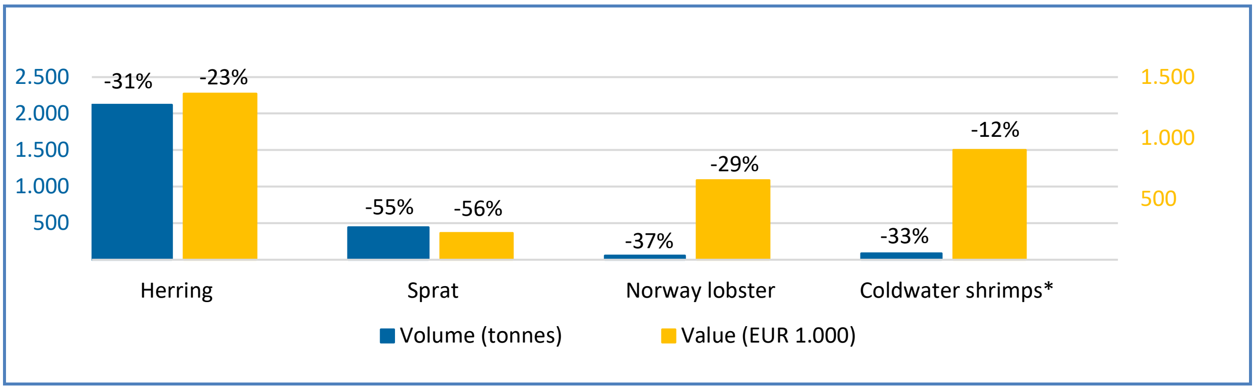


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 79,1 million, -10%	83.089 tonnes, -20%	Sprat, herring, cod, eel., other groundfish*.
Nov 2025 vs Nov 2024	EUR 4,4 million, -21%	2.963 tonnes, -36%	Herring, sprat, Norway lobster, coldwater shrimps*.

Figure 32. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, NOVEMBER 2025**

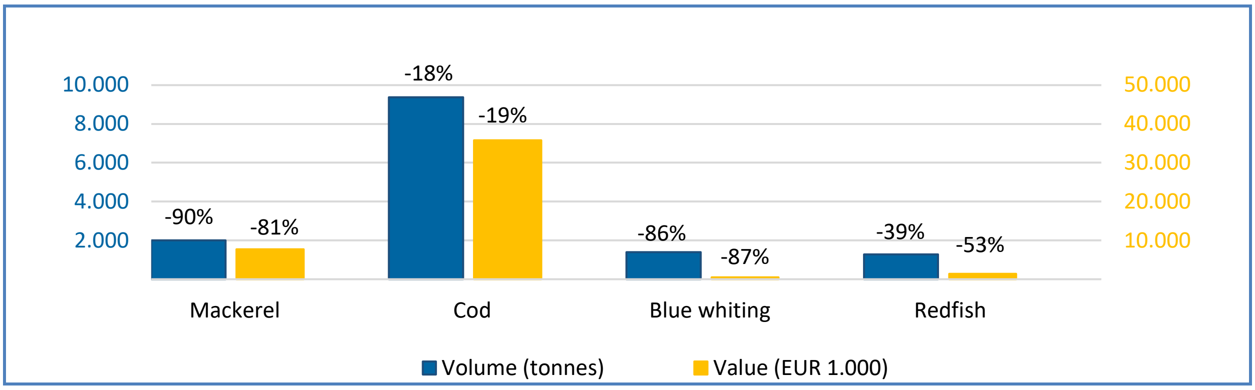


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 2,7 billion, -7%	2.004.321 tonnes, -24%	Cod, mackerel, herring, miscellaneous small pelagics*.
Nov 2025 vs Nov 2024	EUR 178,5 million -17%	127.571 tonnes, -19%	Mackerel, cod, blue whiting, redfish.

Figure 33. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, NOVEMBER 2025**

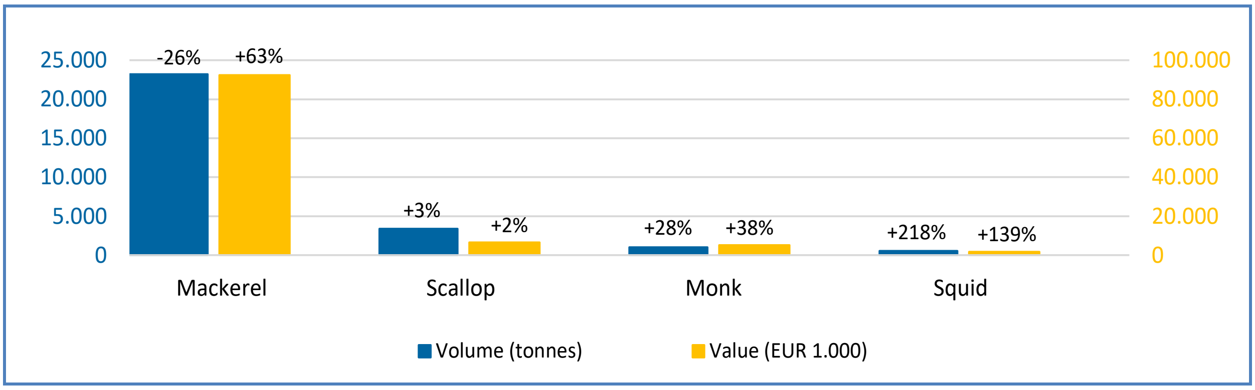


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Nov 2025 vs Jan-Nov 2024	EUR 789,2 million, +17%	342.405 tonnes, -3%	**Value**: mackerel, saithe, haddock. **Volume**: mackerel, blue whiting, herring, crab.
Nov 2025 vs Nov 2024	EUR 134,5 million +33%	40.444 tonnes, -18%	**Value**: mackerel, scallop, monk, squid. **Volume**: mackerel, herring.

Figure 34. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, NOVEMBER 2025**



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

From January to November 2025, the value of extra-EU imports increased by 6% compared to the same period in 2024, while volume increased by 9%. The MCSs contributing most to the increase in import values were warmwater shrimps (+23%) and octopus (+29%), while warm water shrimp (+20%) and salmon (+6%) contributed most to the increase in volume.

Increases in value and volume: Belgium, 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 absolute terms in value were recorded in Malta driven by an increase in mackerel (+105%) and bluefin tuna (+25%). The highest increases in volume occurred in Croatia, driven by sardine (+2.159%) and mackerel (+2.740%).

Decreases in value and volume: Finland, 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 (-48% and -49%), and cod (-96% and -97%).

Table 35. **JANUARY - NOVEMBER OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)**[24]

	January - November 2024			January - November 2025			Change from January - November 2024		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	10.780	67,98	6,31	10.173	68,20	6,70	-6%	0%	6%
Belgium	127.565	795,81	6,24	141.041	899,70	6,38	11%	13%	2%
Bulgaria	13.600	35,89	2,64	13.565	39,43	2,91	0%	10%	10%
Croatia	7.823	35,07	4,48	22.339	42,25	1,89	186%	20%	-58%
Cyprus	6.257	39,67	6,34	6.820	41,36	6,07	9%	4%	-4%
Czechia	13.401	60,67	4,53	16.022	72,16	4,50	20%	19%	-1%
Denmark	786.649	3.044,16	3,87	900.563	2.989,67	3,32	14%	-2%	-14%
Estonia	8.833	48,14	5,45	10.340	54,14	5,24	17%	12%	-4%
Finland	44.818	292,50	6,53	44.073	270,62	6,14	-2%	-7%	-6%
France	543.936	2.954,81	5,43	549.008	2.909,52	5,30	1%	-2%	-2%
Germany	313.680	1.448,63	4,62	404.417	1.742,20	4,31	29%	20%	-7%
Greece	123.779	479,69	3,88	146.307	567,45	3,88	18%	18%	0%
Hungary	2.353	9,66	4,11	2.716	11,73	4,32	15%	21%	5%
Ireland	153.476	204,25	1,33	219.772	237,38	1,08	43%	16%	-19%
Italy	432.901	2.527,39	5,84	461.191	2.760,92	5,99	7%	9%	3%
Latvia	23.689	55,18	2,33	20.304	62,34	3,07	-14%	13%	32%
Lithuania	48.841	170,84	3,50	43.185	142,41	3,30	-12%	-17%	-6%
Luxembourg	17	0,55	33,25	15	0,79	51,69	-7%	44%	55%
Malta	18.908	40,66	2,15	31.436	53,23	1,69	66%	31%	-21%
Netherlands	644.554	3.301,21	5,12	646.093	3.604,09	5,58	0%	9%	9%
Poland	237.133	1.006,46	4,24	243.989	1.089,77	4,47	3%	8%	5%
Portugal	158.222	715,17	4,52	177.109	826,97	4,67	12%	16%	3%
Romania	18.276	80,55	4,41	19.948	91,90	4,61	9%	14%	5%

[24] During January - November 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.

Slovakia	4.978	15,48	3,11	4.490	14,92	3,32	-10%	-4%	7%
Slovenia	7.070	27,59	3,90	6.873	28,58	4,16	-3%	4%	7%
Spain	1.112.881	5.186,83	4,66	1.191.191	5.710,55	4,79	7%	10%	3%
Sweden	653.212	4.827,48	7,39	705.804	4.857,23	6,88	8%	1%	-7%
EU-27	**5.517.631**	**27.472**	**4,98**	**6.038.785**	**29.189**	**4,83**	**9%**	**6%**	**-3%**

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: Bivalves, cephalopods, crustaceans, freshwater fish, groundfish, small pelagics and tuna and tuna-like species were those commodity groups recording an increase in both value and volume of extra-EU imports. Highest increases in value were observed for cephalopods, with octopus and other cephalopods (+29% and +55%, respectively) driving the increase. In terms of volume the increase in small pelagics was driven by sardine (+62%) and herring (+5%).

Decreases in value: only salmonids recorded a decline in extra-EU import value, where the largest decline in value was attributed to salmon (-5%).

Decrease in volume: flatfish and other marine fish recorded a decline in extra-EU import volume, where the largest decline was attributed to Greenland halibut (-6%) for flatfish and to European seabass (-31%) for other marine fish.

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

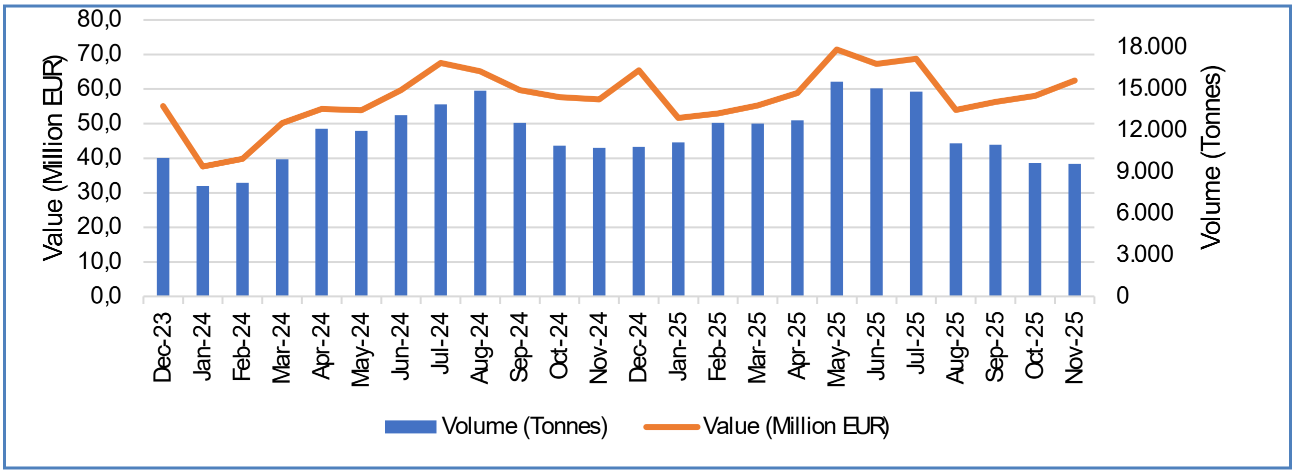
	January - November 2024			January - November 2025			Change from January - November 2024			
Commodity group	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	602,6	126.320	4,77	657,1	135.644	4,84	9%	7%	2%	Clam, Other mussels
Cephalopods	2.681,4	478.879	5,60	3.228,9	525.461	6,14	20%	10%	10%	Octopus, Other cephalopods
Crustaceans	4.128,7	610.859	6,76	4.534,0	654.872	6,92	10%	7%	2%	Warmwater shrimp, Norway lobster
Flatfish	454,7	86.753	5,24	454,7	85.666	5,31	0%	-1%	1%	Greenland halibut
Freshwater fish	513,4	128.460	4,00	530,2	137.964	3,84	3%	7%	-4%	Tilapia, Freshwater catfish
Groundfish	4.101,7	1.001.194	4,10	4.627,8	1.043.214	4,44	13%	4%	8%	Cod, Alaska pollock
Other marine fish	1.606,8	288.707	5,57	1.752,0	287.191	6,10	9%	-1%	10%	Other marine fish, monk
Salmonids	7.872,8	984.469	8,00	7.480,1	1.040.056	7,19	-5%	6%	-10%	Salmon
Small pelagics	969,5	401.971	2,41	1.126,1	445.604	2,53	16%	11%	5%	Sardine, herring
Tuna and tuna-like species	2.958,4	632.237	4,68	3.170,9	681.404	4,65	7%	8%	-1%	Skipjack tuna, Miscellaneous tunas

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of bivalves in EU Member States

In January – November 2025, extra-EU imports of bivalves accounted for a total value of EUR 657,1 million and a total volume of 135.644 tonnes, marking a 9% increase in value and 7% increase in volume compared to the same period in 2024.

Figure 35. **EXTRA-EU IMPORT VALUE AND VOLUME OF BIVALVES, DEC 2023 – NOV 2025 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

Between January and November 2025, Spain, France and Italy were the main importers of bivalves in the EU and together imported from extra-EU countries about 76% of the total volume of bivalves, Spain (36%), Italy (20%) and France (20%) respectively.

Table 37. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR BIVALVE SPECIES**

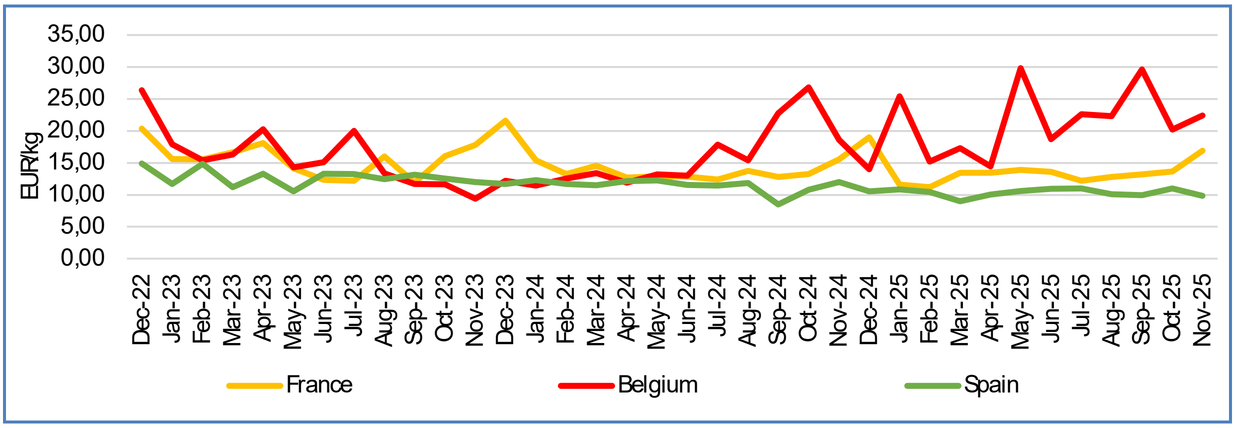
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan–Nov 2024	Jan-Nov 2025	Trend (%)	Jan–Nov 2024	Jan-Nov 2025	Trend (%)	
Spain	233,5	209,0	-11%	52.960	48.491	-8%	Other mussels, clam
France	207,3	210,4	1%	27.242	27.763	2%	Scallop, clam
Italy	69,6	78,6	13%	23.915	26.981	13%	Clam, other mussels

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

In terms of value, scallop was the main imported species within the “bivalves” commodity group, accounting for 40% of the total value, followed by other mussels with 30%.

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

Figure 36. **EXTRA-EU IMPORT PRICE OF SCALLOP IN SPAIN, FRANCE AND ITALY (DEC 2022 – NOV 2025)**



Between December 2022 and November 2025, the price of scallop fluctuated and decreased in the three countries analysed: France (-6%), Belgium (-5%) and Spain (-11%). Between January and November 2025, the volume of scallop imported to France was 10.593 tonnes, 8% more compared with the same period in 2024, while the price decreased by 2%. Most imports by volume came from the United Kingdom (51%), followed by Argentina (34%).

During the same period, 1.364 tonnes of scallops were imported to Belgium, 7% less compared to 2024, with a price increase of 34% compared to 2024. Peru accounted for 41% of the total imported volumes of scallop in 2025 followed by Japan at 31%.

In Spain, 4.444 tonnes were imported in 2025, of which almost 73% came from Peru and 19% from Chile. Import volumes increased by 5% while prices decreased by 12%.

No clear seasonal pattern was observed in the three countries analysed in terms of imports.

Figure 37. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SCALLOP IN FRANCE, DEC 2022 – NOV 2025 (volume in tonnes, price in EUR/kg)**

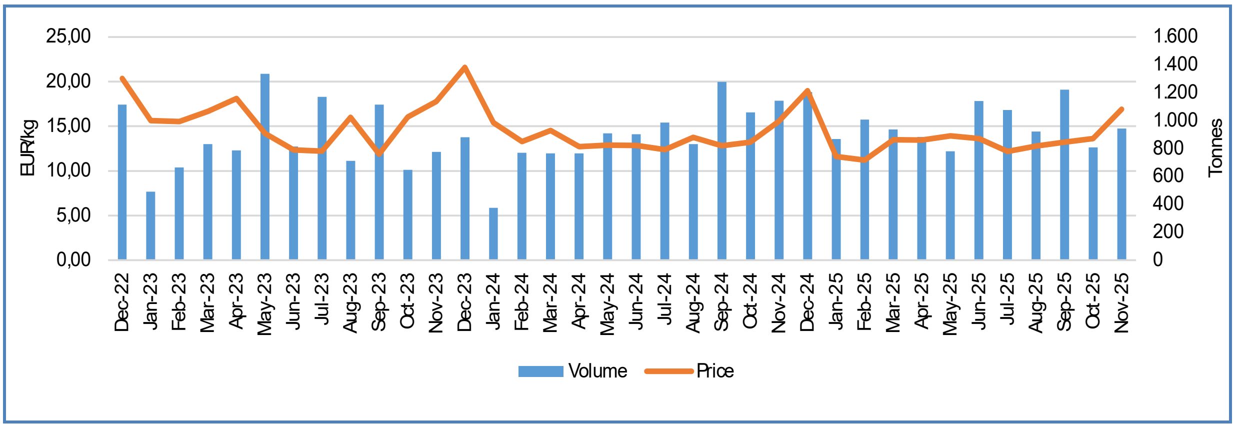


Figure 38. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SCALLOP IN BELGIUM, DEC 2022 – NOV 2025 (volume in tonnes and price in EUR/kg)**

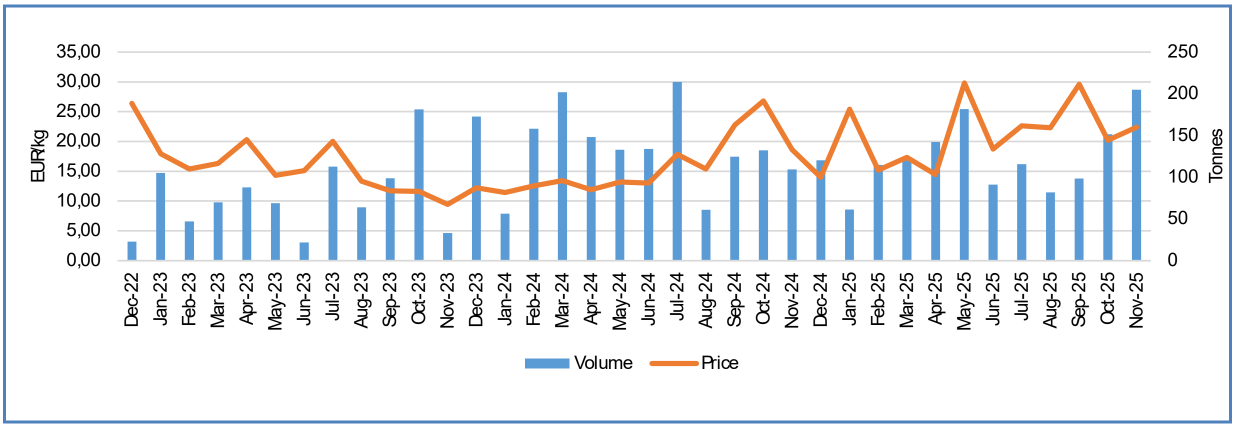
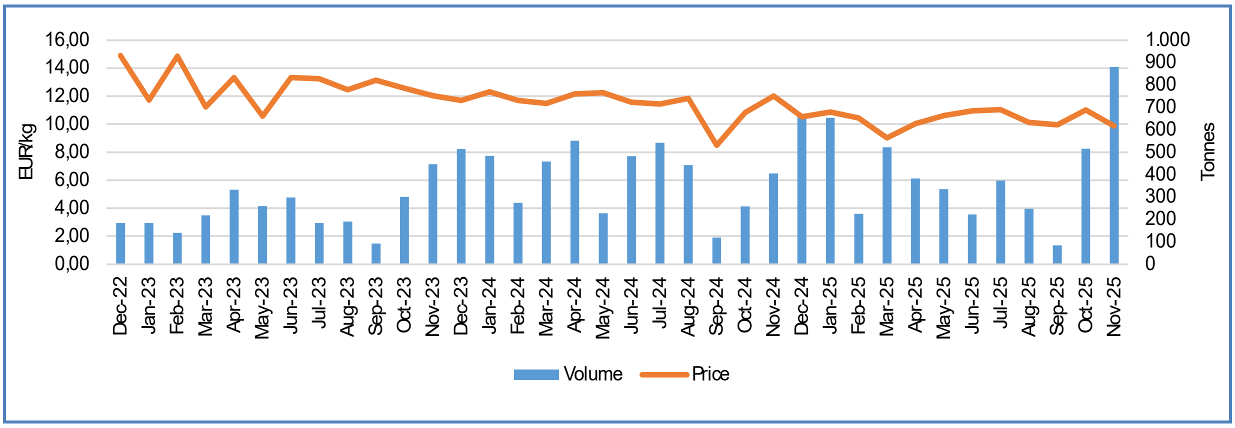


Figure 39. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SCALLOP IN SPAIN, DEC 2022 – NOV 2025 (volume in tonnes and price in EUR/kg)**



4.3. Extra-EU imports of scallop by origin

Between January and November 2025, EU imports of scallop[25] recorded an increasing trend in volume (+1%) and in value (+1%) compared with the same period in 2024. In 2025, the EU imported 19.570 tonnes of bivalves for a value of EUR 262,7 million. The main extra-EU countries supplying scallops to the EU in 2025 were the United Kingdom (31%), followed by Peru (26%) and Canada (5%). Compared with the same period in 2024, imports increased from the United Kingdom, Peru, and Argentina, while imports declined from Canada, Japan (–35%), Chile (–8%) and the United States (-32%).

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

Country	Jan – Nov 2023		Jan – Nov 2024		Jan – Nov 2025		Jan – Nov 2024/2025	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
United Kingdom	77,8	5.298	79,4	5.653	88,6	6.059	12%	7%
Peru	42,0	3.269	54,8	4.733	50,1	5.152	-9%	9%
Canada	45,5	1.577	36,1	1.338	33,1	931	-8%	-30%
Argentina	20,7	2.535	24,8	2.874	31,2	3.635	26%	26%
Others	78,1	5.857	64,3	4.853	59,7	3.793	-7%	-22%
Total	**264,0**	**18.537**	**259,4**	**19.451**	**262,7**	**19.570**	**1%**	**1%**

[25] 03072110 - Live, fresh or chilled, scallops, incl. queen scallops, of the genera *Pecten*, *Chlamys* or *Placopecten*, even in shell
03072190 - Live, fresh or chilled, scallops and other molluscs of the family Pectinidae, even in shell (excl. genera *Pecten*, *Chlamys* and *Placopecten*)
03072210 - Coquilles St Jacques "*Pecten maximus*", frozen, even in shell
03072290 - Scallops, incl. queen scallops, of the genera *Pecten*, *Chlamys* or *Placopecten*, frozen, even in shell (excl. Coquilles St Jacques "*Pecten maximus*")
03072295 - Scallops and other molluscs of the family Pectinidae, frozen, even in shell (excl. genera *Pecten*, *Chlamys* and *Placopecten*)
03072910 - Scallops, incl. queen scallops, of the genera *Pecten*, *Chlamys* or *Placopecten*, smoked, dried, salted or in brine, even in shell
03072990 - Scallops and other molluscs of the family Pectinidae, smoked, dried, salted or in brine, even in shell (excl. genera *Pecten*, *Chlamys* and *Placopecten*)
16055200 - Scallops, incl. queen scallops, prepared or preserved (excl. smoked)

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[26]. They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

Compared with November 2024, household consumption of fresh fishery and aquaculture products in November 2025 increased in both volume and value in Hungary and Ireland. In contrast, France, Germany and Sweden recorded decreases in both value and volume. Denmark, the Netherlands, Poland, Portugal and Spain registered decreases in volume and increases in value while Italy registered no decrease in volume but an increase in value.

The most notable increases were in Hungary and Ireland where consumption increased in volume by 14% and 26% respectively, and in value by 26% and 29% respectively compared to 2024. Germany recorded the most notable decrease in volume (-12%) and in value (-15%).

Table 39. **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	November 2023		November 2024		November 2025		Change from November 2024 to November 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	876	17,29	968	19,92	938	20,23	-3%	2%
France	32,14	16.401	206,95	16.913	215,13	15.340	208,68	-9%	-3%
Germany	12,08	4.836	74,11	4.801	80,36	4.248	68,48	-12%	-15%
Hungary	5,83	296	2,65	318	2,89	362	3,74	14%	29%
Ireland*	20,00	830	14,62	873	15,90	1.099	20,44	26%	29%
Italy	30,38	18.109	224,45	17.788	234,83	17.832	236,74	0%	1%
Netherlands*	19,90	2.296	45,00	2.329	45,72	2.310	46,39	-1%	1%
Poland	13,67	3.678	38,87	3.857	42,33	3.816	47,52	-1%	12%
Portugal	53,61	4.717	37,17	4.511	37,83	4.167	38,86	-8%	3%
Spain	40,68	40.276	403,00	38.364	412,15	36.404	418,46	-5%	2%
Sweden	10,00	781	10,99	612	8,99	585	8,26	-4%	-8%

** 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.*

[26] Last update: 20.02.2026.

5. 2. Overview of household consumption[27] of bivalves and other molluscs and aquatic invertebrates consumed in the EU

In the household consumption data used by EUMOFA, consumption of bivalves is monitored in 10[28] Member States of which Denmark, Germany, Italy, the Netherlands and Portugal are the main consumers. At species level, Italy monitors mussels (*Mytilus* spp.) and clams, Denmark, Germany and the Netherlands monitor mussels, and Portugal monitors clams.

Figure 40. **HOUSEHOLD PURCHASES (in value) OF BIVALVES IN DENMARK, GERMANY, ITALY, THE NETHERLANDS AND PORTUGAL DEC 2022 – NOV 2025**

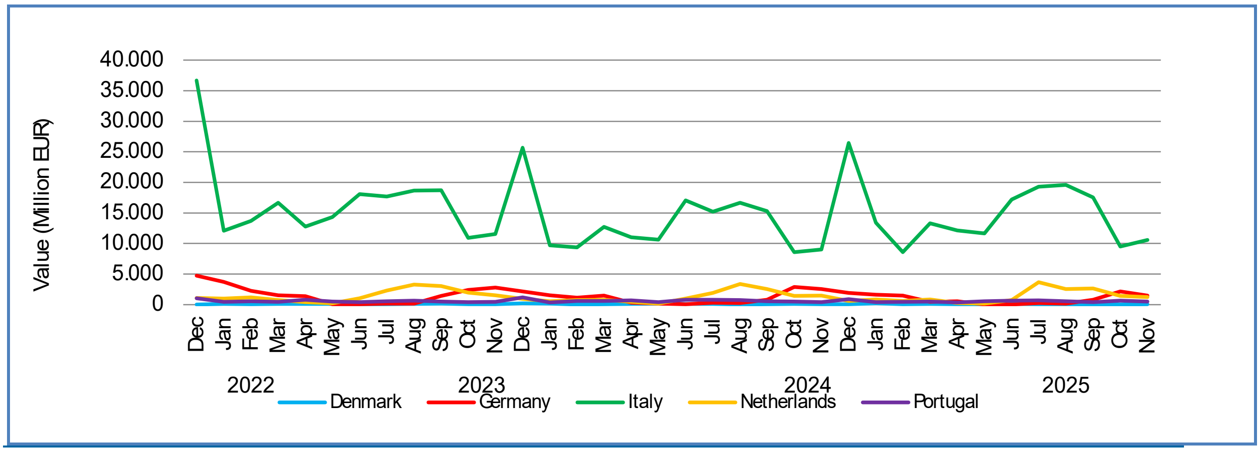
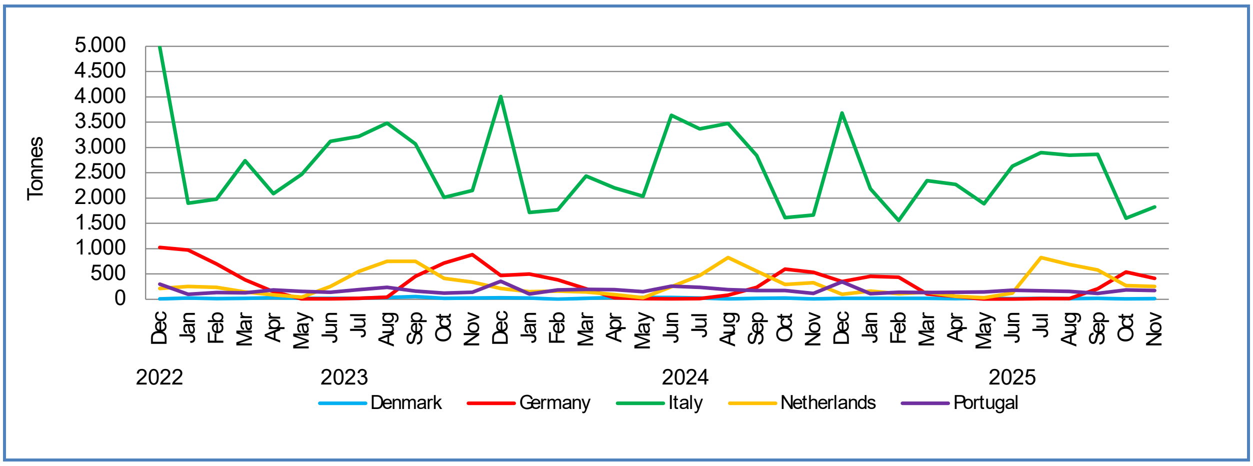


Figure 41. **HOUSEHOLD PURCHASES (in volume) OF BIVALVES IN DENMARK, GERMANY, ITALY, THE NETHERLANDS AND PORTUGAL DEC 2022 – NOV 2025**

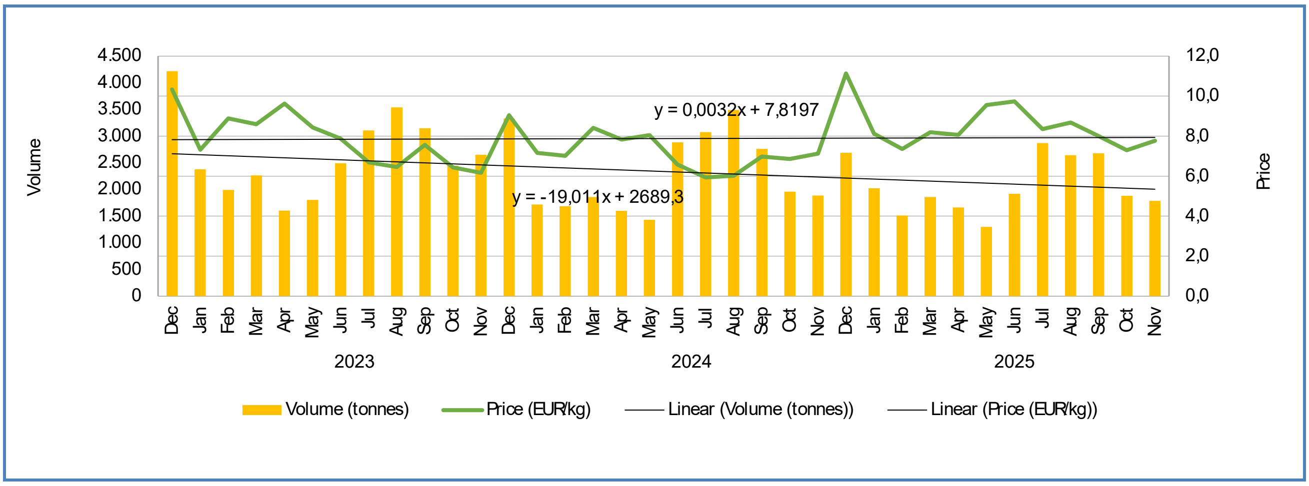


[27] The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the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

5. 3. Household consumption trends of mussels (*Mytilus* spp.*)* the main species of bivalves in reporting countries

Long-term trend (Dec 2022 to Nov 2025): Downward trend in volume and slightly upward trend in price.
Yearly average retail price (Jan – Nov): 7,64 EUR/kg (2023), 7,09 EUR/kg (2024), 8,28 EUR/kg (2025)
Yearly consumption (Jan – Nov): 27.427 tonnes (2023), 24.355 tonnes (2024), 22.135 tonnes (2025)
Short-term trend (Dec 2024 to Nov 2025): Slightly downward trend in price and upward trend in volume.
Average retail price (Dec 2024 to Nov 2025): 8,52 EUR/kg.
Consumption (Dec 2024 to Nov 2025): 24.823 tonnes.

Figure 42. **RETAIL PRICE AND VOLUME OF BIVALVES PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, DEC 2022 – NOV 2025**



Consumption of mussels (*Mytilus* spp.) in the reporting countries shows a seasonal fluctuation with a peak between June and August due to higher summer consumption and another annual peak in December. Prices showed higher peaks between December and January while they decreased between June and August. Between December 2022 and November 2025, consumption volumes showed a downward trend and prices showed a slight upward trend.

6. Case study: sharks and rays in the EU

Source: Vecteezy

Sharks are commonly known as top predators of the oceans and seas. Yet, they are very vulnerable species, whose populations face significant decline and, for some species, even a real threat of extinction. The life history characteristics of most sharks is slow growth, late maturity and small number of young which make them particularly susceptible to overfishing and slow to recover once depleted.

Today, more than 50% of shark species are threatened or near threatened with extinction. Pelagic sharks, which inhabit the high seas, have been especially affected with populations declining by more than 70% in only a 50-year period29. While shark fisheries still account for a limited share of world fishing production, they have experienced rapid growth since the mid-1980s. This trend has been driven by an increased demand for shark products (fins, but also meat, skin, cartilage, etc), especially in Asian markets. Improvements in fishing technology and processing, effective consumer marketing, and declines in other commercially important fish stocks have also contributed to making sharks a more economically valuable fishery[30].

The EU plays a leading role in global shark conservation, working through international organisations and regional fisheries management organisations (RFMOs). In 2009, the EU adopted its own Shark Action Plan, building on the UN FAO's international plan. The EU was also the first to sign the global agreement for protecting migratory sharks. Through CITES, the EU supports controls on international trade in threatened species, including many shark and ray species added in 2022. Under the Common Fisheries Policy, the EU follows scientific advice to protect marine species[31]. Overall, global shark declines are primarily driven by international demand for shark fins and meat.

Within this global context, the EU is a significant player. In 2023, the EU accounted for 17% of global shark and ray catches (FAO). Spain is the dominant catching nation within the EU, responsible for 62% of EU shark catches in 2023, of which 83% consisted of blue shark. Regarding external trade, EU imports of sharks and rays (whole, fresh, chilled, and frozen) decreased from 8.375 tonnes in 2021 to 6.242 tonnes in 2024. EU exports of these products also declined, from 10.722 tonnes in 2021 to 7.935 tonnes in 2024. Preliminary figures for January–November 2025 indicate a continued downward trend in both imports and exports.

6. 1. Ecology, environmental change and management in the EU

Many shark species in EU waters, especially in the Mediterranean, are at high risk of extinction and continue to decline. This is mainly due to long-term overfishing, the slow reproductive cycle of sharks, strong demand for shark products, delayed or weak fishery management and high levels of bycatches. Although conservation measures exist, they have often not kept pace with the speed in decline[32]. Warming oceans are also making it harder for sharks to find food because many of their prey species are moving to cooler areas as temperatures rise.

Shark finning is one of the leading contributors to shark overfishing. Shark finning occurs when people catch sharks, slice their fins off, and then throw them back in the ocean to die a slow death. According to some estimates, as much as 80% of intentionally

[29] https://d1jyxxz9imt9yb.cloudfront.net/resource/1180/attachment/original/IFAW_Report_EU_role_in_global_shark_trade_FINAL_Feb_2022_HRes.pdf
[30] https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=CELEX%3A52009DC0040
[31] https://oceans-and-fisheries.ec.europa.eu/ocean/marine-biodiversity/sharks_en
[32] https://www.wwf.mg/?349770/Sharks-in-the-Mediterranean-sea-are-the-most-at-risk-in-the-world-says-WWF

killed sharks are targeted for this reason[33]. Shark fins are highly valuated in the Asiatic markets where they can reach prices far higher than shark meat.

The EU regulates sharks' fisheries through a comprehensive framework that combines conservation rules, fishing regulations, and strict trade controls. Shark finning is completely banned and all sharks caught in EU waters or by EU vessels worldwide must be landed with their fins naturally attached[34] . To improve monitoring, the EU introduced new shark-specific customs codes in January 2025, enabling more detailed tracking of traded shark products and species. This measure also helps to address to the European Citizens' Initiative "Stop Finning – Stop the Trade," which called for stronger trade oversight of shark fins and products35.

Fishing activities involving sharks are governed by the Common Fisheries Policy (CFP), which sets science-based catch limits, maintains zero-catch rules for many threatened species, and promotes an ecosystem-based management approach across EU waters[36]. Internationally, the EU plays a leading role in promoting shark conservation within Regional Fisheries Management Organisations (RFMOs).

The Shark Alliance[37] established in Europe in 2006, has been an important advocate for stronger shark protection. The Shark Alliance was a global coalition founded by the Pew Charitable Trusts. It brought together non-governmental organizations focused on improving shark conservation policies and restoring depleted shark populations. By 2010, the alliance had grown to include around 85 non-governmental members from more than 35 countries. Its efforts contributed to the adoption of the EU Plan of Action for the Conservation and Management of Sharks[38] in 2009, which significantly improved regulatory oversight. A second milestone was achieved in 2013, when the European Parliament and the Council adopted a regulation[39] requiring that all sharks be landed with their fins naturally attached, closing previous loopholes and making the finning ban fully enforceable. While the original alliance was a specific and time-bound project, its work continues through coalitions like Shark Allies[40].

Today, the EU is becoming a global leader in shark conservation. These milestones represent major steps toward ensuring a sustainable future for shark populations[41].

6. 2. EU catches of sharks and rays

Global catches of sharks and rays reached 580.000 tonnes in 2023, a 2% decrease compared to 2022, and a 23% decrease compared to 2014. The largest catching nations in 2023 were Indonesia (76.000 tonnes), Spain (60.000 tonnes), Mexico (56.000 tonnes), Taiwan (42.000 tonnes) and USA (30.000 tonnes).

EU shark and ray catches have shown a general decline over the decade, with total catches decreasing from 125.386 tonnes in 2014 to 96.248 tonnes in 2023 (23%). This downward trend reflects reductions in several major species groups. EU catches in 2023 showed a 5% increase compared to 2022.

Blue sharks dominate the catches making up 64% of EU shark catches and 50% of global blue shark catches in 2023. The catches fell from 78.218 tonnes in 2014 to 61.724 in 2023 and was at its lowest in 2020 with 52.379 tonnes. Although the species shows some year-to-year fluctuations, the long-term pattern is a slow decline.

Among rays, thornback ray catches have gradually increased, rising from 4.295 tonnes in 2014 to 5.742 tonnes in 2023, indicating a steady upward trend. Blonde ray also experienced moderate growth through the decade, peaking in 2019 before stabilizing at slightly lower levels.

In contrast, several smaller shark species such as small spotted catshark and shortfin mako have shown noticeable declines. Small spotted catshark catches dropped from 6.252 tonnes in 2014 to 4.876 tonnes in 2023, while shortfin mako declined more sharply from 7.712 tonnes in 2014 to 2.272 tonnes in 2023.

The picked dogfish showed a strong growth in 2023 after the fishery was reopened after years with closure[42].

[33] https://safeworldwide.org/shark-overfishing-why-the-oceans-bad-guys-need-protection/
[34] https://oceans-and-fisheries.ec.europa.eu/news/commission-improves-shark-trade-monitoring-part-follow-european-citizens-initiative-2024-12-16_en
[35] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=oj:JOC_2023_275_R
[36] https://oceans-and-fisheries.ec.europa.eu/news/commission-improves-shark-trade-monitoring-part-follow-european-citizens-initiative-2024-12-16_en
[37] https://www.pew.org/en/projects/archived-projects/shark-alliance
[38] EUR-Lex - 52009DC0040 - EN - EUR-Lex
[39] Regulation 605/2013 - EN - EUR-Lex
[40] https://sharkallies.org/eu-action
[41] https://www.pew.org/en/projects/archived-projects/shark-alliance
[42] https://www.gov.scot/publications/european-union-and-the-united-kingdom-fisheries-consultations-written-record-2025/pages/spurdog/

Other categories including mixed ray groups and miscellaneous species also decreased significantly over time. For example, the category "Other" fell from 19.542 tonnes in 2014 to 6.589 tonnes in 2023, reflecting reduced landings of less common or aggregated species.

Overall, the data show that catches of a few species have increased, while most shark species demonstrate a clear decline, contributing to a marked reduction in total EU catches over the period.

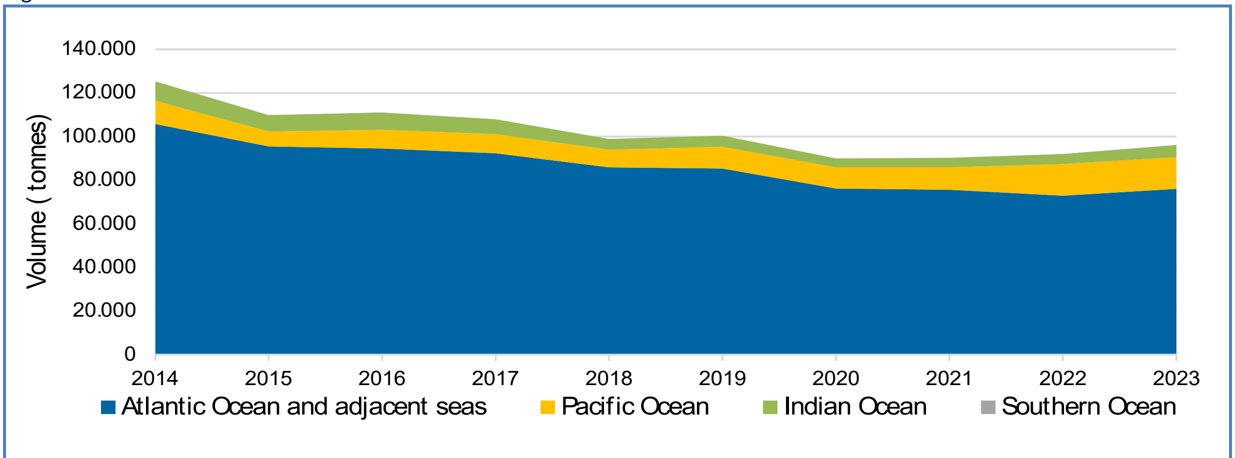
Table 40. **SHARK AND RAY CATCHES IN THE EU (tonnes)**

Species	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Blue shark	78.218	64.405	68.766	64.987	59.523	59.196	52.379	53.796	57.396	61.724
Thornback ray	4.295	4.357	4.369	4.769	5.067	5.555	5.032	5.174	5.438	5.742
Small-spotted catshark	6.252	6.007	6.370	6.079	5.775	5.869	5.477	5.537	5.245	4.876
Raja rays nei[43]			71	88	169	5.067	5.371	5.030	4.548	3.873
Smooth hounds nei	3.659	3.628	3.602	3.578	4.036	3.128	3.096	3.698	3.477	3.753
Blonde ray	1.949	1.968	1.766	1.831	2.122	2.773	2.863	2.576	2.841	2.419
Shortfin mako	7.712	5.091	5.763	6.540	4.930	5.242	4.946	3.532	2.737	2.272
Cuckoo ray	3.020	3.092	2.728	2.591	2.797	2.761	2.342	2.420	2.213	2.059
Picked dogfish	109	310	210	144	86	211	181	163	146	1.643
Nursehound	631	832	1.091	978	1.141	1.331	1.174	1.284	1.284	1.299
Other	19.542	20.205	16.331	16.402	13.301	9.332	7.172	7.164	6.707	6.589
Total catches	**125.386**	**109.894**	**111.068**	**107.988**	**98.946**	**100.466**	**90.034**	**90.373**	**92.033**	**96.248**

Source: FAO

EU catches of sharks and rays in the Atlantic are the highest but have been showing a steady downward trend with a peak of 105.838 tonnes in 2014 and a low of 72.848 tonnes in 2022, after which there was a slight increase in 2023 to 76.060 tonnes. Since 2014, catches in the Atlantic Ocean decreased by 28%. The Pacific has become increasingly important in catches, possibly reflecting changes in migration patterns, fishing fleet activity, or availability of oceanic pelagic species. In the period from 2014 to 2023, catches increased by 38%. A 37% drop was seen in the EU catches in the Indian Ocean during the same period. Catch volumes in the Southern Ocean are fewer and irregular, fluctuating sharply year to year. The overall decline in the 2014-2023 period was 71%. Catches in 2023 were only 28 tonnes.

Figure 43. **EU SHARKS AND RAY CATCHES BY OCEAN GROUP**



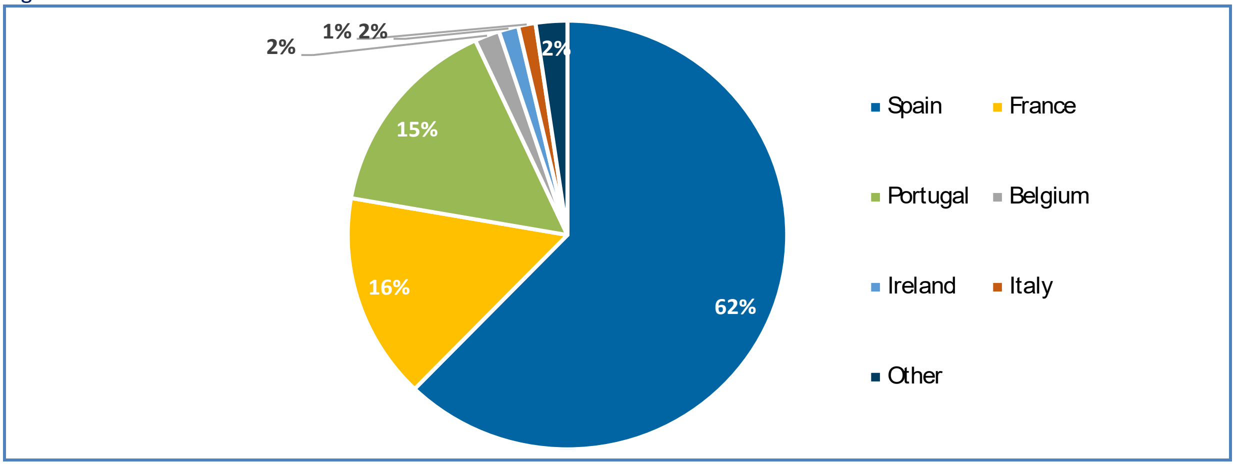
Source: FAO

There are basically three Member States within the EU covering most of EU shark and ray catches. Spain dominates the fishery, accounting for 62% of all reported catches in 2023. The second-largest contributor is France, responsible for 16%, followed by

[43] Not elsewhere included

Portugal with 15%. The remaining countries contribute only small shares. Overall, the data show that shark and ray catches in 2023 are concentrated in a few southern Member States, with Spain playing by far the largest role.

Figure 44. **EU CATCHING NATIONS OF SHARKS AND RAY IN 2023**



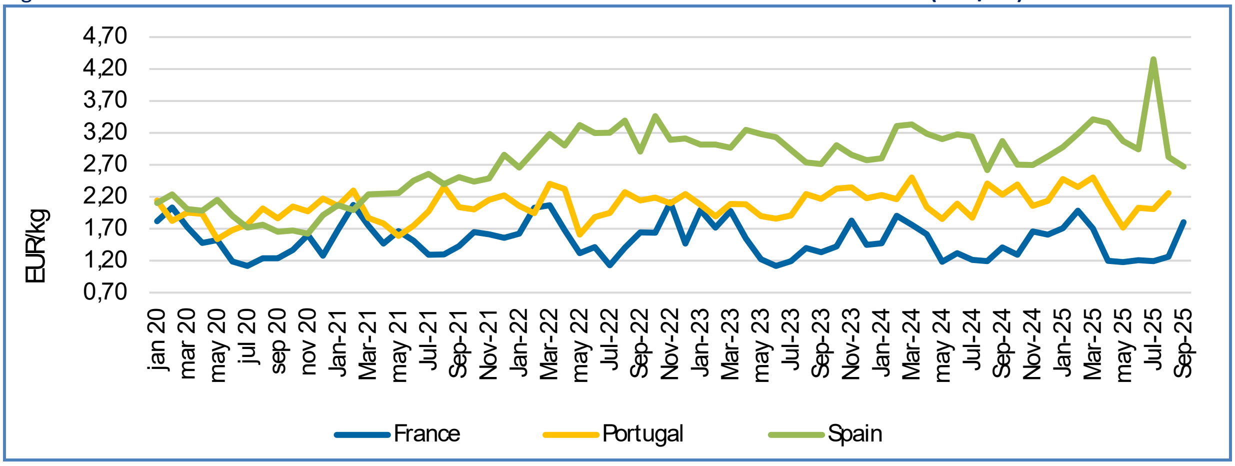
Source: FAO

Spain shows the highest average first-sale prices of the three. Prices rise sharply over time, reaching above 3,00 EUR/kg regularly from 2023 onwards. One notable peak occurred in July 2025 at 4,35 EUR/kg. This indicates strong demand or higher value shark and ray species sold from Spanish vessels. Most Spanish catches are made up by blue sharks at prices around or slightly below 3 EUR/kg while shortfin mako and rays achieves higher average prices but at lower volumes.

In Portugal, prices remain relatively stable generally between 1,70 and 2,40 EUR/kg. Portugal shows occasional peaks above 2,50 EUR/kg, but the trend is steady and moderate reflecting a less dynamic market compared to Spain. Most Portuguese catches are made up by thornback ray, blonde ray and small-eyed ray at prices varying between 2,5 EUR/ kg to 3 EUR/kg. Nursehound, is another major specie, is lower prices around 0,9 EUR/kg.

France consistently has the lowest prices, mainly between 1,10 and 1,80 EUR/kg. Very limited long-term increase is observed, and prices rarely exceed 2,00 EUR/kg. This indicates lower- value species or weaker market demand. In France, catches of smoothounds and smallspotted catshark make up around 40% of the volumes at prices below 1 EUR/kg. Thornback ray, cuckoo ray and blonde ray make ups around 35% of the catches with unit prices above 2 EUR/kg.

Figure 45. **AVERAGE FIRST SALE PRICES IN MAIN CATCHING NATIONS OF SHARKS AND RAYS (EUR/KG)**



Source: EUMOFA

6.3. EU imports

EU imports of sharks and rays show fluctuating but generally declining volumes from 2021 to 2025, along with shifts in value depending on product type where fresh and frozen rays and skates are higher priced than similar products of blue shark. While total import volumes decrease across the period, the value per unit increases for several key products, suggesting changes in market demand, product quality, or supply conditions.

The main countries importing to the EU in 2024 were USA (1.017 tonnes), Japan (990 tonnes), UK (974 tonnes, Ecuador (856 tonnes) and South Africa (526 tonnes). Together the top five suppliers accounted for 70% of the volumes and 69% of the import values.

Total import volumes fell from 8.375 tonnes in 2021 to 6.242 tonnes in 2024, while total values increased from 16,2 million EUR to 18,1 million EUR over the same period. Figures through Jan–Nov 2025 shows a decreasing trend in both volumes and values.

Frozen rays and skates ("Rajidae") remained a stable category but showed no long-term growth, with imports fluctuating between 1.200 and 1.800 tonnes. Imports in January – November 2025 shoed a decreasing trend.

Frozen blue shark peaked in 2022 at more than 5.000 tonnes but declined steadily thereafter, reaching 2.300 tonnes in 2024 with a further decreasing trend in the January – November period in 2025.

Fresh or chilled rays and skates have also shown a continuous downward trend in both volume and value.

Frozen ray's bream rose sharply from 2021 to 2023 before decreasing in 2024 and falling sharply in Jan–Nov 2025. Fresh or chilled ray's bream followed a similar pattern, increasing up to 2023 and then dropping significantly in the following years.

Frozen fillets of rays and skates was the only category showing strong recent growth. Despite low volumes in earlier years, imports rose sharply in 2024 and continued to climb into 2025, with volumes reaching 355 tonnes and values increasing markedly to 1.82 million EUR by the end of November 2025.

Overall, EU imports are going down because there is much less trade in blue shark and in fresh or chilled Rajidae and Brama products. The only thing slowing this decline is the recent increase in imports of frozen fillets of rays and skates.

Table 41. **EU IMPORT OF SHARKS AND RAYS (tonnes, 1.000 EUR)**

	2021		2022		2023		2024		Jan- Nov 24		Jan- Nov 25	
Product	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Frozen rays and skates *Rajidae*[44]	1.523	5.159	1.536	5.949	1.216	4.566	1.823	8.153	1.743	7.835	1.304	5.485
Frozen blue shark *Prionace glauca*[45]	3.967	4.093	5.033	7.793	4.725	7.421	2.300	3.624	2.180	3.389	1.816	3.076
Fresh or chilled, rays and skates *Rajidae*[46]	1.175	3.318	896	2.878	792	2.943	697	2.699	657	2.563	657	2.620
Frozen ray's bream *Brama* spp.[47]	146	283	482	1.096	605	1.473	621	1.326	599	1.267	246	609
Fresh or chilled ray's bream *Brama* spp.[48]	310	586	324	910	508	1.525	281	875	263	807	183	726
Frozen fillets of rays and skates *Rajidae*[49]	76	432	86	644	40	266	148	776	111	628	355	1.825
Other	1.179	2.367	893	2.306	921	2.488	373	660	360	635	93	347
Total	**8.375**	**16.237**	**9.250**	**21.576**	**8.807**	**20.682**	**6.242**	**18.112**	**5.913**	**17.124**	**4.654**	**14.689**

Source: EUMOFA elaboration of Eurostat-Comext data

[44] 03038200
[45] 03038140
[46] 03028200
[47] 03038960
[48] 03028940
[49] 03048890

6. 4. EU exports

EU exports reached 7.935 tonnes valued at 12,73 million EUR in 2024, a 10% decrease in volumes and a 14% decrease in terms of value from the year before. In the January- November period in 2025 export volumes dropped by 3% while export values remained stable from the same period in 2024.

Frozen blue shark is by far the largest product reaching 6.530 tonnes in 2024 which was up by 10% from the year before. Frozen blue shark accounted for 82% of the export volumes and 72% of the values in 2024. Figures through January – November 2025 indicates decreasing export volumes on blue sharks.

Fresh fillets of dogfish and other sharks have increased strongly in 2024 reaching 169 tonnes, up from 17 tonnes the year before. Export figures through January- November in 2025 indicate further growth in the exports of that product.

Spain is by far the largest supplier in the EU export accounting for 64% of the export volumes and 59% of the export values in 2024. More than 90% of the export from Spain is frozen blue shark.

Portugal is the second largest supplier accounting for 30% of the export volumes and 28% of the values in 2024. Of this, 76% was frozen blue shark and 19% was frozen fillets of blue shark.

Croatia on third place accounted for 2% of the volumes and 10% of the values. Exports here contains entirely of fresh fillets of dogfish.

Table 42. **EU EXPORTS OF SHARKS AND RAYS (tonnes, 1000 EUR)**

	2021		2022		2023		2024		Jan- Nov 24		Jan- Nov 25	
Product	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Frozen blue shark *Prionace glauca*[50]	9.333	9.594	6.121	10.407	5.954	9.754	6.530	9.137	5.819	8.212	5.528	7.329
Fresh or chilled fillets of dogfish and other sharks[51]	9	21	13	32	17	51	169	1.295	153	1.166	199	1.487
Frozen rays and skates *Rajidae*[52]	223	634	419	1.349	428	1.377	317	1.168	188	627	311	1.184
Frozen fillets of blue shark *Prionace glauca*[53]	252	201	219	261	162	198	469	431	302	284	401	392
Frozen ray's bream *Brama* spp.[54]	349	499	3	6	49	93	76	147	46	108	82	162
Fresh or chilled picked dogfish[55]	5	8	9	15	29	35	57	60	56	60	75	154
Other	550	1.018	1.004	2.700	2.189	3.296	317	492	276	443	52	182
Total	**10.722**	**11.975**	**7.786**	**14.771**	**8.827**	**14.804**	**7.935**	**12.732**	**6.840**	**10.899**	**6.647**	**10.891**

Source: EUMOFA elaboration of Eurostat-Comext data

Main EU destination markets for exports of sharks and rays are Morocco and Brazil. In 2024, Morocco received 3.433 tonnes, representing 43,3% of total export volume, while Brazil received 3.398 tonnes, or 42,8% of total exports. Together, these two markets accounted for over 86% of all exported tonnage. In value terms, Brazil was the leading market with 5,118 million EUR, corresponding to 40% of total export value, followed by Morocco with 4,139 million EUR or 32,5%. Combined, the two markets represented nearly 73% of the total export value.

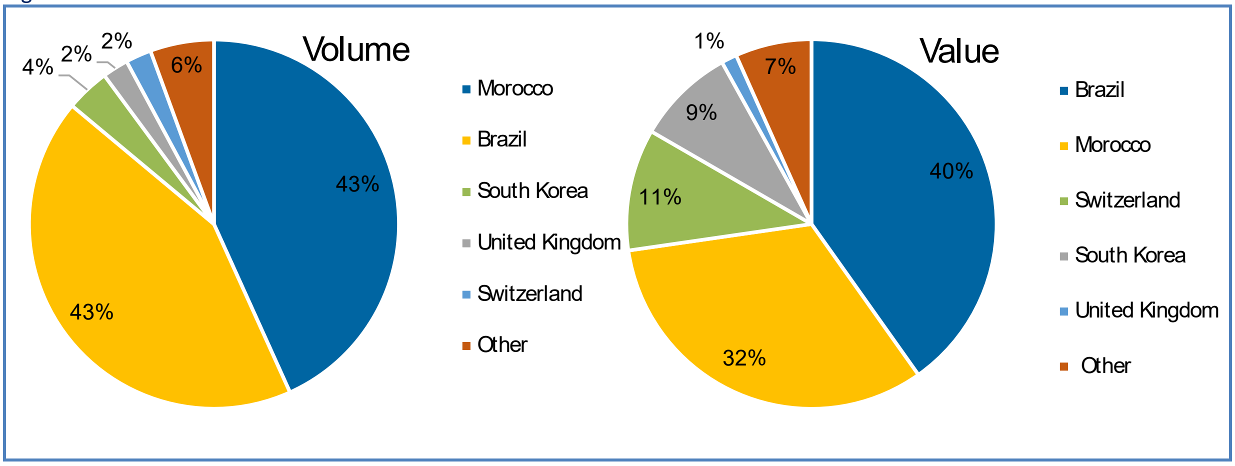
Switzerland and South Korea were comparatively small in terms of volume but significant in value due to high unit prices. Switzerland imported 178 tonnes, equivalent to 2,2% of total volume, but generated 1,356 million EUR (10,7% of total export value), resulting in an estimated unit value of approximately 7,61 EUR/kg. South Korea imported 303 tonnes (3,8%of volume) valued at 1,096 million EUR (8,6% of value), corresponding to around 3,61 EUR/kg. The United Kingdom accounted for 180 tonnes

[50] 03038140
[51] 03044790
[52] 03038200
[53] 03048818
[54] 03038960
[55] 03048811

of exports (2,3% of the total), valued at 0,173 million EUR, which implies a unit value of roughly 0,96 EUR/kg. Exports to UK consist mainly of fresh or chilled dogfish which has a lower unit value compared to other species. Remaining markets grouped as "Other" amounted to 443 tonnes and 0,85 million EUR, representing 5,6% of total volume and 6,7% of total value.

Overall, the 2024 export landscape shows that Morocco and Brazil dominate EU trade in sharks and rays in terms of both volume and value, while certain smaller markets achieved higher prices per tonne.

Figure 46. **EU EXPORTS OF SHARKS AND RAYS BY MARKET IN 2024**



Source: EUMOFA elaboration of Eurostat-Comext data

6. 5. Market outlook

The future trend for sharks in the EU is moving toward stricter protection, tighter trade controls, and increasingly precautionary fisheries management. Several signals at EU level and recent policy initiatives show that shark conservation will become more restrictive and closely monitored over the coming years. The European Commission has confirmed that many shark populations remain in critical condition, with more than one-third of species globally threatened with extinction. This awareness is driving increasingly protective actions[56].

A major development shaping the future is the EU's response to the European Citizens' Initiative *Stop Finning – Stop the Trade*, which triggered extensive public consultation and demonstrated strong public demand for strengthened shark protections. Starting in January 2025, the EU will introduce 13 new customs codes to better monitor the trade of sharks and shark fins, including species such as blue shark and shortfin mako. These codes will allow more detailed tracking of imports and exports, with the data made publicly available through Eurostat. The Commission has also completed the first stage of an impact assessment on a possible trade ban on detached fins[57]

[56] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=oj:JOC_2023_275_R
[57] https://oceans-and-fisheries.ec.europa.eu/news/commission-improves-shark-trade-monitoring-part-follow-european-citizens-initiative-2024-12-16_en

7. CASE STUDY: Cod in Portugal

Although one of the most popular food products in the country, Portugal does not catch significant amounts of cod itself. The market is largely supplied by imports of frozen cod and semi-processed salted products, especially from Norway. The dried salted cod market is the main product, marketed mostly by large-scale retailers. In recent years, rising prices on the European cod market seem to have impacted the frozen cod market rather than the dried and salted cod market, where demand has seemed to resist inflation well. However, over a longer-term perspective, per capita consumption has been decreasing since 2016. Portugal also re-exports some dried salted cod, notably to Brazil, France, and Spain, which gives the sector an outward-oriented component despite its heavy reliance on imports.

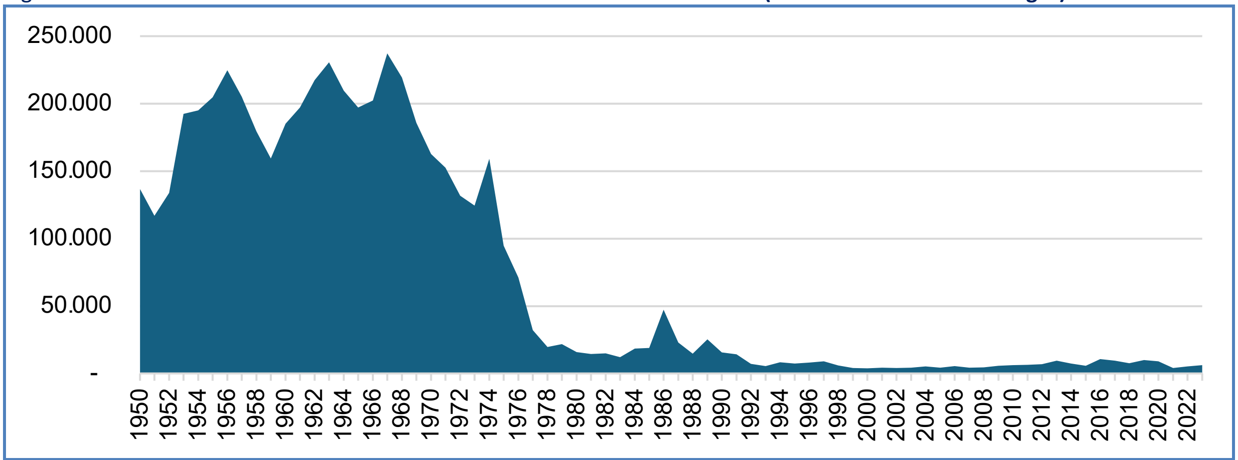
7. 1. History and production

Atlantic cod (*Gadus morhua*) is a fish of the family Gadidae. It can be found on the continental shelves and in coastal waters throughout the North Atlantic. It is a benthopelagic species, living at depths of less than 200 m. Fourteen different cod stocks exist in the Northeast Atlantic, the largest of which is the Arctic stock, located off the coast of Norway. There are also two stocks of Baltic cod: the eastern and western Baltic cod. The latter is the smaller of the two[58]. On average, Atlantic cod weighs 5 kg to 12 kg. It can live up to 25 years and usually reproduces for the first time when five or six years old. Atlantic cod reproduces during a one to two-month spawning season annually. Cod has lean, moist meat with a dense, but very flaky texture[59]. Atlantic cod is caught mainly with generic gillnets, bottom trawls and longlines with hooks, usually in mixed demersal fisheries with a bycatch of flatfish and other groundfish species[60].

Portugal's cod (bacalhau) market has deep historical roots and today combines very high domestic consumption with almost total dependence on imported raw fish that is then processed and traded locally. Trade began in the 14th century, when Portugal exchanged salt for dried cod from England, making cod a preserved product linked to long-distance trade rather than local fishing. From the 16th century, Portuguese fleets fished cod near Newfoundland and the North Atlantic, but over time English and French fleets gained dominance and Portugal increasingly relied on imports. Large-scale, popular consumption only really took off during the 19th century, when salted cod became cheap and easy to transport inland. In the 1920s, the national industry experienced a renewed push for national cod fishing and processing capacity. Under the Estado Novo dictatorship, the "Cod Campaign" launched in 1934 made cod a strategic staple. The state controlled the fleet, prices, and industry, and by the 1950s domestic production supplied over 80% of national consumption[61]. The 1950s–60s were the "glory years" of the Portuguese cod fleet, when Portugal became a leading producer of dried salted cod[62]. In the 1970s the Atlantic cod fishery declined strongly following the strong decline of the resource.

[58] http://ec.europa.eu/fisheries/marine_species/wild_species/cod/index_en.htm
[59] http://thisfish.info/fishery/species/atlantic-cod/
[60] https://fish-commercial-names.ec.europa.eu/fish-names/species/gadus-morhua_fr
[61] https://www.visitlisboa.com/en/lisbon-stories/13-the-codfish-route
[62] https://portugaliamarketplace.com/collections/salted-codfish

Figure 47. **LONG TIME SERIES OF PORTUGUESE CATCHES OF ATLANTIC COD (volume in tonnes live weight)**



Source: FAO

In 2023, EU Atlantic cod catches reached 40.400 tonnes, registering a 0,5% decrease from 2022 and a more significant 63% fall compared to 10 years ago. The serious decline in Atlantic cod catches affected all fishing nations except Latvia which showed an increase compared to 10 years ago. In 2023, Germany was ranked as the largest Atlantic cod catching nation in the EU followed by Spain, Portugal, Denmark and France, all of which experienced a significant drop in catches from 2014 to 2023. Portugal accounted for 15% of EU production with 6.156 tonnes caught in 2023. The decline in EU Atlantic cod catches is mainly due to a strong decline in several European Atlantic cod stocks and particularly in the Baltic Sea[63]. The strong decline in the recent decade reflects the interaction of legacy overfishing with rapid climate-driven environmental change, altered food webs, and biological erosion of stock resilience, rather than a single isolated cause[64].

Table 43. **EU CATCHES OF ATLANTIC COD BY MEMBER STATE (live weight, tonnes)**

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

Source: FAO

7. 2. Trade and processing

The Portuguese cod market is highly specialized, import-dependent, and culturally driven, with very strong and relatively inelastic demand centred on salted and dried products (*bacalhau*). The market is largely supplied by imports of frozen cod and semi-processed salted products, especially from Norway.

[63] ICES, Cod (*Gadus morhua*) in subdivisions 24–32, eastern Baltic stock (eastern Baltic Sea). Replacing advice provided in May 2024, Cod (Gadus morhua) in subdivisions 22-24, western Baltic stock (western Baltic Sea), ICES Advice 2025
[64] https://academic.oup.com/icesjms/article/82/7/fsaf117/8196468?login=false

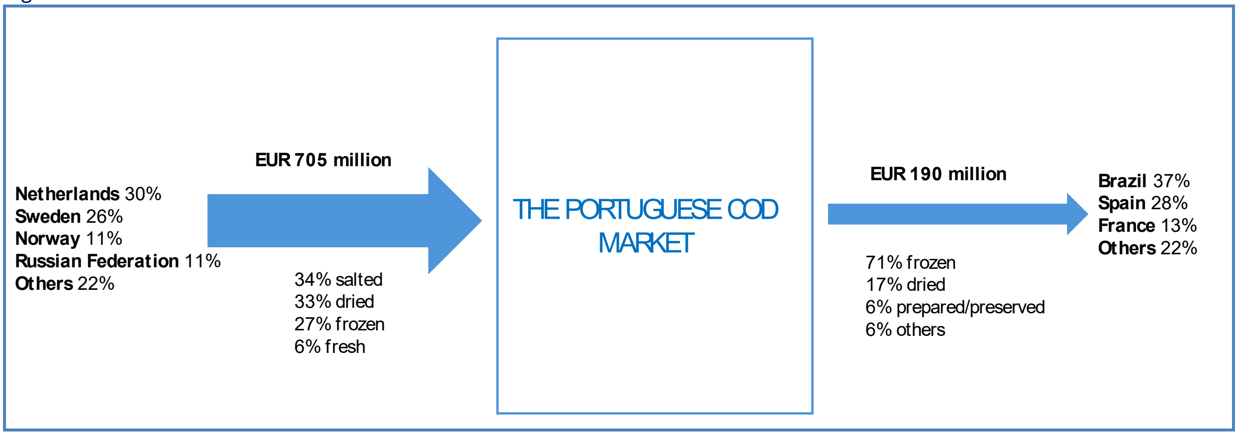
In 2024, Portuguese imports of cod products amounted to 88.203 tonnes for a value of EUR 705 million. This was stable in volume compared to 2020 (-4%) but an increase of 40% in value over the same period, following rising prices on the global cod market.

Frozen products accounted for 44% of the import volumes and 27% of the import value. Dried (37%) and salted (32%) cod accounted for most of the imported volumes. Fresh products only represent a small share of imports (6% in both volume and value). Over the 2020-2024 period, imports of salted cod products increased strongly in volume (40%), whereas frozen (-13%) and dried products (-18%) experienced decreases. This also contributes to explaining the increase in overall cod import value over the period.

In terms of origin, the Netherlands (28%), Sweden (20%), the Russian Federation (14%), Norway and Denmark (9% each) account for most of the imported volumes. However, the Netherlands and Sweden are actually the entry points in the EU of Norwegian products (and to a lesser extent Icelandic and Faroese).

In 2024, Portuguese exports of cod products amounted to 23.440 tonnes for a value of EUR 190 million. Frozen products dominated exports in both volume and value. Brazil, Spain and France were by far the main destinations of these exports. This can be linked with the significant Portuguese diasporas in those countries.

Figure 48. **THE COD TRADE MARKET IN PORTUGAL IN 2024 IN VALUE**

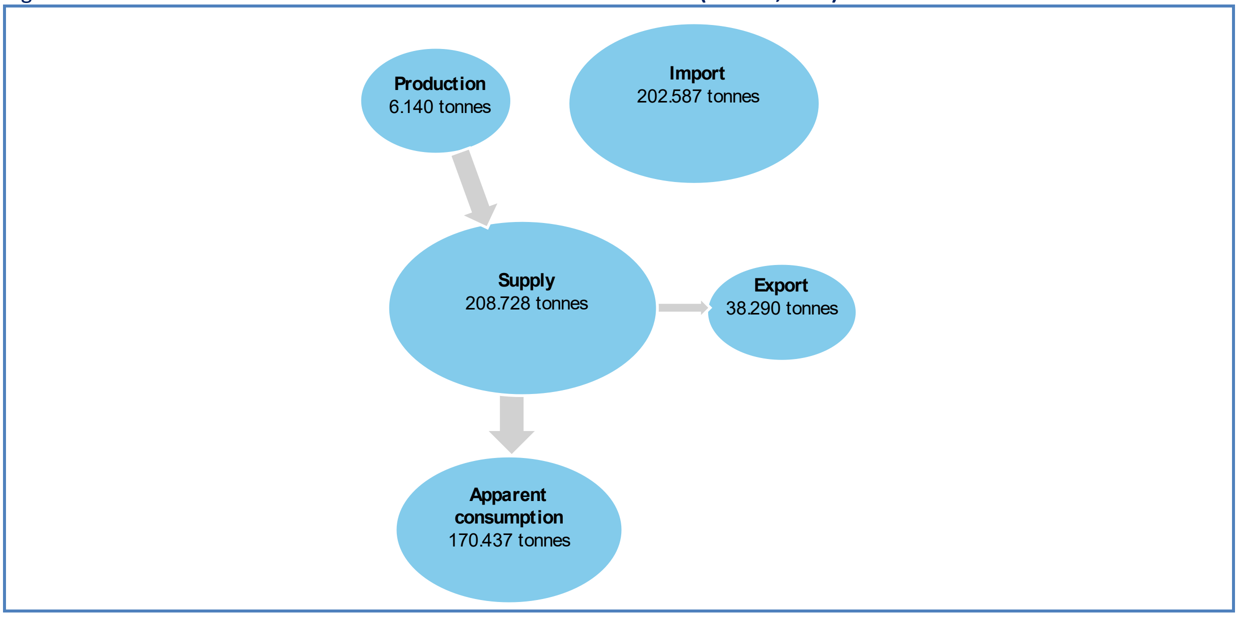


Source: EUMOFA elaboration of Eurostat-COMEXT data

7. 3. Consumption

Apparent consumption of cod in Portugal was estimated at 170.437 tonnes LWE in 2023 (+34% compared to 2020), equivalent to a per capita consumption of 16,2 kg LWE. Supply reached 208.728 tonnes LWE, originating predominantly from imports (97% of the volume) rather than from domestic catches (3% of the volume). Exports represented 19% of the overall supply. In the same year, apparent consumption accounted for 81%.

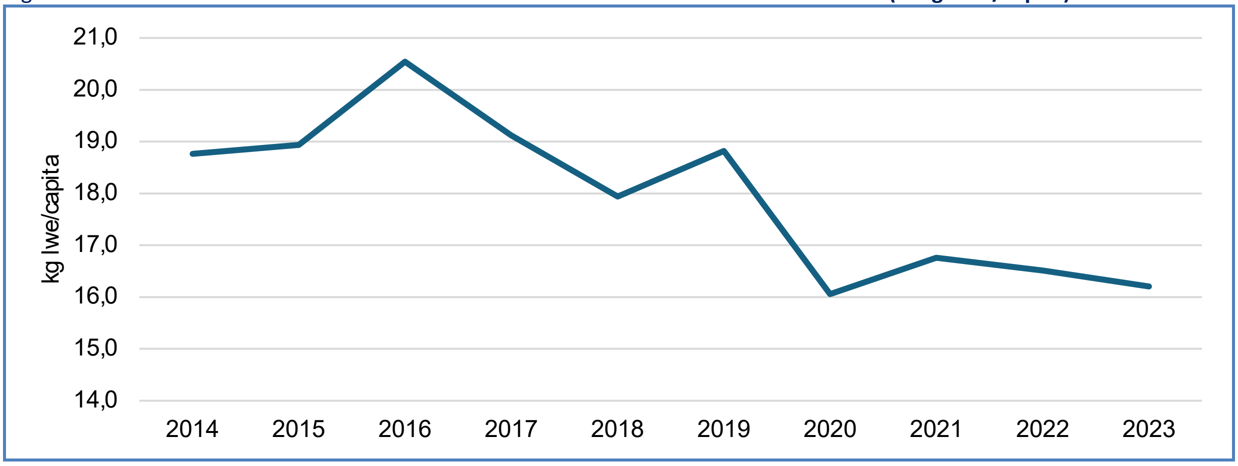
Figure 49. **APPARENT CONSUMPTION OF COD IN PORTUGAL IN 2023 (tonnes, LWE)**



Source: EUMOFA elaboration of EUROSTAT and EUROSTAT-COMEXT data

Recently, driven by tighter supply on the global market and falling import volumes, per capita apparent consumption experienced a decrease. Over the last decade, after reaching a peak at 20,5 kg LWE/capita, apparent consumption has kept on declining.

Figure 50. **EVOLUTION OF APPARENT CONSUMPTION OF COD PRODUCTS IN PORTUGAL (in kg LWE/capita)**

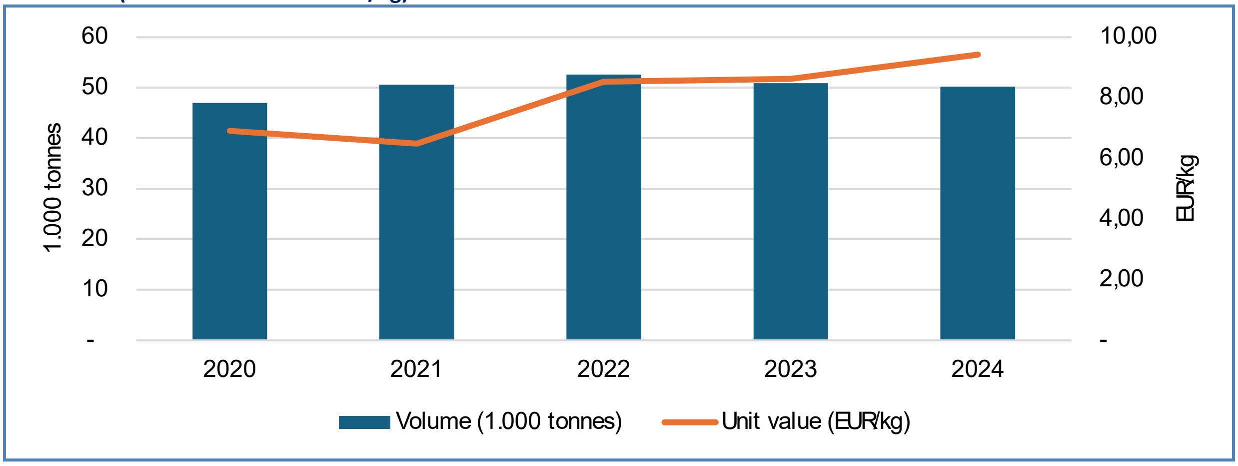


Source: EUMOFA elaboration of EUROSTAT and EUROSTAT-COMEXT data.

Besides this observed long-term declining trend, domestic consumption has resisted well to increased prices over recent years, especially for dried and salted cod. Demand is relatively price inelastic at aggregate level, which means that volumes do not change dramatically with price, reflecting cod's role as a staple rather than a luxury.

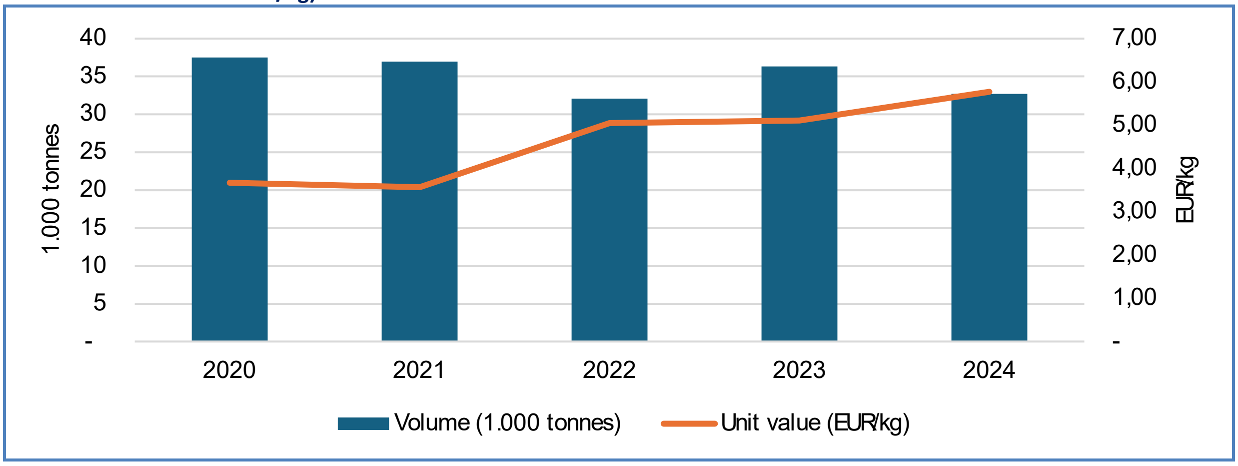
Over the 2021-2024 period, import prices of dried and salted cod rose by 45% whereas import volumes remained stable (-1%). Over the same period, imports of frozen cod fell by 12%, following a 62% price increase.

Figure 51. **EVOLUTION OF IMPORT VOLUMES AND UNIT VALUES OF DRIED AND SALTED COD PRODUCTS IN PORTUGAL (in 1.000 tonnes and EUR/kg)**



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

Figure 52. **EVOLUTION OF IMPORT VOLUMES AND UNIT VALUES OF FROZEN COD PRODUCTS IN PORTUGAL (in 1.000 tonnes and EUR/kg)**



Source: EUMOFA elaboration of EUROSTAT-COMEXT data.

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FOR MORE INFORMATION AND COMMENTS:

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

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

Global highlights: European Commission, Seafood Source, FAO.

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

First sales: ICES.

Case studies: IFAW, EUR-lex, WWF, Safe Worldwide, European Commission, Pew, Scottish Government, FAOSTAT, Eurostat COMEXT, DG-MARE, Thisfish.info, Visitlisboa.com, Portugaliamarketplace.com, ICES, EUROSTAT.

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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