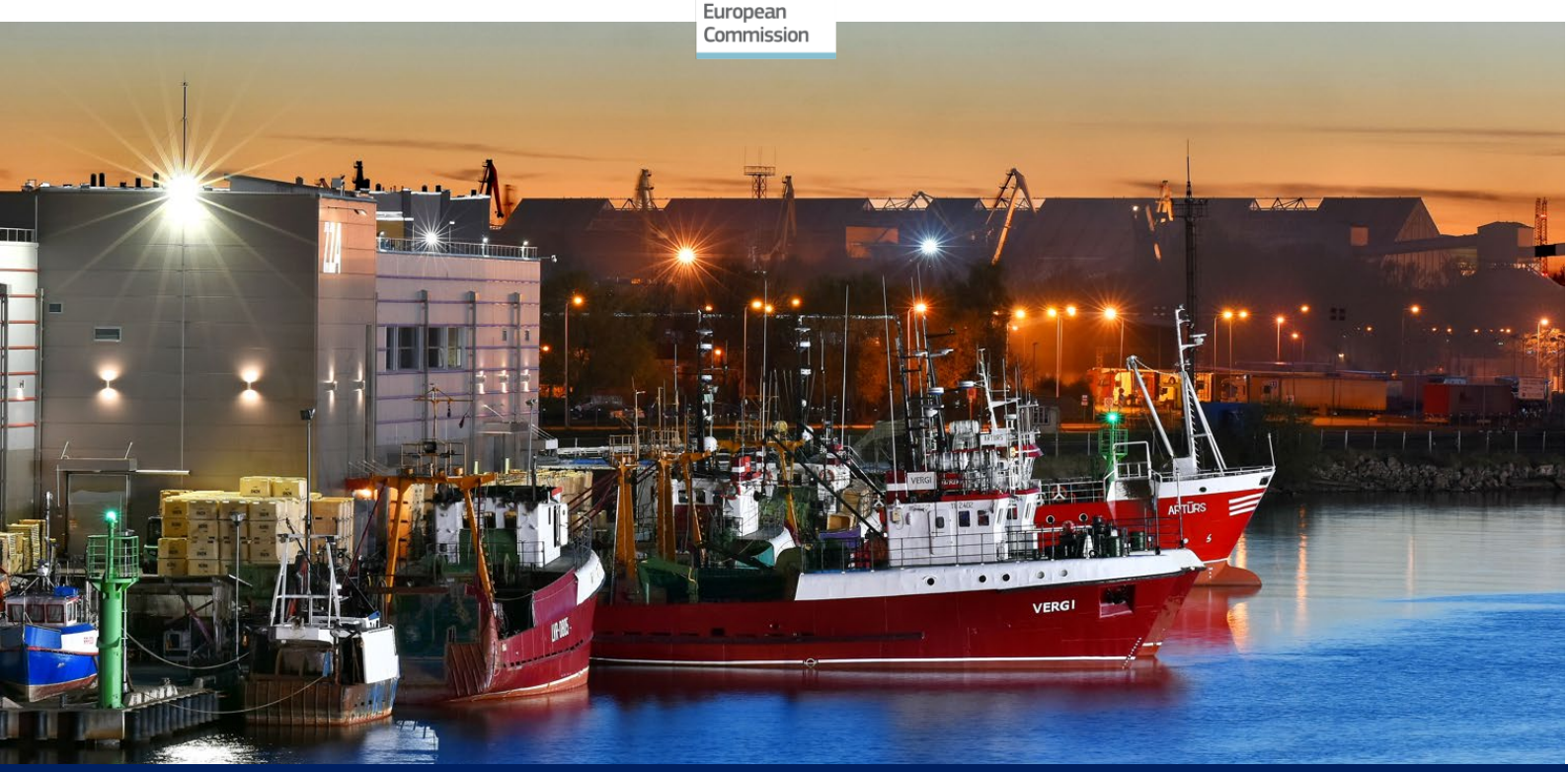
European Commission



Monthly Highlights

No. 3/2026

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

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Contents

Maritime Affairs and Fisheries

1. GLOBAL HIGHLIGHTS

EU/Fisheries Communities: On 10 February 2026, the European Commission highlighted Germany's EU-funded Sea Ranger programme in Mecklenburg–Western Pomerania, which retrains small-scale Baltic fishers as "stewards of the sea" to provide environmental services while maintaining maritime livelihoods. Launched with stakeholder cooperation and scientific partners (including training delivered with the Thünen Institute and at GEOMAR), the first cohort began in October 2023 and 11 fishers completed the programme, receiving certification as specialists in fisheries and the marine environment. Sea Rangers are now involved in activities such as monitoring herring migration, investigating harmful algae, analysing seaweed samples, recovering ghost nets, and testing hydrographic data-collection systems on fishing vessels, with a second course planned for 2027 and potential expansion through Baltic exchanges.[1]

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FAO/Seafood Integrity: On 10 February 2026, FAO released a new report on food fraud in fisheries and aquaculture, outlining how practices such as species substitution, mislabelling, adulteration and counterfeit products affect markets worldwide and can pose health, biodiversity and economic risks. The publication notes that empirical studies suggest that a significant share of seafood trade may be affected, while global baseline estimates remain limited due to inconsistent definitions and monitoring. FAO recommends stronger traceability and harmonised labelling (including scientific names where possible) and reviews analytical tools to detect fraud, ranging from DNA barcoding and stable isotope analysis to portable screening technologies and emerging machine-learning approaches, alongside the role of enforcement and international standards work through FAO and Codex[2].

EU/Biodiversity: On 12 February 2026, the European Commission published the EU's 7th National Report on Biodiversity[3], assessing progress toward the 45 EU targets aligned with the Kunming–Montreal Global Biodiversity Framework. The report finds that the EU is on track for 16 targets, with two already achieved, but calls for faster implementation across Member States to meet 2030 objectives. The assessment will feed into the Convention on Biological Diversity (CBD)'s reporting process ahead of the global review at CBD COP17 in Armenia in October 2026 and highlights the role of the Nature Restoration Regulation and recent 2025 initiatives such as the EU Water Resilience Strategy, the European Ocean Pact, the new Bioeconomy Strategy, and a nature credits roadmap, alongside continued EU funding support.[4]

EU/Small-Scale Fisheries (Spain): On 16 February 2026, the European Commission highlighted the work of producer organisation Pesqueros Artesanales Lonja de Conil (OPP72) along the Cádiz coast, supporting small-scale fishers from Conil, La Atunara and Rota. Founded in 2010, OPP72 represents around 70 producers and 59 vessels and uses EU-supported production and marketing plans to strengthen markets and resource stewardship. The organisation developed research and action plans for previously data-limited stocks, introduced the "Pescado de Conil" label with QR-code tagging for traceability, and is piloting laser-engraved clam traceability. It also operates a digital auction platform and online shop, runs education campaigns with restaurants and schools, and implements environmental actions including restoring accidentally caught corals before returning them to the sea.[5]

EU/Fisheries and Aquaculture: On 24 February 2026, the European Commission launched a call for evidence on a Vision 2040 to set a 15-year strategic framework for the fishery and aquaculture sector. Open until 24 March 2026, the consultation seeks input on structural challenges including ageing workforce, limited generational renewal, external shocks, fossil-fuel dependency and sustainable harvesting, and will address four areas: aquatic food demand, aquatic food supply, workforce, and infrastructure/financing, alongside

[1] https://oceans-and-fisheries.ec.europa.eu/news/meet-sea-rangers-germanys-stewards-sea-2026-02-10_en
[2] https://www.fao.org/newsroom/detail/new-fao-publication-describes-global-fish-fraud-and-the-tools-to-combat-it/en
[3] 7th National Report to the CBD on progress on the implementation of the Global Biodiversity Framework - Environment
[4] https://environment.ec.europa.eu/news/progress-made-biodiversity-swifter-action-needed-2026-02-12_en
[5] https://oceans-and-fisheries.ec.europa.eu/news/building-sustainable-future-small-scale-coastal-fishers-southern-spain-2026-02-16_en

simplification. Feedback will inform the Vision 2040, building on the European Ocean Pact, the Fishers of the Future foresight work and the ongoing evaluation of the CFP.[6]

[6] https://oceans-and-fisheries.ec.europa.eu/news/commission-seeks-feedback-future-fisheries-and-aquaculture-sector-2026-02-24_en

2. MACROECONOMIC CONTEXT

2. 1. Marine fuel

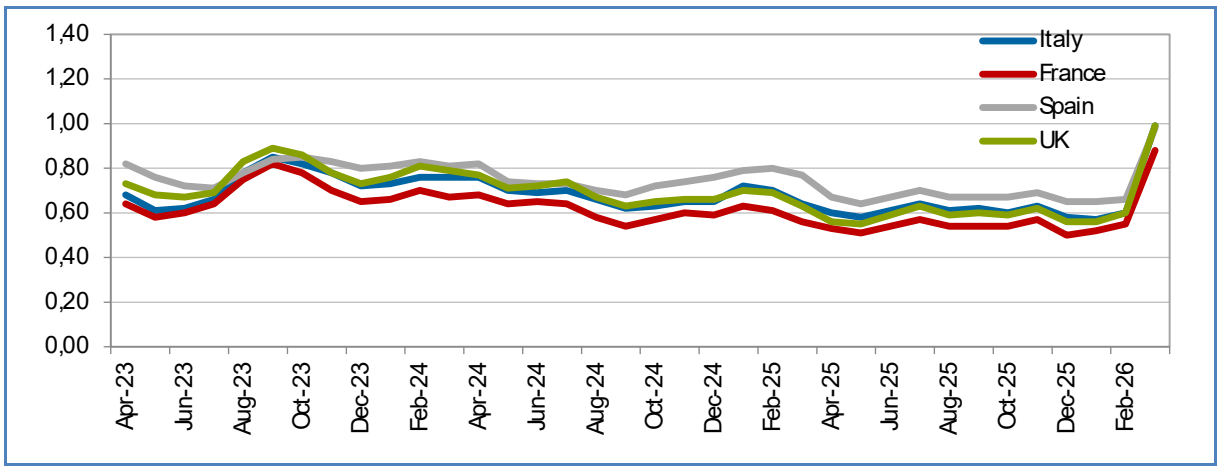
Average prices for marine fuel in **March 2026** ranged between 0,88 and 0,99 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 60% compared with the previous month and increased by an average of 48% compared with the same month in 2025.

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

Country	Mar 2026	Change from Feb 2026	Change from Mar[7] 2025
France *(ports of Lorient and Boulogne)*	0,88	60%	57%
Italy *(ports of Ravenna and Livorno)*	0,99	65%	55%
Spain *(ports of A Coruña and Vigo)*	0,98	48%	27%
The UK *(ports of Grimsby and Aberdeen)*	0,99	65%	57%

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 January 2026 the EU annual inflation rate was 2,0%, down from 2,3% compared to December 2025. A year earlier, the rate was 2,8%.

Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR JANUARY 2026, COMPARED WITH DECEMBER 2025**

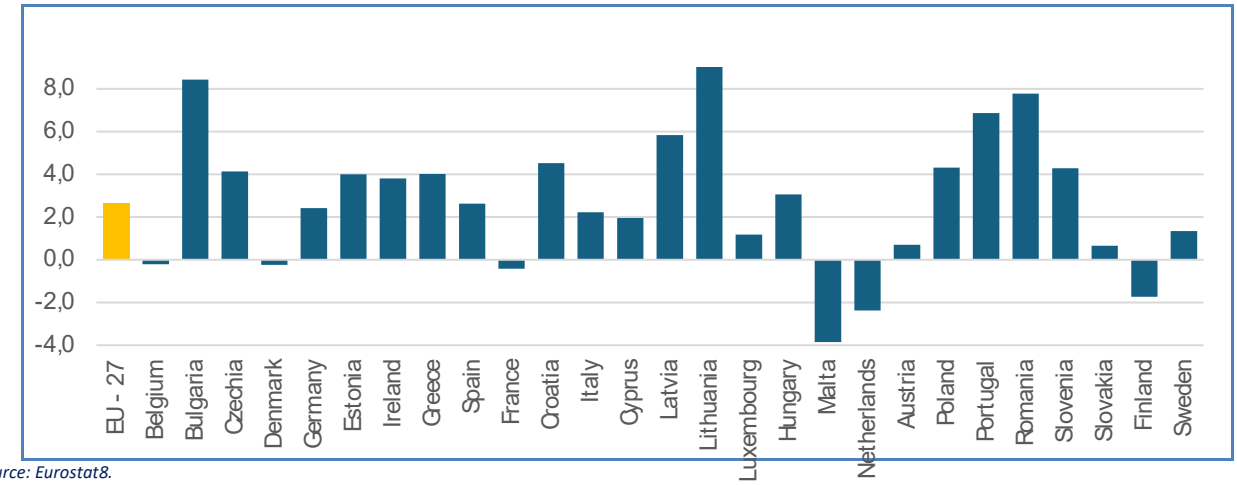
Lowest inflation rates		Highest inflation rates	
France	+0,4%	Romania	+8,5%
Denmark	+0,6%	Slovakia	+4,3%
Finland, Italy	+1,0%	Estonia	+3,8%

[7] Price up to March 20th 2026

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 JANUARY 2026 (value expressed in percentage)**



Source: Eurostat[8].

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

	Jan 2024	Jan 2025	Dec 2025	Jan 2026	Change from Dec 2025	Change from Jan 2025
Food and non-alcoholic beverages	142,54	145,88	148,89	150,10	0,8%	2,9%
Fish and seafood	141,53	145,10	146,88	148,96	1,4%	2,7%
Fish, live, fresh, chilled or frozen	97,56	100,66	101,86	104,02	2,1%	3,3%
Fish, dried, salted, in brine or smoked	94,91	98,00	101,49	102,36	0,9%	4,4%
Fish preparations	98,55	99,46	100,29	100,62	0,3%	1,2%
Other seafood, live, fresh, chilled or frozen	97,25	99,11	99,66	100,64	1,0%	1,5%
Other seafood, dried, salted, in brine or smoked	92,64	99,93	94,91	99,19	4,5%	-0,7%
Other seafood preparations	96,15	98,83	99,87	101,24	1,4%	2,4%

Source: Eurostat[8].

2.4. Exchange rates

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

Currency	Feb 2024	Feb 2025	Jan 2026	Feb 2026
NOK	11,4920	11,7245	11,3885	11,2085
GBP	0,8566	0,8261	0,8662	0,8763
USD	1,0826	1,0411	1,1919	1,1805

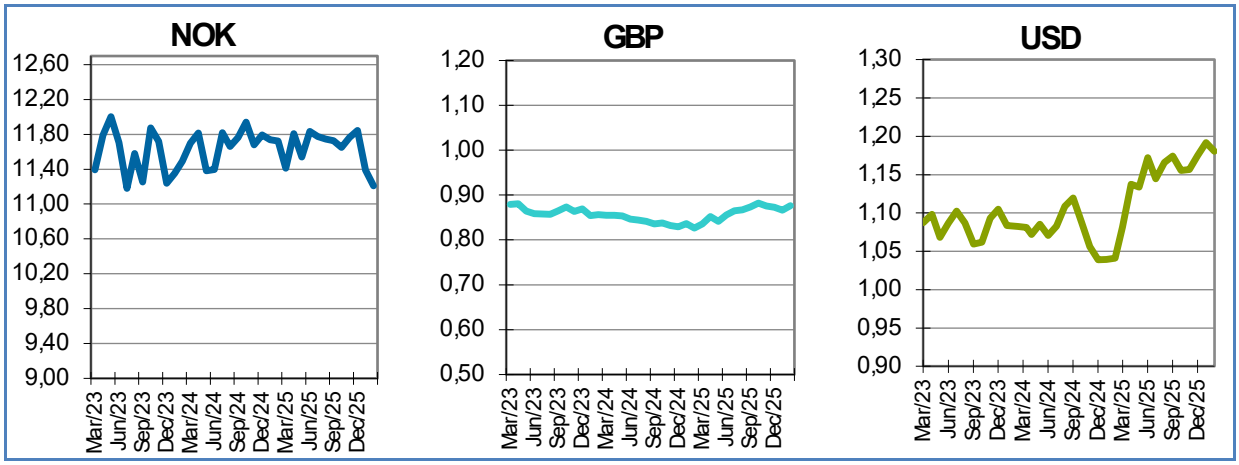
In February 2026, the euro appreciated against the British pound sterling (1,2%) and depreciated against the US dollar (1,0%), and against the Norwegian krone (1,6%), relative to the previous month. For the past six months, the euro has fluctuated around 1,1723 against the US dollar, 11,5966 against the Norwegian krone and 0,8742 against the British pound sterling. Compared with February 2025, the euro appreciated 13,4% against the US dollar and 6,1% against

[8] Updates in data collection and analysis.

Source: European Central Bank.

the British pound sterling and depreciated 4,4% against the Norwegian krone.

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



Source: European Central Bank.

3. FIRST SALES IN EUROPE[9]

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

Increases in value and volume (Jan - Dec 2025 vs Jan - Dec 2024): Finland and France recorded increases in both first-sales value and volume. The increase observed in Finland was due mainly to sprat, herring, and salmon, while in France it was due to squid and sardine.

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

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

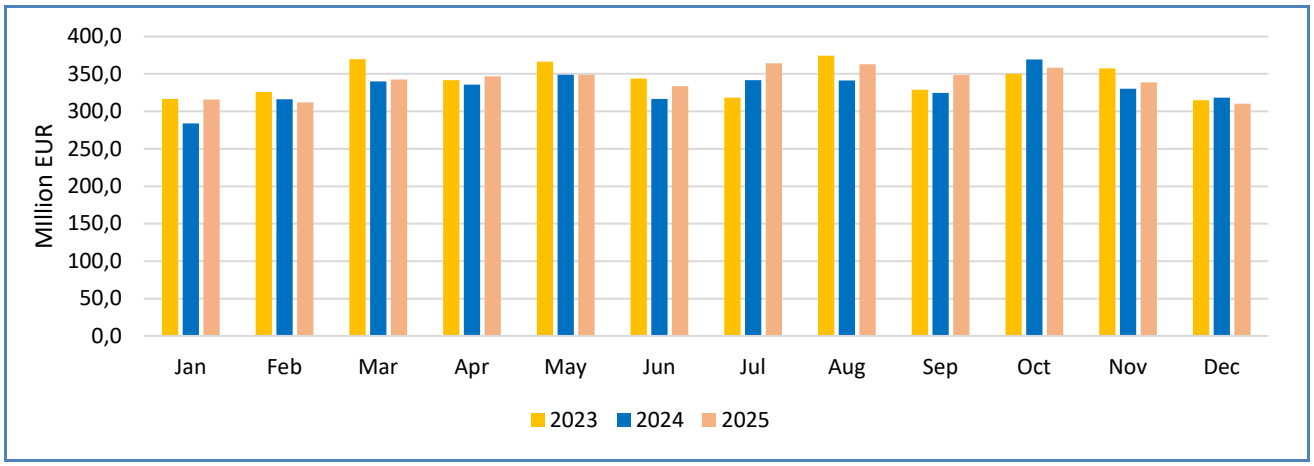
	January – December 2023		January – December 2024		January – December 2025		Change from January – December 2024	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	14.241	87,27	12.539	72,45	12.510	76,57	0%	6%
Bulgaria	2.783	1,50	3.174	2,49	3.084	2,66	-3%	7%
Croatia	53.252	59,72	39.783	52,43	36.813	54,02	-7%	3%
Cyprus	655	3,30	600	3,19	562	2,62	-6%	-18%
Denmark	733.343	541,03	681.533	502,20	670.044	526,16	-2%	5%
Estonia	72.666	30,61	65.149	31,72	55.052	25,12	-15%	-21%
Faroe Islands	760.673	566,65	644.028	527,86	568.965	572,98	-12%	9%
Finland	56.254	17,41	46.393	16,80	58.649	18,61	26%	11%
France	247.894	731,32	239.918	724,69	246.032	780,64	3%	8%
Germany	36.870	75,64	27.107	57,01	14.585	77,53	-46%	36%
Ireland	176.178	247,77	188.439	249,72	186.448	270,01	-1%	8%
Italy	73.046	327,25	61.481	281,39	53.998	265,07	-12%	-6%
Latvia	45.018	13,20	39.800	14,55	39.432	15,81	-1%	9%
Lithuania	306	0,66	326	0,51	222	0,33	-32%	-34%
Netherlands	62.404	146,15	23.430	148,85	26.682	144,51	14%	-3%
Portugal	122.328	299,04	114.578	293,74	113.435	305,44	-1%	4%
Spain	415.483	1.428,08	398.380	1.423,68	368.447	1.435,04	-8%	1%
Sweden	129.478	98,93	107.852	92,26	84.262	82,20	-22%	-11%
Norway	2.898.413	3.130,64	2.692.367	3.065,37	2.381.240	3.342,48	-12%	9%
United Kingdom	353.063	696,68	364.035	710,56	353.818	824,69	-3%	16%

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.*

[9] During January–December 2025, 18 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section "First sales in Europe" are extracted from EUMOFA.

The overall value of first sales in the period January - December in 2025 was EUR 4,1 billion, a 3% increase compared to 2024, and 1% decrease compared to 2023. Overall volume was 2,0 million tonnes, a 4% decrease compared to 2024, and an 12% decrease compared to 2023.

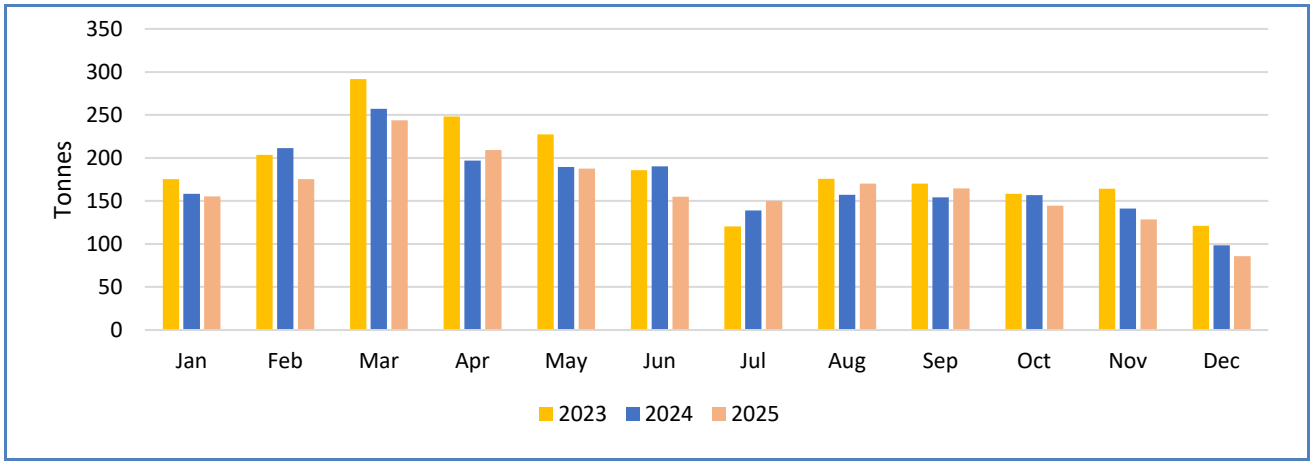
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VALUE FROM THE REPORTING COUNTRIES[10] (value in million EUR)**



In 2025, monthly first-sales value was higher in several months compared to 2024, except in February, October and December. Compared to 2023, values were generally lower except in April, July, September and October. Between January and December 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 were below 2025 levels.

The increase in first-sales value compared to 2024 was mainly driven by small pelagics (+8%). Compared to 2023, first-sales value in 2025 decreased by 1% mainly due to flatfish (-12%). Similarly, in the same period in 2025, the decrease in first-sales volume was mainly due to groundfish which fell by 10% in comparison to 2024. Compared with 2023 both groundfish and small pelagics contributed to the reduction, declining by 17% and 12%, respectively.

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



[10] During January–December 2025, 17 EU Member States (MS), reported first-sales data on value and volume.

3. 2. First-sales evolution at commodity group (CG) level[11,12]

Bivalves and other molluscs and aquatic invertebrates

In January-December 2025, first-sales value of "Bivalves and other molluscs and aquatic invertebrates" amounted to EUR 275,3 million, a 1% increase compared to the same period in 2024. First-sales volume reached 92.921 tonnes, a decrease of 3% compared to 2024. Scallop was the main commercial species driving the increase in value of the commodity group (+15%), while the decrease in volume was mainly due to clam (-16%).

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

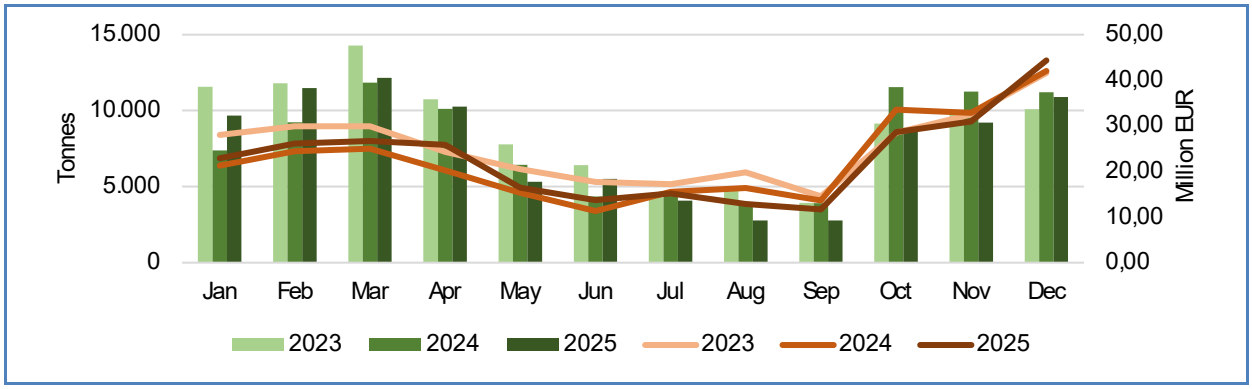


Table 6. **FIRST SALES PRICES OF BIVALVES MAIN COMMERTIAL SPECIES (MCS) (JAN - DEC 2024 AND JAN - DEC 2025)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
France	Scallop	2,46 EUR/kg	2,50 EUR/kg	+1%
France	Other molluscs and aquatic invertebrates*	3,04 EUR/kg	3,67 EUR/kg	+21%
France	Clam	1,87 EUR/kg	1,78 EUR/kg	-5%

*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 336,5 million, a 4% increase compared to 2024. First-sales volume totalled 52.840 tonnes, a decrease of 3% compared to 2024. Octopus (+23%) was the main commercial species driving the growth in first-sales value, while squid was the main species (-14%) driving the decrease in first-sales volume.

[11] 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

[12] 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

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

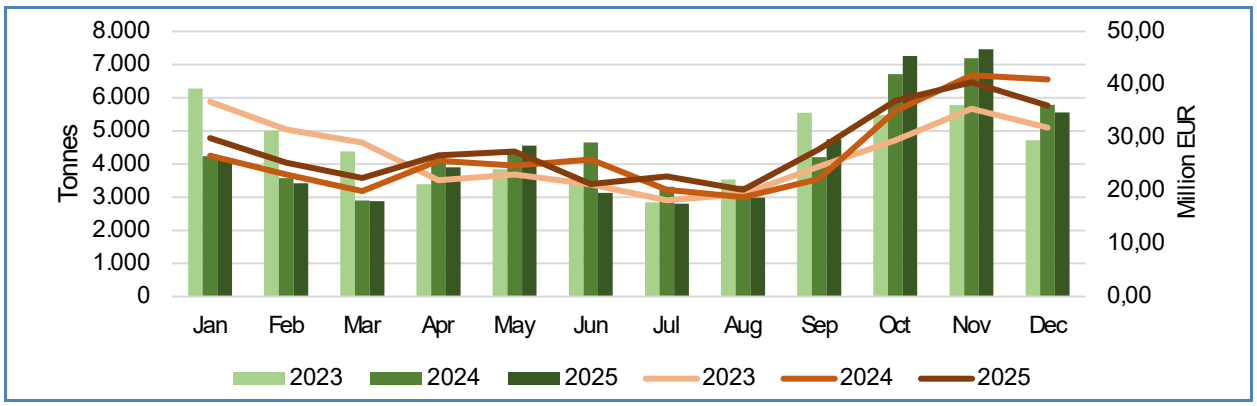


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN-DEC 2024 AND JAN-DEC 2025)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
France	Octopus	7,18 EUR/kg	7,26 EUR/kg	+1%
Belgium	Cuttlefish	3,49 EUR/kg	3,90 EUR/kg	+12%
Belgium	Octopus	1,67 EUR/kg	6,38 EUR/kg	+283%

Crustaceans

In 2025, first-sales value of "Crustaceans" totalled EUR 679,7 million, a 5% increase in value compared to 2024. First-sales volume amounted to 74.767 tonnes, an increase of 4% compared to 2024. Shrimp *Crangon* spp. (+27% and +34%) 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 – DEC 2025**

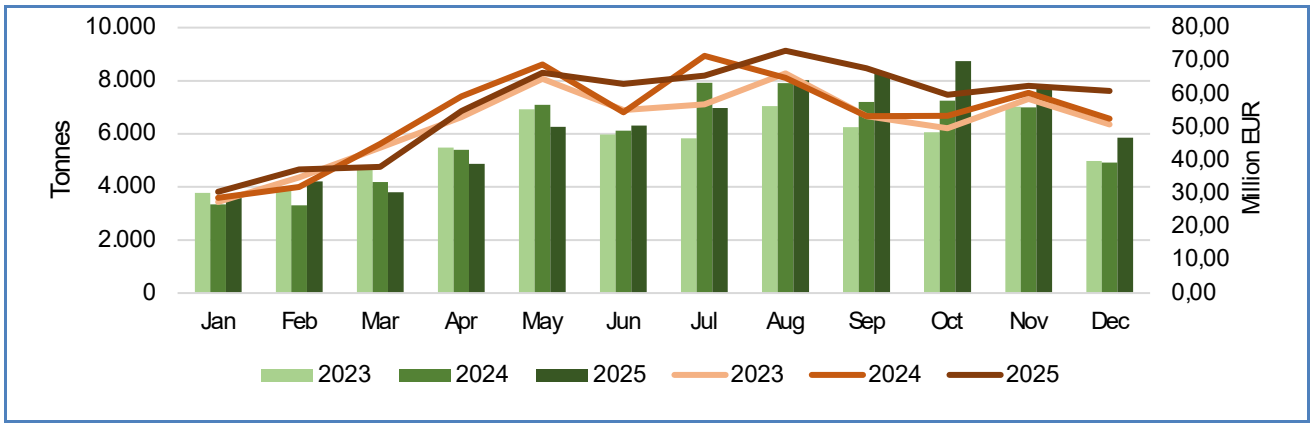


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN-DEC 2024 AND JAN-DEC 2025)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
Germany	Shrimp *Crangon* spp.	7,74 EUR/kg	6,38 EUR/kg	-18%
Spain	Miscellaneous shrimp	22,76 EUR/kg	27,31 EUR/kg	+20%
Spain	Deep-water rose shrimp	9,48 EUR/kg	8,33 EUR/kg	-12%

Flatfish

In 2025, first-sales value of "Flatfish" totalled EUR 338,1 million, a 1% decrease compared to 2024. First-sales volume amounted to 44.868 tonnes, a decrease of 9% compared to 2024. European flounder (−22% in value and −12% in volume) was the main species driving the decline in first-sales value and, together with Greenland halibut (−24%), also accounted for most of the reduction in first-sales volume.

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

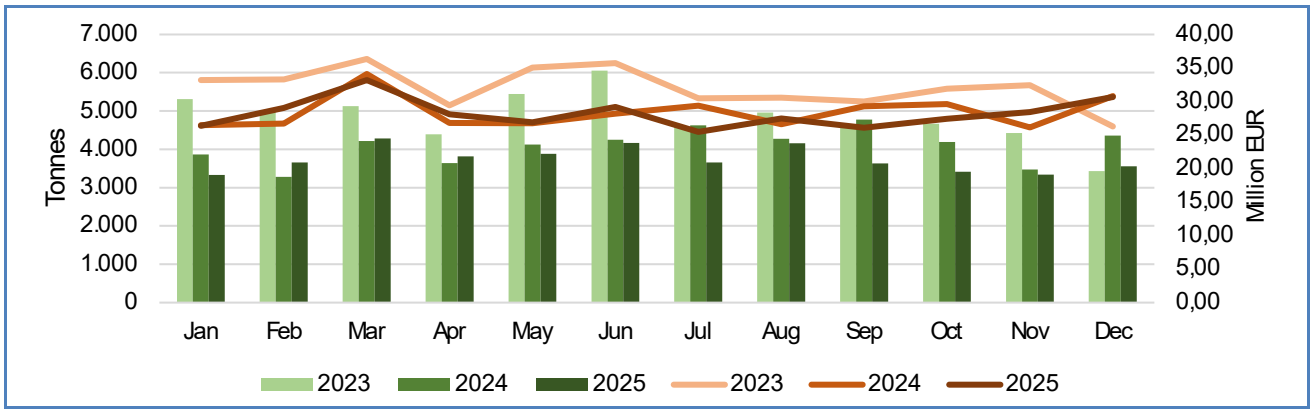


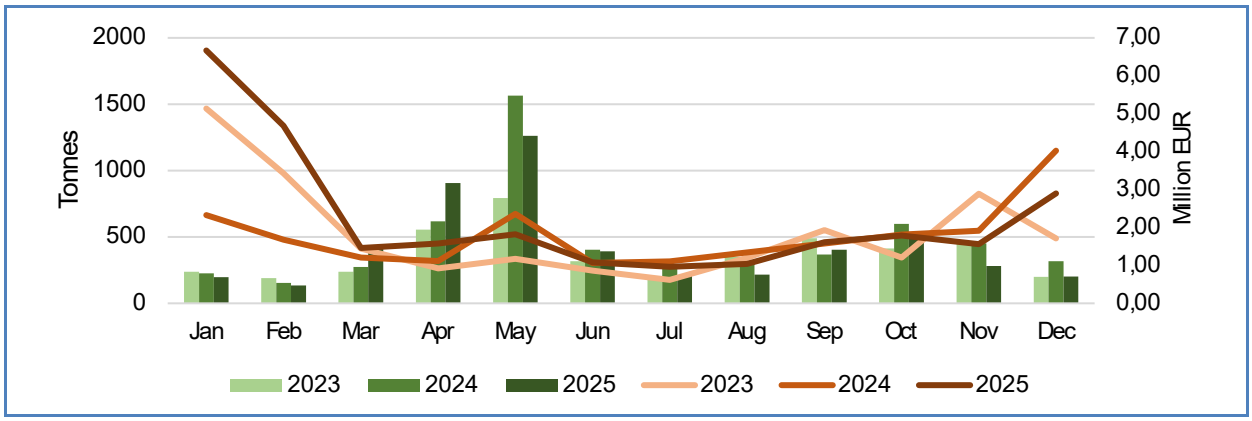
Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN-DEC 2024 AND JAN-DEC 2025)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
Denmark	European plaice	2,77 EUR/kg	2,53 EUR/kg	-9%
Germany	Greenland halibut	3,60 EUR/kg	5,88 EUR/kg	+63%
Netherlands	European plaice	2,60 EUR/kg	2,13 EUR/kg	-18%

Freshwater fish

In 2025, first-sales value of "Freshwater fish" reached EUR 27,1 million, marking a 26% increase compared to 2024. First-sales volume amounted to 5.095 tonnes, a decrease of 8% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+54%), while the category "other freshwater fish"[13] was the main contributor to the decrease in first-sales volume (-12%).

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



[13] „Other freshwater fish" comprises 30 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-DEC 2024 AND JAN-DEC 2025)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
France	Eel*	29,97 EUR/kg	54,23 EUR/kg	+81%
Estonia	Pike-perch	3,93 EUR/kg	4,14 EUR/kg	+5%
Denmark	Eel	9,67 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 674,5 million, an increase of 2% compared to 2024. First-sales volume amounted to 537.034 tonnes, a decrease of 10% compared to 2024. The category "other groundfish"[14] (+12%) was mainly responsible for the increase in first-sales value, while blue whiting (-11%) was mainly responsible for the decrease in first-sales volume.

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

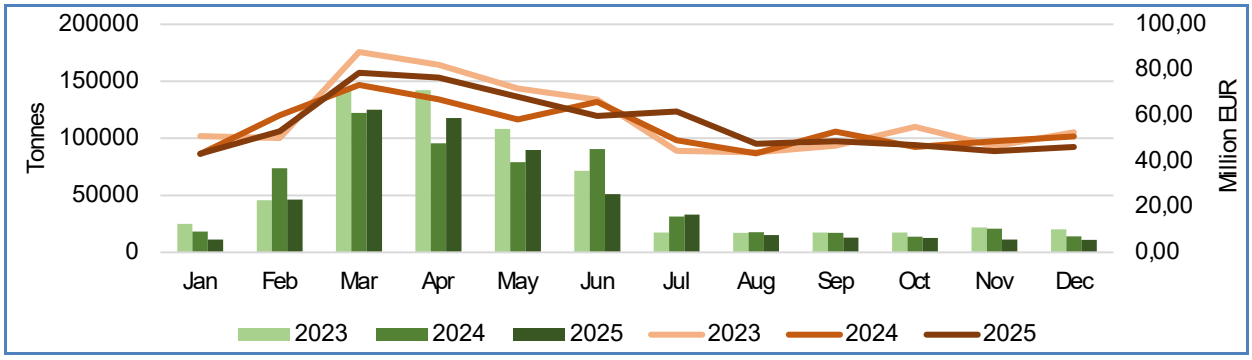


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN-DEC 2024 AND JAN-DEC 2025)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
Denmark	Other groundfish[15]	0,30 EUR/kg	0,40 EUR/kg	+36%
Denmark	Saithe	1,84 EUR/kg	2,29 EUR/kg	+24%
Denmark	Haddock	1,40 EUR/kg	1,97 EUR/kg	+40%

Other marine fish[16]

In 2025, first-sales value of the category "other marine fish" totalled EUR 584,4 million, an increase of 1% compared to 2024. First-sales volume amounted to 146.985 tonnes, a decrease of 2% compared to 2024. Monk (+4%) was the main commercial species contributing to the rise in first-sales value, while the category "other shark"[17] was behind the decrease in first-sales volume (-12%).

[14] In 2025 „Other goundfish" comprised 50 species of which sandeel nei and European conger together account for 70% of total first-sales value.
[15] „Other goundfish" in Denmark comprised 8 species of which sandeel nei accounting for 95% of total first-sales value and 96% of total first-sales volume.
[16] Seventeen Main Commertial Species are included in the Commmodity Group „Other Marine Fish" with monk representing more than 25% of the total value and almost 20% of total volume.
[17] Of the „Other shark" Main Commercial Species (MCS), blue shark and small-spotted catshark represent 69% of total first-sales volume.

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

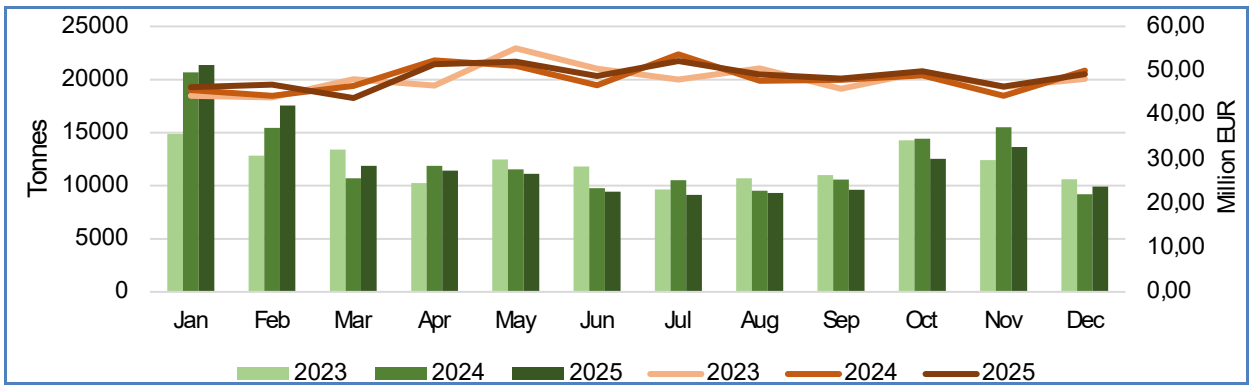


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN-DEC 2024 AND JAN-DEC 2025)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
France	Other marine fish[18]	5,18 EUR/kg	5,14 EUR/kg	-1%
Spain	Red mullet	6,94 EUR/kg	8,36 EUR/kg	+20%
France	Monk	5,90 EUR/kg	6,39 EUR/kg	+8%

Salmonids

In 2025, first-sales value of "Salmonids" totalled EUR 4,8 million, an increase of 5% compared to 2024, while first-sales volume amounted to 362.631 kg, a decrease of 4% compared to 2024. Vendace[19] (+22%) was the main commercial species driving the increase in value of the commodity group, while salmon (-39%) was the main species responsible for the decrease in first-sales value and volume of salmonids.

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

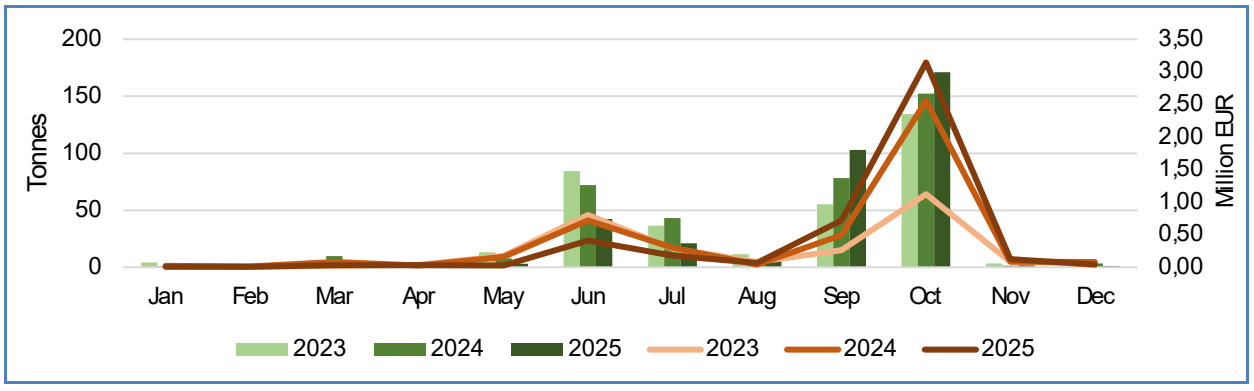


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN-DEC 2024 AND JAN-DEC 2025)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
Sweden	Other salmonids[20]	14,23 EUR/kg	14,52 EUR/kg	+2%
Germany	Trout	9,41 EUR/kg	9,88 EUR/kg	+5%
Estonia	Salmon	10,54 EUR/kg	12,77 EUR/kg	+21%

[18] „Other marine fish" MCS in France comprises 212 species in the period analysed of which meagre, thicklip grey mullet and ballan wrasse together represented 51% of the total value.
[19] Of the „other salmonids" main commercial species, vendace represents 95% of the total first-sales value.
[20] Of the „other salmonids" main commercial species in Sweden, vendace represents 99% of the total first-sales value and 98% of the total first-sales volume.

Small pelagics

In 2025, first-sales value of "Small pelagics" amounted to EUR 829,9 million, an increase of 8% compared to 2024. First-sales volume amounted to 878.834 tonnes, a stable value compared to 2024. Sardine and Atlantic horse mackerel (+21% and +60%) were the commercial species contributing most to the increase in first-sales value.

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

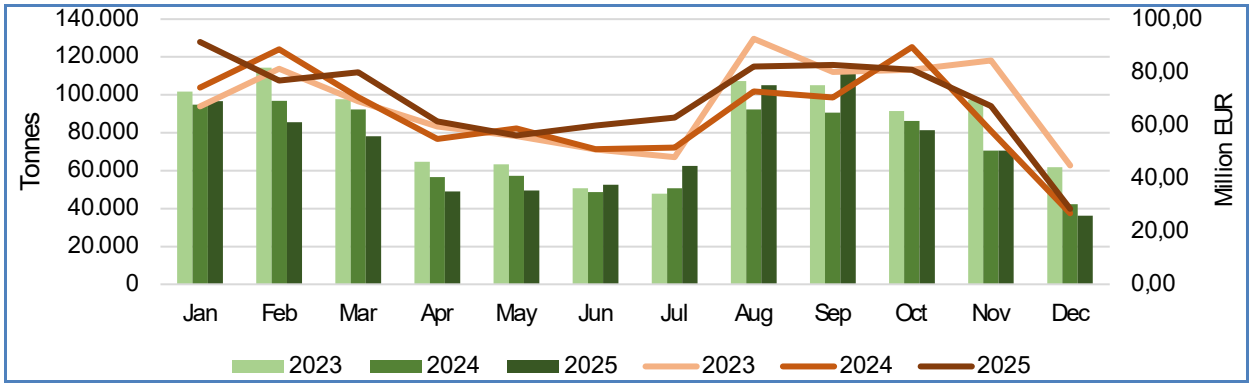


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN-DEC 2024 AND JAN-DEC 2025)**

Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
Denmark	Sprat	0,43 EUR/kg	0,47 EUR/kg	+8%
Ireland	Atlantic horse mackerel	1,15 EUR/kg	1,19 EUR/kg	+3%
Portugal	Sardine	1,06 EUR/kg	1,22 EUR/kg	+15%

Tuna and tuna-like species

In 2025, first-sales value of "Tuna and tuna-like species" totalled EUR 331,6 million, a decrease of 6% compared to 2024. First-sales volume totalled 89.476 tonnes, a decrease of 7% compared to 2024. Yellowfin tuna (-42% and -40%), and swordfish (-6% and -7%) were the main commercial species driving the decrease in first-sales value and volume.

Figure 15. **FIRST-SALES VALUE AND VOLUME OF TUNA AND TUNA-LIKE SPECIES, JAN 2023 – DEC 2025**

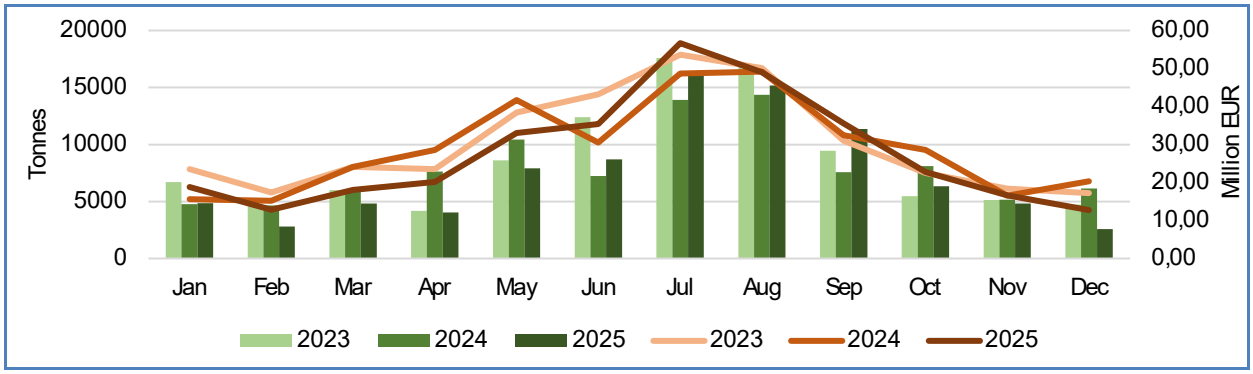


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN-DEC 2024 AND JAN-DEC 2025)**

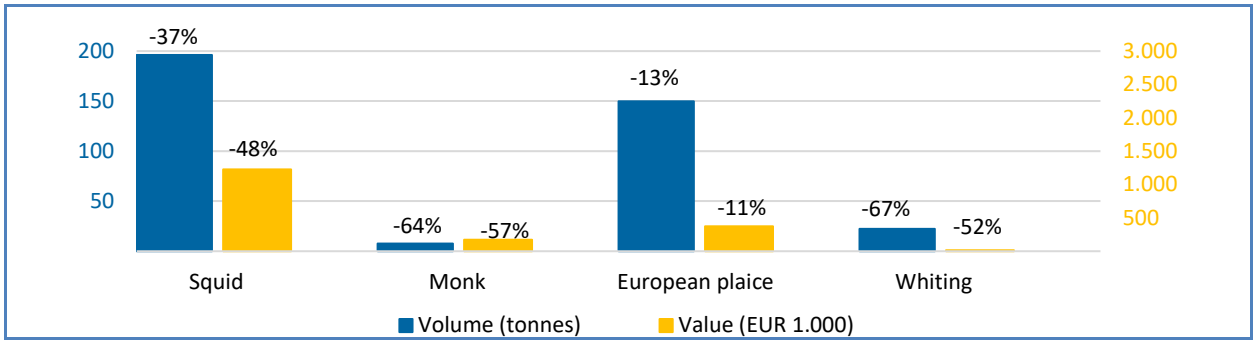
Country	Main Commercial Species	First-sales average price Jan-Dec 2024	First-sales average Price Jan-Dec 2025	Trend (Jan-Dec 2025 vs Jan-Dec 2024 %)
Spain	Yellowfin tuna	2,68 EUR/kg	2,50 EUR/kg	-7%
Spain	Skipjack tuna	1,60 EUR/kg	1,53 EUR/kg	-4%
Spain	Bigeye tuna	2,45 EUR/kg	2,41 EUR/kg	-2%

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-Dec 2025 vs Jan-Dec 2024	EUR 70,0 million, -3%	12.510 tonnes, 0%	**Value**: squid, European plaice, Other sole*. **Volume**: cuttlefish, common sole, ray.
Dec 2025 vs Dec 2024	EUR 7,0 million, -15%	1.395 tonnes, -15%	Squid, monk, European plaice, whiting.

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

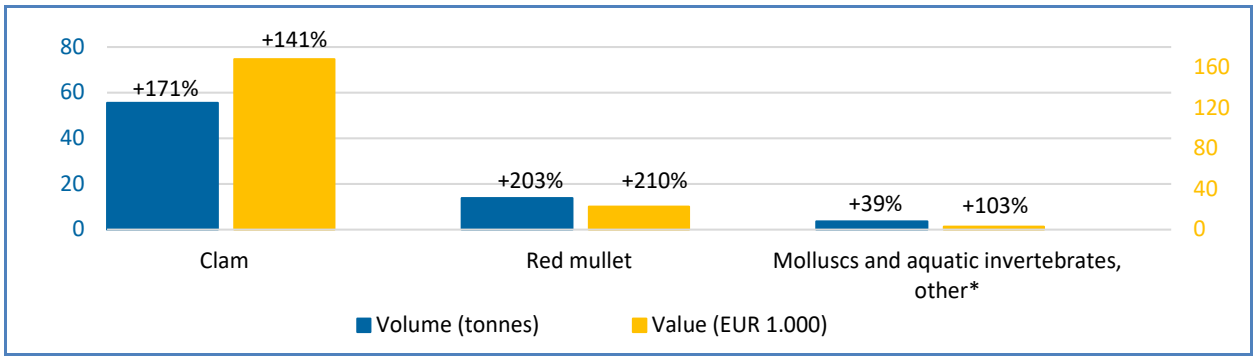


*Percentages show change from the previous year. *EUMOFA aggregation for species.*[22]

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 2,6 million, +4%	3.084 tonnes, -3%	**Value**: sprat, clam **Volume**: Other molluscs and aquatic invertebrates*, Other marine fish*, red mullet.
Dec 2025 vs Dec 2024	EUR 0,2 million, +125%	75 tonnes, +108%	Clam, red mullet, Other molluscs and aquatic invertebrates*.

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



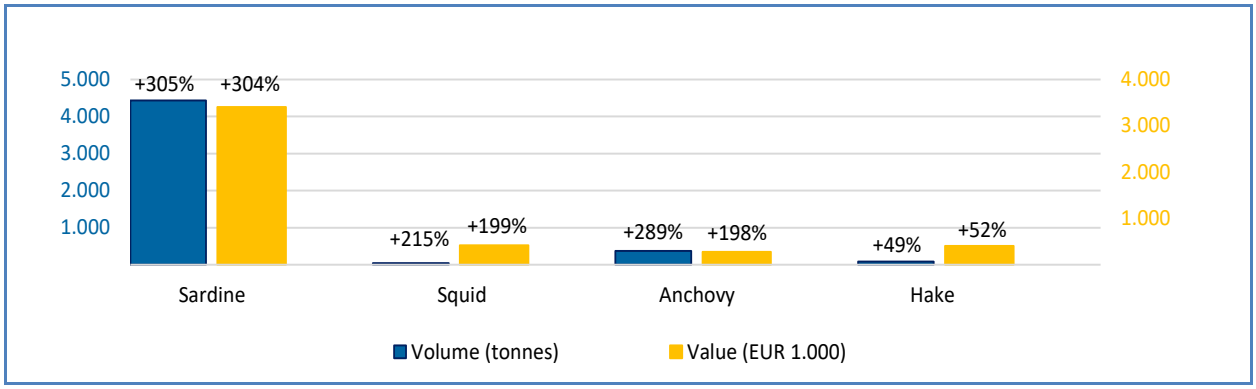
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

[21] First-sales data updated on 24. 02. 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-Dec 2025 vs Jan-Dec 2024	EUR 52,8 million, +1%	36.813 tonnes, -7%	**Value**: Sardine, squid, Other marine fish*. **Volume**: anchovy, hake, mackerel.	In December 2025, there was a sharp increase in value (+304%) and volume (+305%) of **sardine** compared to December 2024. This rise was mainly driven by more favourable weather conditions in the Northern Adriatic, allowing for more fishing days compared to the storm-affected period in December 2024, when strong bora winds significantly constrained activity. In addition, Croatia's monthly catch management system for small pelagics (sardine and anchovy) enabled vessels to utilise previously unused catch capacity once conditions improved, resulting in a strong rebound in landings and first-sale value.
Dec 2025 vs Dec 2024	EUR 6,5 million, +128%	5.391 tonnes, +247%	Sardine, squid, anchovy, hake.	

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

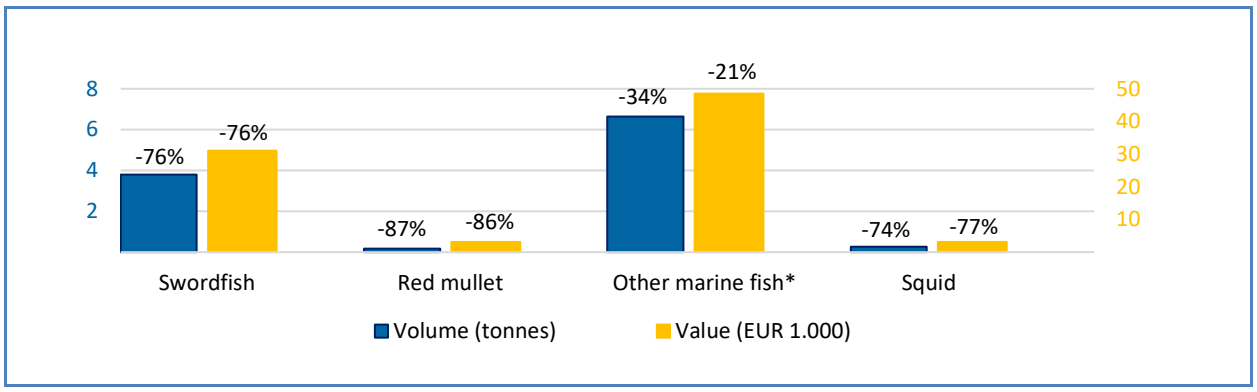


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 2,4 million, -24%	562 tonnes, -6%	Other seabream*, swordfish, red mullet.
Dec 2025 vs Dec 2024	EUR 0,2 million, -50%	22 tonnes, -47%	Swordfish, red mullet, Other marine fish*, squid.

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



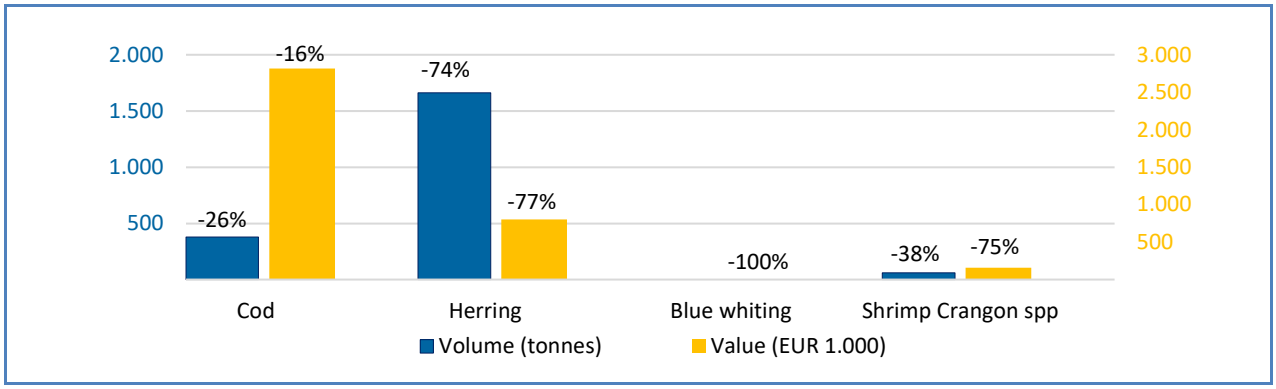
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 479,6 million, -4%	670.044 tonnes, -2%	Herring, mackerel, European plaice, blue whiting.
Dec 2025 vs Dec 2024	EUR 18,0 million, -13%	10.048 tonnes, -43%	Cod, herring, blue whiting, shrimp *Crangon* spp.

Percentages show change from the previous year.

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



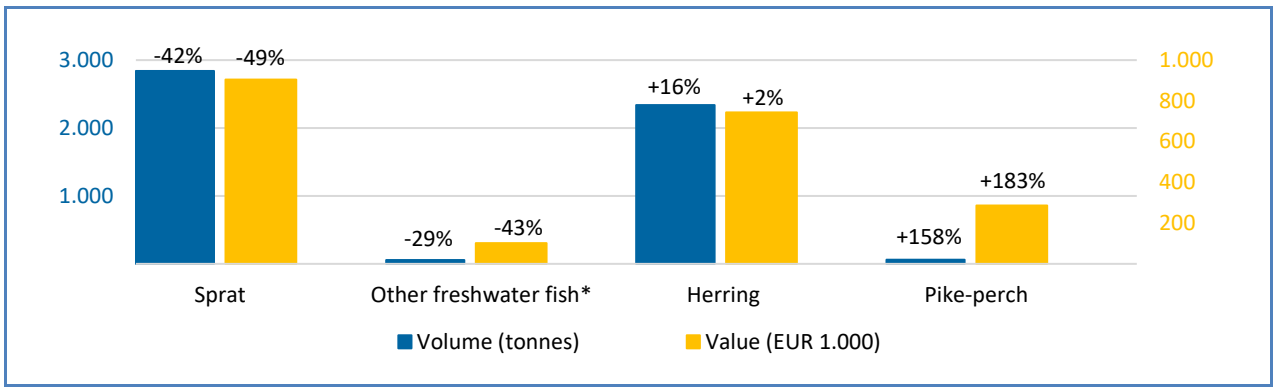
Percentages show change from the previous year.

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 22,5 million, -29%	55.052 tonnes, -15%	Sprat, herring, Other freshwater fish*, European flounder.
Dec 2025 vs Dec 2024	EUR 2,1 million, -26%	5.330 tonnes, -24%	Sprat, Other freshwater fish*, herring, pike-perch.

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

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

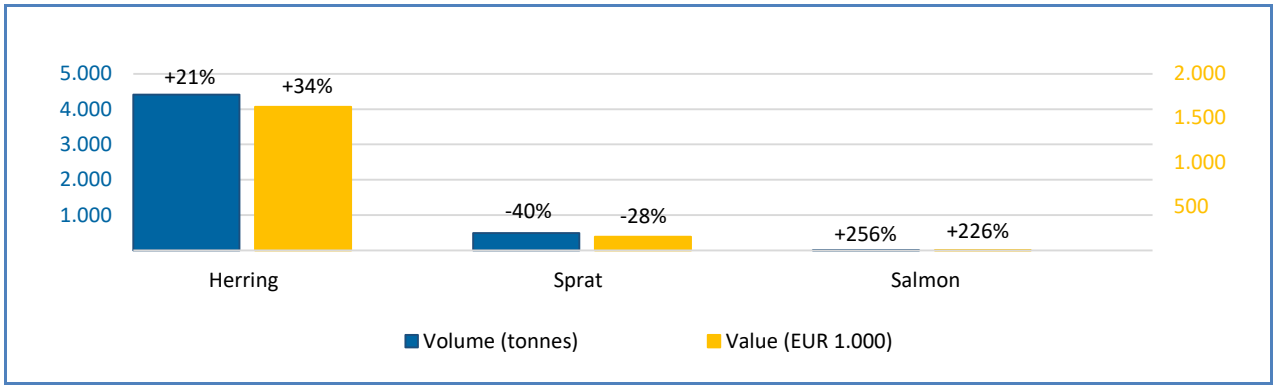


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 16,3 million, -3%	58.649 tonnes, +26%	**Value**: sprat, herring, salmon, cod. **Volume**: herring.
Dec 2025 vs Dec 2024	EUR 1,8 million, +25%	4.905 tonnes, +10%	Herring, salmon Sprat accounted for the main offset in total sales.

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

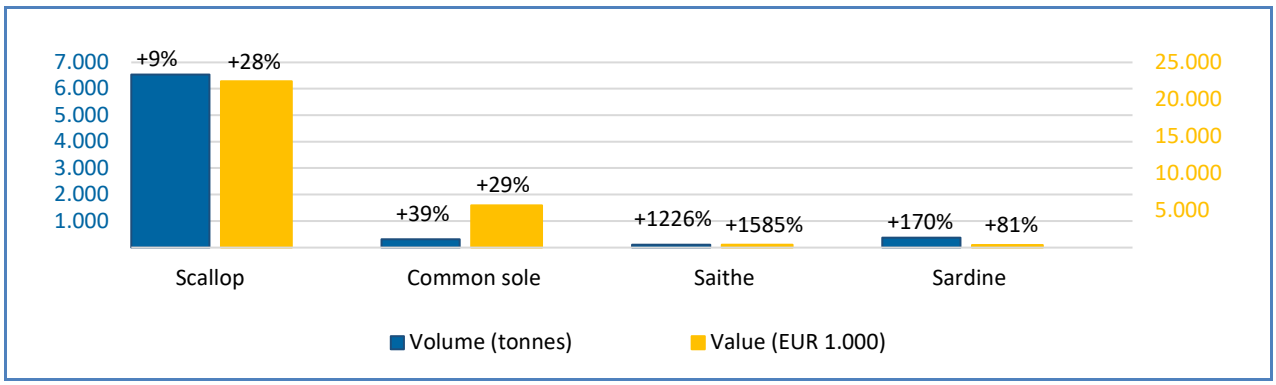


Percentages show change from the previous year.

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 718,6 million, -1%	246,0 tonnes, +3%	**Value**: squid, Norway lobster, common sole, saithe. **Volume**: sardine, scallop, octopus.
Dec 2025 vs Dec 2024	EUR 84,9 million, +4%	17.665 tonnes, +4%	Scallop, common sole, saithe, sardine.

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

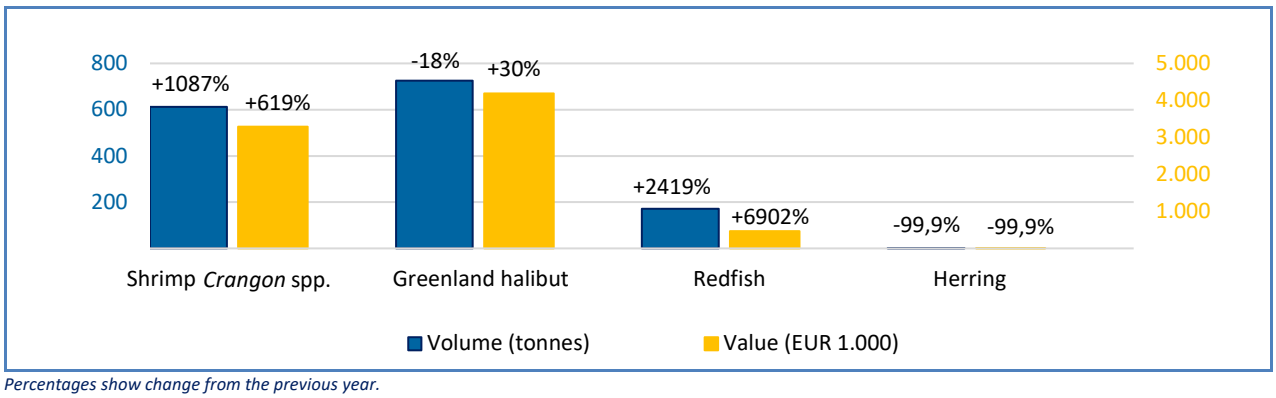


Percentages show change from the previous year.

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-Dec 2025 vs Jan-Dec 2024	EUR 75,3 million, +32%	14.585 tonnes, -46%	**Value**: shrimp *Crangon* spp. **Volume**: blue whiting, herring, mackerel.	Germany's **redfish** sector recorded an exceptional spike in December 2025, with value up by 6902% and volume by 2419% compared to December 2024. This surge reflects a shift in fishing strategies following fleet modernisation in 2025, including the deployment of two large industrial vessels enabling longer trips. Despite the December peak, total production over November–December remained broadly stable year-on-year, within a context of healthy stock status and sustainable fishing pressure.
Dec 2025 vs Dec 2024	EUR 9,3 million, +45%	1.744 tonnes, -46%	Shrimp *Crangon* spp., Greenland halibut, redfish, herring.	

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

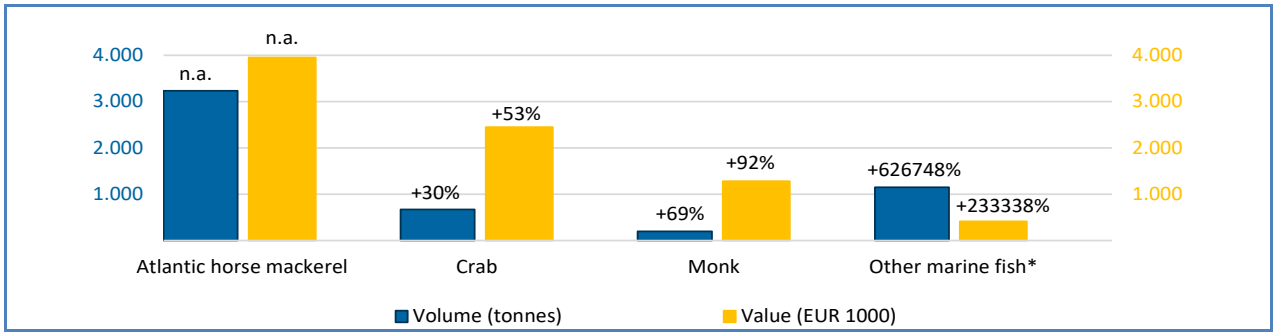


Percentages show change from the previous year.

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

Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 224,5 million, -10%	186.448 tonnes, -1%	Mackerel, albacore tuna, Other molluscs and aquatic invertebrates*, sprat.
Dec 2025 vs Dec 2024	EUR 16,5 million, +34%	7.405 tonnes, +24%	Atlantic horse mackerel, crab, monk, Other marine fish*.

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

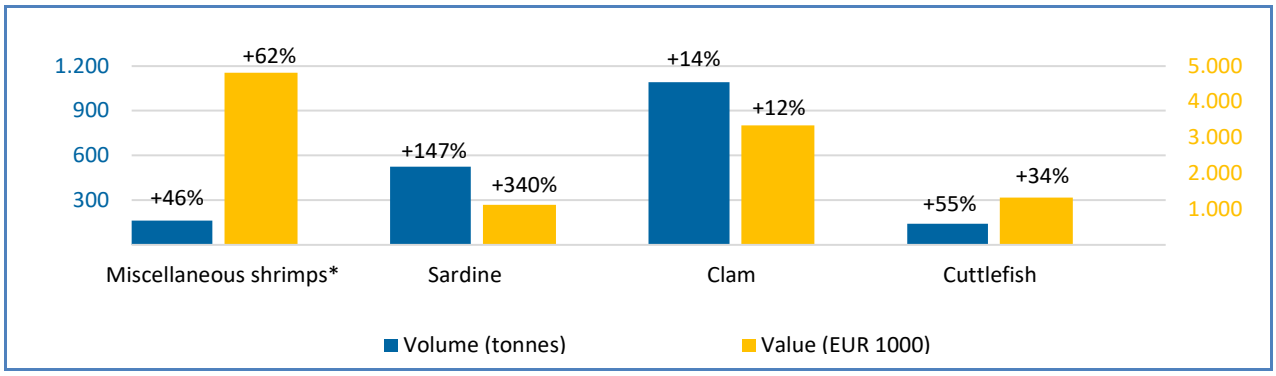


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 245,0 million, -13%	53.998 tonnes, -12%	Miscellaneous shrimps*, clam, sardine, anchovy, octopus.
Dec 2025 vs Dec 2024	EUR 28,6 million, +12%	4.960 tonnes, +7%	Miscellaneous shrimps*, sardine, clam, cuttlefish.

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

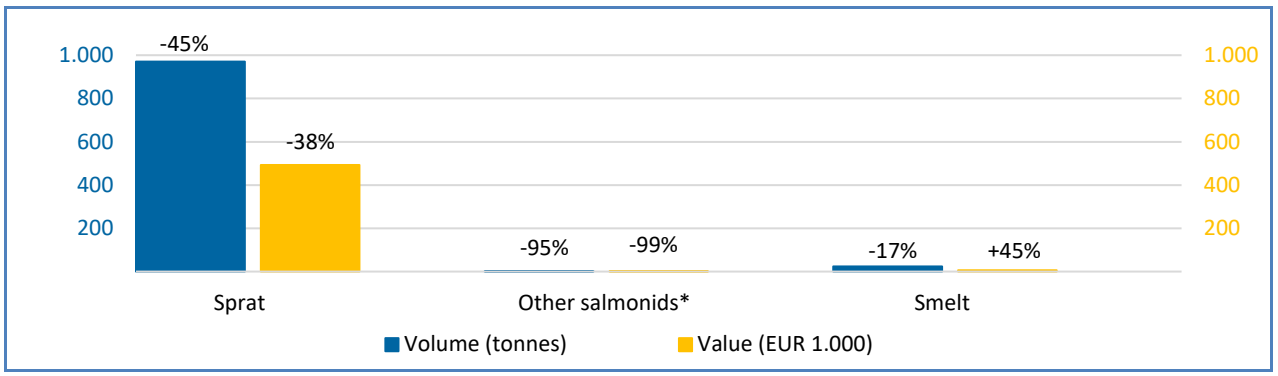


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 14,1 million, -3%	39.432 tonnes, -1%	Sprat, Other freshwater fish*, Other marine fish*.
Dec 2025 vs Dec 2024	EUR 1,5 million, -2%	3.633 tonnes, -7%	Herring, Other salmonids*, smelt.

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

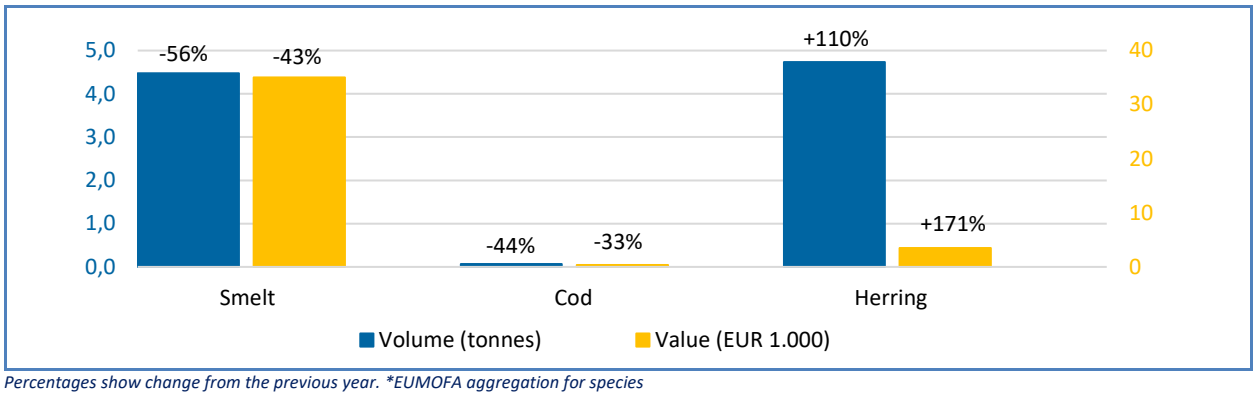


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 0,3 million, -44%	222 tonnes, -32%	Smelt, turbot, Other groundfish*, Other freshwater fish*.
Dec 2025 vs Dec 2024	EUR 0,04 million, -36%	11 tonnes, -17%	Smelt, cod, herring.

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

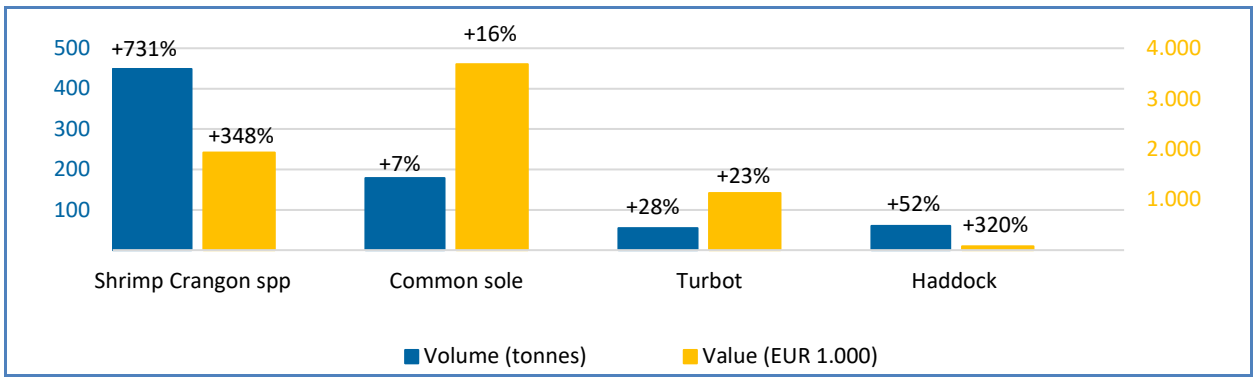


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 133,8 million, -10%	26.682 tonnes, +14%	**Value**: Shrimp *Crangon* spp., common sole, squid, European plaice. **Volume**: mackerel, Atlantic horse mackerel, European flounder.
Dec 2025 vs Dec 2024	EUR 9,9 million, +27%	1.584 tonnes, +39%	Shrimp *Crangon* spp., common sole, turbot, haddock.

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

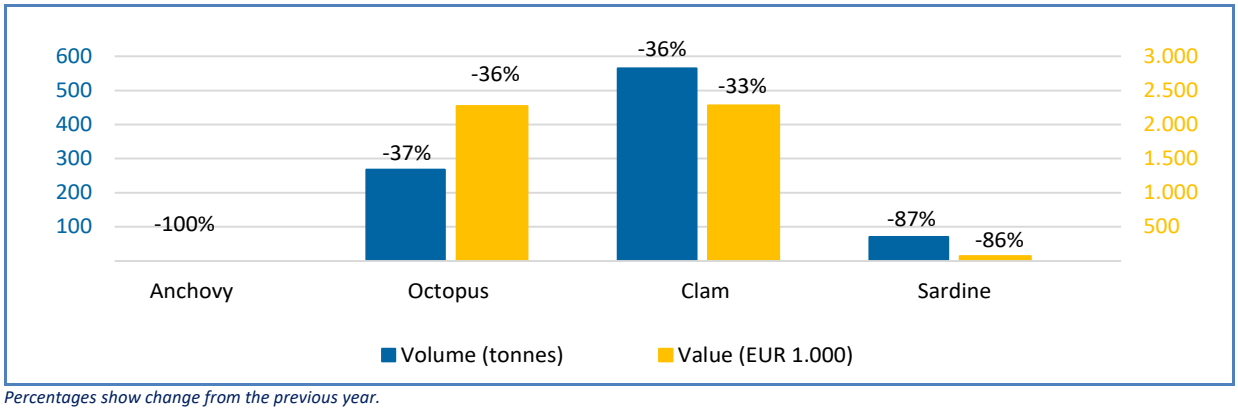


Percentages show change from the previous year.

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 288,7 million, -2%	113.435 tonnes, -1%	Clam, scabbardfish, Atlantic horse mackerel, clam.
Dec 2025 vs Dec 2024	EUR 14,4 million, -35%	2.814 tonnes, -42%	Anchovy, octopus, clam, sardine.

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

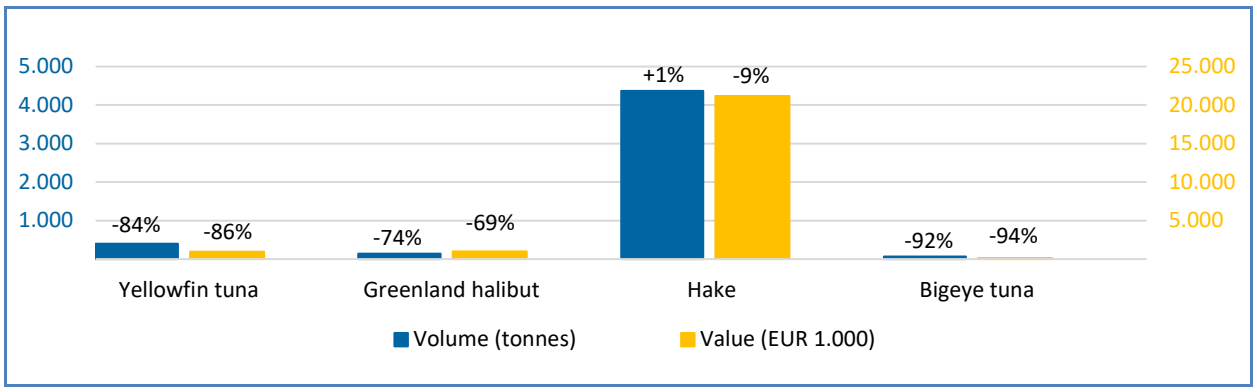


Percentages show change from the previous year.

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 1.344,7 million, -6%	368.447 tonnes, -8%	Yellowfin tuna, hake, blue whiting.
Dec 2025 vs Dec 2024	EUR 106,2 million -12%	17.547 tonnes, -19%	Yellowfish tuna, Greenland halibut, hake, bigeye tuna.

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

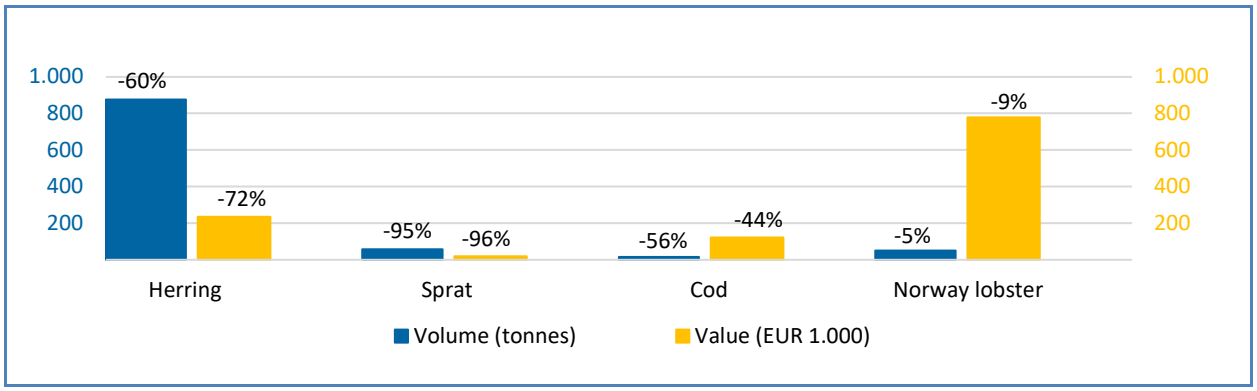


Percentages show change from the previous year.

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 75,2 million, -18%	84.262 tonnes, -22%	Sprat, Other groundfish*, herring.
Dec 2025 vs Dec 2024	EUR 3,1 million, -26%	1.162 tonnes, -68%	Herring, sprat, cod, Norway lobster.

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



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

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

The Faroe Islands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 497,6 million, -6%	568.965 tonnes, -12%	Herring, mackerel, blue whiting, redfish.
Dec 2025 vs Dec 2024	EUR 29,2 million, -29%	20.218 tonnes, -39%	Herring, mackerel, cod, blue whiting.

Figure 33. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE FAROE ISLANDS, DECEMBER 2025**

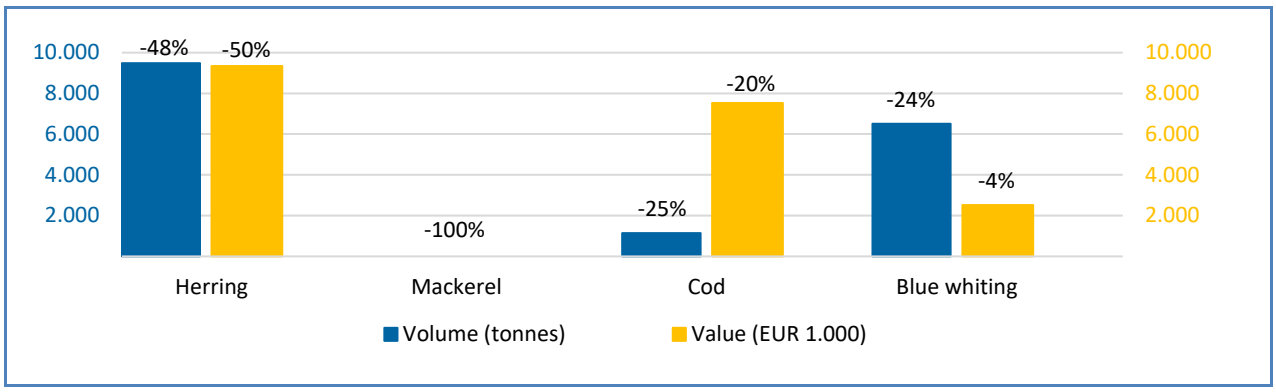
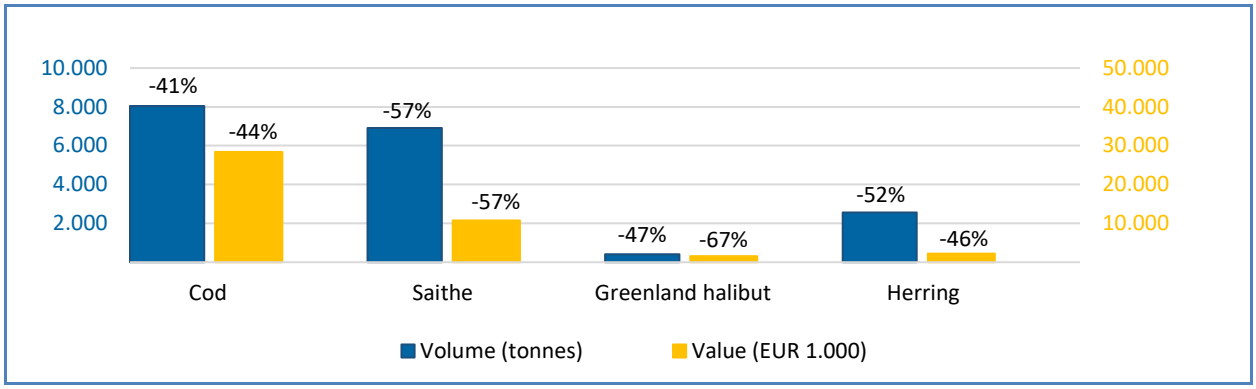


Table 34. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY**

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 3,0 billion, -2%	2.381.240 tonnes, -12%	Herring, Miscellaneous small pelagics*, cod, mackerel.
Dec 2025 vs Dec 2024	EUR 75,3 million -33%	41.982 tonnes, -26%	Cod, saithe, Greenland halibut, herring.

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

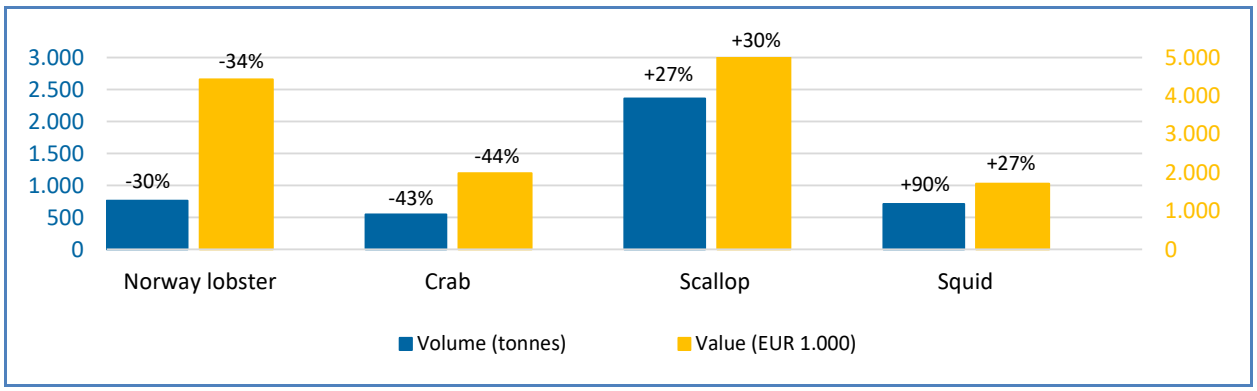


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Dec 2025 vs Jan-Dec 2024	EUR 708,6 million, 0%	353.818 tonnes, -3%	**Value**: mackerel, Norway lobster, haddock. **Volume**: mackerel, blue whiting, herring.
Dec 2025 vs Dec 2024	EUR 35,5 million -4%	11.412 tonnes, +1%	**Value**: Norway lobster, crab **Volume**: scallop, squid.

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



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

From January to December 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 shrimp (+24%) and octopus (+26%), while warmwater shrimp (+21%) and salmon (+5%) contributed most to the increase in volume.

Increases in value and volume: Belgium, Bulgaria, Croatia, Cyprus, Czechia, Estonia, Germany, Greece, Hungary, Ireland, Italy, Malta, the Netherlands, Poland, Portugal, Romania, Spain and Sweden recorded an increase in extra-EU imports in both value and volume. The most significant increases in value in absolute terms were recorded in Malta driven by an increase in mackerel (+109%), bluefin tuna (+21%) and sardine (+403%). The highest increase in volume occurred in Croatia, driven by sardine (+2.311%) and mackerel (+2.740%).

Decreases in value and volume: Austria, 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 (-47% in both value and volume), and cod (-96% and -97%).

Table 36. **JANUARY - DECEMBER OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)[23]**

	January - December 2024			January - December 2025			Change from January - December 2024		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	11.194	72,0	6,43	10.542	71,5	6,78	-6%	-1%	5%
Belgium	138.042	874,6	6,34	152.148	975,9	6,41	10%	12%	1%
Bulgaria	14.118	37,0	2,62	14.534	42,3	2,91	3%	14%	11%
Croatia	7.914	35,7	4,51	23.363	43,4	1,86	195%	22%	-59%
Cyprus	6.595	41,8	6,34	7.244	44,5	6,14	10%	6%	-3%
Czechia	14.391	65,5	4,55	17.770	80,6	4,53	23%	23%	0%
Denmark	839.391	3302,4	3,93	951.598	3252,6	3,42	13%	-2%	-13%
Estonia	9.634	52,1	5,41	11.167	58,7	5,25	16%	13%	-3%
Finland	48.834	320,8	6,57	49.579	310,0	6,25	2%	-3%	-5%
France	587.454	3215,8	5,47	596.624	3189,1	5,35	2%	-1%	-2%
Germany	332.016	1557,7	4,69	434.018	1871,6	4,31	31%	20%	-8%
Greece	133.191	518,9	3,90	156.828	611,3	3,90	18%	18%	0%
Hungary	2.322	9,8	4,20	2.725	12,3	4,51	17%	26%	7%
Ireland	160.448	209,3	1,30	225.421	241,8	1,07	40%	16%	-18%
Italy	463.916	2728,1	5,88	493.731	2970,9	6,02	6%	9%	2%
Latvia	25.292	60,0	2,37	21.995	68,8	3,13	-13%	15%	32%
Lithuania	52.549	183,0	3,48	47.642	159,3	3,34	-9%	-13%	-4%
Luxembourg	7	0,57	78,22	4	0,84	213,56	-46%	48%	173%
Malta	19.293	40,8	2,12	32.931	53,2	1,62	71%	30%	-24%
Netherlands	690.042	3560,5	5,16	693.973	3895,5	5,61	1%	9%	9%

[23] During January -December 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.

Poland	265.015	1131,4	4,27	266.939	1199,2	4,49	1%	6%	5%
Portugal	171.026	772,1	4,51	186.735	874,2	4,68	9%	13%	4%
Romania	19.687	87,4	4,44	21.297	98,7	4,63	8%	13%	4%
Slovakia	5.312	16,7	3,14	4.702	15,8	3,37	-11%	-5%	7%
Slovenia	7.450	29,2	3,92	7.168	29,7	4,14	-4%	2%	6%
Spain	1.194.667	5.610,4	4,70	1.274.330	6118,1	4,80	7%	9%	2%
Sweden	709.093	5.258,0	7,42	764.615	5318,3	6,96	8%	1%	-6%
EU-27	**5.928.894**	**29.791**	**5,02**	**6.469.626**	**31.608**	**4,89**	**9%**	**6%**	**-3%**

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: Bivalves, cephalopods, crustacean, freshwater fish, groundfish, small pelagics and tuna and tuna-like species were the commodity groups recording an increase in both value and volume of extra-EU imports. Highest increases in value were observed for cephalopods, with octopus and other cephalopods (+26% and +47%, respectively) driving the increase. In terms of volume the increase of small pelagics was driven by sardine (+59%).

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

Decrease in volume: Flatfish and other marine fish recorded a decline in extra-EU import volume, with the largest decline in volume attributed to Greenland halibut (-8%) and European seabass (-32%), respectively.

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

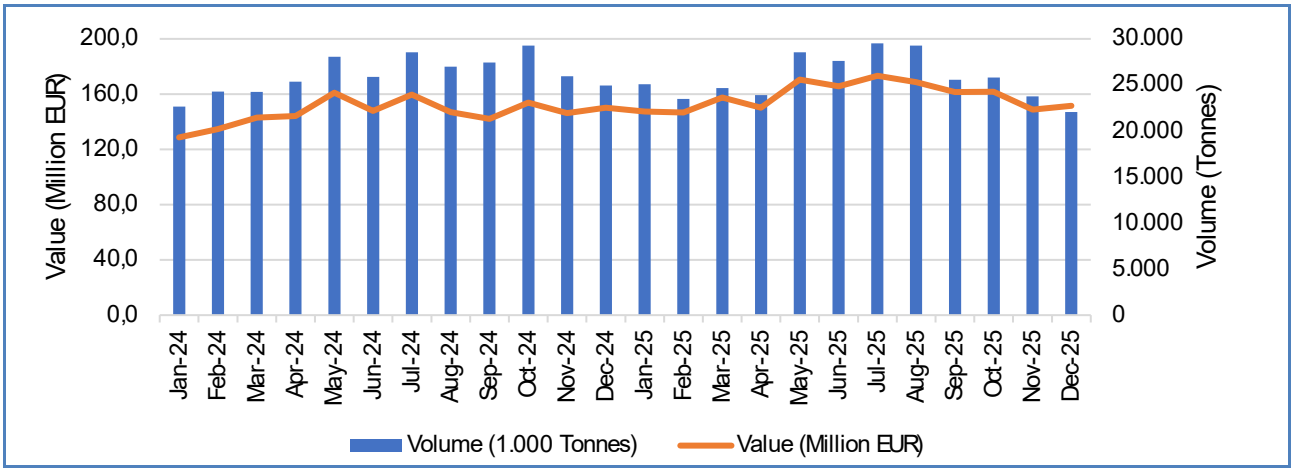
	January - December 2024			January - December 2025			Change from January - December 2024			
Commodity group	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	668,2	137.140	4,87	725,7	145.042	5,00	9%	6%	3%	Clam, other mussel.
Cephalopods	2.888,0	514.454	5,61	3.398,0	555.344	6,12	18%	8%	9%	Octopus, other cephalopods.
Crustaceans	4.546,8	665.739	6,83	5.032,1	723.421	6,96	11%	9%	2%	Warmwater shrimp, Norway lobster.
Flatfish	493,2	93.690	5,26	492,4	91.957	5,35	0%	-2%	2%	Greenland halibut, other flatfish.
Freshwater fish	565,7	141.206	4,01	577,2	150.240	3,84	2%	6%	-4%	Tilapia, freshwater catfish.
Groundfish	4.434,7	1.069.301	4,15	5.004,7	1.115.011	4,49	13%	4%	8%	Cod, Alaska pollock.
Other marine fish	1.758,5	313.637	5,61	1.903,8	309.243	6,16	8%	-1%	10%	Other marine fish, monk.
Salmonids	8.620,6	1.075.864	8,01	8.235,3	1.132.023	7,27	-4%	5%	-9%	Salmon.
Small pelagics	1.060,4	438.119	2,42	1.243,0	480.118	2,59	17%	10%	7%	Mackerel, herring.
Tuna and tuna-like species	3.171,6	675.689	4,69	3.357,2	721.791	4,65	6%	7%	-1%	Skipjack tuna, miscellaneous tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of other marine fish in EU Member States

In January – December 2025, extra-EU imports of other marine fish accounted for a total value of EUR 1,9 million and a total volume of 309.243 tonnes, marking an 8% increase in value and 1% decrease in volume compared to the same period in 2024.

Figure 36. **EXTRA-EU IMPORT VALUE AND VOLUME OF OTHER MARINE FISH, JAN 2024 – DEC 2025 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

Extra-EU imports of other marine fish peak between May, July and October both in terms of value and volume.

Between January and December 2025, Spain, Italy and France were the EU's main importers of other marine fish. Together they accounted for 51% of total extra-EU import volumes, with Spain representing 20%, Italy 18% and Greece 15% of the total import volume.

Table 38. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR OTHER MARINE FISH**

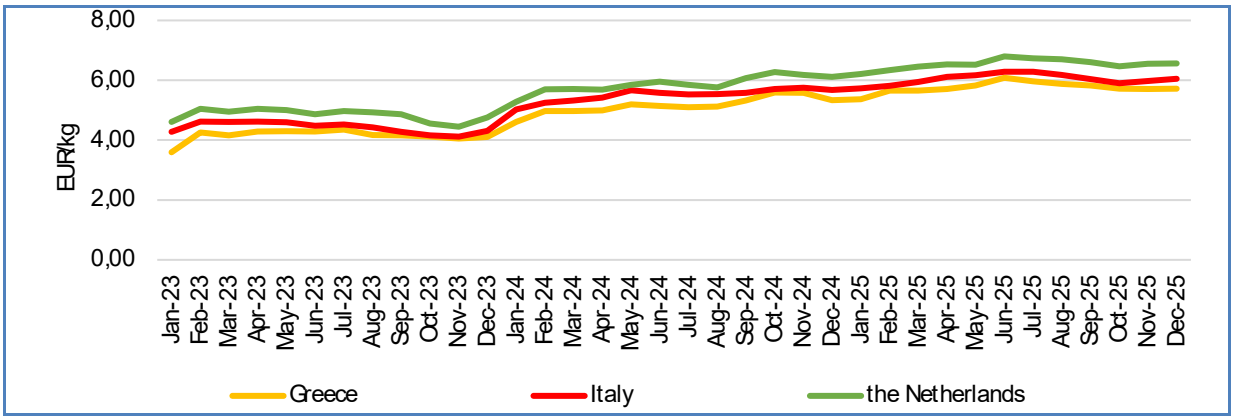
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan–Dec 2024	Jan-Dec 2025	Trend (%)	Jan–Dec 2024	Jan-Dec 2025	Trend (%)	
Spain	344,2	318,3	-8%	70.089	61.118	-13%	Other marine fish.
Italy	362,5	431,4	19%	52.158	56.383	8%	Other marine fish.
France	227,5	241,2	6%	38.001	40.855	8%	Other marine fish.

4.2. Extra-EU imports of gilthead seabream in EU Member States

In terms of value, other marine fish was the main imported species within the "other marine fish" commodity group, accounting for 66% of the total value, followed by gilthead seabream with 14%. Because of the data granularity, it is not possible to identify a specific product within the main commercial species category "other marine species" on which to focus. For this reason, the analysis in this section focuses on gilthead seabream, the second most imported product in this commodity group.

The price analysis below focuses on the main EU importers of gilthead seabream from non-EU countries, namely Italy, Greece and the Netherlands.

Figure 37. **EXTRA-EU IMPORT PRICE OF GITLHEAD SEABREAM IN ITALY, GREECE AND THE NETHERLANDS (JAN 2023 – DEC 2025)**



Between January 2023 and December 2025, the price of gilthead seabream fluctuated and increased in the three countries analysed: Greece (+17%), Italy (+12%), and the Netherlands (+13%). Between January and December 2025, the volume of gilthead seabream imported to Greece was 11.870 tonnes, 13% more compared with the same period in 2024, while the price increased by 12%. Almost 100% of imports by volume came from Türkiye.

During the same period, 18.327 tonnes of gilthead seabream were imported to Italy, 26% more compared to 2024, with a price increase of 10% compared to 2024. Türkiye accounted for 77% of the total imported volume of gilthead seabream in 2025, followed by Albania with 18%. In the Netherlands, 5.431 tonnes of gilthead seabream were imported in 2025, of which almost 100% came from Türkiye. Import volumes increased by 13% and prices by 12%. In Italy import volumes of gilthead seabream peaked between January and April. In the Netherlands volume imports reached their maximum between January and October. No specific trends were detected in imports from Greece.

Figure 38. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GITLHEAD SEABREAM IN GREECE JAN 2023 – DEC 2025 (volume in tonnes, price in EUR/kg)**

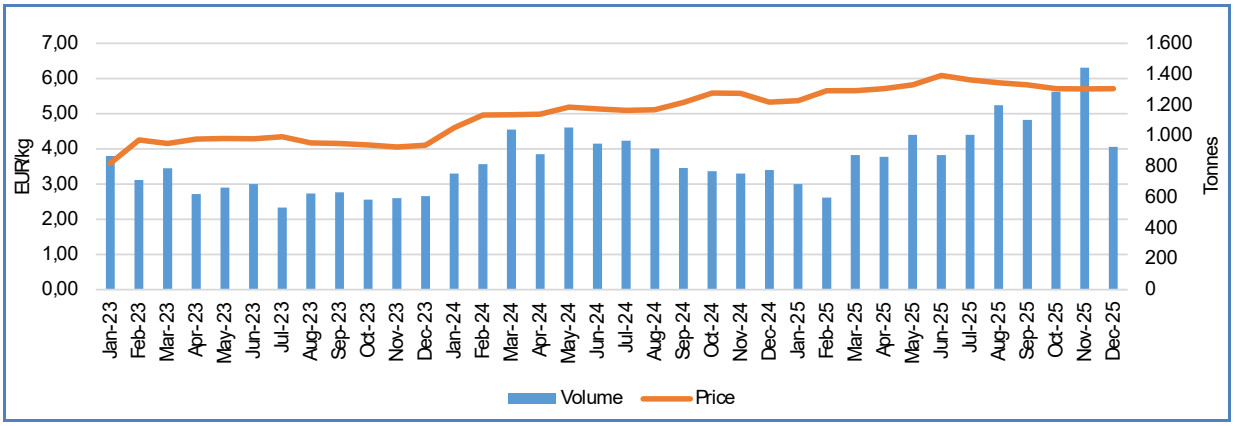


Figure 39. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME GITLHEAD SEABREAM IN ITALY JAN 2023 – DEC 2025 (volume in tonnes and price in EUR/kg)**

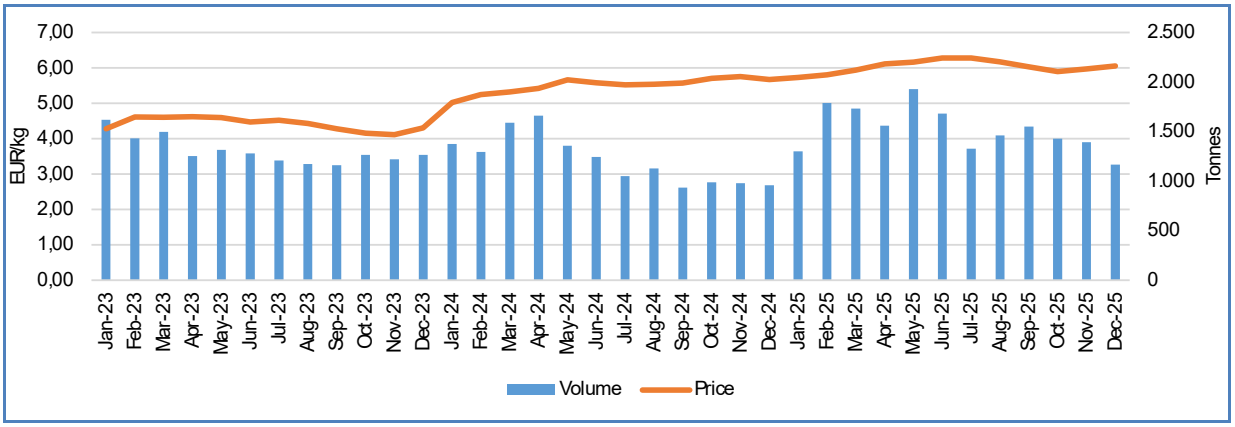
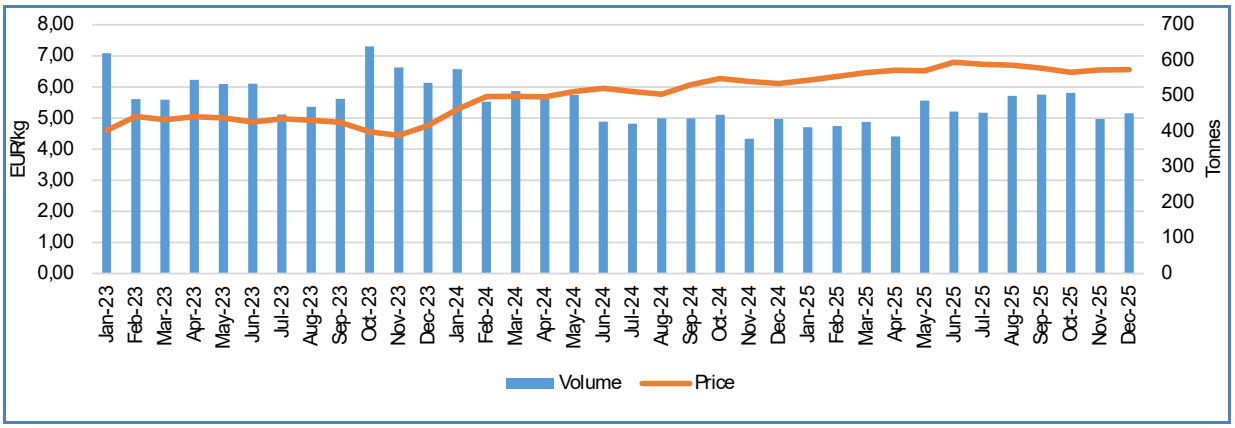


Figure 40. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GITLHEAD SEABREAM IN THE NETHERLANDS JAN 2023 – DEC 2025 (volume in tonnes and price in EUR/kg)**



4.3. Extra-EU imports of gilthead seabream by origin

Between January and December 2025, EU imports of gilthead seabream[24] recorded a decreasing trend in volume (-5%) and an increase in value (+5%) compared with the same period in 2024. In 2025, the EU imported 43.568 tonnes of gilthead seabream for a value of EUR 269,7 million. The main extra-EU countries supplying octopus to the EU in 2025 were Türkiye (89%), followed by Albania (8%), Tunisia (2%) and Morocco (1%). Compared to the same period in 2024, imports increased from several of these countries, except Türkiye (-5%) and Morocco (-64%). Over the same period, imports also increased from Israel (+68%), and Algeria (+104%).

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

Country	Jan – Dec 2023		Jan – Dec 2024		Jan – Dec 2025		Jan – Dec 2025/2024	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Türkiye	187,4	40.713	229,0	40.924	242,4	38.806	6%	-5%
Albania	13,1	3.110	14,4	2.990	17,1	3.340	19%	12%
Tunisia	2,9	659	4,2	789	5,4	864	28%	10%
Morocco	2,2	215	9,0	1.358	4,0	492	-55%	-64%
Others	0,3	41	0,2	32	0,7	66	201%	107%
Total	**205,8**	**44.737**	**256,9**	**46.092**	**269,7**	**43.568**	**5%**	**-5%**

[24] 03028530 - Fresh or chilled gilt-head sea bream "*Sparus aurata*"
03038955 - Frozen gilt-head sea bream "*Sparus aurata*"

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[25]. They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

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

The most notable increases are in Portugal and Spain where consumption increased in volume by 5% and 2% respectively and in value by 13% and 9% respectively compared to 2024. Ireland recorded the most notable decrease in volume (-19%) and in value (-15%).

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

Country	Per capita consumption 2023* (live weight equivalent, LWE) kg/capita/year	December 2023		December 2024		December 2025		Change from December 2024 to December 2025	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	1.109	24,50	1.231	27,10	1.244	27,57	1%	2%
France	32,14	23.450	318,44	21.977	302,41	22.205	314,89	1%	4%
Germany	12,08	6.363	102,29	6.420	101,99	6.347	101,18	-1%	-1%
Hungary	5,83	1.439	12,88	1.362	10,87	1.344	12,03	-1%	11%
Ireland*	20,00	939	18,55	1.161	22,30	938	18,93	-19%	-15%
Italy	30,38	32.157	417,39	29.744	403,59	28.636	412,33	-4%	2%
Netherlands*	19,90	3.790	83,44	3.456	77,40	3.467	78,64	0%	2%
Poland	13,67	10.879	102,70	11.474	107,09	11.471	114,28	0%	7%
Portugal	53,61	5.958	54,26	3.861	38,25	4.070	43,32	5%	13%
Spain	40,68	43.876	481,12	38.949	452,77	39.700	491,55	2%	9%
Sweden	10,00	1.032	15,94	859	12,95	851	13,28	-1%	3%

** 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.*

[25] Last update: 26.02.2026.

5. 2. Overview of household consumption[26] of other marine fish consumed in the EU

In the household consumption data used by EUMOFA, consumption of other marine fish is monitored in ten[27] Member States of which France, Italy, Portugal and Spain are the main consumers. At species level, France monitors monk (*Lophius piscatorius*) and gilthead seabream (*Sparus aurata*), Italy monitors European seabass (*Dicentrarchus labrax*) and gilthead seabream, Portugal monitors scabbardfish (*Aphanopus carbo*), European seabass and gilthead seabream, and Spain monitors monk, European seabass and gilthead seabream.

Figure 41. **HOUSEHOLD PURCHASES (in value) OF OTHER MARINE FISH IN FRANCE, ITALY, PORTUGAL AND SPAIN JAN 2023 – DEC 2025**

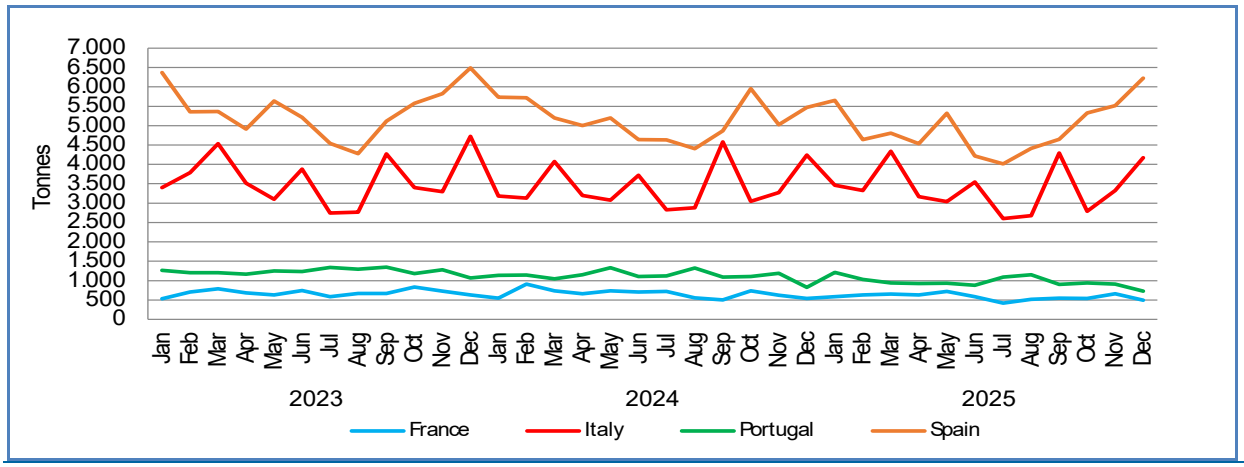
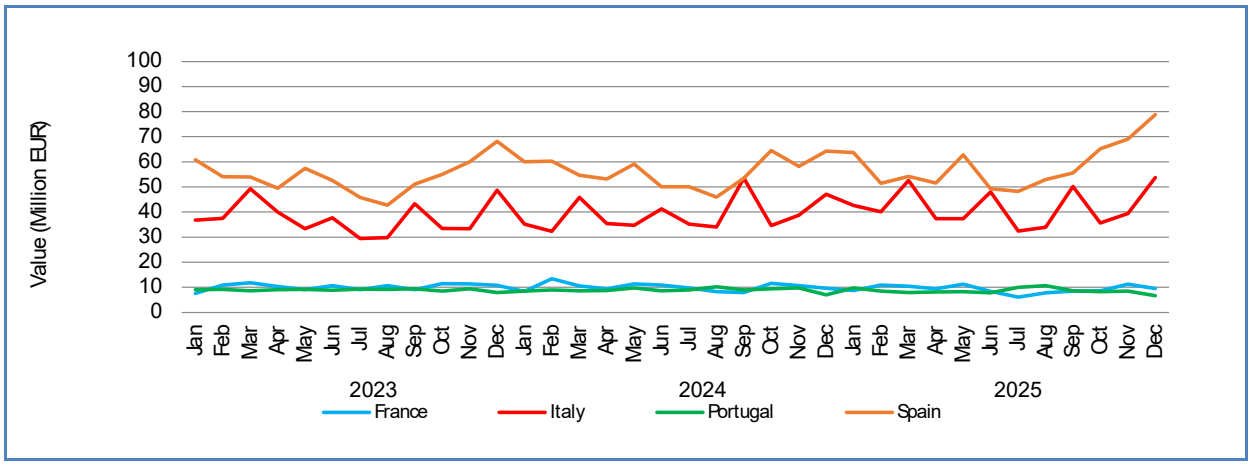


Figure 42. **HOUSEHOLD PURCHASES (in volume) OF OTHER MARINE FISH IN FRANCE, ITALY, PORTUGAL AND SPAIN JAN 2023 – DEC 2025**

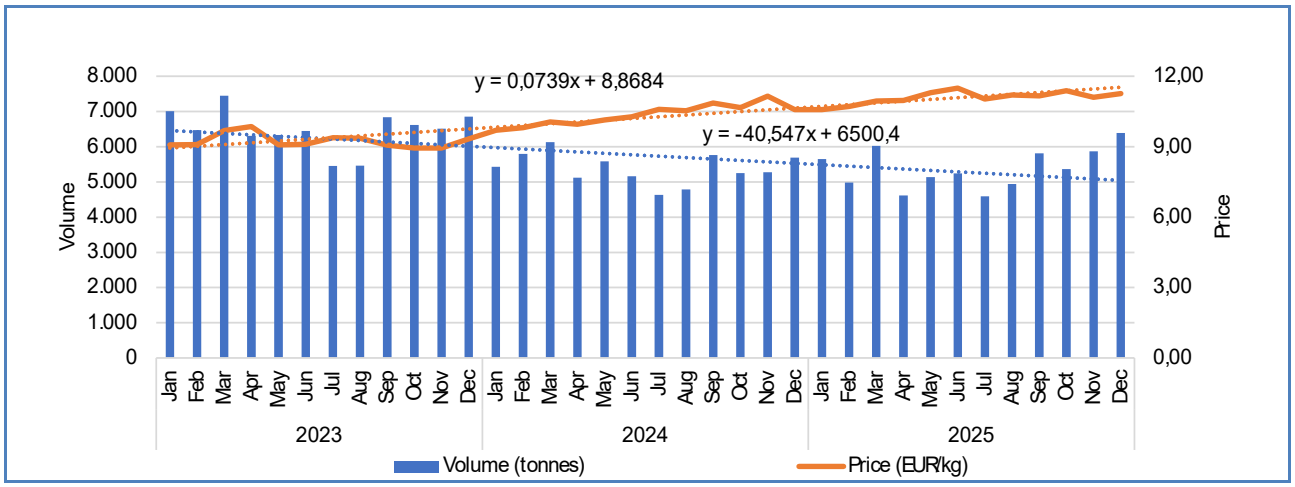


[26] The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the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

5. 3. Household consumption trends of gilthead seabream - the main species of other marine fish in reporting countries

Long-term trend (Jan 2023 to Dec 2025): Downward trend in volume and upward trend in price.
Yearly average retail price (Jan – Dec): 9,24 EUR/kg (2023), 10,36 EUR/kg (2024), 11,10 EUR/kg (2025)
Yearly consumption (Jan – Dec): 77-764 tonnes (2023), 64.622 tonnes (2024), 64.621 tonnes (2025)
Short-term trend (Jan 2025 to Dec 2025): Slightly upward trend in price and upward trend in volume.
Average retail price (Jan 2025 to Dec 2025): 11,10 EUR/kg.
Consumption (Jan 2025 to Dec 2025): 64.621 tonnes.

Figure 43. **RETAIL PRICE AND VOLUME OF GILTHEAD SEABREAM PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, JAN 2023 – DEC 2025**



Consumption of gilthead seabream in the reporting countries fluctuates slightly around the year with lower consumption in July and August. Prices show a non-seasonal variability related to availability of the resource. Between January 2023 and December 2025, consumption volumes showed a downward trend, while prices showed a slight upward trend.

6. CASE STUDY: Fisheries and aquaculture in the UK: market impacts of Brexit on EU aquatic food trade

Source: Ray Harrington, Unsplash.

For many decades, the fishery and aquaculture sector of the UK operated within the highly integrated single market. Shared access to fishing grounds, harmonised regulations, and frictionless trade created a tightly connected system in which fishery and aquaculture products could move rapidly across borders, often several times between harvesting, processing, and final consumption. This close integration shaped how fleets operated, how supply chains were organised, and how markets developed on both sides of the Channel.

The UK's withdrawal from the EU brought a structural break to this system. Trade in fishery and aquaculture products shifted from an internal EU relationship to third-country trade, introducing new customs requirements, sanitary and phytosanitary controls, and certification demands. While economic ties between the EU and UK have largely continued, the conditions governing aquatic food trade have changed substantially, impacting especially fresh and perishable products for which speed, consistency, and predictable logistics are essential.

Several years after Brexit, the impacts remain visible across EU seafood markets. Trade flows have adjusted, and large volumes of fishery and aquaculture products are exchanged between the two markets. However, higher transaction costs, additional checks, and more complex logistics have become permanent features of the supply chain. These effects differ across fleets, species groups, and Member States, depending on their historical dependence on access to UK waters or on imports of fishery and aquaculture products of UK origin.

Brexit has also contributed to structural changes in the EU fleet. Some Member States have introduced decommissioning programmes to manage reduced quota shares, which have led to reduced fishing capacity and landings. These supply-side adjustments have interacted with evolving trade patterns, influencing availability, sourcing decisions, and price formation in EU markets. British Overseas Territories, which play a significant role in particular supply chains—for example squid—have also become more prominent in imports because their products are now classified as third-country imports.

6. 1. Fisheries and aquaculture in the UK

In 2024, total catches by the UK fleet reached 716.000 tonnes, a 5% increase from 2023. Among the three species groups, pelagic species ranked the largest and accounted for 64% of total volumes in 2024 followed by demersal (groundfish) species (19%) and shellfish species (17%). Ranked by value, pelagic species were the major species, accounting for 39% of first-sales value, followed by shellfish (31%) and demersal species (30%).

In terms of volume, Atlantic mackerel was the most important landed species, accounting for 31% of the volume, followed by Atlantic herring (16%), blue whiting (15%), and haddock (6%). In terms of value, Atlantic mackerel also ranked first (17% of total value) followed by Norway lobster (14%), scallops (8%) and lobster (6%).

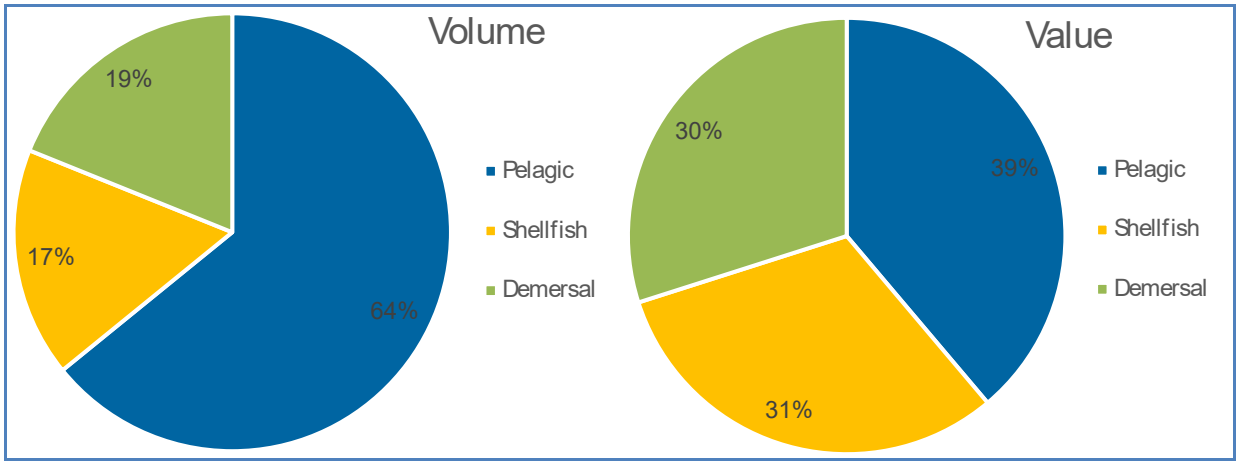
Over the past ten years, landings by the UK fleet have been relatively stable varying from around 612.000 tonnes at their lowest in 2022 up to 716.000 tonnes at their highest in 2024. The fluctuations are to a large degree caused by variations in the allocated fishing quotas. A substantial part of the UK fisheries is landed abroad. This is mainly mackerel, blue whiting and herring. Main landing ports are in Norway, Denmark, the Netherlands and Ireland. During the past 10 years, landed volumes abroad have varied between 290.000 tonnes at their highest in 2015 to 223.000 tonnes at their lowest in 2022.

Table 41. **UK CATCHES (in 1000 tonnes)**

Specie	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Mackerel	248	217	225	191	150	204	210	197	217	226
Herring	94	92	82	104	75	75	77	99	94	114
Blue whiting	32	38	66	73	61	52	74	50	100	105
Haddock	33	34	34	36	34	29	25	33	39	40
Scallops	41	39	31	29	29	26	29	26	27	31
Norway lobster	26	31	30	25	35	23	32	29	28	27
Crabs	32	36	36	35	34	27	25	22	20	20
Cod	28	34	35	35	29	25	11	16	14	19
Whelks	21	23	21	18	20	22	18	14	16	17
Monks or anglers	18	20	20	19	18	18	19	19	17	16
Other	135	135	128	133	134	120	111	108	108	102
Total	**708**	**700**	**708**	**696**	**618**	**620**	**631**	**612**	**680**	**716**

Source: Monthly UK sea fisheries statistics - GOV.UK.

Figure 44. **UK FISHERIES BY SPECIES GROUP IN 2024**



Source: Monthly UK sea fisheries statistics - GOV.UK.

In 2023, total aquaculture production volumes amounted to 183.000 tonnes, a 9% decrease from 2022. Atlantic salmon production fell in 2022 and 2023 due to environmental stress (warm seas) and biological challenges (gill disease, micro-jellyfish, and low survival). These factors resulted in reduced growth, increased mortality, and ultimately lower harvested tonnage[28]. Atlantic salmon is by far the main species produced, accounting for 82% of the volumes, followed by sea mussels (8%) and rainbow trout (7%). In 2023, aquaculture production volumes accounted for 17% of total UK aquatic food production and aquaculture values accounted for more than 50%.

Table 42. **UK AQUACULTURE PRODUCTION (in 1000 tonnes)**

Specie	2015	2016	2017	2018	2019	2020	2021	2022	2023
Atlantic salmon	172	163	190	156	204	192	205	169	151
Sea mussels nei	19	15	16	14	13	9	12	14	14
Rainbow trout	15	14	13	12	13	12	13	13	13
Pacific cupped oyster	2	2	2	2	3	2	3	3	3

[28] https://www.fishfarmingexpert.com/salmon-scotland-scottish-farmed-fish-production-survey-2023/salmon-production-fell-by-11-last-year-scottish-government-confirms/1844063

Common edible cockle	3	0	5	4	0	4	4	1	1
Other	1	1	1	1	1	1	1	2	2
Total	**212**	**195**	**228**	**190**	**234**	**220**	**239**	**201**	**183**

Source FAO.

6. 2. Post-Brexit trade and regulations in fishery and aquaculture products

Since 2021, trade in fishery and aquaculture products between the EU and the UK has operated under a new regulatory framework: the Trade and Cooperation Agreement (TCA)[29]. While tariff-free trade was preserved, new customs procedures, sanitary and phytosanitary (SPS) controls, and certification requirements increased administrative burdens and logistical complexity, particularly for fresh and live products due to their perishability[30]. Changes in access to fishing opportunities and quota allocations further affected certain EU fleet segments and processing activities, with impacts varying considerably across Member States and regions[31, 32].

Certain medium-risk seafood products such as crustaceans, bivalves and molluscs for human consumption and fishery products from aquaculture which are not in hermetically sealed containers intended to render them stable at ambient temperatures[33] require Export Health Certificates issued in Ireland before shipment, reflecting enhanced UK health and biosecurity standards for products of animal origin entering the UK. On arrival, consignments are subject to documentation checks, with physical inspections introduced in phases under the UK Border Target Operating Model from 2024 to reinforce food safety and import control measures[34].

Under the EU-UK TCA, new quota arrangements have been introduced for around 100 fish species caught in UK waters. The UK gained additional quotas for approximately 60 of these species. During a transition period (between 2021 and 2026), the EU's quotas of 55 shared stocks were gradually transferred to the UK for a value equivalent to 25% of the EU's pre-Brexit landings from UK waters[35]. Total allowable catches are set annually in consultations that occur under the TCA umbrella, and regular cooperation takes place on fisheries management under the Specialised Committee on Fisheries (SCF). The SCF adopted a decision extending the reciprocal arrangements on access to waters[36] and both Parties enjoy full access to each other's waters for fishing until 30 June 2038. The decision puts into law the political agreement reached before the EU–UK Summit in London on 19 May 2025[37]. In late 2025, in the framework of these annual consultations, the UK and EU agreed on fishing opportunities for 95 shared stocks for 2026, ensuring continuity and predictable conditions for the fishing fleet[38].

Trade flows

6. 3. EU imports from the UK

Between 2015 and 2019, imports of fishery and aquaculture products from the UK into the EU grew steadily, rising by 30% in volume and 33% in value. This growth ended abruptly after Brexit. From 2021, trade in fishery and aquaculture products between the UK and the EU decreased as new non-tariff barriers were introduced. These include customs procedures, SPS controls and certification requirements linked to the UK's new status as a third-country exporter[39]. As a result, EU imports of UK fishery and aquaculture products fell from around 450.000 tonnes in 2019 to about 322.000 tonnes in 2022. Although volumes rose slightly to 353.000 tonnes in 2024, they remained more than 14% below pre-Brexit levels. Import values followed the same pattern, decreasing from nearly EUR 2 billion in 2019 to roughly EUR 1.6 billion in 2024, indicating a more permanent loss of UK market share rather than a temporary post-Brexit adjustment.

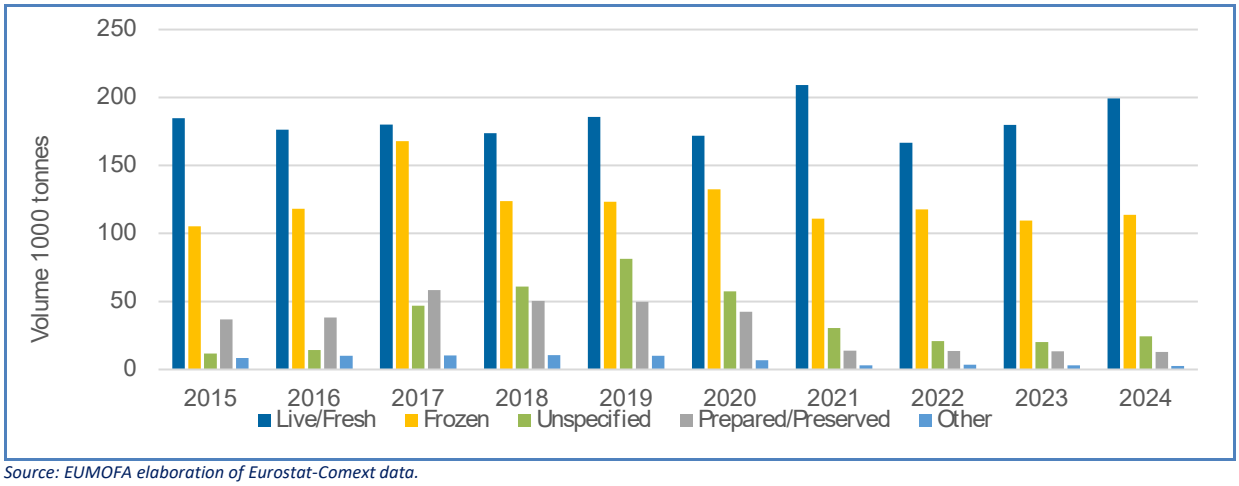
[29] European Commission (2021). EU-UK Trade and Cooperation Agreement. Eur-lex.europa.eu
[30] EPRS (2025). Implementation of the EU-UK TCA. Europarl.europa.eu
[31] European Parliament (2022). Impacts of the EU-UK TCA on fisheries and aquaculture in the EU. Europarl.europa.eu
[32] European Parliament (2022). Brexit and the reduction in EU fishing quota shares, 2021 to 2023. Europa.eu
[33] https://www.gov.uk/government/publications/risk-categories-for-animal-and-animal-product-imports-to-great-britain/products-of-animal-origin-products-intended-for-human-consumption-risk-categories-for-imports-from-the-eu-to-gb#fishery-products-and-bivalve-molluscs
[34] https://brexitlegal.ie/gb-border-2023-sps/
[35] https://www.consilium.europa.eu/en/policies/fish-stocks-shared-between-the-eu-and-the-united-kingdom/
[36] EUR-Lex - 22025D1231 - EN - EUR-Lex
[37] https://oceans-and-fisheries.ec.europa.eu/news/eu-and-uk-formalise-agreement-full-reciprocal-access-waters-until-2038-2025-06-20_en
[38] https://researchbriefings.files.parliament.uk/documents/CBP-9174/CBP-9174.pdf
[39] https://commonslibrary.parliament.uk/new-customs-rules-for-trade-with-the-eu/

The effects of Brexit have differed across product types. Live and fresh products decreased by 7% between 2019 and 2020 but increased by 22% between 2020 and 2021. In 2022, a drop beyond the 2020 level was registered but imports increased again in 2023 and 2024. These categories are especially vulnerable to delays and administrative requirements because they are fresh, and the introduction of border procedures, SPS controls, and certification rules have clearly disrupted their time-sensitive supply chains. Frozen products increased by 7% between 2019 and 2020 but decreased by 16% in 2021 and have shown small variations since then.

Prepared and preserved products experienced the strongest decline. Imports of prepared, preserved, and smoked seafood from the UK fell by 67% between 2020 and 2021 and have not recovered since. This trend suggests a weakening of the UK's position in value-added seafood processing for the EU market, as EU buyers increasingly source such products (clam, shrimp, crab, soups and food preparations) from processors within the EU or from other third-country suppliers.

Overall, Brexit introduced structural and lasting barriers that have significantly reshaped trade in fishery and aquaculture products between the UK and the EU. While some product groups have partly recovered, total volumes and values remain well below pre-Brexit levels, pointing to a shift in trade patterns.

Figure 45. **EU IMPORTS OF FISHERY AND AQUACULTURE FROM UK BY PRESERVATION STATE (in 1000 tonnes)**



Source: EUMOFA elaboration of Eurostat-Comext data.

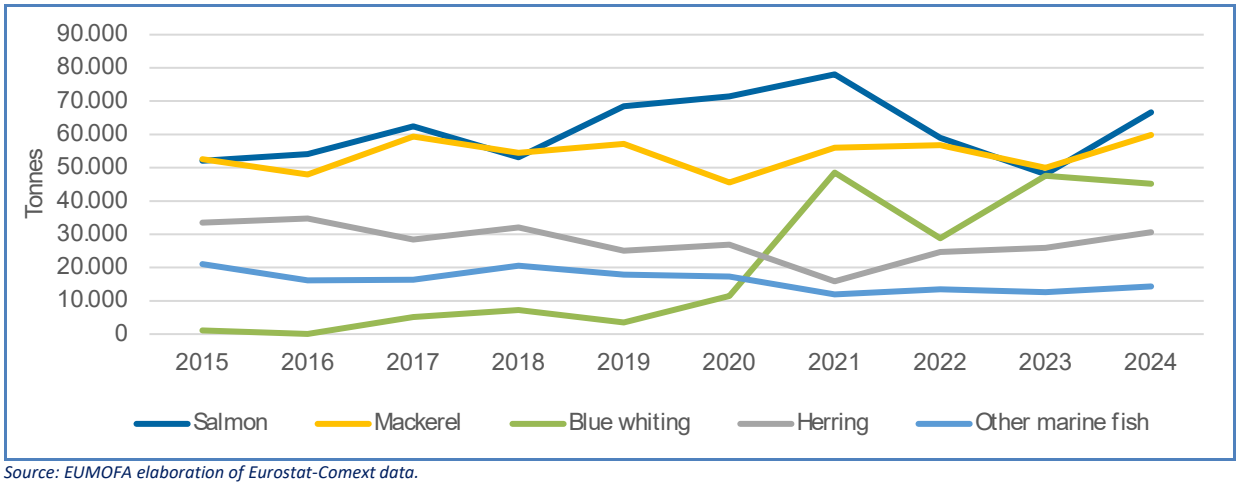
In 2024, the five most imported species by volume were salmon, mackerel, blue whiting, herring and other marine fish.[40] Together, these species accounted for 61% of the UK's total import volumes. This is a marked increase from the period between 2015 and 2019, when their combined share varied between 37% and 46%. Since 2020, the share held by these key species has grown steadily, reaching its highest point in 2024.

In terms of value, the leading imported species in 2024 were salmon, Norway lobster, mackerel, crab and lobster (Homarus). These species together represented 63% of total import value. Between 2015 and 2019, they typically accounted for between 39% and 41%, but their share began rising after 2020, peaking at 63% in 2024 in line with the trend seen in import volumes.

Salmon is particularly notable due to its strong position in both import volume and especially import value. However, salmon import volumes fell sharply between 2021 and 2023 (38%). Although volumes recovered somewhat in 2024, they remain below pre-Brexit levels. Import values followed a similar pattern, with a 16% decline from 2021 to 2023, followed by a recovery in 2024.

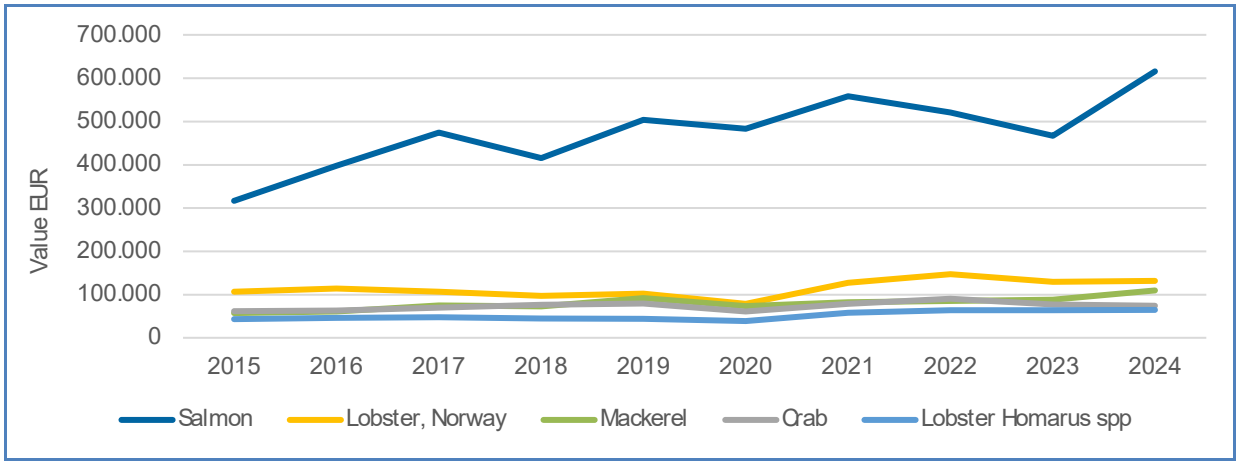
[40] Frozen raw fish fillets, coated with batter or breadcrumbs, whether or not pre-fried in oil, Fresh or chilled fish, n.e.s., Fresh or chilled fillets of fish, n.e.s.

Figure 46. **EU IMPORT TRENDS OF TOP FIVE SPECIES FROM THE UK BY 2024 VOLUME**



Source: EUMOFA elaboration of Eurostat-Comext data.

Figure 47. **EU IMPORT TRENDS OF TOP FIVE SPECIES BY 2024 VALUE**



Source: EUMOFA elaboration of Eurostat-Comext data.

The Falkland Islands are a major supplier of squid to the EU, with roughly 94% of their fish exports mainly *Loligo* squid[41] entering via the Spanish port of Vigo. Brexit significantly altered the Falkland Islands' relationship with the European Union, removing long-standing benefits that the Islands previously enjoyed as part of the EU's Overseas Association Decision[42]. These had included tariff-free access to the EU market and dedicated development funding[43].

The EU, which is a major market for Falkland Islands squid, imposed tariffs on squid imports as the United Kingdom left the EU. After Brexit, foreign shipowners operating in the Falkland Islands (except Spanish shipowners) have been obliged to pay tariffs of 8% for Loligo squid, and 6% for flying squid. Since 2021, the Falkland Islands and the EU have come to an agreement, whereby the EU can import a total of 75.000 tonnes of *Loligo* squid tariff free every year [44]. The agreement is limited to products destined for industrial processing in the EU[45].

In 2024, a total of 69.600 tonnes of squid were imported into the European Union, virtually all of it into Spain from the Falkland Islands, for a total value of EUR 236 million.

[41] https://www.falklands.gov.fk/fisheries/overview/commercial-species/falkland-calamari-loligo
[42] https://international-partnerships.ec.europa.eu/countries/overseas-countries-and-territories_en
[43] https://committees.parliament.uk/writtenevidence/140069/pdf/
[44] https://www.stradalex.eu/fr/se_src_publ_leg_eur_jo/toc/leg_eur_jo_3_20210722_261/doc/ojeu_2021.261.01.0001.01
[45] https://www.consilium.europa.eu/en/press/press-releases/2023/11/27/import-of-fishery-products-council-adopts-autonomous-eu-tariff-quotas-for-2024-to-2026/

Table 43. **EU IMPORTS FROM THE FALKLAND ISLANDS**

	2019		2020		2021		2022		2023		2024	
MCS	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Squid	79.700	203.900	56.500	197.600	67.700	214.000	69.400	268.300	62.800	219.100	69.600	236.200
Hake	5.500	8.700	2.900	4.900	1.800	2.900	3.700	6.500	4.500	7.700	6.200	11.900
Other	1.400	3.300	1.200	1.900	200	600	400	1.000	900	2.100	800	1.800
Total	**86.600**	**215.900**	**60.600**	**204.300**	**69.800**	**217.500**	**73.500**	**275.900**	**68.300**	**228.900**	**76600**	**249.900**

Source EUMOFA elaboration of Eurostat-Comext data.

6. 4. UK imports from EU and other markets

All fishery products, except for farmed fish and scallops which are imported to the UK, must be accompanied by a catch certificate[46]. As of January 2021, this also includes fishery products of EU origin. The catch certificate must be validated by the authority in the flag state of the catching vessel - the country where the vessel is registered.

The catch certificate must remain with the product throughout the supply chain and is required on entry to the UK. Imports without a catch certificate cannot enter the UK[47].

From 2015 to 2020, more than half of the UK's import volumes of fishery and aquaculture products came from the EU Member States. After Brexit, the situation changed significantly, and the EU's share fell sharply, reaching its lowest level of 24% in 2024. Among the main EU suppliers, both import volumes and values declined strongly compared with the period before Brexit. Ireland recorded a 60% drop in volume and a 16% drop in value, while the Netherlands experienced decreases of 32% in volume and 37% in value. Denmark's exports to the UK fell by 58% in volume and 59% in value, and Germany saw even bigger declines of 76% in volume and 57% in value. France experienced a reduction of 34% in both volume and value, Lithuanian exports fell by 30% in volume and 36% in value, Poland dropped by 53% in volume and 6% in value, and Belgium declined by 25% in volume and 8% in value.

As EU supplies have decreased, the UK has increasingly relied on non-EU countries to fill the gap. By 2024, imports from non-EU suppliers had reached 977.000 tonnes, valued at EUR 4,2 billion. Compared with 2020, this represented a 58% increase in volume and a 59% increase in value. In 2024, the top five non-EU suppliers in terms of value were Norway, Iceland, China, Vietnam and the Faroe Islands. While imports from China and Vietnam have remained relatively stable since Brexit, several other suppliers have expanded strongly. The countries showing the largest growth since 2020 include Norway, Iceland, the Faroe Islands, Ecuador and the United States.

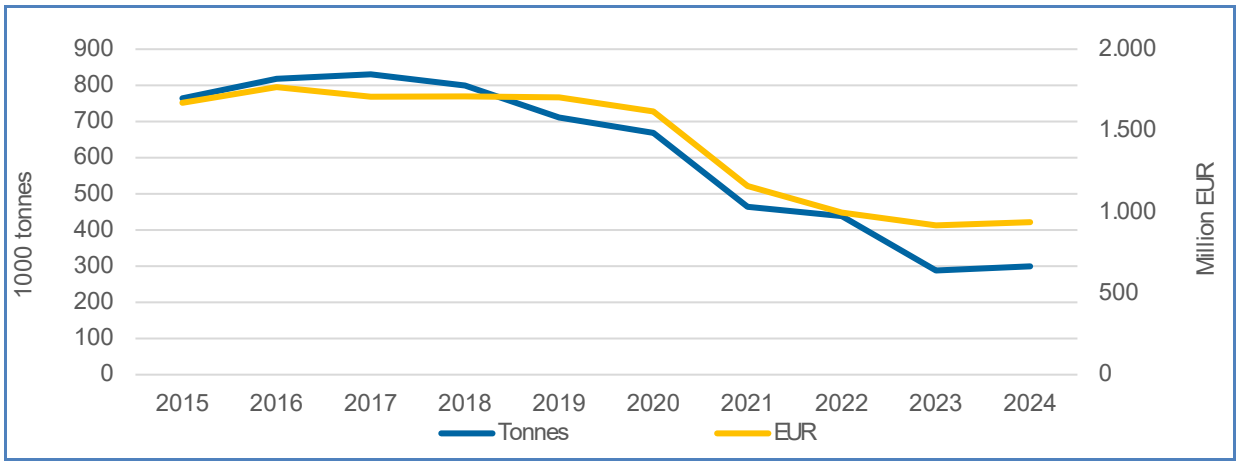
Compared with 2020, imports from Norway rose by 79% in volume and by more than 300% in value, driven mainly by salmon, cod and haddock. Imports from Iceland increased by 24% in volume and 28% in value, with cod and haddock the key species. The Faroe Islands expanded exports to the UK by 47% in volume and 34% in value, largely through salmon, cod and haddock. Ecuador increased its export volumes by 50% and values by 77%, mainly due to tuna and shrimp. The United States saw one of the strongest increases, with volumes up by 153% and values up by 33%, primarily through salmon and Alaska pollock.

UK imports of fishery and aquaculture products declined by 8% from 2020 to 2021, then increased by 5% in 2022. In 2023, imports fell again, this time by 10%. In 2024, volumes rebounded, rising by 14% to 1,26 million tonnes. Despite this increase, total imports in 2024 were still 6% lower than in 2019 and 1% below 2020.

Overall, the decline in imports of fishery and aquaculture products from EU countries has been offset by the growth of non-EU suppliers, resulting in a significant shift in the UK's import structure since Brexit. UK import volumes fluctuate over the 2020-2024 period, declining from 2020 (1,287 million tonnes) to a low point in 2023 (1.115 million tonnes) before recovering strongly in 2024 (1,284 million tonnes). The largest category, unspecified, drives much of this movement, falling sharply in 2023 and rebounding to its highest level in 2024. Whole/Gutted and other cuts remain relatively stable with modest variations, while fillet shows a gradual recovery after 2021. By-products grow steadily from very low levels. Overall, total imports in 2024 nearly return to 2020 levels, indicating that the downturn in 2021–2023 has largely reversed.

[46] https://www.legislation.gov.uk/eur/2008/1005/contents
[47] https://www.legislation.gov.uk/eur/2008/1005/contents

Figure 48. **UK SEAFOOD IMPORTS FROM THE EU (1000 tonnes, million EUR)**



Source: EUMOFA elaboration of Trade Data Monitor data.

6. 5. UK exports

After an initial drop following Brexit in 2021, UK exports of fishery and aquaculture products have gradually recovered, with notable growth by 2024. According to EUMOFA elaboration of Trade Data Monitor data, 964.000 tonnes of seafood products were exported from the UK at a value of EUR 3,2 billion. This was a 14% increase in volume and value from the year before. Compared to 2020, it was a slight decrease in terms of volume and a 26% increase in nominal value.

Exports to the EU declined in both 2020 and 2021 but began to recover in 2022 and continued to increase during 2023 and 2024. Even with this improvement, export volumes have not returned to the levels seen before Brexit. Export values fell by 10% from 2019 to 2020, and although they improved in the following years, they only saw a strong recovery in 2024 with an 11% increase compared to 2023 driven mainly by salmon and mackerel.

Other European (non-EU) markets showed much stronger growth after Brexit. Between 2019 and 2020, exports to these markets increased sharply, rising by 140% in volume and 103% in value. Although export levels declined somewhat in the years that followed, they remained well above pre-Brexit levels. Growth accelerated again in 2024, when export volumes increased by 36% to 134.000 tonnes and export values rose by 33% to EUR 297 million.

The EU remains the UK's most important seafood export destination, accounting for 67% of UK seafood export volumes and 61% of export values in 2024.

Table 44. **EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM UK BY MARKET (1000 tonnes)**

Market	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
EU	725	716	784	790	695	681	545	576	582	648
Other Europe	40	48	41	48	60	144	117	127	99	134
Asia	82	83	97	96	102	73	76	79	80	102
North America	41	39	45	33	54	37	45	42	53	51
Africa	34	32	22	22	16	16	21	23	17	15
Other	12	30	44	46	53	24	16	14	13	15
Total	**934**	**947**	**1.034**	**1.036**	**979**	**975**	**819**	**861**	**844**	**964**

Source: EUMOFA elaboration of Trade Data Monitor data.

Table 45. **EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM THE UK BY MARKET (million EUR)**

Market	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
EU	1.697	1.837	1.925	1.872	1.864	1.677	1.671	1.782	1.750	1.944
North America	328	381	384	258	418	280	326	381	386	449
Asia	393	494	627	445	409	237	309	320	352	417
Other Europe	100	104	89	103	124	251	206	269	224	297
Africa	58	62	77	38	37	27	29	30	34	32
Other	37	58	132	91	103	51	38	48	52	51
Total	**2.614**	**2.937**	**3.234**	**2.808**	**2.954**	**2.523**	**2.579**	**2.831**	**2.797**	**3.190**

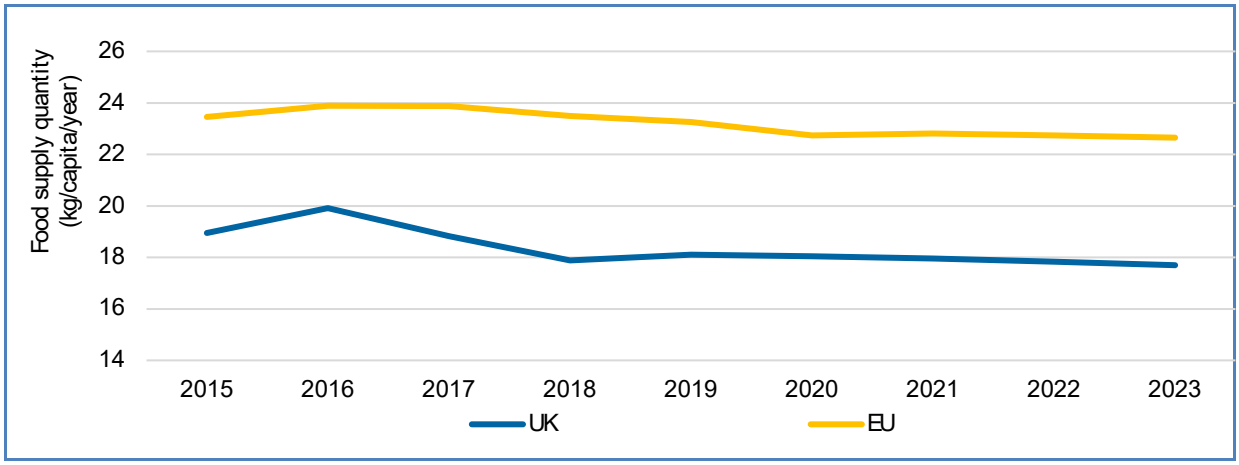
Source: EUMOFA elaboration of Trade Data Monitor data.

6. 6. Consumption of fishery and aquaculture products in the EU and UK

Consumption of fishery and aquaculture products in the UK has fallen in recent years reaching 17,7 kg per capita in 2023. This was a 0,7% decrease from 2022 and a 6,6% decrease compared to 2015. The reason for this includes weaker purchasing power and an increase in fish prices. Fish prices in the UK have risen faster than general inflation, food inflation, and meat prices[48], and Brexit has been a significant factor due to higher trade barriers, certification requirements, and increased costs on EU-sourced seafood[49]. Another factor is that young people now consume much less fish than older people[50].

The same falling trend is seen in EU per capita consumption. According to FAO, annual per capita consumption in 2023 was 22,7 kg LWE[51], a 0,4% decrease from 2022 and a 3,4% decrease compared to 2015. Consumption of wild products was above 16 kg per capita, the lowest level in a decade, while consumption of farmed products was around 6.5 kg per capita. Portugal remained the highest per capita consumer in the EU, at 53,6 kg in 2023[52]. Driven by strong price increases in recent years and reduced purchasing power, consumers are choosing cheaper, more convenient frozen or canned options over fresh, wild-caught fish.

Figure 49. **PER CAPITA SEAFOOD CONSUMPTION IN THE UK AND EU**



Source: FAO.

[48] https://www.statista.com/topics/10116/food-price-inflation-in-the-united-kingdom-uk/#editorsPicks
[49] https://cep.lse.ac.uk/pubs/download/brexit18.pdf
[50] https://fishfocus.co.uk/uk-fish-consumption-trends/
[51] Live weight equivalent
[52] https://eumofa.eu/market-analysis#yearly

7. CASE STUDY: Fresh sardine in the EU: Focus on Spain

The European sardine is an important species in the EU, especially popular in Spain, France, and Portugal. It is a commercially important species for several fisheries along the EU coast from the North Sea to the Mediterranean. In 2023, EU catches amounted to 142.286 tonnes. The Spanish fleet is the second most important at EU level after Croatia, accounting for 21% of the EU catches in 2023, while Croatia represented 22% of the catches. Landings are seasonal, with higher volumes available in summer and autumn. Complementing its production, around 10.000 tonnes of fresh European sardines are imported each year in Spain, mostly from Portugal. Spain also imports significant amounts of frozen sardines, mainly from Morocco, as well as prepared and preserved sardines from Morocco, Portugal, and Croatia. Spanish exports largely consist of fresh and frozen sardines to Portugal, and to a lesser extent of prepared/preserved sardines to France and Portugal. Spain is the main consumption market for sardine in the EU, with consumption of 1,77 kg lwe per capita in 2023. Spanish household consumption of fresh sardine reached over 48.000 tonnes in 2025. Prices on the Spanish market are following a rising trend, with a 37% increase in nominal terms for fresh sardine between 2015 and 2024 (10% in real terms[53]).

7. 1. Biology resource and exploitation: focus on Spain

European sardine (*Sardina pilchardus*) is a pelagic species belonging to the Sardina genus and the Clupeidae family.[54] It is found in the Northeast and Central Atlantic from Iceland to Senegal, and in the Mediterranean and Black Sea. It can also be found in brackish water and freshwater in Africa, Asia and Europe[55]. The European sardine is a small pelagic species that lives in large schools in coastal and oceanic waters. It commonly lives at depths ranging from a few metres to 100 metres[56]. It is mainly a nocturnal hunter and follows the daily vertical migration of plankton, returning to the depths during the day. It feeds mainly on zooplankton, small planktonic crustaceans, and copepods[57]. Its normal size is between 10 and 20 cm in length when sardines reach their sexual maturity (1 year old approximately). The spawning period is spread out over a long time from October to June, with peaks during spring. Mating usually occurs in coastal waters, with warmer temperatures and more abundant resources[58]. Females can produce up to 60.000 eggs that then reach the water's surface due to their lower density. Hatching occurs 2 to 4 days after external fertilisation. Larvae are around 4 millimetres.

The most important commercial stocks in European waters are located along the Atlantic–Iberian coast. Sardine stocks are not managed through Total Allowable Catches (TAC). However, conservation measures are implemented locally by Member States. For example, the Multiannual Management Plan for the Iberian sardine (2021-2026) is currently implemented by Portugal and Spain, setting fishery management actions, including the adoption of "no take zones" and a maximum volume of catches[59]. In addition, a minimum conservation reference size of 11 cm is enforced in all EU fishing areas. In the Mediterranean Sea, a maximum number of 55 fish per kg is also required[60]. The main fishing gear used for catching sardine are purse seiners and trawlers.

7. 2. Production

Global production

In 2023 global production of European sardine reached 1,2 million tonnes. The main producers were Morocco and Mauritania, which accounted for 57% and 24% respectively of global catches. The EU was the third largest producer of European sardine in 2023 with

[53] Real terms were calculated using the Eurostat GDP deflator (2021=100)
[54] https://fish-commercial-names.ec.europa.eu/fish-names/species/sardina-pilchardus_en
[55] Ibidem
[56] https://doris.ffessm.fr/Especes/Sardina-pilchardus-Sardine-d-Europe-3095/(rOffset)/0
[57] Ibidem
[58] Ibidem
[59] Multiannual management plan for the iberial sardine (2021-2026): https://www.dgrm.pt/documents/20143/46478/PGSARDINHA2021-2026.pdf/d36a1df9-7353-32a4-a06e-c72852e73cb0
[60] https://fish-commercial-names.ec.europa.eu/fish-names/species/sardina-pilchardus_en#ecl-accordion-header-conserv-meas

catches reaching 142.286 tonnes caught exclusively in Northeast and Southeast Atlantic, and the Mediterranean and Black Sea. Other producers include Algeria, Türkiye, and Tunisia. EU production accounted for 12% of world production in 2023.

Over the last decade (2014-2023), the global production of sardine has fluctuated, peaking at 1,6 million tonnes in 2018 before decreasing and going back to levels similar to the beginning of the period. Overall, global sardine production has remained stable, increasing slightly (2%) over the period. Among main producing countries, trends have varied with declining Moroccan production (17%) and EU production (43%), while production in Mauritania went from 1.532 tonnes in 2014 to above 300.000 tonnes in 2023. This strong rise is probably a statistical artefact resulting from improved statistical precision so as to distinguish between sardines and other small pelagics such as sardinellas.

Table 46. **WORLD CATCHES OF EUROPEAN SARDINE (volume in tonnes live weight)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Morocco	851.355	844.912	917.554	943.288	949.543	968.477	843.308	788.174	989.735	707.919
Mauritania	1.532	14.793	6.584	157.826	324.967	234.630	220.550	304.014	295.205	301.105
EU-27	249.855	194.621	238.728	207.207	190.111	174.527	178.751	171.323	166.253	142.286
Algeria	35.762	36.514	33.142	42.590	50.853	24.884	18.440	29.926	30.525	26.300
Türkiye	18.077	16.693	18.162	23.426	18.854	19.119	21.265	15.800	16.729	17.311
Tunisia	19.279	19.276	16.370	11.621	13.539	14.528	13.525	16.466	15.481	14.290
Others	36.825	49.117	48.605	51.014	58.941	61.344	35.979	35.451	34.394	27.512
Total	**1.212.686**	**1.175.927**	**1.279.145**	**1.436.971**	**1.606.808**	**1.497.510**	**1.331.818**	**1.361.155**	**1.548.322**	**1.236.724**

Source: FAO.

EU production

In 2023, EU catches of European sardine reached 142.286 tonnes, representing 12% of global production. The main EU producers were Croatia (22% of the total EU catch) and Spain (21%). Other significant producers were Portugal (18%) and France (17%).

Over the last decade (2014-2023), EU production of sardine declined by 43%, driven by a strong decline in Dutch catches (70% between 2014 and 2023), as well as a decrease in catches by the Croatian and Spanish fleets (respectively 48% and 33%). Portuguese catches followed an opposite trend, increasing by 63% over the period, while French catches remained relatively stable (-3%).

Table 47. **EU CATCHES OF EUROPEAN SARDINE (volume in tonnes live weight)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Croatia	61.036	51.777	54.412	48.420	46.267	45.105	50.153	40.509	39.194	31.525
Spain	45.104	33.625	32.105	25.861	25.641	16.970	20.536	27.403	27.664	30.025
Portugal	16.129	13.936	13.725	14.975	9.928	10.230	16.061	28.019	25.517	26.254
France	24.551	20.700	25.957	28.210	30.301	25.744	30.064	22.330	26.244	23.752
Netherlands	50.868	14.129	34.414	28.766	15.939	15.163	22.433	20.514	17.271	10.471
Others	52.167	60.454	78.115	60.975	62.035	61.315	39.504	32.548	30.362	20.258
Total	**249.855**	**194.621**	**238.728**	**207.207**	**190.111**	**174.527**	**178.751**	**171.323**	**166.253**	**142.286**

Source: FAO.

7. 3. First sales in the EU

In 2025, reported first sales of European sardines in EU countries[61] amounted to a volume of 120.454 tonnes and a value of EUR 146 million[62]. The main EU countries in terms of first-sales volume and value were Portugal (30% of total volume and 30% of the value) and

[61] Belgium, Croatia, Cyprus, Denmark, France, Greece, Ireland, Italy, Netherlands, Portugal, Spain, and Sweden.
[62] Source: EUMOFA.

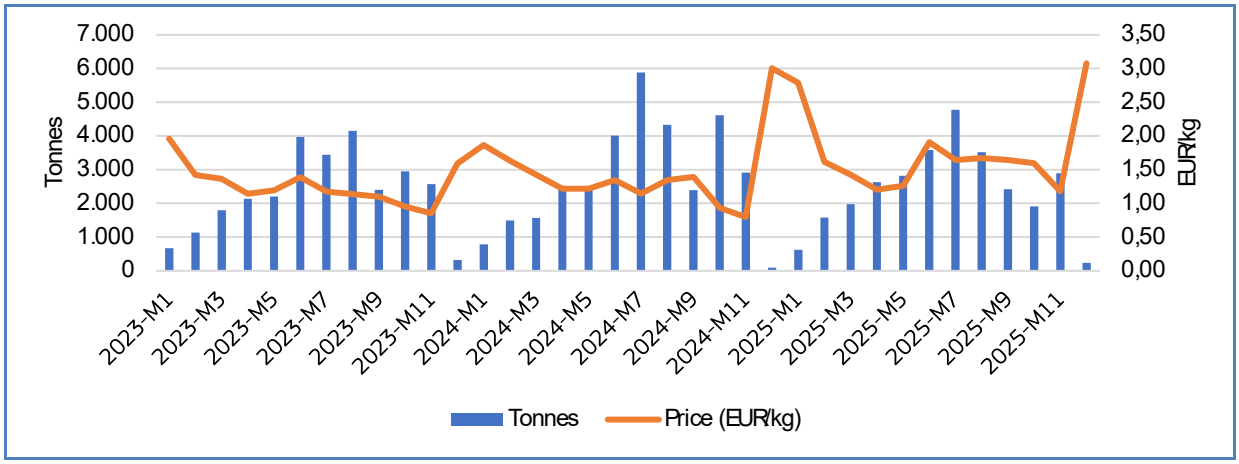
Spain (24% of the volume, and 31% of the value), followed by France (22% of the volume and 14% of the value) and Croatia (18% of the volume and 11% of the value).

Spanish first sales of European sardines reached a volume of 28.954 tonnes and a value of EUR 45 million in 2025. First sales consist exclusively of fresh whole sardines. European sardine of size 1[63] (equivalent to fish of more than 0,067 kg) accounted for more than half of Spanish first sales in volume in 2025 (57% in volume, 57% in value), followed by size 2 (23% of the volume, 21% of the value), size 3 (13% in volume, 12% in value), and size 4 (8% in volume, 9% in value). Over the decade (2016-2025), volumes of first sales fluctuated with a low point reached in 2019 at 17.363 tonnes, before increasing until 2024. Overall, Spanish first sales experienced a 32% decline in volume and a 17% decline in value. Prices peaked in 2019 at 1,90 EUR/kg and have been fluctuating since. In 2025, first sale prices of European sardine reached 1,57 EUR/kg.

In 2025, first sales of European sardine in Spain were reported in 82 places of sales, with five of them accounting for almost half of the first sales in value. The most important places of sale in value terms were Santa Eugenia Ribeira (17% of the total value in Spain and 5% of the total value in EU), A Coruña (10% of the value in Spain; 5% of the EU), Isla Cristina (8% of the Spanish first sales in value), Torrevieja (6%), and Vigo (5%).

First sales data show a significant seasonality pattern with higher volumes sold in summer and autumn, with first-sale volumes from June to August usually accounting for 40% of the total yearly first sales, and lesser volumes in winter. Price trends are related to these volume fluctuations with higher prices in winter and lower prices in summer and autumn when higher volumes are available. The lowest prices (less than 1,00 EUR/kg) are generally observed in November, at the end of the sardine fishery season.

Figure 50. **FIRST SALES OF EUROPEAN SARDINES IN SPAIN (volume in tonnes net weight and nominal price in EUR/kg)**



Source: EUMOFA.

7. 4. International trade

In the CN used for registering EU import-export data, sardine is specifically reported as fresh[64], frozen[65] and prepared or preserved, whole or in pieces of olive oil[66] or not[67].

In 2025, the EU imported 74.235 tonnes of European sardine at a value of EUR 176 million, mostly frozen (65% of the imports total volume and 29% of the value) and prepared and preserved (34% if the volume; 71% of the value). The major provider of sardine to the EU market was by far Morocco, accounting for 91% of the extra-EU import value, followed by the United Kingdom (4% of the imports in value), and China (2%). Spain and France were the main importers accounting for 60% of the extra-EU import value, followed by Germany (11%), the Netherlands (6%), Italy and Portugal (5% each). Overall, extra-EU imports of European sardines declined by 14% in volume between 2020 and 2025 but increased in value by 9% over the same period, resulting from a 26% price rise.

[63] Size 1 correspond to the largest standard for sardine as defined in the Council Regulation (EEC) No 21/36/89 : size 1 (>0,067 kg ; size 2 between ,.042 and 0,067 kg ; size 3 between 0,028 and 0,042 kg ; size 4 between 0,015 and 0,028 kg)
[64] 03024310 - Fresh or chilled sardines "*Sardina pilchardus*"
[65] 03035310 - Frozen sardines "*Sardina pilchardus*"
[66] 16041311 - Sardines, prepared or preserved, whole or in pieces, in olive oil (excl. minced sardines)
[67] 16041319 - Sardines, prepared or preserved, whole or in pieces (excl. minced sardines and sardines in olive oil)

It is worth noticing that besides European sardine, significant amounts of Sardinops spp. and Sardinella spp.[68] were imported in the EU in 2025. These imports reached over 21.000 tonnes, consisting exclusively of frozen sardines. They originated from Russia (49% of the imported volume), Japan (35%), and the Republic of Korea (11%), and were imported by Croatia (56% of the volume), Malta (26%), and Spain (17%). A significant share of these imports of Sardinops spp. and Sardinella spp. is likely to be used as fish feed in Mediterranean bluefin tuna fattening farms. Imports of these species may be used to a lesser extent for the processing industry as canned sardine products.

Spanish imports of European sardines amounted to 63.134 tonnes and EUR 121 million in 2025. Frozen sardines accounted for 70% of the imported volume and 39% of the imported value, while prepared and preserved sardines accounted for 15% of the volume and 50% of the value. Imports of fresh sardines represented 15% of the volume and 12% of the value of the Spanish imports of the same year. Frozen sardines originated mainly from Morocco (71% of the imported volume in 2025 and 65% of the value), followed by France (9% of the volume, 11% of the value), and Portugal (9% of the volume, 11% of the value). Morocco, Portugal, and Croatia were the main suppliers of prepared and preserved sardines, accounting for 92% of the imported volume, and 92% of the value in 2025. Finally, imports of fresh sardines originated mainly from Portugal (81% of the imported volume and 80% of the imported value). Spanish imports declined progressively since 2020, reaching their lowest volume in 2024 (46.791 tonnes), before increasing in 2025, mainly driven by frozen imports. Overall, imports decreased by 18% in volume between 2020 and 2025. Since 2025, imports of frozen and fresh sardines have decreased by 22% and 30% respectively in volume, while prepared and preserved imports have risen by 30%. Nominal prices for all products increased significantly: 28% for fresh sardines, reaching 1,55 EUR/kg; 49% for frozen sardines, reaching 1,06 EUR/kg; and 73% for prepared and preserved products, reaching 6,24 EUR/kg.

Table 48. **EVOLUTION OF SPANISH IMPORTS of EUROPEAN SARDINES (tonnes, 1.000 EUR, nominal price in EUR/kg)**

Product		2020	2021	2022	2023	2024	2025	Evol. 2025/2020
Fresh	Value	15.760	15.215	14.629	14.399	13.349	14.246	-10%
	Volume	13.026	13.597	11.316	10.948	10.503	9.183	-30%
	Price	**1,21**	**1,12**	**1,29**	**1,32**	**1,27**	**1,55**	**28%**
Frozen	Value	40.198	36.225	39.103	35.286	26.698	47.088	17%
	Volume	56.544	49.092	47.387	43.262	28.234	44.354	-22%
	Price	**0,71**	**0,74**	**0,83**	**0,82**	**0,95**	**1,06**	**49%**
Prepared and preserved	Value	26.721	20.929	29.328	41.176	50.163	60.023	125%
	Volume	7.429	5.445	6.532	7.735	8.054	9.627	30%
	Price	**3,60**	**3,84**	**4,49**	**5,32**	**6,23**	**6,24**	**73%**

Source: EUMOFA elaboration of Eurostat-Comext data.

In 2025, EU exports to third countries amounted to 20.515 tonnes at a value of EUR 108 million. Prepared and preserved products accounted for 92% of the total extra-EU export value (79% of the export volume) and frozen sardines accounted for 7% of the total extra-EU export value (18% of the volume). The main destinations in value terms were the United States (36% of the total value) and the UK (14%). Portugal (30% of the extra-Export value), Poland (24%) and Spain (18%) were the main EU exporters of European sardines to third countries. Extra-EU exports have declined significantly in volume since 2020 (59%), while export value remained stable (+3%), thanks to a 151% increase in nominal price over the same period.

The same year, Spanish exports of sardines amounted to 29.135 tonnes and EUR 77 million. Frozen sardines accounted for 49% of exports in volume (31% of the value), while fresh sardines represented 35% of the exported volume (23% of the value), and prepared and preserved sardines represented 16% of the volume and 46% of the value. Portugal was the main destination for exports of frozen sardine in 2025 (76% of the exported frozen volume and 73% of the value), followed to a lesser extent by Morocco and Greece (6% and 5% respectively of the exported frozen volume). Fresh sardines were also mostly exported to Portugal (68% of the volume, 55% of the value), as well as to France (16% of the volume, 29% of the value), and Italy (10% of the volume, 7% of the value). Regarding prepared and preserved sardines, the main destinations were the United States (30% of the exported volume, 33% of the value), followed by France (14% of the volume, 12% of the value), Mexico and Portugal (accounting each for 9% of the exported volume). Frozen exports experienced a decrease in volume between 2020 and 2025 (44%) driven by a decline in exports to South Africa, France, Croatia and Thailand, while fresh and prepared/preserved exports grew by 91% and 31% respectively over the same period. The value of Spanish fresh exports increased at a lower rate than the volumes, resulting from a 18% price decrease, at 1,80 EUR/kg in 2025. Nominal prices

[68] 03024330 - Fresh or chilled sardines "*Sardinops* spp." and sardinella "*Sardinella* spp."
03035330 - Frozen sardines "*Sardinops* spp." and sardinella "*Sardinella* spp."

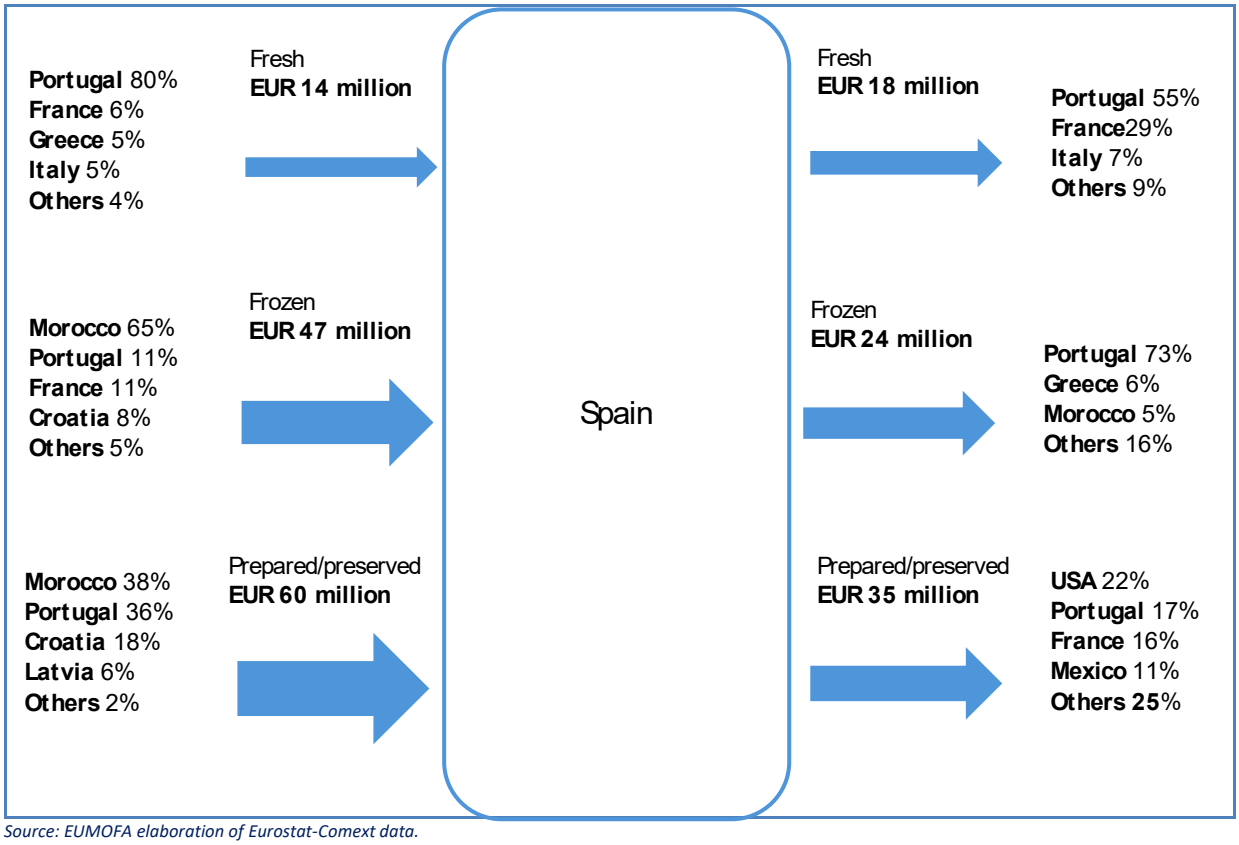
of frozen and prepared/preserved exports increased significantly over the period: 110% for frozen exports, reaching 1,65 EUR/kg in 2025; 89% for prepared and preserved exports, reaching 7,52 EUR/kg.

Table 49. **EVOLUTION OF SPANISH EXPORTS of EUROPEAN SARDINES (tonnes, 1.000 EUR, nominal price in EUR/kg)**

Product		2020	2021	2022	2023	2024	2025	Evol. 2025/2020
Fresh	Value	11.609	14.698	15.244	13.536	15.769	18.066	56%
	Volume	5.278	6.817	11.513	10.120	11.448	10.056	91%
	Price	**2,20**	**2,16**	**1,32**	**1,34**	**1,38**	**1,80**	**-18%**
Frozen	Value	20.208	22.268	22.908	18.006	17.556	23.827	18%
	Volume	25.672	26.858	24.242	19.088	13.990	14.411	-44%
	Price	**0,79**	**0,83**	**0,94**	**0,94**	**1,25**	**1,65**	**110%**
Prepared and preserved	Value	14.181	15.071	16.938	18.309	25.470	35.083	147%
	Volume	3.568	2.474	2.517	2.569	3.444	4.668	31%
	Price	**3,97**	**6,09**	**6,73**	**7,13**	**7,39**	**7,52**	**89%**

Source: EUMOFA elaboration of Eurostat-Comext data.

Figure 51. **THE EUROPEAN SARDINE TRADE MARKET IN SPAIN IN 2025 (in value)**



Source: EUMOFA elaboration of Eurostat-Comext data.

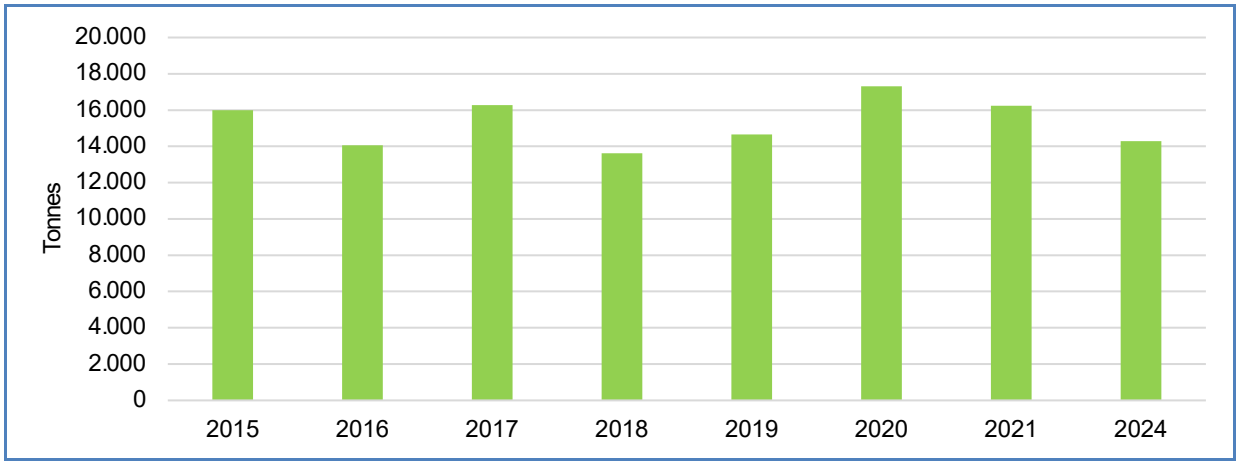
7. 5. Processing

In PRODCOM data, canned products of sardine, sprat and sardinella are aggregated together in one single category: 10202530 - Prepared or preserved sardines, sardinella, brisling and sprats, whole or in pieces (excluding minced products and prepared meals and dishes). In 2024, the Spanish processing of sardine, sprat and sardinella was second in volume at EU level after Poland. Spanish

production mostly focuses on canned sardine, while Poland mainly produces canned sprat[69]. The production of the Spanish sardine processing industry reached 14.282 tonnes of products, equivalent to 21% of the EU sardine processing sector. In value, the Spanish sardine processing sector was the leader at EU level, with a production value of almost EUR 100 million, accounting for 23% of the EU processing value in 2024.

Over the last decade (2025-2024), the Spanish production of prepared or preserved sardines fluctuated, reaching its lowest volume in 2018 at 13.615 tonnes, and peaking in 2020 at 17.306 tonnes. Overall, it experienced an 11% decrease over the decade.

Figure 52. **THE SPANISH PRODUCTION OF PROCESSED SARDINE (in tonnes product weight)**



Source: EUMOFA elaboration of Eurostat data.

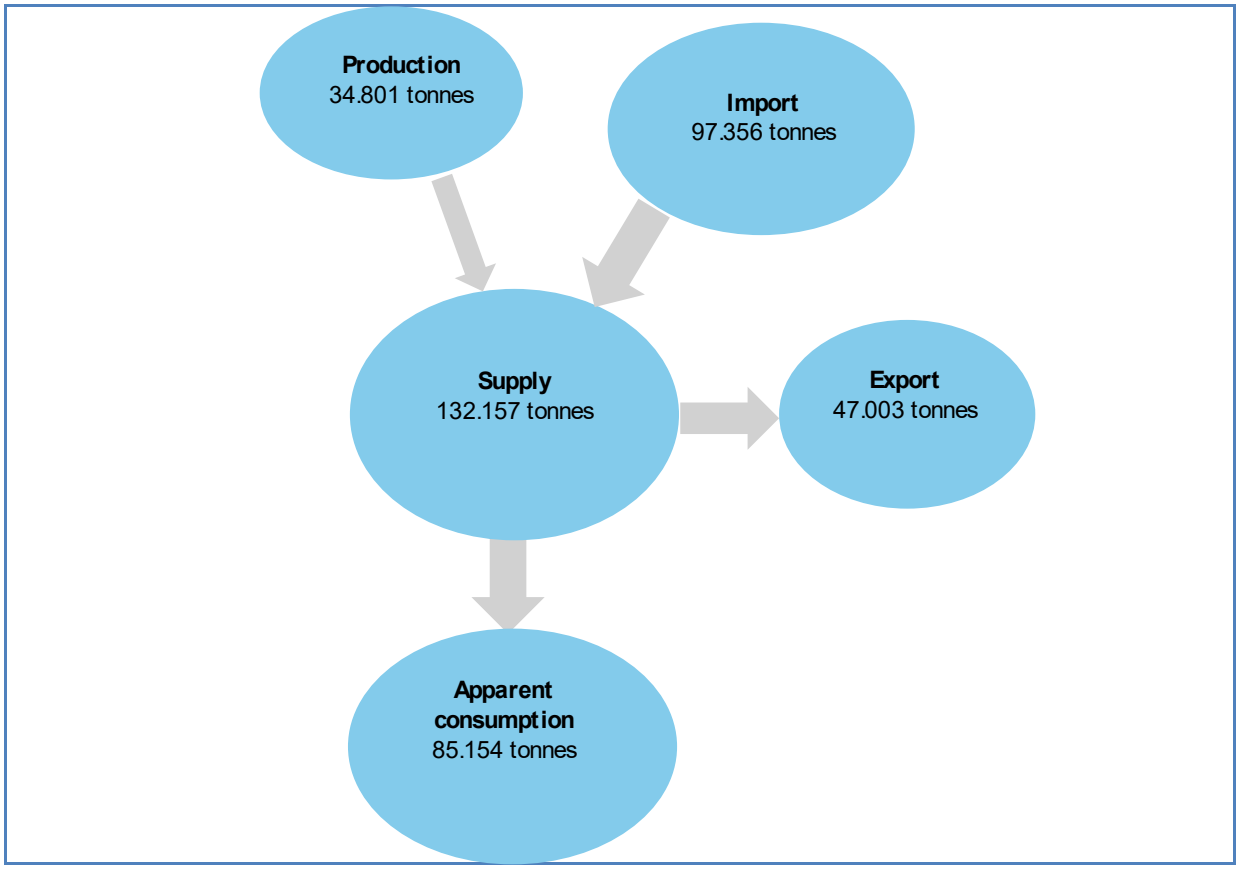
7. 6. Consumption

Sardines are among the main species consumed in the EU along with hake and anchovies. Consumption is very seasonal and linked with the seasonal supply: fresh sardines peak in summer and early autumn, linked to local festivities, outdoor grilling and tourism. Fresh sardines mainly supply traditional retail (fish counters, municipal markets) and Horeca[70].

Spain is the biggest consumer of sardines at EU level. Spanish apparent consumption was estimated at 85.154 tonnes in 2023 LWE, equivalent to 1,77 kg lwe per capita. Over the last decade (2014-2023), Spanish apparent consumption increased by 16% (12% in per capita consumption, from 1,58kg to 1,77 kg lwe per capita). However, it is worth noticing that this figure includes the consumption of canned sardines and is not representative of the Spanish consumption of fresh sardines.

[69] EUMOFA – Monthly Highlight 05/2021: https://eumofa.eu/documents/20124/55261/MH5+2021+EN.pdf/af9f0c1e-6166-0280-fc92-1740e456058a?t=1622727824408
[70] https://www.sciencedirect.com/science/article/pii/S0308597X25000429

Figure 53. **SPANISH APPARENT CONSUMPTION OF EUROPEAN SARDINE IN 2023 (tonnes, LWE)**

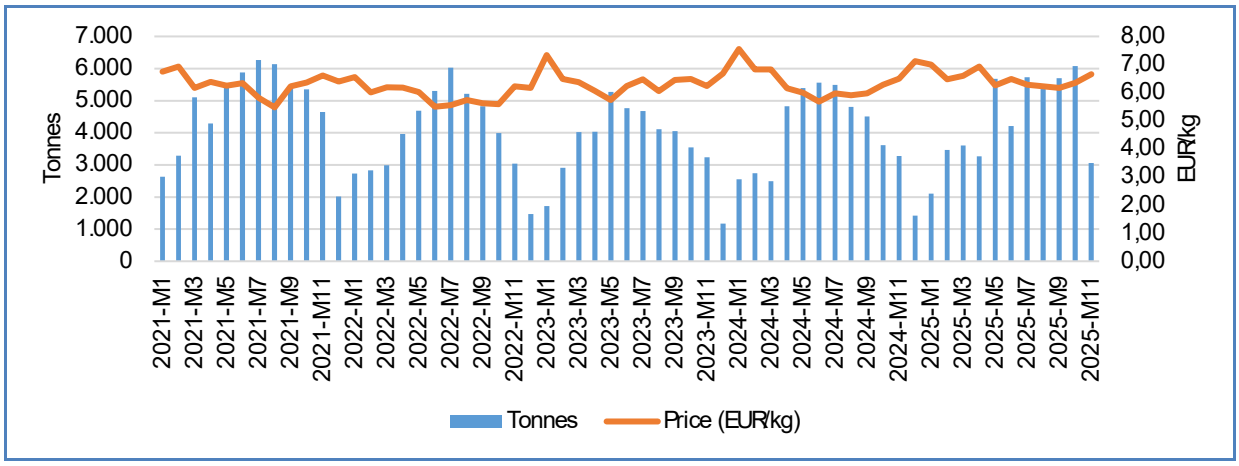


Source: EUMOFA elaboration of EUROSTAT and EUROSTAT-COMEXT data.

Spanish household consumption of fresh sardine reached over 48.000 tonnes in 2025 (January to November included). This is 18 times more than the consumption of French households, and 15 times more than the Portuguese consumption of fresh sardine over the same period. Over the period 2016-2025[71], Spanish household consumption of fresh sardines progressively declined, reaching its lowest volume in 2023 (42.343 tonnes), before increasing again in 2024 and 2025. Overall, it decreased by 28%. Consumption of fresh sardines occurs almost all year long, with peaks in summer (between May and October) and lower consumption in winter (between December and March). The price of fresh sardines is relatively stable between 6,00 and 7,00 EUR/kg all year long, although some peaks are reached in January, and lowest prices are usually reached in June, July, and August, in relation to availability of supply. Seasonality is more significant in Portugal, with around 60% of the household consumption of fresh sardine occurring between June and August, and in France where 60% to 70% of the consumption of fresh sardine occurs between May and September. French prices for fresh sardine are similar to the Spanish, while prices in Portugal are usually lower (between 5,00 and 6,00 EUR/kg).

[71] The evolution is given for the period from January to November of each year (November is the last month available in 2025 for fresh household consumption)

Figure 54. **SPANISH HOUSEHOLD CONSUMPTION OF FRESH SARDINE (tonnes, EUR/kg)**



Source EUMOFA elaboration of Europanel data.

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

Global highlights: European Commission, FAO.

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

Case studies: Fishfarmingexpert, BBC, European Parliament, gov.ie, Brexit (An Irish Guide), House of Commons Library, gov.uk, UK Parliament, FAO, Penguin News, Mersey Port Health Authority, Statista, FishFocus, EUR-Lex, SAFE worldwide, European Commission, Pew, Scottish Government, Falkland Islands Government, Eurostat COMEXT, Doris, DGRM, ScienceDirect.

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].

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