European Commission

Monthly Highlights

No. 4/2026

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

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Contents

Maritime Affairs and Fisheries

1. GLOBAL HIGHLIGHTS

EU/Biodiversity: On 23 March 2026, the 15th Conference of the Parties to the Convention on the Conservation of Migratory Species (CMS CoP15) opened in Campo Grande, Brazil (23–29 March), bringing together governments, scientists and stakeholders to agree on actions to address the biodiversity crisis affecting migratory species. Discussions covered stronger coordinated conservation, proposals to add 44 additional fish, bird and terrestrial species under protection, measures to reduce illegal catches, overexploitation and bycatches, and actions to improve ecological connectivity and limit harmful impacts from infrastructure and pollution. Ahead of the meeting, a UNEP-WCMC update reported that 49% of monitored migratory species populations are declining and 24% of species face risk of extinction. The EU will support higher protection listings and measures on species including the European eel and tope shark, alongside control of bycatch and marine pollution.[1]

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FAO/Crab Markets: On 23 March 2026, FAO GLOBEFISH reported that global crab markets remained tight through 2025 and into early 2026, as limited catch-based supply continued to lag behind demand in North America, Europe and East Asia. Prices stayed elevated for key species such as king and snow crab, with strong buyer preference for certified supply chains. Alaska's partial reopening improved supply compared with 2024 but quotas remain below historical levels due to stock rebuilding, while Russian snow crab exports faced logistical disruption, and tropical swimming crab supplies remained relatively stable despite higher costs.[2]

EU/Ocean Policy: On 19 March 2026, the European Commission published a wrap-up of the European Ocean Days 2026 held in Brussels on 2–6 March, bringing together policymakers, scientists, investors, youth and industry around the European Ocean Pact and upcoming initiatives. The week opened with President von der Leyen announcing OceanEye, an EU ocean monitoring and observation initiative, alongside a call for an International Alliance and EUR 50 million from Horizon Europe for 2026–2027 and showcased the European Digital Twin Ocean (EDITO) through interactive demonstrations. Sessions covered ocean diplomacy, research and innovation, ocean health, blue careers, maritime security and the forthcoming Vision 2040 for fisheries and aquaculture, while BlueInvest reported 159 active investors and EUR 3 billion in dedicated blue investments, and the Mission Ocean and Waters Forum featured projects including VeriFish and other EU-backed initiatives.[3]

FAO/Markets & Trade: On 13 March 2026, FAO GLOBEFISH reported that the fisheries and aquaculture outlook began 2026 on a positive note, with easing inflation, steady demand, and rising aquaculture supply, while estimating global production up 1,7% in 2025 and trade up 2,1% in volume and 5% in value. The update highlights three February 2026 shocks affecting trade: a US–India tariff reduction to 18% (effective from 7 February) with knock-on effects on shrimp flows; a US Supreme Court decision on 20 February reshaping the legal basis for tariffs, followed by a new 10% global tariff (with 25% tariffs on seafood processed in China remaining under separate rules); and the closure on 28 February of the Strait of Hormuz, driving Brent crude up 13% in five days and disrupting air-freighted seafood logistics, including reports of Norwegian salmon export volumes falling by half via Gulf-linked air routes. The briefing also flags tightening supply for key wild-catch species (e.g., cod, mackerel) and recent volatility across tuna, lobster, cephalopods and bivalves.[4]

[1] https://environment.ec.europa.eu/news/global-conference-protecting-migratory-species-kicks-brazil-2026-03-23_en
[2] https://www.fao.org/in-action/globefish/news-events/news/news-detail/global-crab-markets-stay-tight-as-demand-outpaces-limited-supply/en
[3] https://oceans-and-fisheries.ec.europa.eu/news/deep-dive-across-european-ocean-days-2026-2026-03-19_en
[4] https://www.fao.org/in-action/globefish/news-events/news/news-detail/aquatic--products-and-the-global-economy/en

2. MACROECONOMIC CONTEXT

2. 1. Marine fuel

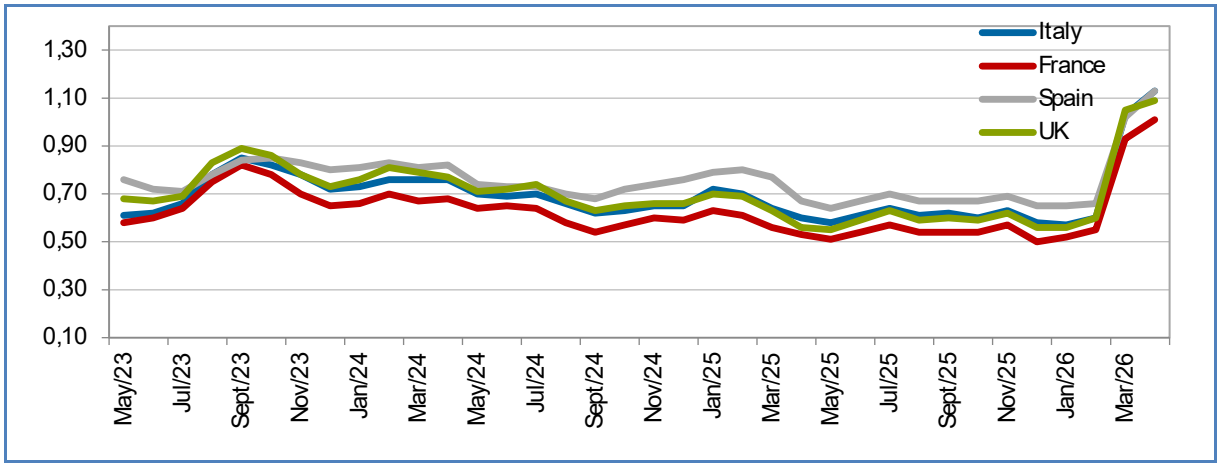
Average prices for marine fuel in **April**[5] **2026** ranged between 0,93 and 1,05 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 67,2% compared with the previous month and by an average of 55,0% compared with the same month in 2025. With oil tankers having been blocked in the Strait of Hormuz, even with an easing of the blockage, impacts on marine fuel prices, and thereby on the markets for fisheries and aquaculture products, can be expected to last some time.

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

Country	Apr 2026	Change from Mar 2026	Change from Apr 2025
France *(ports of Lorient and Boulogne)*	1,01	9%	91%
Italy *(ports of Ravenna and Livorno)*	1,13	10%	88%
Spain *(ports of A Coruña and Vigo)*	1,13	11%	69%
The UK *(ports of Grimsby and Aberdeen)*	1,09	4%	95%

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 March 2026 the EU annual inflation rate was 2,8%, up from 2,1% compared to February 2026. A year earlier, the rate was 2,5%.

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

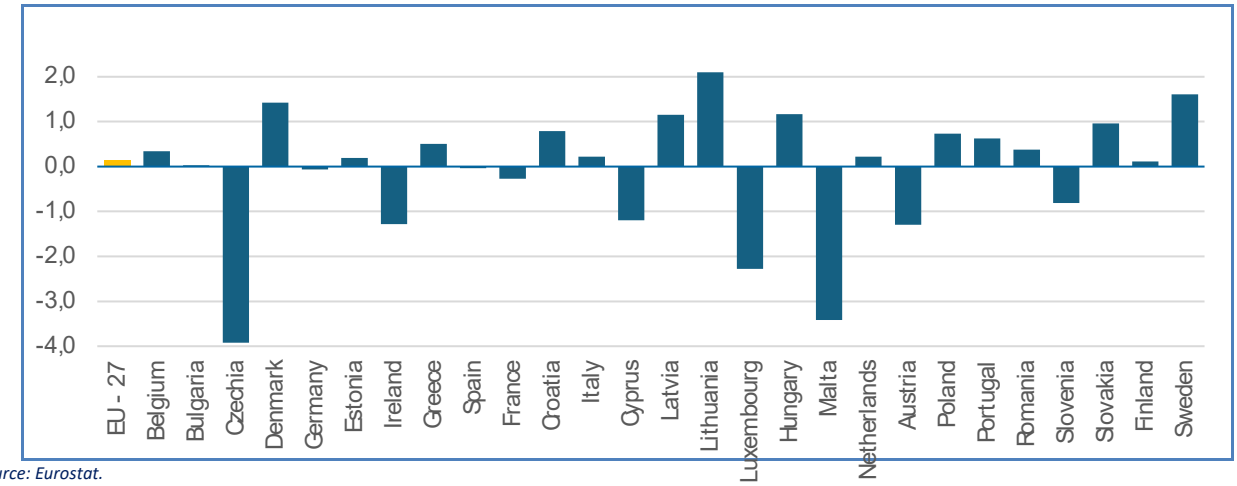
Lowest inflation rates		Highest inflation rates	
Denmark	+1,0%	Romania	+9%
Czechia, Cyprus, Sweden	+1,5%	Croatia	+4,6%
Czechia	+1,0%	Lithuania	+4,4%

Source: Eurostat.

[5] Prices up to April 21st 2026

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 FEBRUARY 2026 (value expressed in percentage)**



Source: Eurostat.

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

	Feb 2024	Feb 2025	Jan 2026	Feb 2026	Change from Jan 2026	Change from Feb 2025
Food and non-alcoholic beverages	142,41	146,57	150,10	150,46	0,2%	2,7%
Fish and other seafood	141,10	144,35	148,96	149,16	0,1%	3,3%
Fish, live, fresh, chilled or frozen	96,86	99,42	104,02	103,87	-0,1%	4,5%
Fish, dried, salted, in brine or smoked	96,06	98,92	102,36	103,87	1,5%	5,0%
Fish preparations	98,31	99,82	100,62	100,72	0,1%	0,9%
Other seafood, live, fresh, chilled or frozen	96,94	98,77	100,64	100,46	-0,2%	1,7%
Other seafood, dried, salted, in brine or smoked	97,02	95,43	99,19	99,48	0,3%	4,2%
Other seafood preparations	96,32	99,14	101,24	102,43	1,2%	3,3%

Source: Eurostat.

2.4. Exchange rates

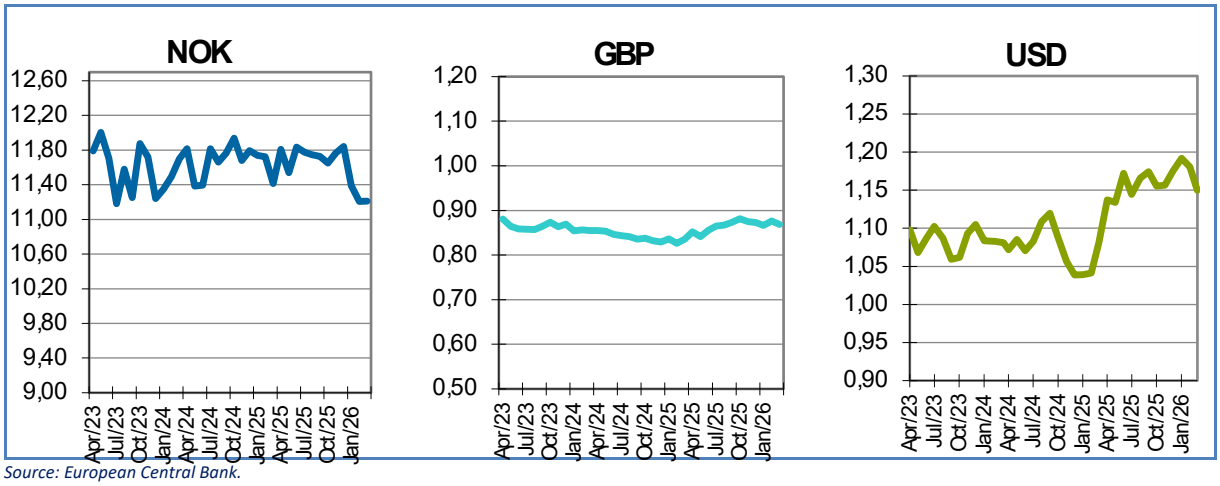
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Mar 2024	Mar 2025	Feb 2026	Mar 2026
NOK	11,6990	11,4130	11,2085	11,2125
GBP	0,8551	0,8354	0,8763	0,8683
USD	1,0811	1,0815	1,1805	1,1498

Source: European Central Bank.

In March 2026, the euro showed stability against the Norwegian krone and depreciated against the US dollar (2,6%) the British pound sterling (0,9%), relative to the previous month. For the past six months, the euro has fluctuated around 1,1682 against the US dollar, 11,5109 against the Norwegian krone and 0,8734 against the British pound sterling. Compared with March 2025, the euro appreciated 6,3% against the US dollar and 3,9% against the British pound sterling and depreciated 1,8% against the Norwegian krone.

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



Source: European Central Bank.

3. FIRST SALES IN EUROPE[6]

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

Increases in value and volume (Jan 2026 vs Jan 2025): Estonia, the Faroe Islands, France, Lithuania, and Sweden recorded increases in both first-sales value and volume. The highest increase in volume was observed in Estonia due mainly to sprat, pike-perch and pike, while the highest growth in value in Lithuania was due to smelt, herring and European flounder.

Decreases in value and volume (Jan 2026 vs Jan 2025): Belgium, Bulgaria, Cyprus, Finland, Germany, Ireland, Latvia, the Netherlands, Portugal, Spain, and Norway recorded decreases in first-sales value and volume. Germany and Bulgaria stood out with the most significant drop both in volume and value in relative terms, due mainly to mackerel in Germany and clam and sprat in Bulgaria.

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

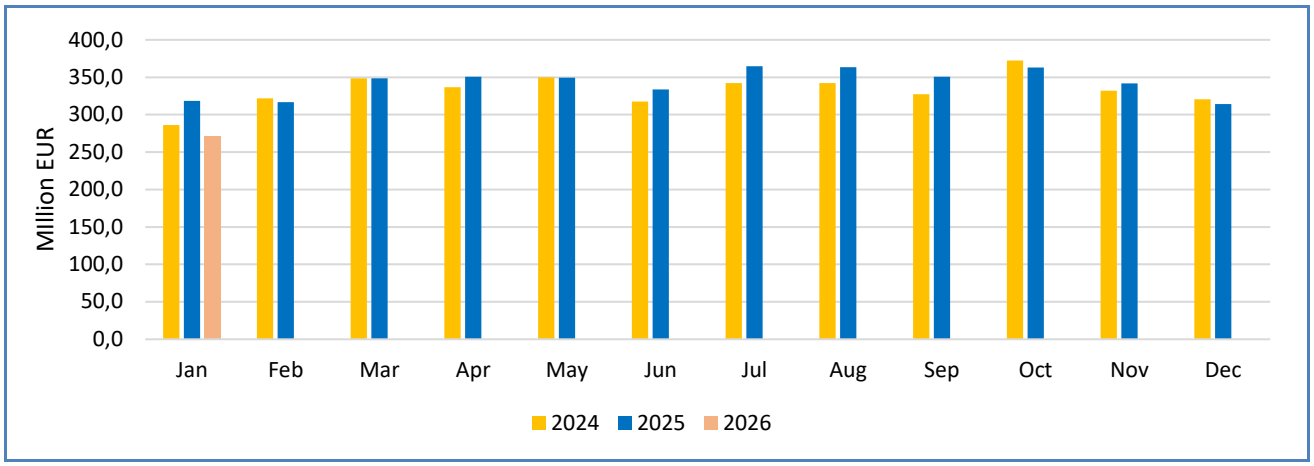
	January 2024		January 2025		January 2026		Change from January 2025	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.359	5,68	1.463	6,54	1.292	5,74	-12%	-12%
Bulgaria	12	0,02	20	0,07	7	0,03	-65%	-56%
Croatia	382	1,82	212	1,22	195	1,26	-8%	4%
Cyprus	16	0,12	26	0,19	16	0,10	-39%	-44%
Denmark	55.320	43,05	48.840	46,55	49.877	42,26	2%	-9%
Estonia	6.140	3,04	6.578	2,60	9.032	3,53	37%	36%
Faroe Islands	73.739	39,54	53.894	75,35	56.261	78,64	4%	4%
Finland	4.430	1,71	7.851	2,34	6.484	2,28	-17%	-3%
France	14.805	48,35	15.326	62,04	15.932	64,98	4%	5%
Germany	6.001	7,63	1.921	2,25	218	0,99	-89%	-56%
Ireland	19.320	26,59	30.071	45,57	15.688	28,88	-48%	-37%
Italy	4.249	17,97	4.063	20,05	3.915	20,07	-4%	0%
Latvia	3.599	1,21	4.314	1,71	2.957	1,42	-31%	-17%
Lithuania	15	0,08	10	0,05	13	0,08	29%	60%
Netherlands	1.322	8,77	1.684	10,72	1.635	9,58	-3%	-11%
Poland	3.876	2,26	5.295	2,38	5.294	2,56	0%	8%
Portugal	4.306	18,30	3.565	16,73	2.093	10,89	-41%	-35%
Spain	21.397	90,62	19.620	90,32	13.358	67,92	-32%	-25%
Sweden	15.694	8,97	9.604	6,98	12.056	8,10	26%	16%
Norway	224.506	239,45	215.998	326,29	213.597	280,60	-1%	-14%
United Kingdom	52.338	110,29	53.435	116,05	42.232	155,79	-21%	34%

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

[6] During January 2026, 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 January 2026 was EUR 270,7 million, a 15% decrease compared to 2025, and 5% less compared to 2024. The volume was 140.060 tonnes, a 13% decrease compared to 2025, and a 14% decrease compared to 2024.

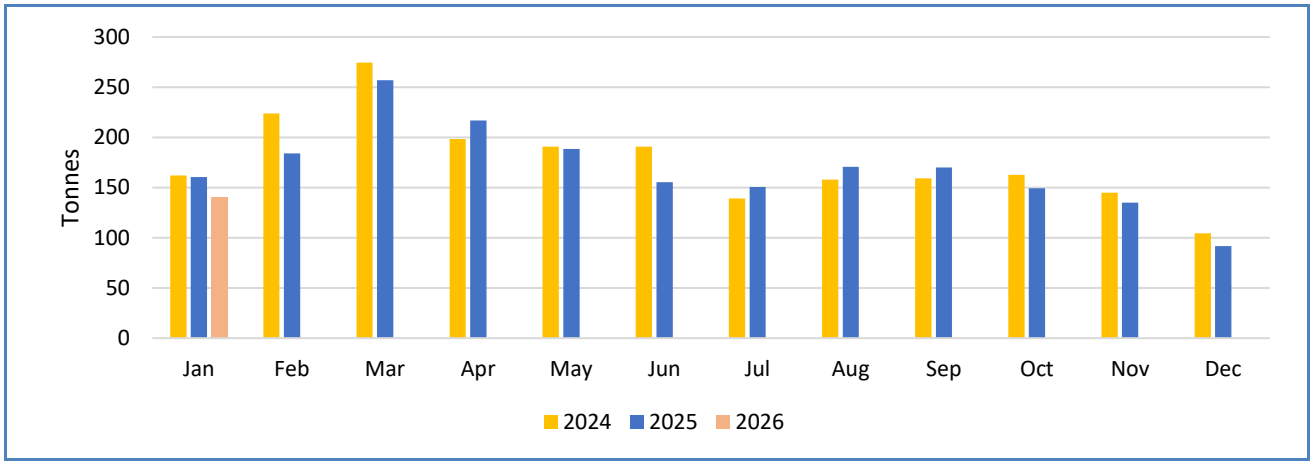
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VALUE FROM THE REPORTING COUNTRIES[7] (value in million EUR)**



In the first months of 2026, monthly first-sales in value and volume were lower compared to the same period in 2024 and 2025.

The decrease in first-sales value compared to January 2025 was mainly driven by small pelagics (-26%). Compared to 2024, the drop in first-sales value in January 2026 was mainly due to a decrease in tuna and tuna-like species (-48%) and small pelagics (-9%). Similarly, in the same period in 2026, the decrease in first-sales volume was mainly due to small pelagics which fell by 12% in comparison to 2025. Compared with 2024 both groundfish and small pelagics contributed to the reduction, declining by 48% and 9%, respectively.

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



[7] During January 2026, 18 EU Member States (MS), reported first-sales data on value and volume.

3. 2. First-sales evolution at commodity group (CG) level[8,9]

Bivalves and other molluscs and aquatic invertebrates

In January 2026, first-sales value of "Bivalves and other molluscs and aquatic invertebrates" amounted to EUR 24,9 million, a 9% increase compared to the same period in 2025. First-sales volume reached 9.593 tonnes, a decrease of 1% compared to 2025. Scallop was the main commercial species driving the increase in value of the commodity group (+35%), while the decrease in volume was mainly due to mussel *Mytilus* spp. and clam (-83% and -16% respectively).

Figure 6. **FIRST SALES VALUE AND VOLUME OF BIVALVES, JAN 2026**

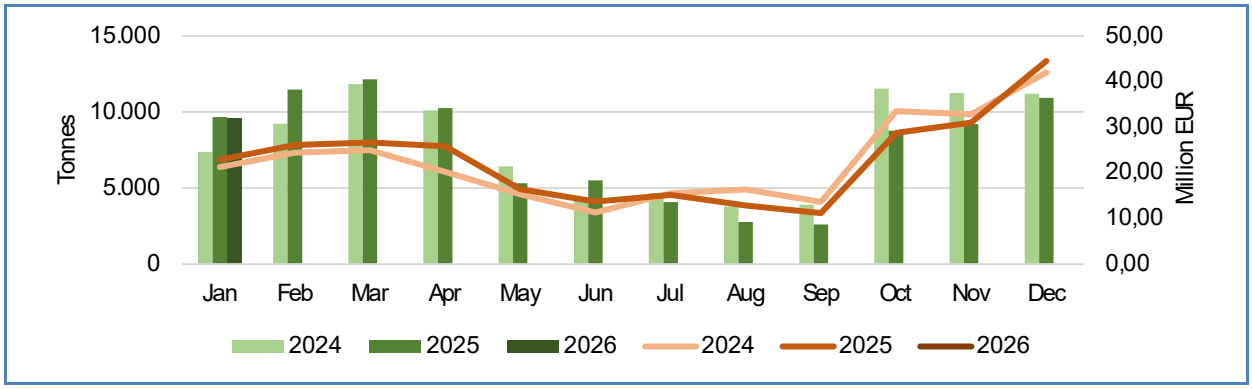


Table 6. **FIRST SALES PRICES OF BIVALVES MAIN COMMERCIAL SPECIES (MCS) (JAN 2025 AND JAN 2026)**

Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
France	Scallop	2,18 EUR/kg	2,32 EUR/kg	+7%
Italy	Clam	2,62 EUR/kg	2,70 EUR/kg	+3%
France	Sea urchin	4,84 EUR/kg	8,28 EUR/kg	+71%

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

** Of the main commercial species other molluscs and aquatic invertebrates in Portugal, rough limpet represents 71% of total first-sales volume and 88% of the total first-sales value.

Cephalopods

In 2026, first-sales value of "Cephalopods" totalled EUR 23,3 million, a 22% decrease compared to 2025. First-sales volume totalled 3.431 tonnes, a decrease of 17% compared to 2025. Octopus (-30% and -32%) and squid (-24% and -16% respectively) were the main commercial species driving the decrease in both first-sales value and volume.

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

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

Figure 7. **FIRST-SALES VALUE AND VOLUME OF CEPHALOPODS, JAN 2026**

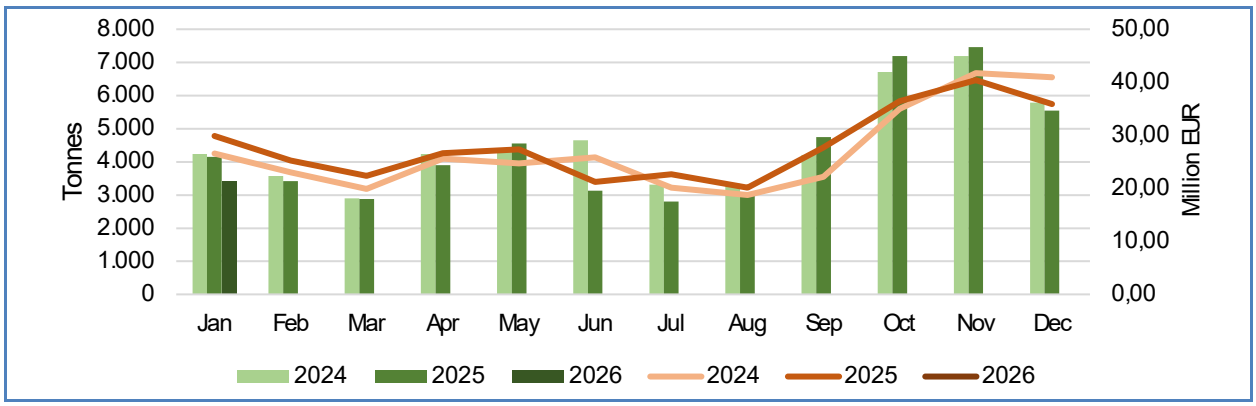


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN 2025 AND JAN 2026)**

Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
France	Octopus	8,89 EUR/kg	7,86 EUR/kg	-12%
Spain	Octopus	7,74 EUR/kg	8,34 EUR/kg	+8%
Portugal	Octopus	8,34 EUR/kg	8,49 EUR/kg	+2%

Crustaceans

In January 2026, first-sales value of "Crustaceans" totalled EUR 28,8 million, a 5% decrease in value compared to 2025. First-sales volume amounted to 3.307 tonnes, a decrease of 9% compared to 2025. Warmwater shrimp (-30% and -50%), deep water rose shrimp (-18% and -6%) and squillid (-28% and -32%) were the three main products responsible for the decrease in first-sales value and volume.

Figure 8. **FIRST-SALES VALUE AND VOLUME OF CRUSTACEANS, JAN 2026**

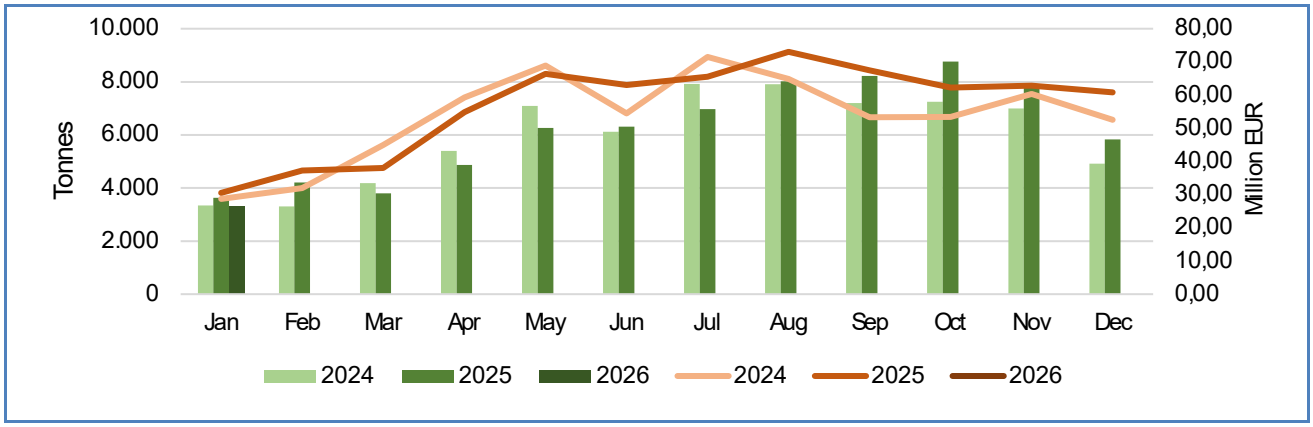


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN 2025 AND JAN 2026)**

Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
The Netherlands	Shrimp *Crangon* spp.	8,38 EUR/kg	4,76 EUR/kg	-43%
Spain	Deep water rose shrimp	8,55 EUR/kg	7,21 EUR/kg	-16%
Spain	Warmwater shrimp	9,30 EUR/kg	12,76 EUR/kg	+37%

Flatfish

In 2026, first-sales value of "Flatfish" totalled EUR 26,7 million, a 1% increase compared to 2025. First-sales volume amounted to 3.162 tonnes, a decrease of 8% compared to 2024. Common sole (+6%) was the main species driving the growth in first-sales value while European plaice (−29%), accounted for most of the reduction in first-sales volume.

Figure 9. **FIRST-SALES VALUE AND VOLUME OF FLATFISH, JAN 2026**

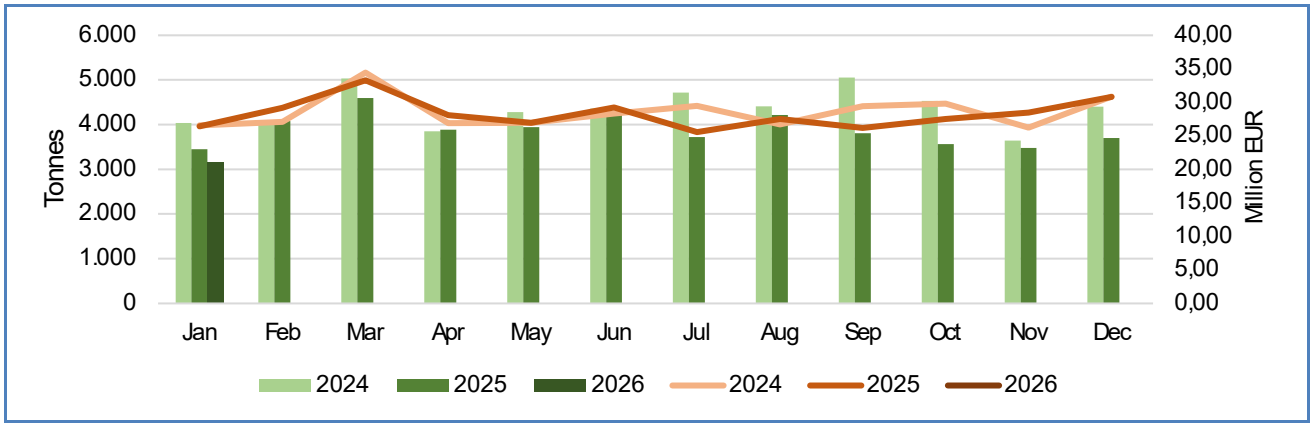


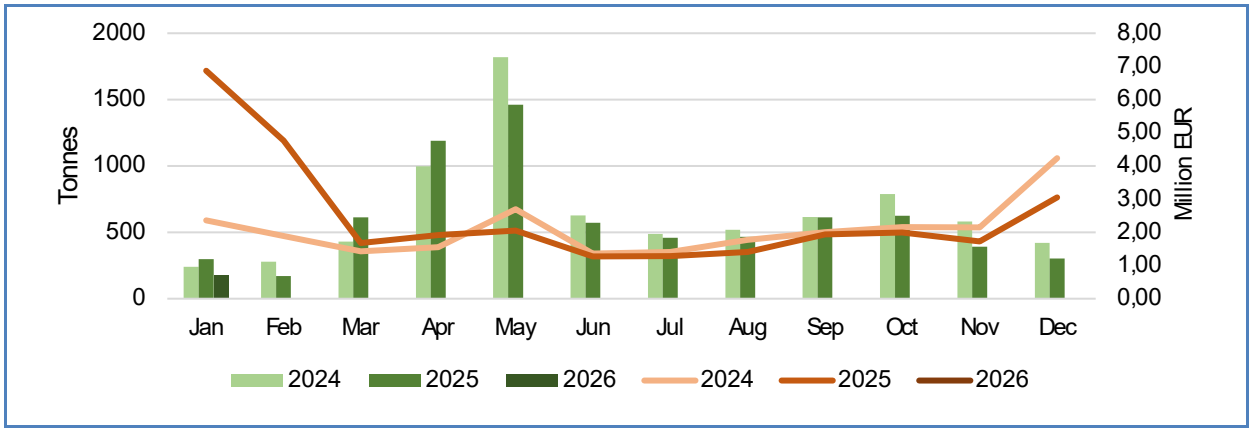
Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN 2025 AND JAN 2026)**

Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
Italy	Common sole	12,08 EUR/kg	11,72 EUR/kg	-3%
Belgium	Common sole	19,97 EUR/kg	19,96 EUR/kg	0%
Netherlands	Turbot	16,94 EUR/kg	17,02 EUR/kg	0%

Freshwater fish

In January 2025, first-sales value of "Freshwater fish" reached EUR 7,0 million, marking a 2% increase compared to 2024. First-sales volume amounted to 177 tonnes, a decrease of 41% compared to 2024. Eel was the main species responsible for the increase in first-sales value (+5%), while the category "other freshwater fish"[10] was the main contributor to the decrease in first-sales volume (-78%).

Figure 10. **FIRST-SALES VALUE AND VOLUME OF FRESHWATER FISH, JAN 2026**



[10] „Other freshwater fish" comprises 23 products, and together freshwater bream, roach and European perch represent 83% of first-sales volume.

Table 10. **FIRST-SALES PRICE OF FRESHWATER FISH MCS (JAN 2025 AND JAN 2026)**

Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
France	Eel*	206,40 EUR/kg	210,36 EUR/kg	+2%
Estonia	Pike-perch	4,89 EUR/kg	4,19 EUR/kg	-14%
Estonia	Pike	1,89 EUR/kg	2,47 EUR/kg	+31%

*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 2026, first-sales value of "Groundfish" totalled EUR 40,0 million, a decrease of 8% compared to 2025. First-sales volume amounted to 9.463 tonnes, a decrease of 15% compared to 2024. Hake (-10% and -26%) and cod (-45% and -52%) were mainly responsible for the decrease in both first-sales value and volume.

Figure 11. **FIRST-SALES VALUE AND VOLUME OF GROUNDFISH, JAN 2026**

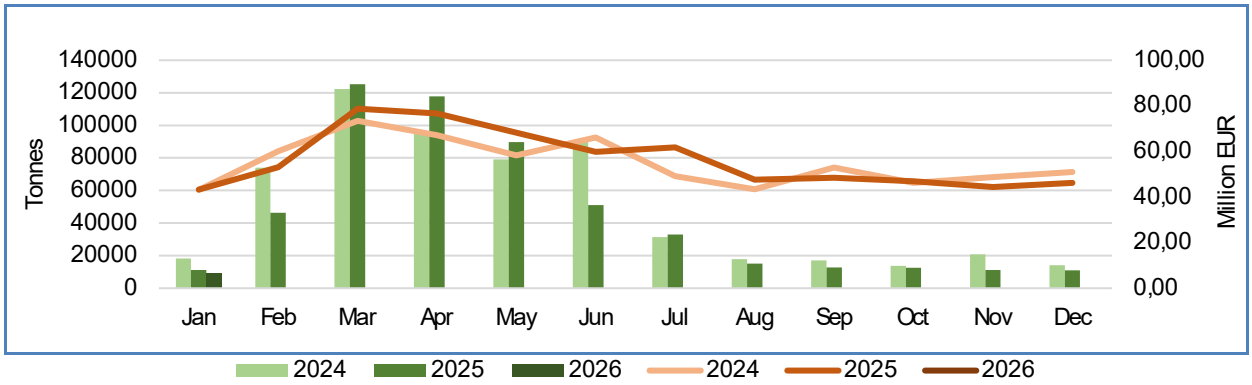


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN 2025 AND JAN 2026)**

Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
Spain	Hake	4,33 EUR/kg	5,38 EUR/kg	+24%
Denmark	Cod	6,12 EUR/kg	7,12 EUR/kg	+16%
Spain	Cod	8,21 EUR/kg	9,94 EUR/kg	+21%

Other marine fish[11]

In 2026, first-sales value of the category "other marine fish" totalled EUR 42,7 million, a decrease of 8% compared to 2025. First-sales volume amounted to 2.006 tonnes, a decrease of 6% compared to 2025. Other sharks[12] was the main commercial species contributing to the decrease in first-sales value (-50%), while the category "other sharks"[13] was behind the decrease in first-sales volume (-43%).

[11] Seventeen Main Commercial Species are included in the Commodity Group „Other Marine Fish" with monk representing more than 25% of the total value and almost 20% of total volume.
[12] Of the „Other sharks" Main Commercial Species (MCS), blue shark represent 67% of total first-sales value.
[13] Of the „Other sharks" 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 2026**

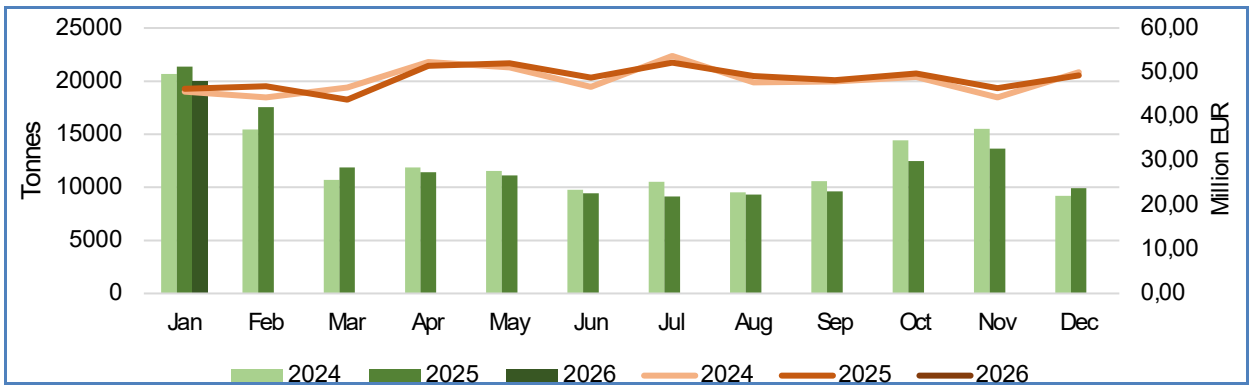


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN 2025 AND JAN 2026)**

Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
Spain	Other sharks[14]	2,99 EUR/kg	2,95 EUR/kg	-1%
Portugal	Scabbardfish	4,61 EUR/kg	4,41 EUR/kg	-4%
Denmark	Monk	5,70 EUR/kg	6,63 EUR/kg	+16%

Salmonids

In 2026, first-sales value of "Salmonids" totalled EUR 9.067, a decrease of 21% compared to 2025, while first-sales volume amounted to 595 kg, a decrease of 51% compared to 2025. Trout (-33% and -54%) 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 2026**

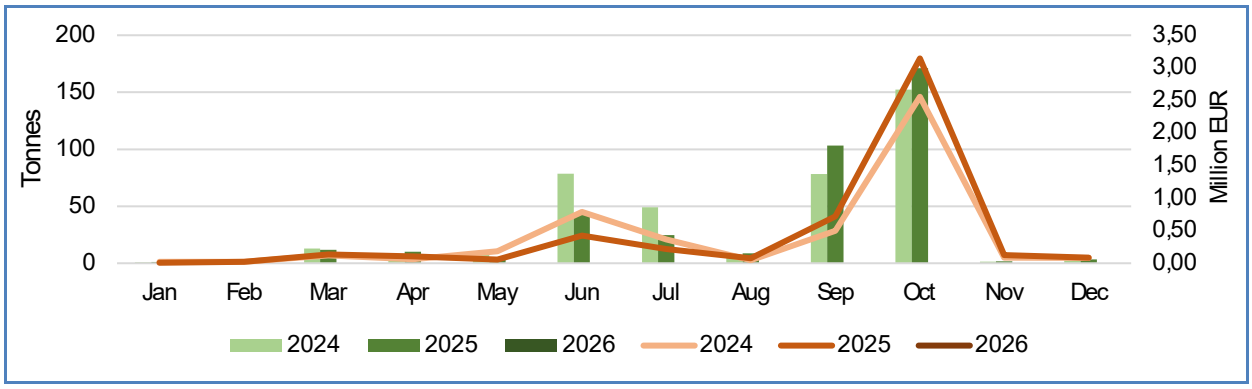


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN 2025 AND JAN 2026)**

Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
Germany	Trout	10,19 EUR/kg	8,00 EUR/kg	-22%

[14] Of the „other sharks" main commercial species in Spain, blue shark represents 90% of first sales value and 89% of first sales volume.

Small pelagics

In 2026, first-sales value of "Small pelagics" amounted to EUR 69,2 million, a decrease of 26% compared to 2025. First-sales volume amounted to 89.276 tonnes; a 12% decrease compared to 2025. Mackerel (-68% and -83%) was the commercial species contributing most to the decrease in first-sales value and volume.

Figure 14. **FIRST-SALES VALUE AND VOLUME OF SMALL PELAGICS, JAN 2026**

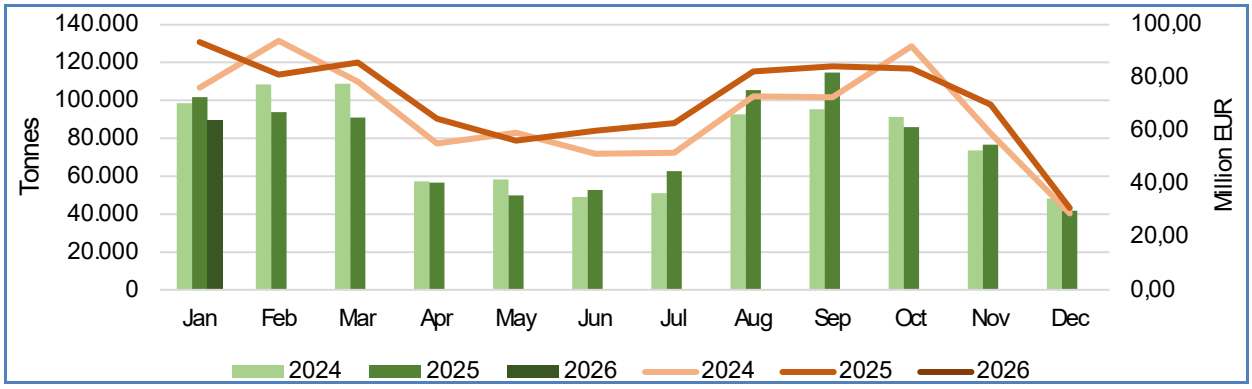


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN 2025 AND JAN 2026)**

Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
Ireland	Mackerel	2,12 EUR/kg	4,00 EUR/kg	+89%
Denmark	Mackerel	2,15 EUR/kg	1,84 EUR/kg	-14%
Portugal	Anchovy	3,86 EUR/kg	1,46 EUR/kg	-62%

Tuna and tuna-like species

In 2026, first-sales value of "Tuna and tuna-like species" totalled EUR 8,1 million, a decrease of 57% compared to 2025. First-sales volume totalled 1.645 tonnes, a decrease of 66% compared to 2025. Yellowfin tuna (-74% and -75%), and swordfish (-49% and -56%) 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 2026**

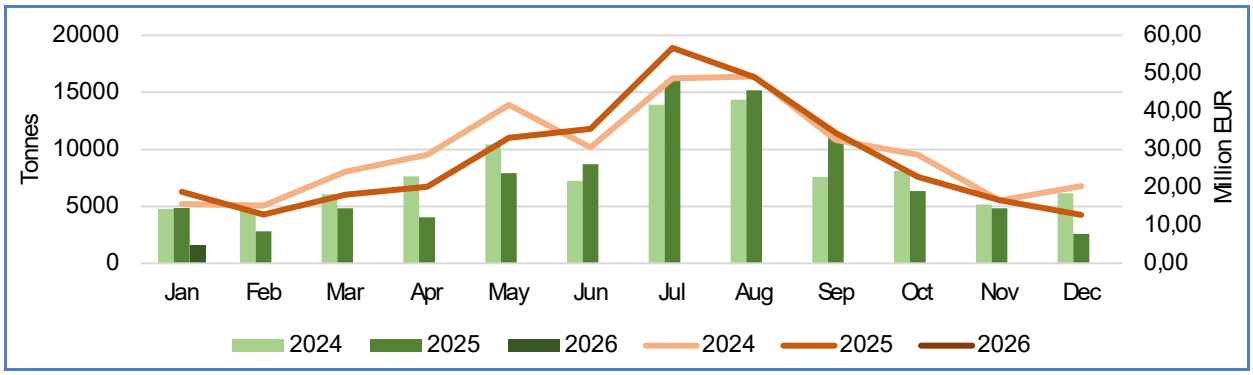


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN 2025 AND JAN 2026)**

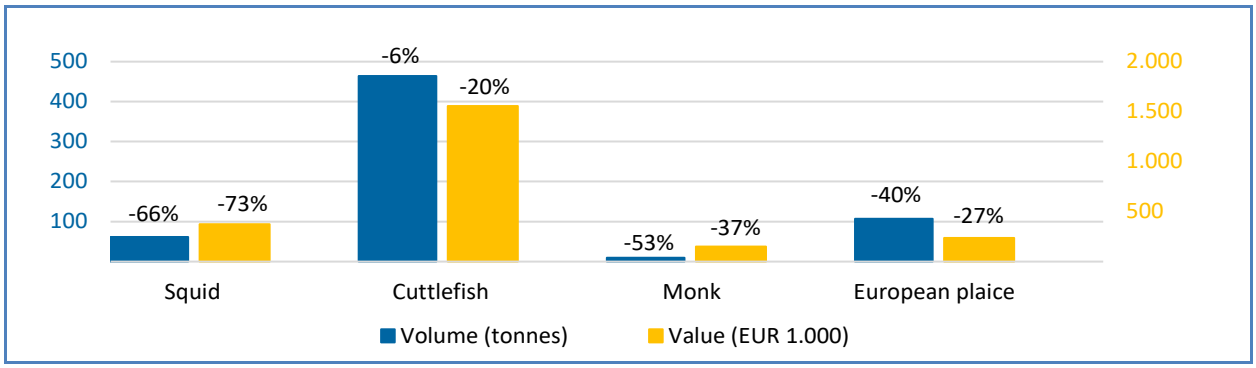
Country	Main Commercial Species	First-sales average price Jan 2025	First-sales average Price Jan 2026	Trend (Jan 2026 vs Jan 2025 %)
Spain	Swordfish	4,97 EUR/kg	5,55 EUR/kg	+12%
Spain	Yellowfin tuna	2,58 EUR/kg	2,45 EUR/kg	-5%
Spain	Skipjack tuna	1,64 EUR/kg	1,81 EUR/kg	+10%

3.3. First sales in reporting countries[15]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 5,7 million, -12%	1.292 tonnes, -12%	Squid, cuttlefish, monk, European plaice.

Figure 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, JANUARY 2026**

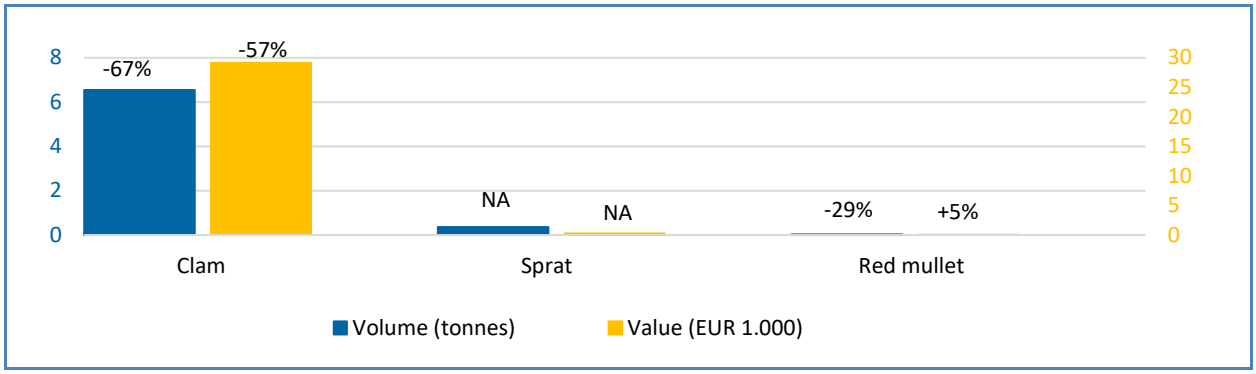


Percentages show change from the previous year.

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 0,3 million, -56%	6.933 tonnes, -65%	Clam, sprat, red mullet.

Figure 17. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, JANUARY 2026**



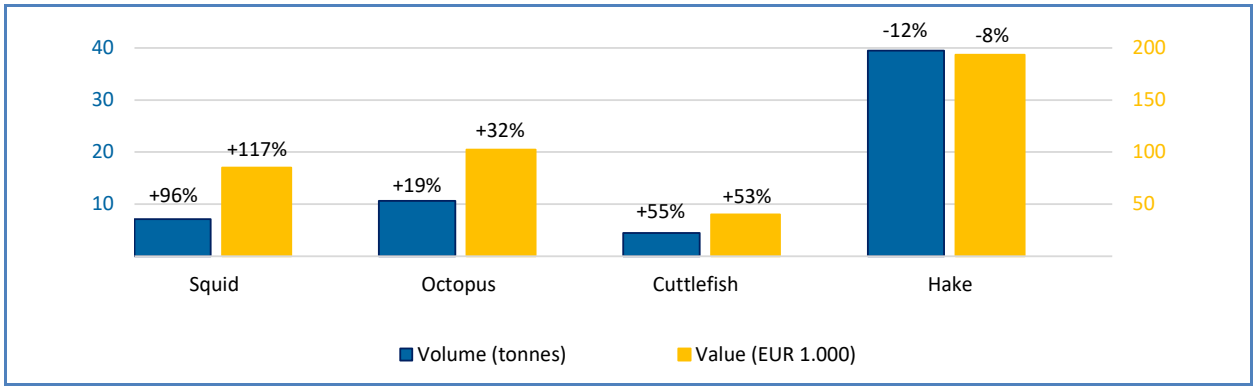
*Percentages show change from the previous year. *EUMOFA aggregation for species.*[16]

[15] First-sales data updated on 20. 03. 2026. This section covers all countries for which data are available on the date of extraction from the EUMOFA database and analysis.
[16] Metadata 2, Annex 3: https://eumofa.eu/supply-balance-and-other-methodologies

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

Croatia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 1,3 million, +4%	195 tonnes, -8%	**Value**: squid, octopus, cuttlefish **Volume**: hake, deep-water rose shrimp, gurnard.

Figure 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CROATIA, JANUARY 2026**

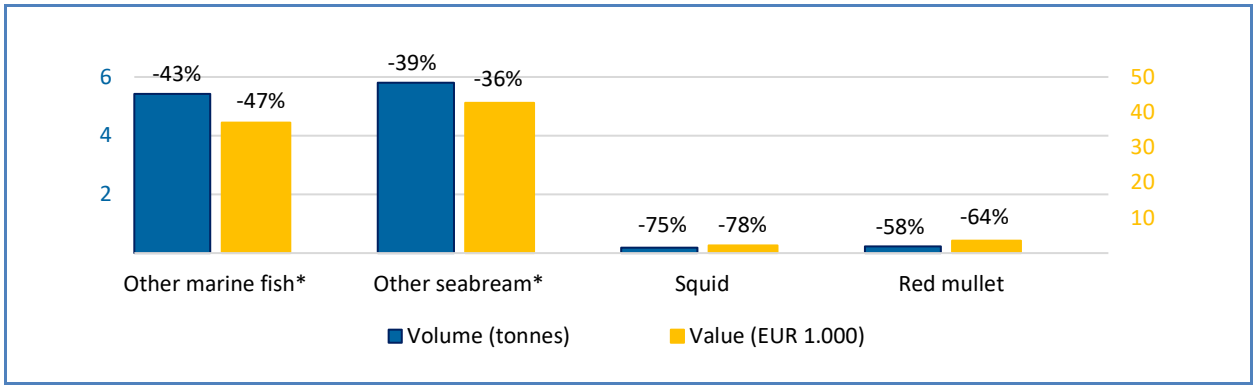


Percentages show change from the previous year.

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 0,1 million, -44%	16 tonnes, -39%	Other marine fish*, Other seabream*, squid, red mullet.

Figure 19. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, JANUARY 2026**



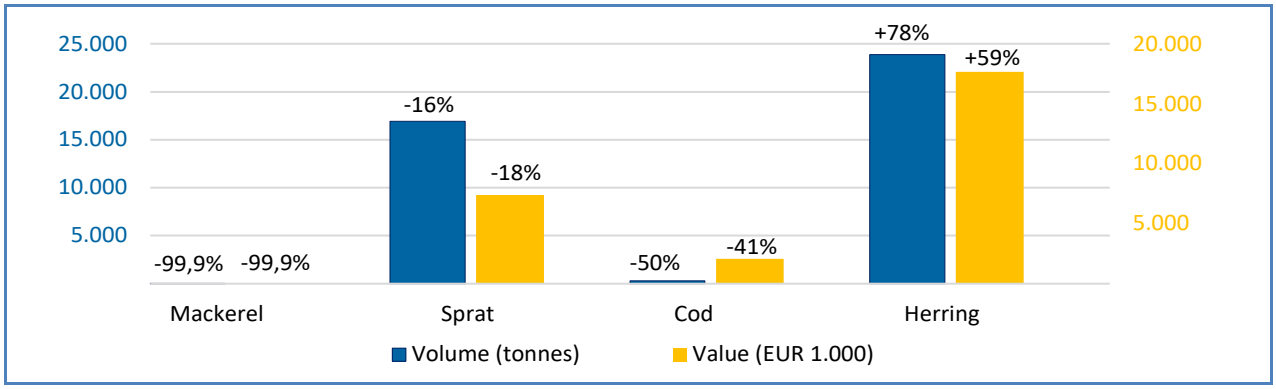
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan 2026 vs Jan 2025	EUR 42,3 million, -9%	49.877 tonnes, +2%	**Value**: mackerel, sprat, cod **Volume**: herring	**Mackerel** recorded a 100% decrease in both value and volume in January 2026 compared with January 2025, mainly due to the EU's implementation of ICES advice for 77% quota cut for North Sea mackerel and the December 2025 quota agreement between the UK and Nordic countries. Following years of catches exceeding scientific advice, the stock is now considered over-exploited, leading to significantly reduced quotas. As a result, EU production fell sharply from 6.100 tonnes in January 2025 to just 27 tonnes in January 2026, despite Denmark receiving the main quota allocation for the first half of 2026 (6.802 tonnes from the 1 January 2026 to 30 June 2026.)

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

Figure 20. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, JANUARY 2026**



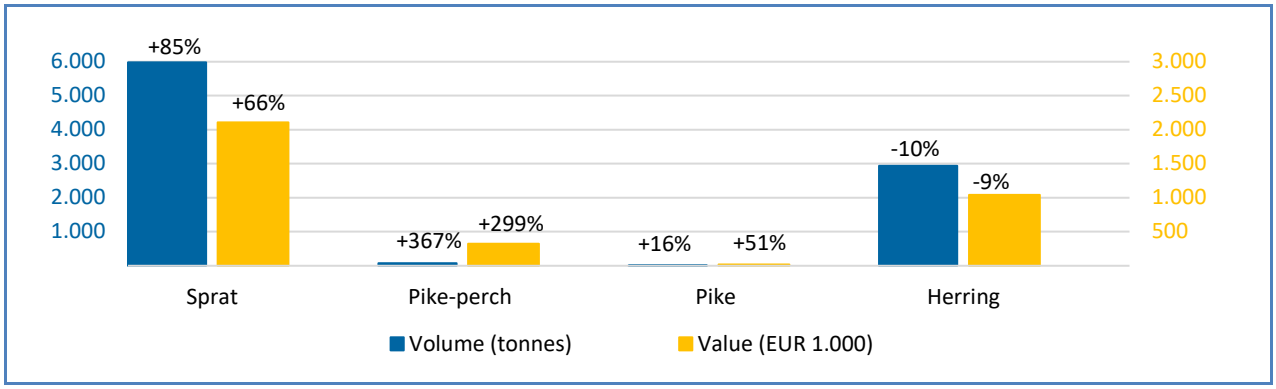
Percentages show change from the previous year.

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

Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 3,5 million, +36%	9.032 tonnes, +37%	Sprat, pike-perch, pike, herring.

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

Figure 21. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, JANUARY 2026**

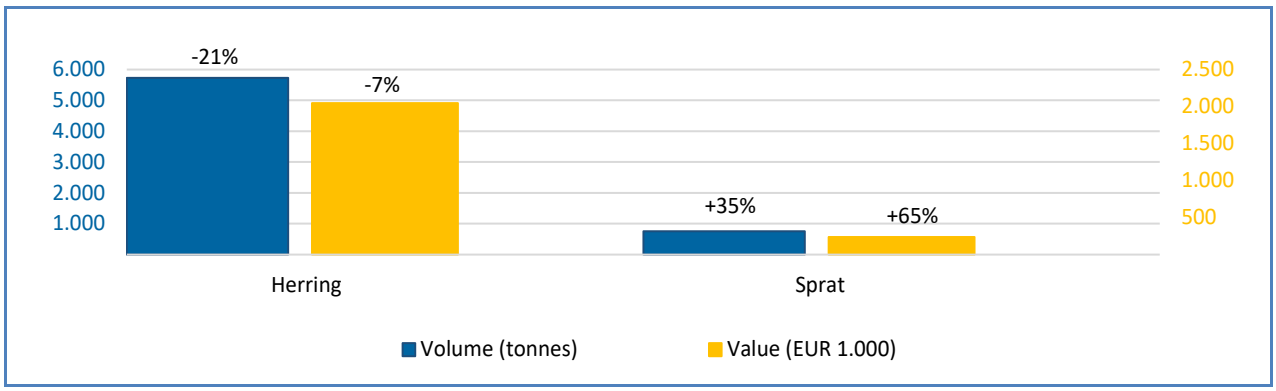


Percentages show change from the previous year.

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

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 2,3 million, -3%	6.484 tonnes, -17%	Herring, sprat.

Figure 22. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND, JANUARY 2026**

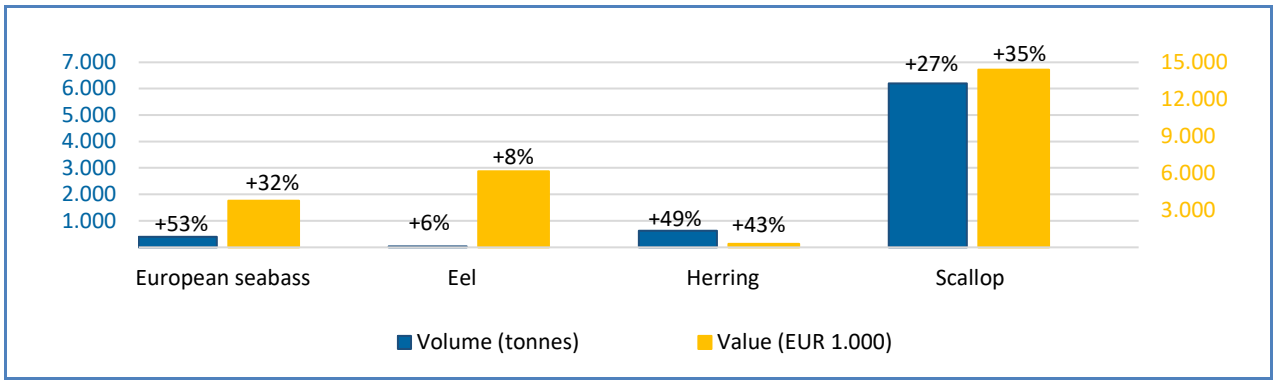


Percentages show change from the previous year.

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 65,0 million, +5%	15.932 tonnes, +4%	European seabass, eel, herring, scallop.

Figure 23. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, JANUARY 2026**

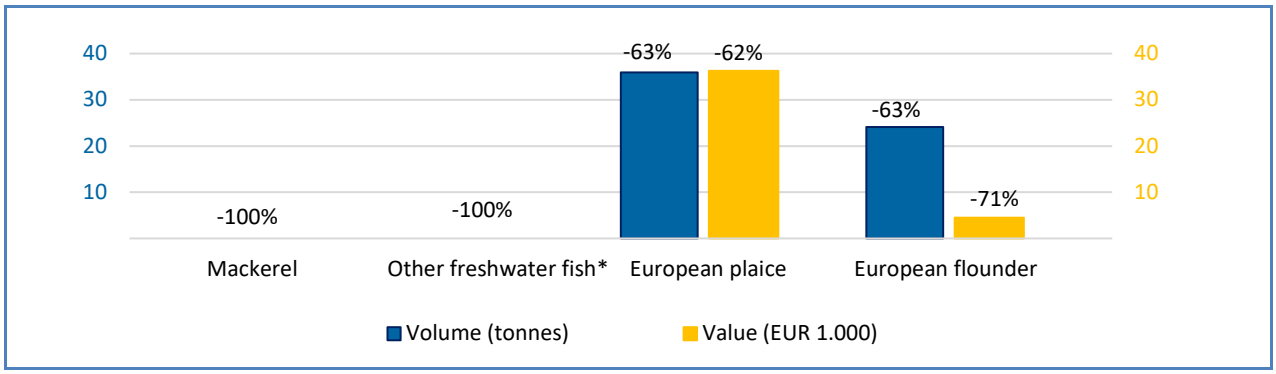


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan 2026 vs Jan 2025	EUR 1,0 million, -56%	218 tonnes, -89%	Mackerel, Other freshwater fish*, European plaice, European flounder.	**Mackerel** recorded a 100% decrease in both value and volume in January 2026 compared with January 2025. For details on the underlying causes of this development, see the explanation provided for Denmark, as the same quota-related constraints applied to Germany. **Other freshwater fish** recorded a 100% decrease in both value and volume in January 2026 compared with January 2025. These species are primarily supplied by small-scale coastal fisheries operating in the Baltic Sea region, whose activity is highly dependent on local weather conditions. The decreases were mainly due to severe frost and coastal ice formation in the Baltic Sea region, which restricted access to nearshore fishing grounds. As a result, small-scale fisheries were temporarily unable to supply these species, leading to their absence from the market during the period.

Figure 24. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY, JANUARY 2026**

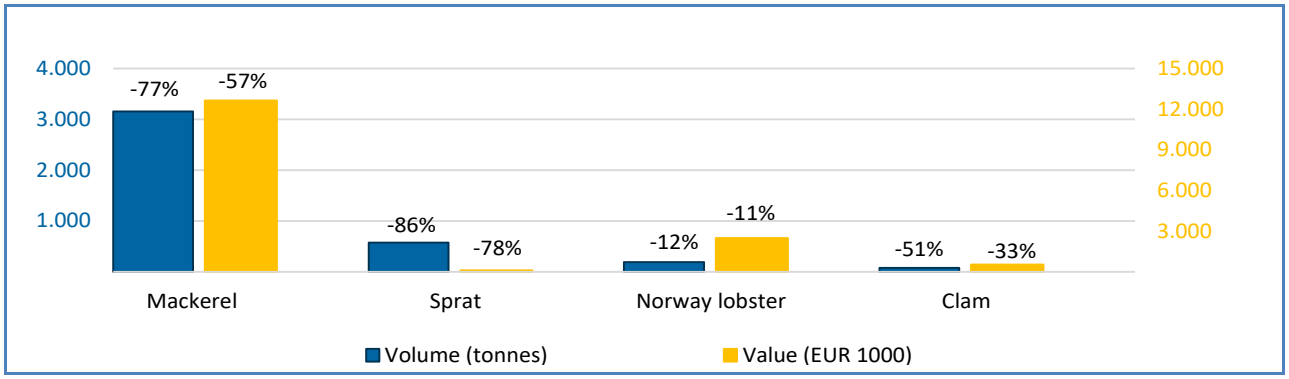


Percentages show change from the previous year.

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

Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 28,9 million, -37%	15.678 tonnes, -48%	Mackerel, sprat, Norway lobster, clam.

Figure 25. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND, JANUARY 2026**

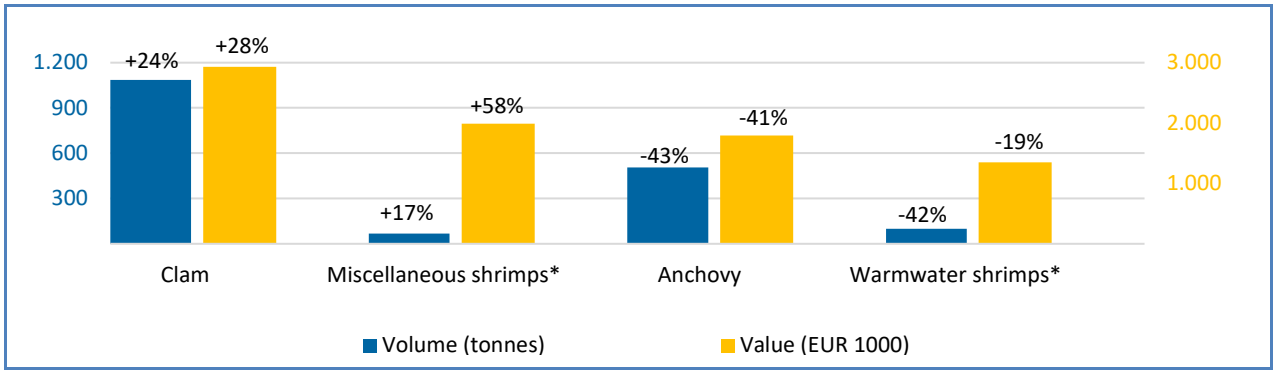


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 20,1 million, 0%	3.915 tonnes, -4%	**Value**: Clam, Miscellaneous shrimps*. **Volume**: anchovy, Warmwater shrimps*.

Figure 26. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, JANUARY 2026**

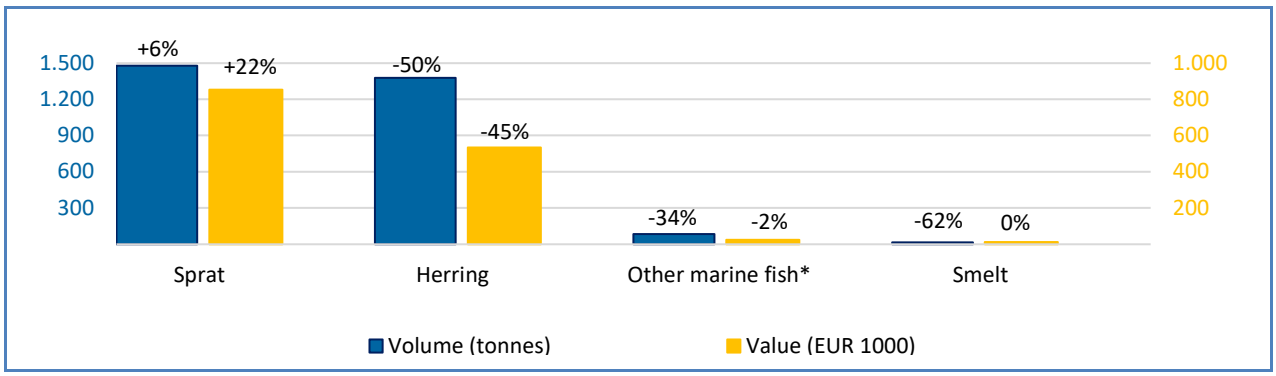


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 1,4 million, -17%	2.957 tonnes, -31%	Sprat, herring, Other marine fish*, smelt.

Figure 27. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, JANUARY 2026**

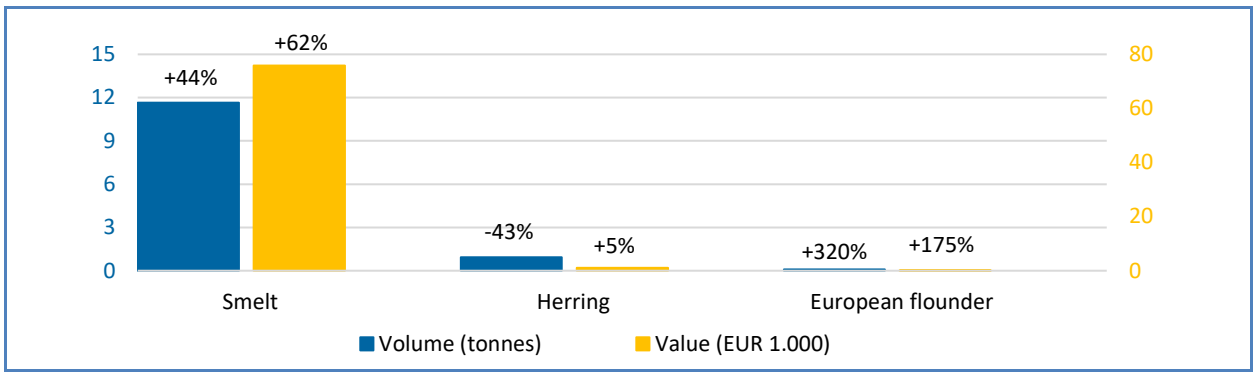


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 0,1 million, +60%	13 tonnes, +29%	Smelt, herring, European flounder.

Figure 28. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, JANUARY 2026**

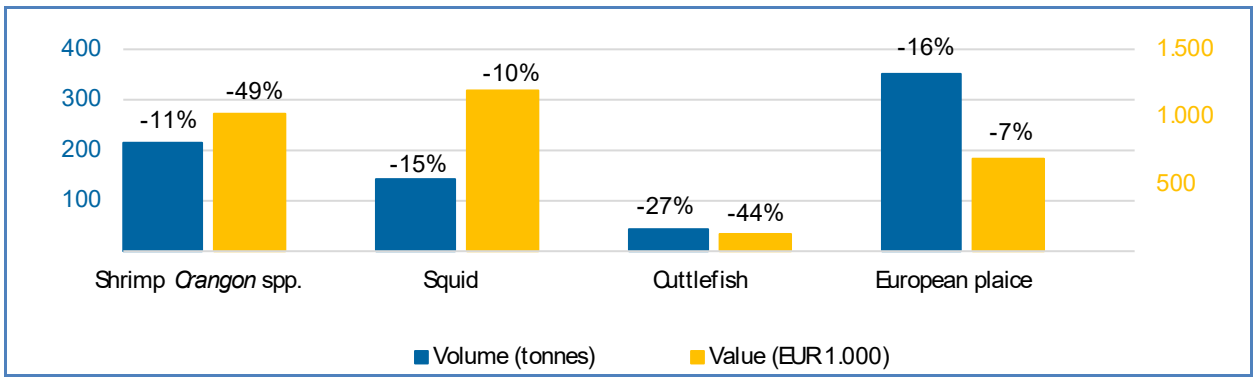


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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 2026 vs Jan 2025	EUR 9.6 million, -11%	1.645 tonnes, -3%	Shrimp *Crangon* spp., squid, cuttlefish, European plaice.

Figure 29. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, JANUARY 2026**

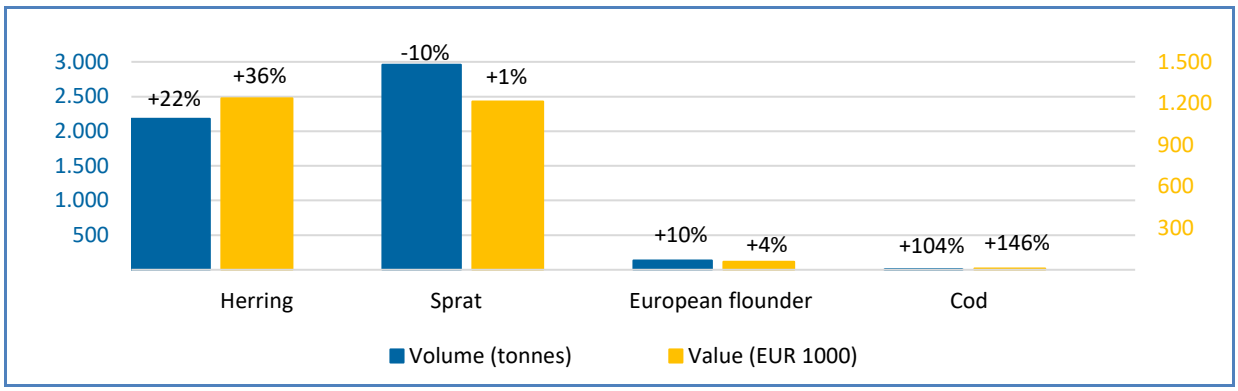


Percentages show change from the previous year.

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

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 2,6 million, +8%	5.294 tonnes, 0%	Herring, sprat, European flounder, cod

Figure 30. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, JANUARY 2026**

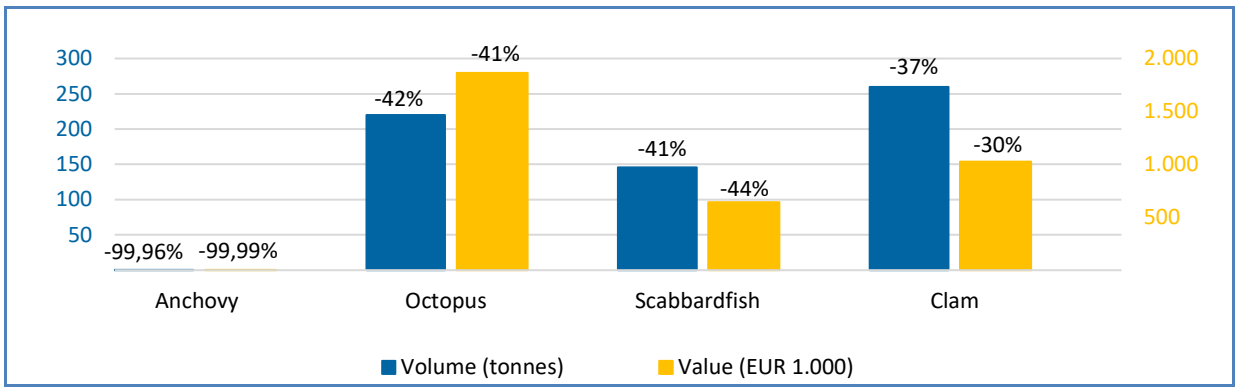


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan 2026 vs Jan 2025	EUR 10,9 million, -35%	2.093 tonnes, -41%	Anchovy, octopus, scabbardfish, clam.	**Anchovy** recorded almost a 100% decrease in both value and volume in January 2026 compared with January 2025, mainly due to the species' high natural variability and environmentally driven fluctuations in recruitment and biomass distribution. In January, stocks tend to be more dispersed, located further north, or at depths inaccessible to the fleet, while fishing activity was further reduced by vessel maintenance and severe weather conditions across the Iberian Peninsula, including Storm Kristin, which made fishing operations largely impossible during the latter half of the month.

Figure 31. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, JANUARY 2026**

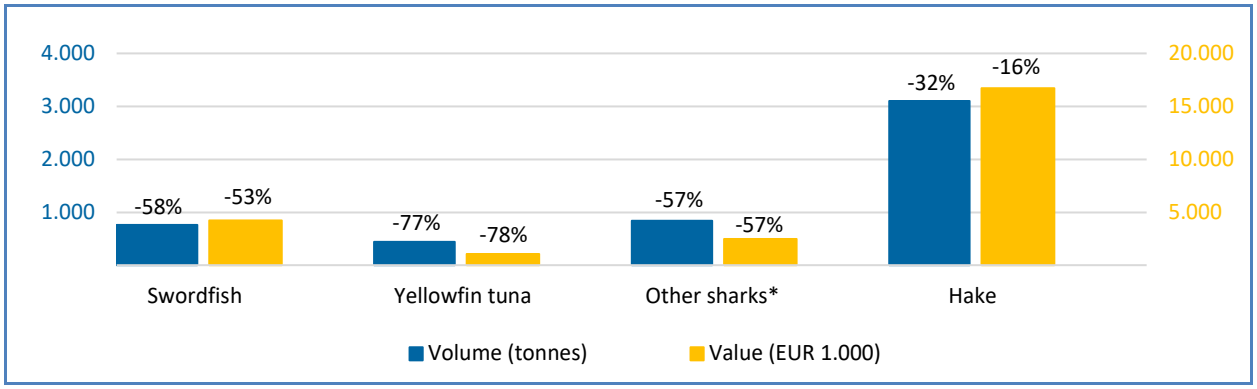


Percentages show change from the previous year.

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 67.915 million, -25%	13.358 tonnes, -32%	Swordfish, Yellowfin tuna, Other sharks*, hake.

Figure 32. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, JANUARY 2026**

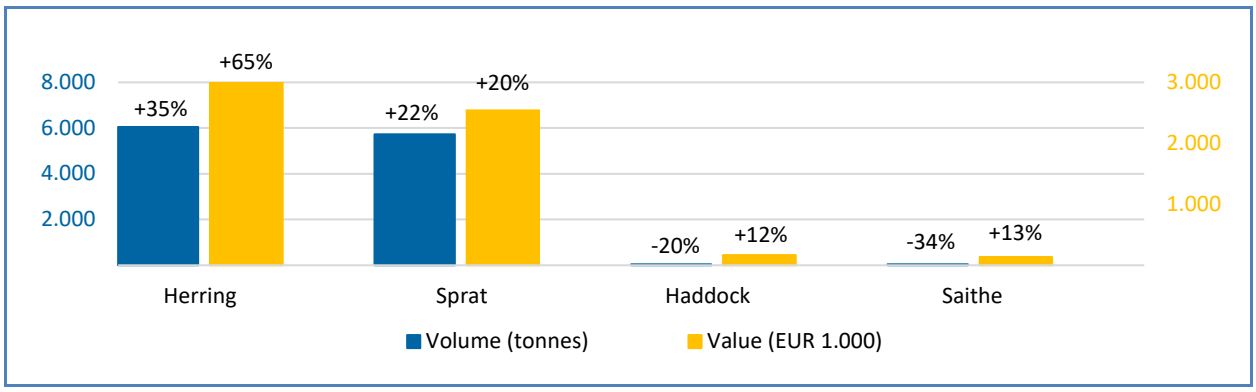


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 8,1 million, +16%	12.056 tonnes, +26%	Herring, sprat, haddock, saithe.

Figure 33. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, JANUARY 2026**



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

Table 34. **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 2026 vs Jan 2025	EUR 78,6 million, +4%	56.261 tonnes, +4%	Herring, blue whiting, monk, sprat.

Figure 34. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE FAROE ISLANDS, JANUARY 2025**

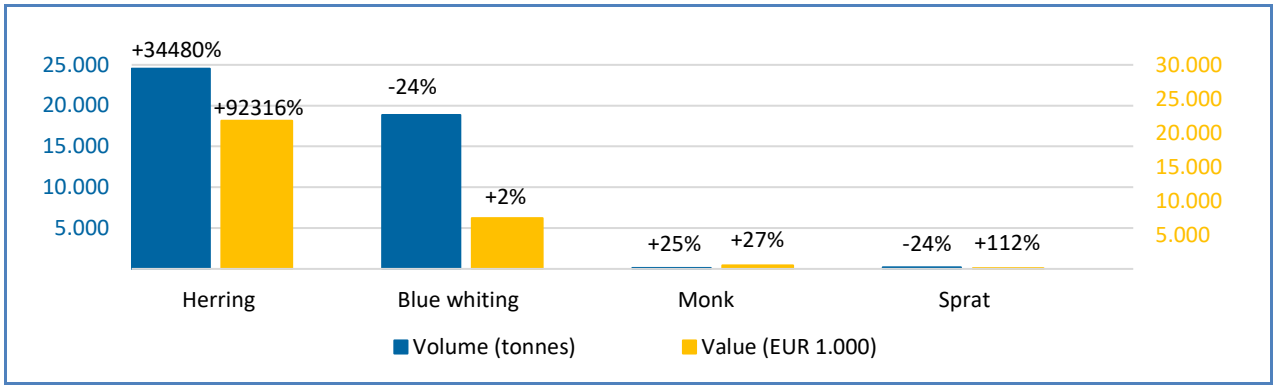
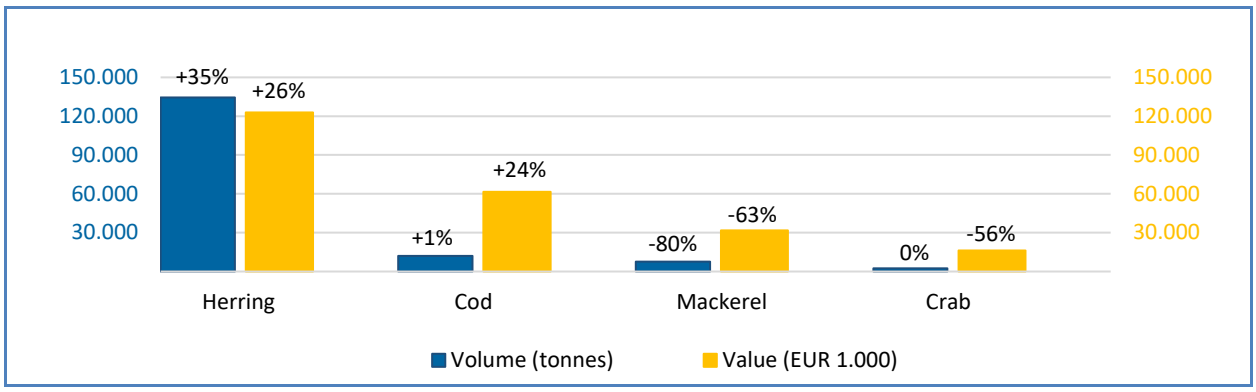


Table 35. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY**

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 281 million, -14%	213.597 tonnes, -1%	Herring, cod, mackerel, crab.

Figure 35. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, JANUARY 2026**

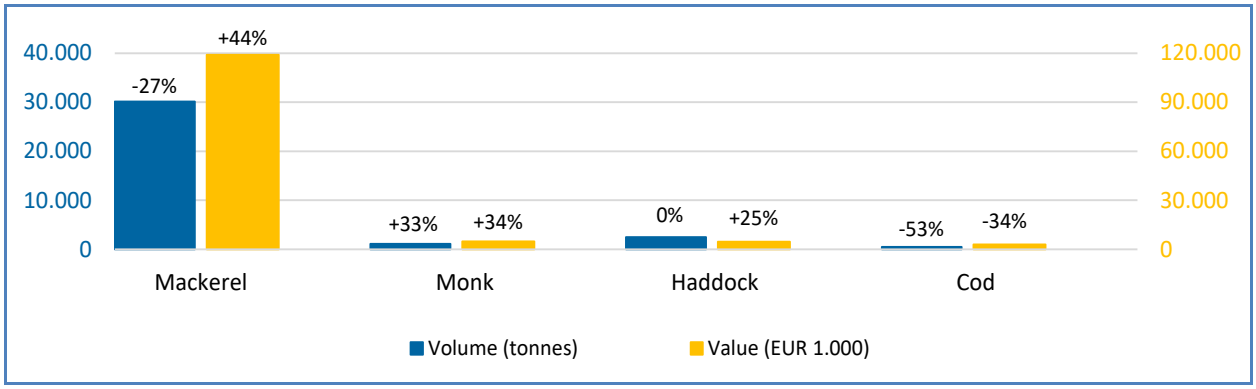


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

Table 36. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM**

The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan 2026 vs Jan 2025	EUR 155,8 million, +34%	42.232 tonnes, -21%	**Value**: mackerel, monk, haddock. **Volume**: mackerel, cod.

Figure 36. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, JANUARY 2026**



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

In January 2026, the value of extra-EU imports decreased by 8% compared to the same period in 2025, while volume decreased by 4%. The MCSs contributing most to the decrease in import values were skipjack tuna (-32%) and octopus (-30%), while skipjack tuna (-21%) and hake (-26%) contributed most to the decrease in volume.

Increases in value and volume: Cyprus, Denmark, the Netherlands, and Slovenia recorded an increase in extra-EU imports in both value and volume. The most significant increases in value and volume in absolute terms were recorded in Slovenia driven by an increase in hake (+218% and +197%) and skipjack.

Decreases in value and volume: Austria, Belgium, Croatia, Czechia, Estonia, France, Hungary, Latvia, Luxembourg, Poland, Portugal, Romania and Spain recorded decreases in extra-EU imports in value and volume. Hungary experienced the most significant decline in absolute terms in value due primarily to lower imports of miscellaneous tuna (-97%), and freshwater catfish (-58%). Croatia experienced the highest decline in absolute terms in volume due primarily to other marine fish (-98%) and sardine (-87%).

Table 37. **JANUARY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)**[17]

	January 2025			January 2026			Change from January 2025		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	846	5,5	6,51	809	5,2	6,45	-4%	-5%	-1%
Belgium	13.322	90,0	6,75	10.258	66,6	6,49	-23%	-26%	-4%
Bulgaria	1.270	2,8	2,23	1.171	3,5	2,95	-8%	22%	32%
Croatia	2.045	4,7	2,29	695	2,2	3,18	-66%	-53%	39%
Cyprus	687	4,1	6,02	819	4,5	5,46	19%	8%	-9%
Czechia	2.173	10,4	4,79	2.145	9,5	4,41	-1%	-9%	-8%
Denmark	67.969	263,5	3,88	75.544	296,8	3,93	11%	13%	1%
Estonia	1.163	6,1	5,23	552	3,4	6,20	-53%	-44%	19%
Finland	3.124	25,0	7,99	3.381	22,2	6,58	8%	-11%	-18%
France	44.820	228,3	5,09	44.455	214,4	4,82	-1%	-6%	-5%
Germany	36.861	165,0	4,48	37.917	163,0	4,30	3%	-1%	-4%
Greece	12.942	51,8	4,00	13.029	51,7	3,97	1%	0%	-1%
Hungary	260	1,2	4,63	96	0,5	4,99	-63%	-60%	8%
Ireland	12.140	19,7	1,62	12.051	20,5	1,70	-1%	4%	5%
Italy	44.982	277,0	6,16	48.047	269,6	5,61	7%	-3%	-9%
Latvia	3.534	8,6	2,44	2.652	6,0	2,26	-25%	-31%	-8%
Lithuania	4.221	12,2	2,89	3.853	13,1	3,41	-9%	7%	18%
Luxembourg[18]	0	0,0	180,40	0	0,0	237,33	-89%	-86%	32%
Malta	310	0,9	2,87	394	0,7	1,70	27%	-25%	-41%
Netherlands	53.728	297,1	5,53	56.006	315,3	5,63	4%	6%	2%
Poland	23.658	95,4	4,03	20.091	85,3	4,25	-15%	-11%	5%

[17] During January 2026, 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.
[18] Luxembourg imports values and volumes are shown separately, as the large unit of measurement used for the rest of the countries analysed does not reflect the real values: Jan 2025: First sales volume = 249 kg; first sales value = 44.920 EUR - Jan 2026: First sales volume = 27 kg; first sales value 6.408.

Portugal	17.220	82,6	4,79	14.263	62,1	4,36	-17%	-25%	-9%
Romania	2.513	9,9	3,94	1.345	7,0	5,18	-46%	-30%	31%
Slovakia	1.468	4,8	3,29	1.560	4,5	2,86	6%	-8%	-13%
Slovenia	403	1,9	4,64	696	2,5	3,57	73%	33%	-23%
Spain	136.606	717,7	5,25	109.639	530,6	4,84	-20%	-26%	-8%
Sweden	52.444	421,3	8,03	58.589	433,5	7,40	12%	3%	-8%
EU-27	**540.706**	**2.807,6**	**5,19**	**520.059**	**2.594,1**	**4,99**	**-4%**	**-8%**	**-4%**

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: Flatfish and small pelagics were the commodity groups recording an increase in both value and volume of extra-EU imports. Highest increases in value were observed for flatfish with Greenland halibut (+86% and +60%) driving the increase both in value and volume.

Decreases in value and volume: Bivalves, cephalopods, freshwater fish, other marine fish and tuna and tuna-like species recorded a decline in both extra-EU import value and value. Freshwater fish recorded the largest decline in value and volume due to freshwater catfish (-41% and -35%). Bivalves also recorded a high decrease in volume imports mainly due to other mussels (-61%).

Table 38. **JANUARY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER CG (volume in tonnes and value in million EUR)**

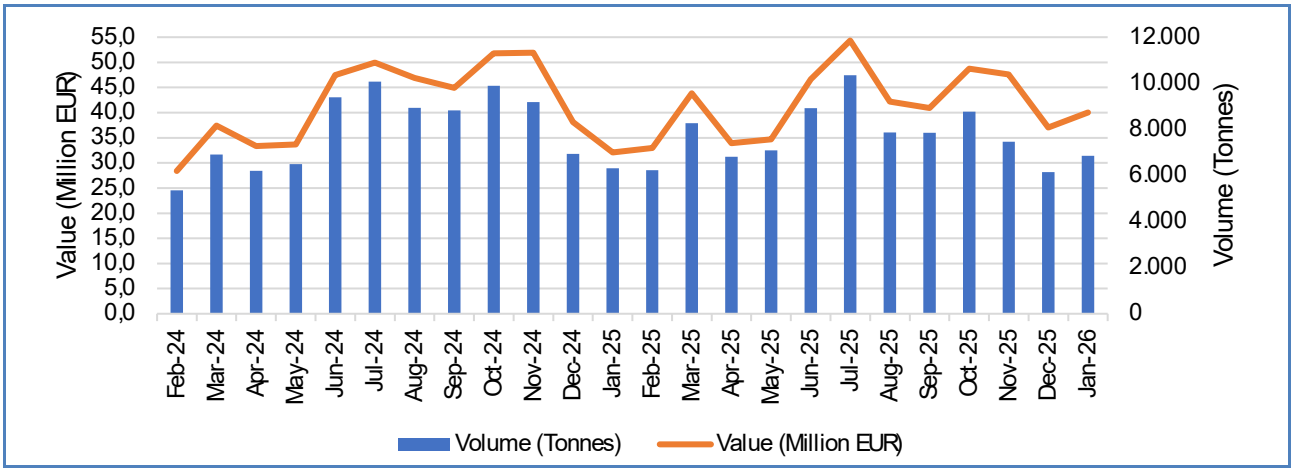
	January 2025			January 2026			Change from January 2025			
Commodity group	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	51,6	11.148	4,63	43,6	8.860	4,92	-16%	-21%	6%	Other mussel, scallop.
Cephalopods	267,8	40.378	6,63	229,8	37.474	6,13	-14%	-7%	-8%	Octopus, squid.
Crustaceans	406,2	56.262	7,22	407,5	57.394	7,10	0%	2%	-2%	Warmwater shrimp, miscellaneous shrimp.
Flatfish	32,1	6.309	5,09	40,0	6.847	5,85	25%	9%	15%	Greenland halibut, megrim.
Freshwater fish	57,0	13.980	4,08	41,6	11.009	3,78	-27%	-21%	-7%	Freshwater catfish, other freshwater fish.
Groundfish	367,3	81.672	4,50	377,6	70.502	5,36	3%	-14%	19%	Cod, other groundfish.
Other marine fish	147,3	25.078	5,87	146,4	23.015	6,36	-1%	-8%	8%	Other marine fish, other seabream.
Salmonids	681,2	74.950	9,09	661,9	85.246	7,76	-3%	14%	-15%	Salmon.
Small pelagics	117,1	47.685	2,46	123,8	51.184	2,42	6%	7%	-2%	Mackerel, herring.
Tuna and tuna-like species	553,1	113.776	4,86	407,6	93.261	4,37	-26%	-18%	-10%	Skipjack tuna, yellowfin tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of flatfish in EU Member States

In January 2026, extra-EU imports of flatfish accounted for a total value of EUR 40,0 million and a total volume of 6.847 tonnes, marking a 25% increase in value and 9% increase in volume compared to the same period in 2025.

Figure 37. **EXTRA-EU IMPORT VALUE AND VOLUME OF FLATFISH, FEB 2024 – JAN 2026 (volume in tonnes and value in million EUR)**



Source: EUMOFA elaboration of Eurostat COMEXT

Extra-EU import volumes of flatfish peak in July and drop to their lowest levels in January and February, while first-sale values peak in July, as well as in October and November, and drop to their lowest point in January and February.

In January 2026, Denmark, the Netherlands and France were the EU's main importers of flatfish. Together they accounted for 80% of total extra-EU import volumes of flatfish, with Denmark representing 47%, the Netherlands 21% and France 12% of the total import volume.

Table 39. **MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR FLATFISH**

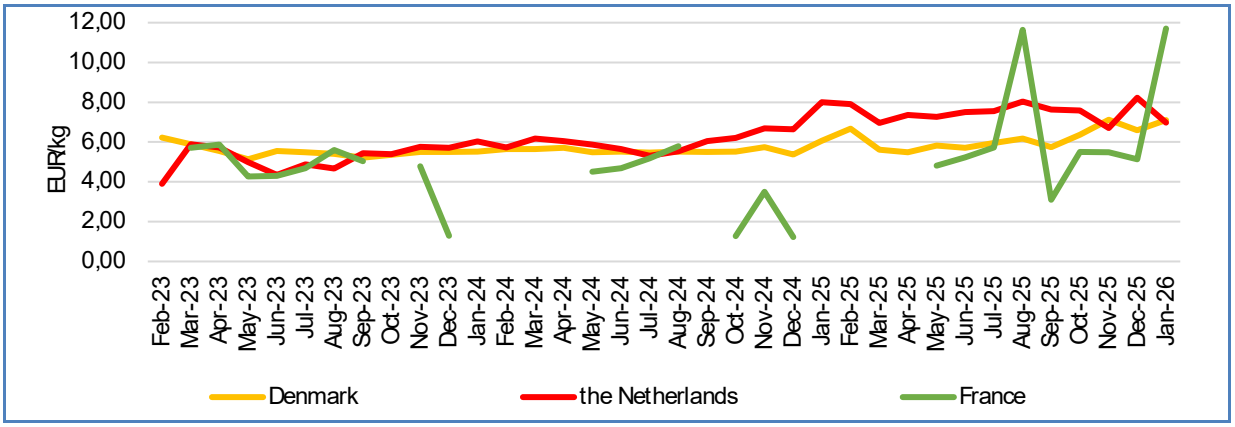
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan 2025	Jan 2026	Trend (%)	Jan 2025	Jan 2026	Trend (%)	
Denmark	12,4	23,4	89%	1.998	3.224	61%	Greenland halibut
Netherlands	7,7	4,8	-38%	2.146	1.425	-34%	Other flatfish
France	4,0	5,7	42%	480	796	66%	Other flatfish

4.2. Extra-EU imports of Greenland halibut in EU Member States

In terms of value, Greenland halibut was the main imported species within the "flatfish" commodity group, accounting for 53% of the total value, followed by other flatfish with 29%.

The price analysis below focuses on the main EU importers of Greenland halibut from non-EU countries, namely Denmark, the Netherlands and Sweden.

Figure 38. **EXTRA-EU IMPORT PRICE OF GREENLAND HALIBUT IN DENMARK, THE NETHERLANDS AND SWEDEN (FEB 2023 – JAN 2026)**



Between February 2023 and January 2026, the price of Greenland halibut fluctuated and increased in the three countries analysed: Denmark (+5%), the Netherlands (+21%), and France (+27%). In January 2026, the volume of Greenland halibut imported to Denmark was 2.913 tonnes, 67% more compared with the same period in 2025, while the price increased by 17%. Most imports by volume came from Greenland (90%), followed by Iceland (4%).

During the same period, 32.077 tonnes of Greenland halibut were imported to the Netherlands, 277% more compared to 2025, with a price decrease of 13% compared to 2025. China accounted for 84% of the total imported volume of Greenland halibut in 2025, followed by the Faroe Islands with 11%.

In France, 59 tonnes of Greenland halibut were imported in 2026, of which almost 100% came from Canada. No import data was available for January 2025.

In Denmark import volumes peaked between September and November; in the Netherlands import volumes reached their maximum in March and between July and September. In France imports volume peaked in May.

Figure 39. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GREENLAND HALIUBT IN DENMARK, FEB 2023 – JAN 2026 (volume in tonnes, price in EUR/kg)**

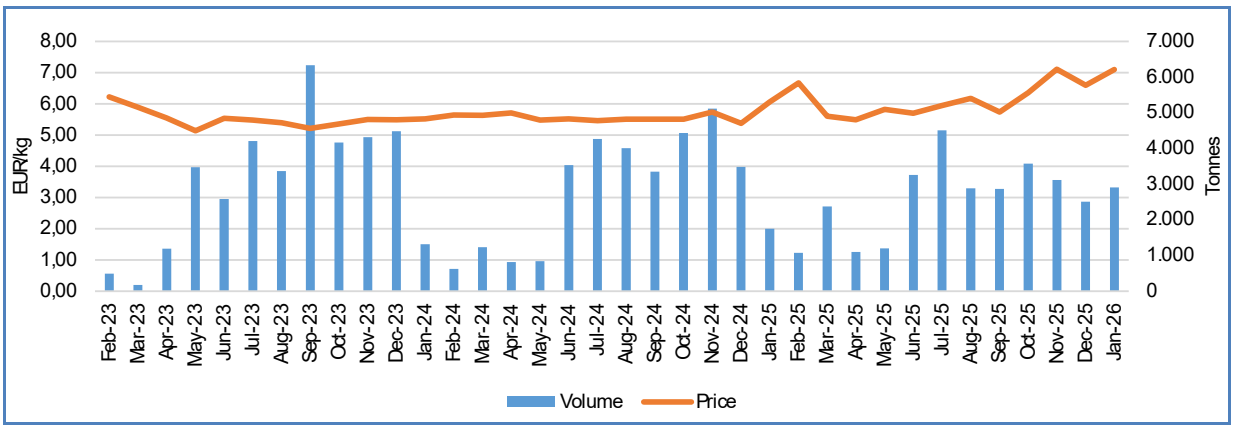


Figure 40. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GREENLAND HALIBUT IN THE NETHERLANDS, FEB 2023 – JAN 2026 (volume in tonnes and price in EUR/kg)**

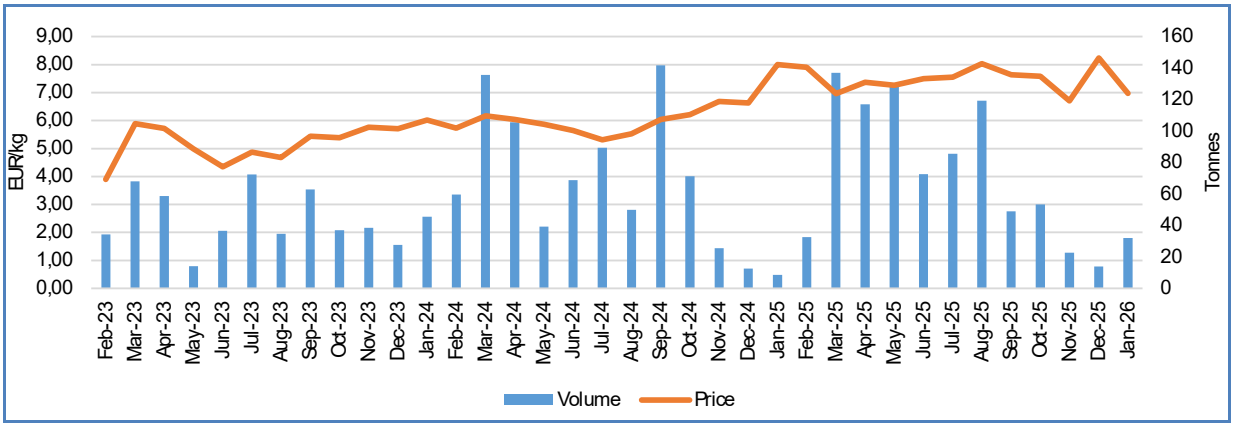
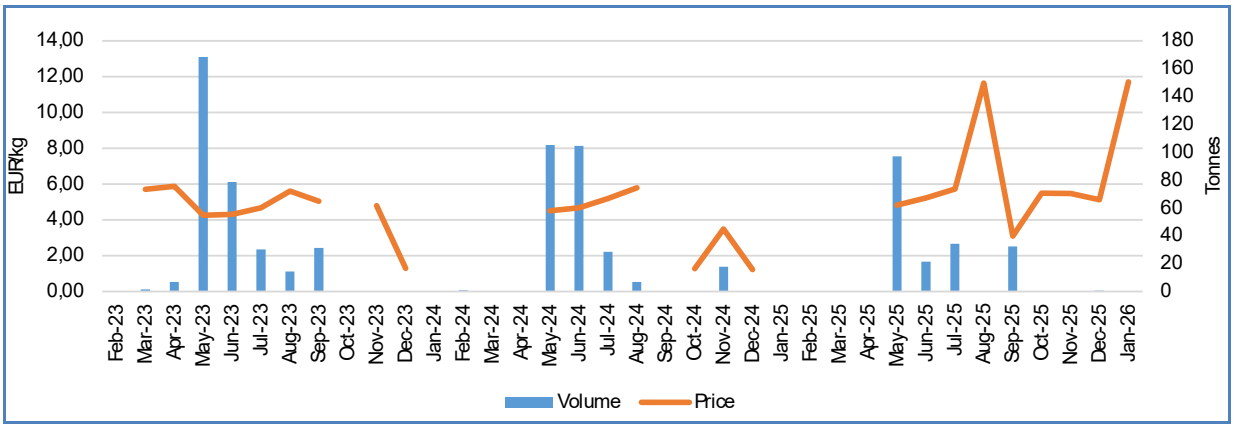


Figure 41. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF GREENLAND HALIUBT IN FRANCE, FEB 2023 – JAN 2026 (volume in tonnes and price in EUR/kg)**



4.3. Extra-EU imports of Greenland halibut by origin

In January 2026, EU imports of Greenland halibut[19] recorded an increasing trend in volume (+60%) and in value (+86%) compared with the same period in 2025. In 2026, the EU imported 2.974 tonnes of Greenland halibut for a value of EUR 21,2 million. The main extra-EU countries supplying Greenland halibut to the EU in 2025 were Greenland (88%), followed by Iceland (4%), the Faroe Islands and Canada (2% respectively). Compared to the same period in 2025, imports increased from most of these countries, except Norway (-72%). Over the same period, imports also increased from Greenland (+64%), Iceland (+229%), the Faroe Islands (+105%) and Canada (+151%)

Table 40. **EXTRA-EU IMPORTS OF GREENLAND HALIBUT BY ORIGIN IN 2026 (value in million EUR and volume in tonnes)**

Country	Jan 2024		Jan 2025		Jan 2026		Jan 2026/2025	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Greenland	6,3	1.146	9,5	1.599	18,3	2.620	92%	64%
Iceland	0,1	11	0,3	39	1,3	129	310%	229%
Faroe Islands	0,5	91	0,2	34	0,5	71	98%	105%
Canada	0,5	91	0,2	21	0,4	53	159%	151%
Others	0,8	132	1,2	160	0,8	101	-36%	-37%
Total	**8,2**	**1.471**	**11,4**	**1.854**	**21,2**	**2.974**	**86%**	**60%**

[19] 03022110 - Fresh or chilled lesser or Greenland halibut *"Reinhardtius hippoglossoides*"
03033110 - Frozen lesser or Greenland halibut "*Reinhardtius hippoglossoides*"
03054910 - Smoked lesser or Greenland halibut "*Reinhardtius hippoglossoides*", incl. fillets (excl. offal)

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[20]. They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

Compared with January 2025, household consumption of fresh fishery and aquaculture products in January 2026 increased in both volume and value in Ireland, the Netherlands, Poland, Portugal and Sweden. In contrast, Spain recorded decreases in both value and volume. Denmark, France and Italy registered decreases in volume and increases in value, while Germany recorded an increase in volume (5%) and Hungary an increase in value (20%).

The most notable increases are in Ireland and Sweden where consumption increased in volume by 32% and 16% respectively and in value by 35% and 20% respectively compared to 2024. Spain recorded the most notable decrease in volume (-10%) and in value (-4%).

Table 41. **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	January 2024		January 2025		January 2026		Change from January 2025 to January 2026	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	975	19,43	1.093	20,51	1.048	21,65	-4%	6%
France	32,14	12.872	180,26	12.883	189,18	12.700	196,77	-1%	4%
Germany	12,08	4.480	78,93	4.642	80,54	4.880	80,63	5%	0%
Hungary	5,83	137	1,30	251	2,42	252	2,90	0%	20%
Ireland*	20,00	833	14,79	819	14,78	1.085	19,98	32%	35%
Italy	30,38	15.574	204,81	17.385	238,30	17.035	245,52	-2%	3%
Netherlands*	19,90	2.105	41,19	2.043	41,69	2.079	42,30	2%	1%
Poland	13,67	3.281	32,21	3.378	40,86	3.595	48,71	6%	19%
Portugal	53,61	3.832	31,66	3.852	34,98	4.078	38,79	6%	11%
Spain	40,68	33.399	347,34	34.385	380,13	31.009	366,31	-10%	-4%
Sweden	10,00	398	6,12	357	5,85	412	7,03	16%	20%

** 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.*

[20] Last update: 20.03.2026.

5. 2. Overview of household consumption[21] of flatfish consumed in the EU

In the household consumption data used by EUMOFA, consumption of flatfish is monitored in ten[22] Member States of which Denmark, Germany, the Netherlands, Spain and Sweden are the main consumers. At species level, Denmark monitors dab, flounder and halibut, Germany and the Netherlands monitor plaice, Spain monitors sole and Sweden monitors flounder and halibut.

Figure 42. **HOUSEHOLD PURCHASES (in value) OF FLATFISH IN DENMARK, GERMANY, THE NETHERLANDS, SPAIN AND SWEDEN FEB 2023 – JAN 2026**

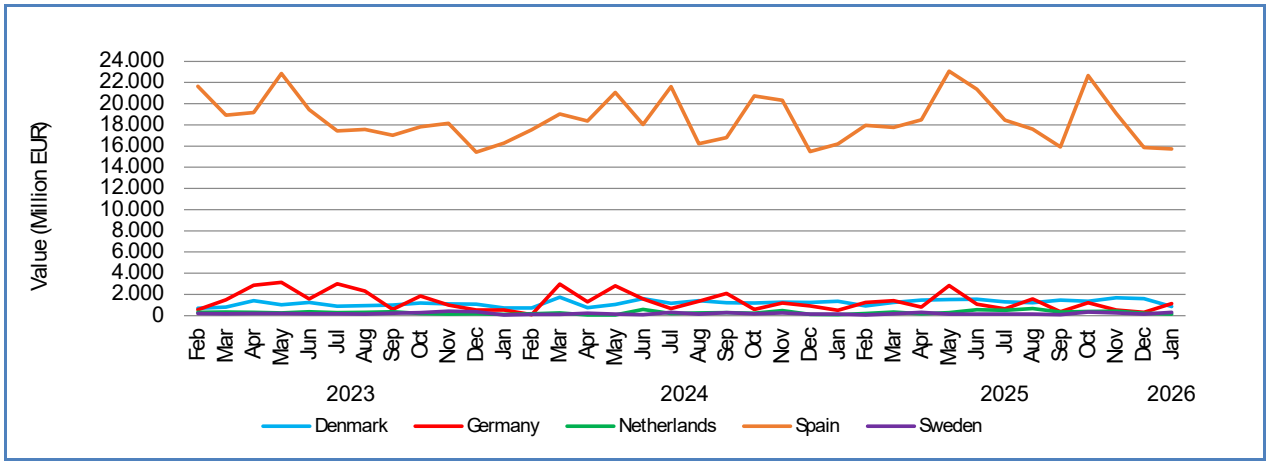
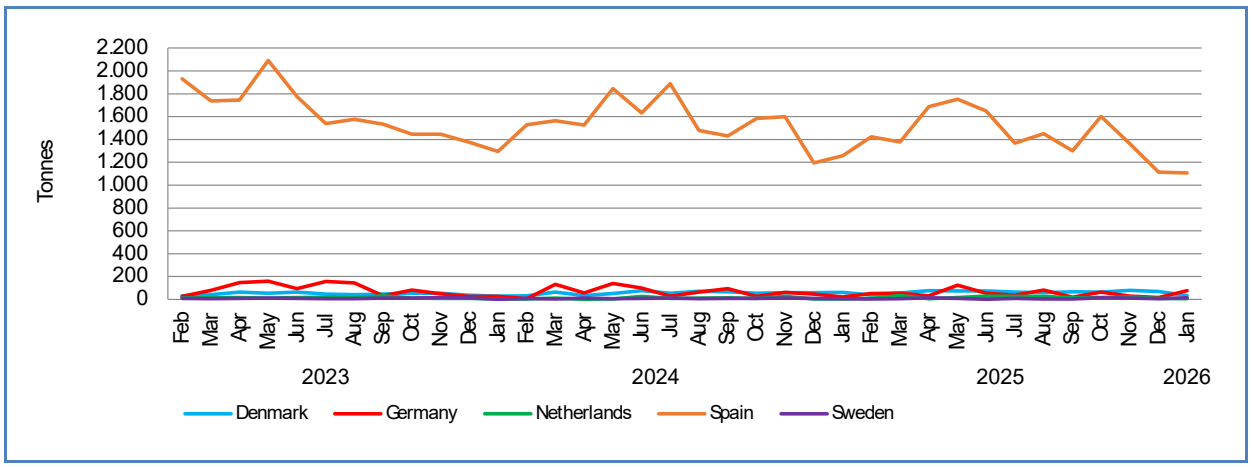


Figure 43. **HOUSEHOLD PURCHASES (in volume) OF FLATFISH IN DENMARK, GERMANY, THE NETHERLANDS, SPAIN AND SWEDEN FEB 2023 – JAN 2026**



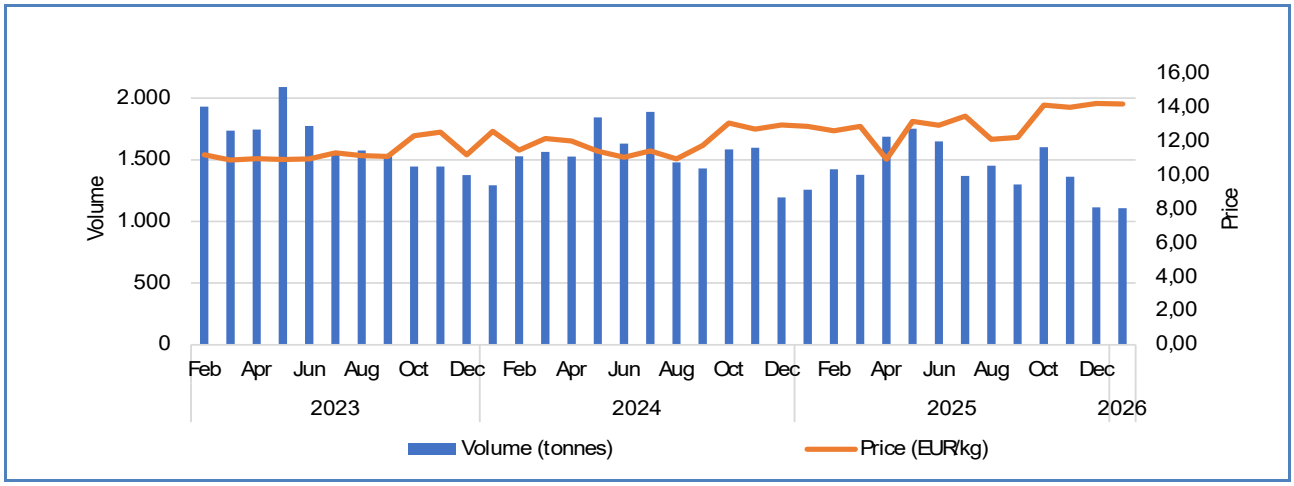
[21] The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the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

5. 3. Household consumption trends of sole - the main consumed flatfish in reporting countries

Long-term trend (Feb 2023 to Jan 2026): Downward trend in volume and slightly upward trend in price.
Yearly average retail price (Jan – Dec): 11,97 EUR/kg (2024), 12,97 EUR/kg (2025), 14,21 EUR/kg (2026)
Yearly consumption (Jan – Dec): 18.564 tonnes (2024), 17.349 tonnes (2025), 1.107 tonnes (2026)
Short-term trend (Feb 25 to Dec 2026): Downward trend in volume and slightly upward trend in price.
Average retail price (Feb 25 to Jan 26): 13,08 EUR/kg.
Consumption (Feb 25 to Jan 26): 17.198 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME OF SOLE PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, FEB 2023 – JAN 2026**

Consumption of sole in the reporting countries has an annual fluctuation, peaking in June and with the lowest consumption between



December and January. Prices show a slight seasonal variability. Between February 2025 and December 2026, consumption volumes showed a downward trend, while prices showed a slight upward trend.

6. CASE STUDY: Salmon processing industry in the EU

In 2023, global Atlantic salmon production reached 2,7 million tonnes (FAO), a 30% increase from 2013, with aquaculture dominating and wild catches accounting for less than 0,1%. Norway is the largest producer, accounting for 57% of the world's salmon production, followed by Chile (28%) and the UK (6%). The EU's production is minimal, with Ireland the main EU producer. The EU is one of the main markets for salmon worldwide and has a significant processing industry for smoking salmon, salmon fillet and prepared salmon. The apparent consumption of salmon at EU-27 level was estimated at 2,40 kg LWE[23] per capita in 2023[24].

Source: Shutterstock

Given the limited salmon production in the EU, the EU salmon processing industry relies entirely on imports. Norway is the leading supplier of salmon to the EU, accounting for 79% of extra-EU imports in Jan- Nov 2025. Sweden and Denmark play key roles as trade hubs, importing fresh salmon from Norway and re-exporting it to major EU markets such as Poland, Germany, and France. The Faroe Islands was the second-largest supplier to the EU, providing 6% of imports, followed by the UK (5,5%) and Iceland (3%).

6. 1. Biological parameters

Atlantic salmon is an amphihaline[25] species but spends most of its life in freshwater. Juveniles spend 1 to 6 years in cold freshwater habitats such as lakes, rocky creeks and pools in small and large rivers. They mainly feed on aquatic insects, crustaceans, molluscs and fish. The juveniles then migrate to coastal waters or open oceans for 1 to 4 years, changing their diet to include squid and shrimp. Reproduction occurs from November to December, when salmon return to their birthplace for spawning. Most Atlantic salmon die after spawning, except for a few females[26].

The life cycle of Atlantic salmon in aquaculture is approximately 2 to 3 years from roe hatch to harvest-ready salmon. Fertilisation of the roe is done in freshwater in land-based facilities. The roe is ready to hatch after 60 days, at a maximum temperature of 8°C. Four to six weeks after hatching, alevins lose the yolk sacs they use to get their food from and start exogenous feeding. Juveniles are fed on pellets. After 8 to 15 months in freshwater rearing tanks, salmon are transported to the sea. At this stage, the fish weigh 100 to 300 g, depending on the location. The salmon are then grown at the sea farm for 14 to 22 months until they are ready for harvest, when they reach 4 to 6 kilos[27].

6. 2. EU salmon production

According to the FAO, EU salmon production in 2023 amounted to 11.587 tonnes, 92% from aquaculture (10.511 tonnes) and 8% from wild catches (944 tonnes). EU farmed salmon production decreased between 2022 and 2023 (-18%), driven mainly by a 22% decrease in Irish production, while EU salmon from fisheries increased by 41% driven by increased Swedish catches.

EU salmon fishing decreased significantly over the past decade, and declined by 32% between 2014 and 2023, mainly due to decreasing Swedish, Polish and Finnish catches.

In the period 2014 to 2023, EU salmon farming production varied between 9.784 tonnes at its lowest (2014) and 19.569 tonnes at its highest (2017) mainly due to the fluctuation in Irish salmon farming.

[23] Live weight equivalent
[24] https://eumofa.eu/documents/20124/210402/EFM2025_EN.pdf/7e142aae-ec07-ec29-dbf4-35c7fc723fa1?t=1764600211543
[25] Amphihaline refers to aquatic species, typically fish, that migrate between freshwater and saltwater during their life cycle.
[26] https://www.fishbase.se/summary/salmo-salar.html
[27] https://www.leroyseafood.com/en/about-us/about-leroy/how-do-we-produce-salmon/

Ireland is by far the largest EU producer, with 82% (9.373 tonnes) of the total production in 2023. The same year, it was followed by Denmark, which accounted for 11% of total EU production (1.230 tonnes), and to a lesser extent by Sweden (472 tonnes from catches) and Finland (356 tonnes from catches). Only very limited volumes have been produced in Spain over the period.

Table 42. **EU SALMON PRODUCTION (fisheries and aquaculture) IN TONNES**

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Ireland	9.424	13.175	16.358	18.394	12.053	11.403	12.940	12.928	12.000	9.373
Denmark	539	532	1.341	823	1.061	1.492	1.956	1.711	1.174	1.230
Spain	6	10	12	92	3	12	1	3	3	3
Sweden	523	639	401	423	778	482	794	401	160	472
Finland	620	563	626	592	518	552	491	495	394	356
Poland	21	29	294	434	544	544	516	590	209	1
Other	38	38	31	31	36	45	38	30	19	20
Total	**11.170**	**14.986**	**19.063**	**20.790**	**14.993**	**14.531**	**16.737**	**16.157**	**13.958**	**11.455**

Source: FAO.

6. 3. EU salmon imports

In 2025, salmon imports (including wild caught pacific salmon) from third countries accounted for 1,04 million tonnes for an overall value of EUR 7,46 billion. Imports consist mainly of fresh salmon (88% of volume and 86% of value in 2025) and frozen products (11% of volume and 13% of value in 2025). Smoked salmon imports from extra-EU represented only 1% of the sales value and 0,6% of the volumes in 2025.

Norway is the main supplier of the EU market. In 2025, imports of salmon from Norway amounted to 823.431 tonnes, representing 79% of extra-EU imports in terms of volume and 78% in terms of value. COMEXT data shows that the value of extra-EU imports of fresh salmon by Sweden and Denmark accounts for 58% and 17% respectively of the EU total in 2025. Both are essentially transit countries for Norwegian exports the main destinations being the main EU markets. The second supplier of the EU market was the Faroe Islands (6% of EU imports in 2025), followed by the UK (5,5% of EU imports) and Iceland (3% of the total volume). Between 2021 and 2025, the total imported volume decreased by 5% and value increased by 12%.

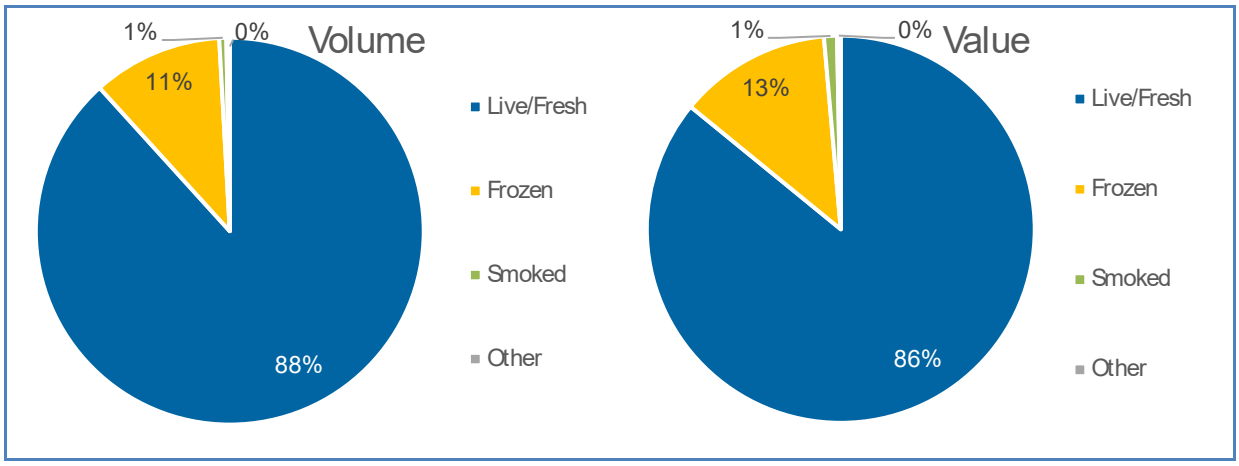
Table 43. **EU IMPORT OF SALMON[28] FROM MAIN SUPPLIERS (tonnes, million EUR)**

	2021		2022		2023		2024		Jan-Nov 2025	
Supplier	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Norway	876.645	5.244	853.205	6.786	834.190	6.953	839.274	6.737	823.451	5.853
Faroe Islands	36.930	281	43.923	422	37.934	389	47.924	436	59.190	447
United Kingdom	78.869	564	62.011	541	51.740	490	69.468	633	53.421	413
Iceland	23.227	130	24.252	179	24.383	187	27.011	218	29.787	211
USA	19.620	162	19.653	190	16.618	114	19.866	136	18.011	158
Chile	12.992	79	16.664	152	18.516	156	20.681	172	15.081	131
Other	40.859	228	44.835	300	40.913	307	47.470	262	37.850	244
Total	**1.089.142**	**6.688**	**1.064.543**	**8.571**	**1.024.293**	**8.597**	**1.071.694**	**8.593**	**1.036.790**	**7.457**

Source: EUMOFA elaboration of Eurostat-Comext data.

[28] Includes also wild caught pacific salmon

Figure 45. **EU IMPORTS OF ATLANTIC SALMON BY PRESERVATION IN JAN – NOV 2025**

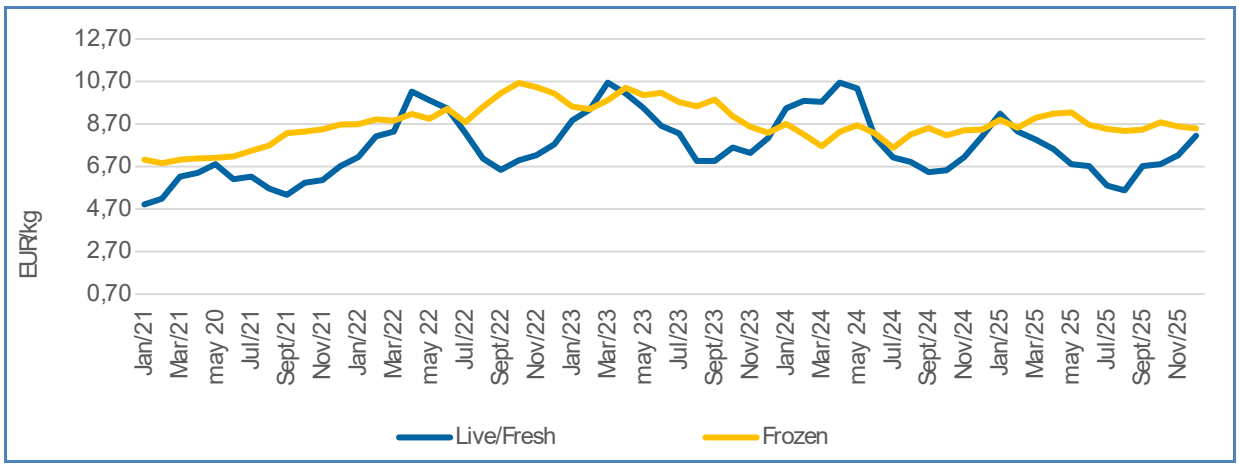


Source: EUMOFA elaboration of Eurostat-Comext data.

EU import prices for salmon rose sharply from early 2021 to the peak period in 2022–2023 before gradually returning to more normal levels through 2024 and 2025. Live and fresh salmon began at low post-pandemic prices but climbed rapidly, reaching a high point in March 2023. After this peak, fresh prices declined steadily and by late 2025 had largely reverted to the levels seen before the market surge. Frozen salmon followed a smoother and more stable path, rising to its highest price in November 2022 and then settling into a narrower range, maintaining a noticeable premium over fresh salmon.

While fresh salmon reacted more strongly to sudden changes in supply and demand and to season variations, frozen products displayed greater stability, with only moderate corrections after the 2022 peak. On yearly average frozen salmon prices have increased while fresh salmon price decrease. In 2025, frozen salmon increased by 6% and fresh salmon decreased by 13% compared to 2024. Overall, the trend reflects a market that experienced significant cost pressure and supply disruptions in 2022–2023 but moved back towards stability as production conditions and trade flows normalized.

Figure 46. **AVERAGE EU IMPORT PRICE OF FRESH AND FROZEN SALMON**



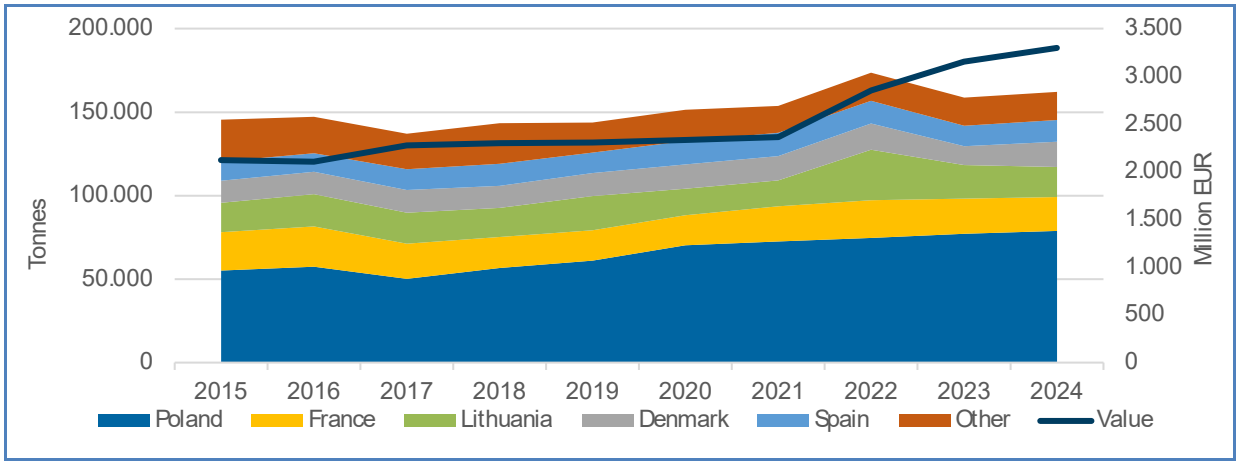
Source: EUMOFA elaboration of Eurostat-Comext data.

6. 4. EU salmon processing

EU salmon processing plays a central role in the European seafood industry and depends heavily on the steady supply of unprocessed salmon from Norway. These raw material flows support thousands of jobs across the Union[29]. For Norway, exporting whole salmon to the EU remains commercially attractive because labour costs in many EU Member States are lower, import duties on unprocessed products are reduced compared with processed goods, and whole, skin-on salmon maintains its quality better during transport than fish that has already undergone processing. Traditional EU wild caught processing plants are forced to diversify their processing assortment to stay solvent due to a shortage of EU production. Salmon has thus become a key species for many of these facilities, especially in Poland, the Netherlands, Belgium, Denmark and France, where filleting and cold or warm smoking constitute the core processing activities[30].

The EU remains a key market and processing hub for Atlantic salmon produced in Norway, the Faroe Islands, the UK and Iceland. A substantial share of these imports is added value through processing, notably smoked fillets, prepared and preserved portions, and frozen cuts. Processing statistics indicate that smoked salmon production volumes between 2015 and 2024 in the EU varied between 137.000 tonnes (2017) at its lowest to 174.000 tonnes (2022) at its highest. The decrease in 2017 was followed by several years of increase before a dip in 2023 and then an increase in 2024.[31] However, PRODCOM data underestimate total production in recent years due to reporting gaps in several major producing Member States, including Germany and Spain in 2023 and Poland in 2021, 2022 and 2024.

Figure 47. **EU PROCESSING VOLUME AND VALUE OF SMOKED SALMON**



Source: EUMOFA processing dashboard (Eurostat PRODCOM). Note that processing volume and value has been estimated for Poland in 2021-2022 and 2024, France in 2019, and Germany (in the "other" category) in 2023.

EU smoked salmon production in recent years is estimated at around 160.000 tonnes, confirming the continued central role of the EU processing sector. Converted in live weight, this corresponds to approximately 340.000 tonnes. Over the same period, the value of smoked salmon production increased steadily, rising from approximately EUR 2,1 billion in 2015 to about EUR 3,3 billion in 2024. This implies a marked increase in average unit values, from roughly 15,00-16,00 EUR/kg in 2020 to around 20,00 EUR/kg in 2024, reflecting higher raw material costs as well as a sustained focus on premium and value-added products[32].

The processing industry is concentrated in a handful of Member States. Poland is the leading EU processor of smoked salmon, with reported volumes rising from about 55.000 tonnes in 2015 to more than 70.000 tonnes in 2020 and over 79.000 tonnes in 2024, accounting for nearly half of total EU smoked salmon production in the most recent years. France, Lithuania, Denmark and Spain also play important roles. In France, smoked salmon volumes fluctuated around 18.000-24.000 tonnes annually, while Lithuania processed roughly 16.000-30.000 tonnes and Denmark about 13.000-15.000 tonnes per year. Spain's smoked salmon production increased from approximately 11.200-12.400 tonnes in 2015-2017 to nearly 14.000 tonnes by 2021, decreasing to 12.900 tonnes in 2024.

Beyond smoked products, EU processors also produce substantial volumes of prepared and preserved salmon. These are either whole salmon or salmon pieces but not minced products or prepared meals and dishes. Based on estimated production data that account for

[29] https://weareaquaculture.com/news/seafood/norwegian-seafood-exports-fuel-job-growth-in-the-eu-study-finds
[30] https://seafoodeurope.eu/aipce-cep/eu-seafood-supply-synopsys/
[31] EUMOFA processing dashboard (Eurostat PRODCOM).
[32] EUMOFA processing dashboard (Eurostat PRODCOM).

gaps in official statistics, annual production in this category increased steadily from around 15.000 tonnes in 2014 to over 22.000 tonnes by 2018, before continuing to rise to approximately 32.000 tonnes in 2024[33].

Production is also led by Poland, which accounts for a large share of EU production, followed by Sweden, France, Lithuania, Italy, and Belgium. In value terms, prepared and preserved salmon production increased markedly over the period, from approximately EUR 147 million in 2015 to around EUR 260-270 million in 2024[34]. This reflects both higher volumes and rising unit values, driven by increased raw material costs and a continued shift toward value-added and convenience-oriented salmon products. While smaller than the smoked segment, prepared and preserved salmon represents a growing and increasingly important component of the EU's salmon processing industry, serving both domestic consumption and export markets.

Because fresh salmon is highly perishable, EU processing activities depend on a reliable and rapid supply of chilled raw material. Efficient logistics, particularly road transport and, to a lesser extent, air freight from Norway and Scotland are therefore critical for maintaining processing schedules and product quality.

6. 5. EU exports of salmon products

Extra-EU exports of salmon remain significantly smaller than imports, confirming the EU's role as a net salmon importer that adds value through processing. By 2024, converted to LWE, export volumes corresponded to only about 12% of extra-EU import volumes, while export values represented approximately 16% of import values, reflecting the higher unit values of processed products[35]. Export flows are geographically concentrated, with a limited number of high-income and processing-oriented markets accounting for most of the volumes. EU exports of salmon products are characterised by a combination of highly processed products and re-export of fresh or chilled salmon to markets outside the EU.

In Jan-Nov 2025, EU salmon exports consisted of smoked salmon accounting for 31% of the export value, fresh fillets accounting for 30% of the export value, and frozen fillets accounting for 22% of the export value.

This reflects the strong processing capacity concentrated in countries such as Poland, Germany, France, Denmark and the Netherlands, where imported whole salmon is filleted, smoked, sliced or packaged before being shipped onward.

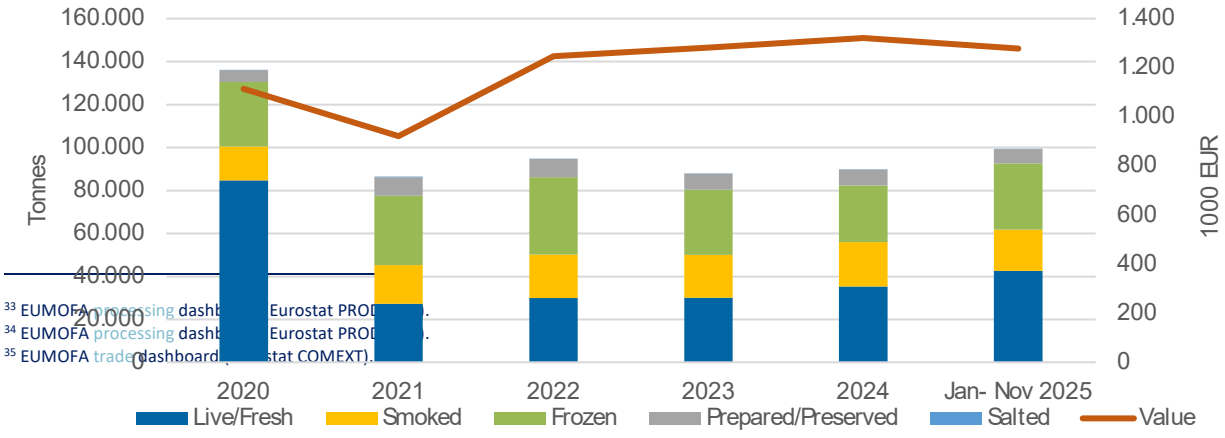
USA is a key market for EU salmon exports accounting for 34% of the volume and 41% of the value in Jan- Nov 2025. Main products exported to USA are fresh and chilled salmon and salmon fillet (43% of the volume and 45% of the value), smoked salmon (28% of the volumes and 32% of the values) and frozen salmon fillet (26% of the volume and 19% of the value). Since the higher tariffs imposed by the US in August 2025 and until end November in 2025, EU exports to USA dropped by 9% to 13.000 tonnes compared to the same period in 2024. A 18% drop was seen on the exports of fresh salmon, and a 24% drop was seen on the exports of smoked salmon. On the contrary exports of frozen salmon increased by 9% to 3.400 tonnes and exports of prepared and preserved salmon increased by 120% to 820 tonnes.

Another key market is Switzerland accounting for 8% of the volume and 12% of the value in Jan-Nov 2025. Main products exported to Switzerland are smoked salmon (40% of the volume and 48% of the value), fresh salmon and salmon fillet (43% of the volume and 37% of the value) and frozen salmon fillet (8% of the volume and 7% of the value).

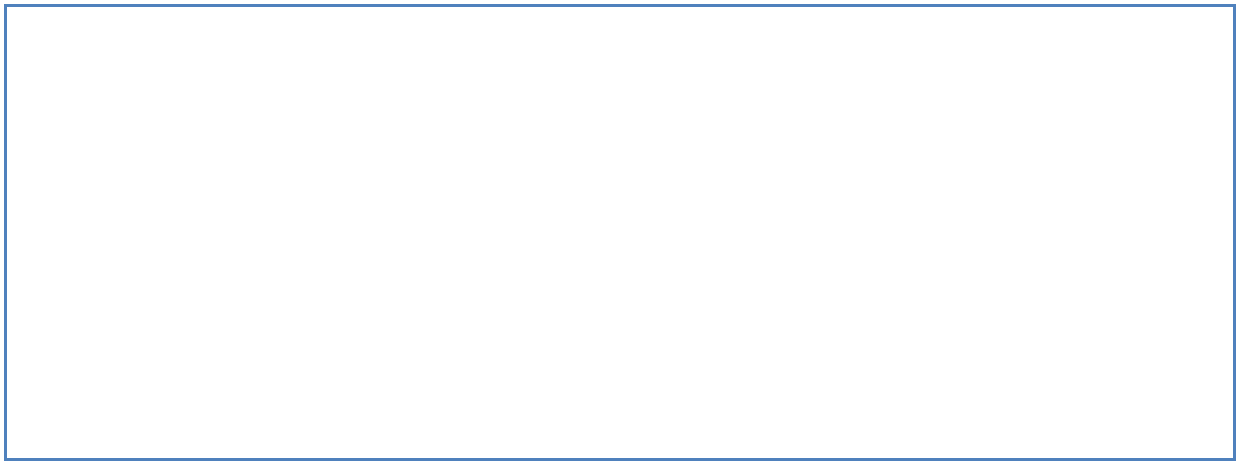
The third largest market in terms of value in Jan- Nov 2025 was Australia accounting for 7% of the volume and 9% of the value. Main products were smoked salmon (44% of the volume and 57% of the value), and frozen fillets (51% of the volume and 40% of the value).

Other markets of importance were Israel, the UK, Vietnam and Canada.

Figure 48. **EU EXPORTS OF SALMON PRODUCTS (tonnes, million EUR)**



[33] EUMOFA processing dashb… Eurostat PROD….
[34] EUMOFA processing dashb… Eurostat PROD….
[35] EUMOFA trade dashboard (… stat COMEXT).



Source: EUMOFA elaboration of Eurostat-Comext data.

6. 6. Intra EU trade

Intra EU trade in salmon products is characterised by significant trade exchange between EU Member States.

In Jan- Nov 2025 salmon exports between EU countries amounted to 1,03 million tonnes, for an overall value of over EUR 9,2 billion. Compared to Jan- Nov in 2024 this was an 11% increase in volume and a 1% increase in value. Exports consisted mainly of fresh salmon (76% of exports volume and 66% of values), followed by frozen salmon (12% and 14%) and smoked salmon (8% and 15%). The value of intra-EU exports increased by 37% in value over the 2020-2025 period. The total volume exported rose by 10% and the average price increased by 24% over the same period.

Sweden is in a specific situation as transit country for farmed salmon from Norway. In Jan- Nov 2025 exports from Sweden to other Member States accounted for 50% of the volume and 41% of the value. The second largest exporter in terms of value were Poland accounting for 10% of the volume and 18% of the value. Exports from Poland consisted mainly of smoked salmon (46% of value), fresh fillet (24%) and frozen fillet (14%). The main destination was Germany, which accounted for 58% of Polish exports in value to EU countries during Jan-Nov in 2025.

Denmark was the third largest exporter, accounting for 13% of intra-EU export value and 15% of the volume. Exports consisted mainly of fresh salmon (71% by value) and frozen salmon (21%). Destinations were mainly Germany (24% of total export value) and other countries such as the Netherlands, Poland, France and Italy, each accounting for around 12-14% of total export value.

Table 44. **INTRA-EU EXPORTS OF SALMON BY PRESERVATION (tonnes, million EUR)**

	2020		2021		2022		2023		2024		Jan- Nov 2025	
Preservation	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Live/Fresh	697.909	4.255	798.599	5.272	782.944	6.737	774.576	7.042	759.998	6.748	780.555	6.148
Frozen	109.179	855	117.531	924	130.806	1.265	123.130	1.268	127.143	1.298	127.341	1.288
Smoked	96.057	1.371	106.421	1.453	100.306	1.632	87.031	1.573	89.940	1.544	83.130	1.341
Prepared/Preserved	26.747	260	31.542	308	31.105	334	35.731	468	38.348	502	35.790	447
Salted	3.538	30	4.075	35	4.009	41	2.647	32	3.077	33	2.224	23
Total	**933.429**	**6.771**	**1.058.168**	**7.991**	**1.049.170**	**10.009**	**1.023.116**	**10.382**	**1.018.507**	**10.124**	**1.029.040**	**9.247**

Source: EUMOFA elaboration of Eurostat-Comext data.

7. CASE STUDY: European anchovy in the EU – focus on the Atlantic seaboard

European anchovy is the most caught and consumed anchovy species in the EU. In 2023, 73% of the world production of European anchovy came from the Mediterranean and Black Seas, while 18% of the catches originated from the Eastern Atlantic[36]. In 2023, EU-27 catches of European anchovy reached 98.883 tonnes, of which 44% originated from the Northeast Atlantic, and 56% from the Mediterranean and Black Sea. Spain is the main landing country of the Atlantic seaboard (85% of the Atlantic seaboard landed volume; 46% of the EU landed volume). Between 2022 and 2025 first sales in the Atlantic seaboard rose by 19% in volume (171% in Portugal; 97% in France; 6% in Spain). This growth is likely to be related to the TAC increase in the Iberian waters since 2022 (42%). Extra-EU exports go mainly to Albania and Morocco for further processing and re-import into the EU market, and to the United States and the United Kingdom as prepared or preserved products. The increased supply in the Atlantic seaboard Member States resulted in significant increases in exports in volume from Portugal, Spain, and France: 140%, 17%, and 21% respectively between 2022 and 2025.

7. 1. Biology resource and exploitation

Biology

European anchovy (*Engraulis encrasicolus*) is a member of the Engraulidae family. It is an oceanic and marine species, although in some areas also enters lagoons, estuaries and lakes, especially when spawning.

Source: Scandinavian Fishing Yearbook

European anchovy is found along the Eastern Atlantic coast from Norway to South Africa as well as in the Mediterranean and Black Sea[37], and the Azov Sea, with stray individuals in the Suez Canal and the Gulf of Suez. There have also been reports of European anchovy in the Baltic Sea[38]. This species lives and moves in large shoals and can tolerate salinity concentration ranging from 5 to 41 ppt.

Shoals can be found in different areas and at different depths depending on the season. Anchovy tends to move further north and into surface waters during the summer, while retreating to lower depths during winter. The species feeds on planktonic organisms. The spawning period is from April to November, with peaks usually in the warmest months[39].

Resource, exploitation, and management in the EU

European anchovy is a highly commercial species. In European waters it is mainly caught by purse seines and pelagic trawlers[40]. The period of highest catches of European anchovy is from May to September. On average, during 2023 and 2024, 80% of catches were made with purse seines, 11% with pelagic trawls, 7% with gear using hooks, and 2% with trawls or demersal seines.

It can be marketed fresh, dried, smoked, canned, salted or in brine and frozen. Anchovy can also be processed into oil or fishmeal for use in aquaculture feed. Since anchovy can be preserved by salting or storing in oil, it has been used for long-distance trade for many centuries.

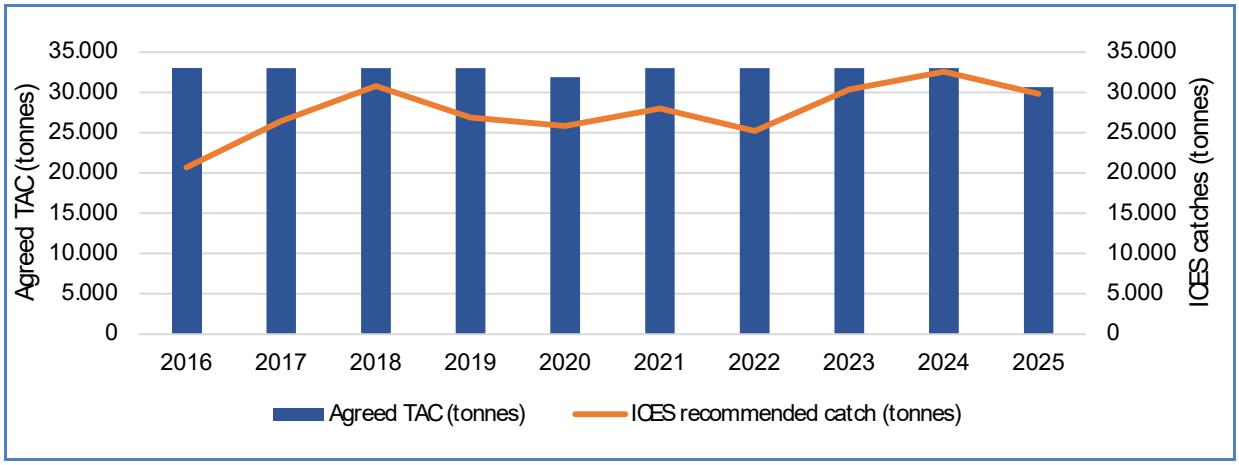
European anchovy is managed by a total allowable catch (TAC), except for the stock in the Mediterranean Sea. Anchovy is subject to fisheries management measures, including fishery closures and TACs in the ICES Subarea 8 (Bay of Biscay)[41] and in Division 9.a (Atlantic Iberian waters)[42]. In the Mediterranean Sea, the anchovy fishery is managed through the General Fisheries Commission for the Mediterranean (GFCM), with regulations and recommendations binding on all members, including the EU (this includes various

[36] FAO
[37] https://fish-commercial-names.ec.europa.eu/fish-names/species/engraulis-encrasicolus_en#ecl-accordion-header-distrib-habitat
[38] https://www.fishbase.se/summary/engraulis-encrasicolus.html
[39] Ibidem
[40] STECF
[41] Anchovy (*Engraulis encrasicolus*) in Subarea 8 (Bay of Biscay) (ICES)
[42] Anchovy (*Engraulis encrasicolus*) in Division 9.a (Atlantic Iberian waters) (ICES)

spatiotemporal and fishing effort measures such as maximum number of fishing days, catch limits per vessel, and fishery closures)[43]. Moreover, EU Regulation 2015/812 sets a minimum conservation reference size (MCRS) which varies according to the fishing area[44].The MCRS can range between 9 and 12 cm. The MCRS must also be from ≥ 90 pieces/kg to ≥ 110 pieces/kg depending on the fishing zone[45].

The stocks in the North-East Atlantic, the Ligurian Sea, the Ionian Sea, and the Aegean Sea are considered to be in good condition, while the stocks in the Black Sea, the Adriatic Sea, and the Southern Iberian coast are classified as degraded and overfished[46]. Those in the Gulf of Lion, the Azov Sea, the South Sicily, and the Western Iberian coast (27.9.a) are classified as replenishable[47]. The European anchovy stock located in the North-East Atlantic was closed for fishing from 2005 to 2010 to protect the stock, which had been severely depleted. There are also temporal or spatio-temporal closure periods depending on the fishing zones and the state of stocks. While TACs in the Bay of Biscay remained relatively stable over the 2016-2025 period, TACs in the Iberian waters increased by 42% between the period from 2021-2022 and 2024-2025.

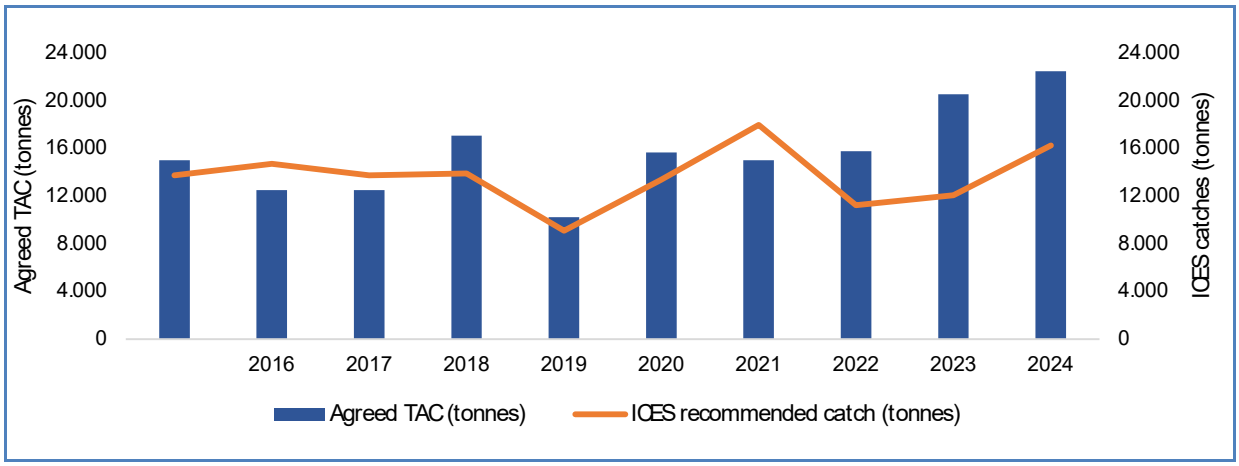
Figure 49. **TOTAL ALLOWABLE CATCH: EUROPEAN ANCHOVY – BAY OF BISCAY**



Source: ICES, 2025.

Notes: - In 2016, the initial TAC was set at 25.000 tonnes; in June 2016 it was raised to 33.000 tonnes.
- For the year 2025, catch estimates are preliminary.

Figure 50. **TOTAL ALLOWABLE CATCH: EUROPEAN ANCHOVY – ATLANTIC IBERIAN WATERS**



Source: ICES, 2025.

Notes: - Catch advice provided for the western and southern components from 1 July in the year to 30 June in the year y+1.

[43] FishSource - European anchovy - Adriatic Sea
[44] *Engraulis encrasicolus* (europa.eu)
[45] Ibidem
[46] Anchois | Guide des espèces (guidedesespeces.org)
[47] Ibidem

- For the year 2021-2022, catch estimates of the first two quarters of 2022 are provisional.
- For the year 2025, catch estimates are provisional based on the two quarters of the years.

7. 2. Production

Catches

In 2023, global production of European anchovy amounted to 577.633 tonnes. The leading producer by volume was Türkiye, accounting for 47% of the global catches, followed by the EU-27 (17%), Georgia (13%), and Ghana (11%). The main EU countries in terms of catch volumes were Spain (45%), Italy (20%), Croatia (14%), Greece (12%), and to a lesser extent Portugal and France, accounting together for 99% of total EU catches in 2023.

Between 2014 and 2023 global catches of European anchovy species have been significantly increasing despite fluctuations (105% overall). Turkish production soared (184%), while EU catches remained relatively stable (-4%).

Table 45. **TOTAL WORLD CATCHES OF EUROPEAN ANCHOVY (volume in tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol. 2023/2014
Türkiye	96.440	193.492	102.595	158.094	96.452	262.544	171.253	151.598	125.980	273.915	+184%
EU-27	**102.705**	**127.926**	**115.315**	**127.706**	**135.404**	**114.770**	**103.790**	**104.983**	**100.685**	**98.883**	**-4%**
Georgia	18.000	21.500	25.921	99.293	90.043	89.813	83.025	75.284	68.500	74.065	+311%
Ghana	6.127	5.368	13.230	38.409	60.975	41.667	44.690	73.467	90.257	62.517	+920%
Morocco	17.768	24.963	26.881	17.682	22.930	19.622	50.078	48.166	19.064	36.727	+107%
Russian Federation	21.745	45.683	48.676	50.217	36.679	32.359	31.167	24.074	19.513	14.080	-35%
Egypt	3.641	3.242	2.657	3.448	4.570	4.491	4.962	4.718	5.319	5.425	+49%
Togo	6.597	8.983	11.297	10.691	10.588	10.607	4.648	3.814	2.828	5.231	-21%
Others	9.366	10.280	9.634	11.555	21.734	21.559	12.948	7.913	11.503	6.790	-28%
Total	**282.390**	**441.436**	**356.206**	**517.095**	**479.375**	**597.432**	**506.561**	**494.017**	**443.649**	**577.633**	**+105%**

Source: FAO.

Ladings in the EU

In 2023, landings of European anchovy in the EU-27 amounted to 98.385 tonnes. Since 2014, Spain has been the main landing EU country, accounting for 46% of the total EU landing volumes in 2023, followed by Italy (20%). Other main landing countries were Croatia (14%), and Greece (12%).

From 2014 to 2023, EU-27 landings of European anchovy remained relatively stable (-4%) despite fluctuations with peaks in 2015, 2017 and 2018. There was nevertheless a 6% increase in Spanish anchovy production and a strong increase in Portuguese production (459%), which are likely to be related to the increase in TACs in the Bay of Biscay and in Iberian waters, whereas a 39% decrease in Italy and a 49% decrease in France were reported.

Table 46. **LANDINGS OF EUROPEAN ANCHOVY IN THE EU (volume in tonnes)**

COUNTRY	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Spain	42.722	49.922	46.192	50.774	59.502	47.776	48.607	49.582	43.952	45.208
Italy	31.842	37.511	37.969	39.039	36.331	31.068	23.736	23.725	24.157	19.567
Croatia	9.114	12.624	8.233	10.880	13.251	7.993	9.781	11.621	13.912	13.833
Greece	9.847	13.515	11.562	13.033	13.208	15.278	11.276	7.322	12.818	11.527
Portugal	818	2.546	6.937	9.059	8.311	9.126	5.484	9.638	3.538	4.567
France	6.935	5.653	3.659	4.491	4.342	3.062	1.233	829	1.156	3.554
Others	1.260	5.139	670	287	516	490	3.483	2.060	549	128
Total	**102.538**	**126.909**	**115.221**	**127.562**	**135.460**	**114.794**	**103.599**	**104.776**	**100.082**	**98.385**

Source: EUMOFA elaboration of Eurostat data

Processing

Anchovy can be consumed fresh or processed. The main processed anchovy products are preserved in oil, salted or marinated[48]. In Eurostat-Prodcom data, only prepared or preserved anchovy are listed[49]. In 2023, EU production of prepared and preserved anchovy amounted to 18.507 tonnes, a 22% increase compared to ten years earlier despite significant fluctuations. EU production peaked in 2020 at 38.000 tonnes before declining by 27% between 2021 and 2023. The main producers were Spain (64% of EU production in 2023) and Italy (29%), and to a lesser extent Greece (4%), France (2%), and Croatia (1%). Spain and Italy recorded significant increases between 2014 and 2023, with production rising by 18% and 54% respectively. Italy's production decreased by 45% between 2021 and 2023, and Spanish production declined by 13% over the same period likely due to global inflation and supply chain tensions. Between 2014 and 2023, production soared in France (157%), while in Greece it decreased by 10% and in Croatia by 62%.

Table 47. **EU PRODUCTION OF PREPARED OR PRESERVED ANCHOVIES (volume in tonnes)**

Country	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Spain	10.012	10.396	11.124	11.120	11.174	11.392	9.997	14.310	n.d.	11.854
Italy	3.482	3.340	4.484	7.335	16.557	13.712	26.704	9.675	8.593	5.369
Greece	723	750	840	806	745	792	747	744	547	650
France	143	110	n.d.	n.d.	n.d.	n.d.	357	339	318	366
Croatia	700	329	24	33	12	4	142	294	580	263
Portugal	n.d.	6	15	16	n.d.	n.d.	3	3	3	5
Estonia	99	992	222	24	n.d.	n.d.	118	119	n.d.	n.d.
Total	**15.158**	**15.923**	**16.709**	**19.334**	**28.488**	**25.900**	**38.069**	**25.484**	**10.041**	**18.507**

Source: Prodcom Eurostat

7. 3. European anchovy: first sales in the EU

In 2025 (from January to November[50]), first sales of European anchovy in reporting countries amounted to 82.975 tonnes at a value over EUR 170 million and an average nominal price of 2,05 EUR/kg. Among the reporting countries, Spain accounted for most first-sale volumes (55%), followed by Italy (13%), Portugal (11%), Greece (10%), Croatia (9%), and to a lesser extent France (2%). More than half of the first sales occurred in the Atlantic seaboard (Spain, Portugal, and France) reaching 57.218 tonnes at a value of EUR 117 million in 2025.

Between 2016 and 2025[51], first-sale volumes decreased by 13% in Spain and by 51% in France, while first sales increased by 32% in Portugal over the same period. Overall, first sales across the Atlantic seaboard decreased by 10% in volume over the period (2016-

[48] https://www.eumofa.eu/documents/20178/111808/Price+structure+-+Anchovy+in+Italy.pdf
[49] 10202560 - Prepared or preserved anchovies, whole or in pieces (excluding minced products and prepared meals and dishes)
[50] Last month available for first sale data in Portugal in 2025
[51] Evolutions are calculated over the January-November period

2025). However, first-sale volumes on the Atlantic seaboard have been increasing significantly since 2022 (19% overall), driven by Portuguese first sales (171% between 2022 and 2025) and Spanish sales (6%). First sales in France are limited compared to Spain and Portugal, but volumes have been rising and anchovies caught are large, resulting in favorable prices for fishers (3,11 EUR/kg in June 2025 at the auction of La Turballe) especially for supplying Spanish demand[52].

Table 48. **FIRST SALES OF EUROPEAN ANCHOVY IN MS OF THE ATLANTIC SEABOARD (volume in tonnes, nominal price in EUR/kg)**

COUNTRY		2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Evol. 2025/2016**
Spain	Tonnes	53.146	47.747	54.336	47.311	48.449	49.660	43.580	44.536	49.930	46.470	-13%
	EUR/kg	1,79	1,73	1,50	1,73	1,49	1,69	1,86	2,04	1,83	2,03	14%
Portugal	Tonnes	6.925	9.021	8.198	9.115	5.475	9.630	3.534	4.566	5.880	9.114	32%
	EUR/kg	1,70	1,58	1,32	1,61	1,68	1,86	3,42	3,44	2,23	1,97	16%
France	Tonnes	3.348	4.403	4.276	3.138	1.270	825	986	3.776	1.560	1.635	-51%
	EUR/kg	2,00	1,02	1,05	1,04	1,16	1,27	1,27	0,92	1,00	2,66	34%

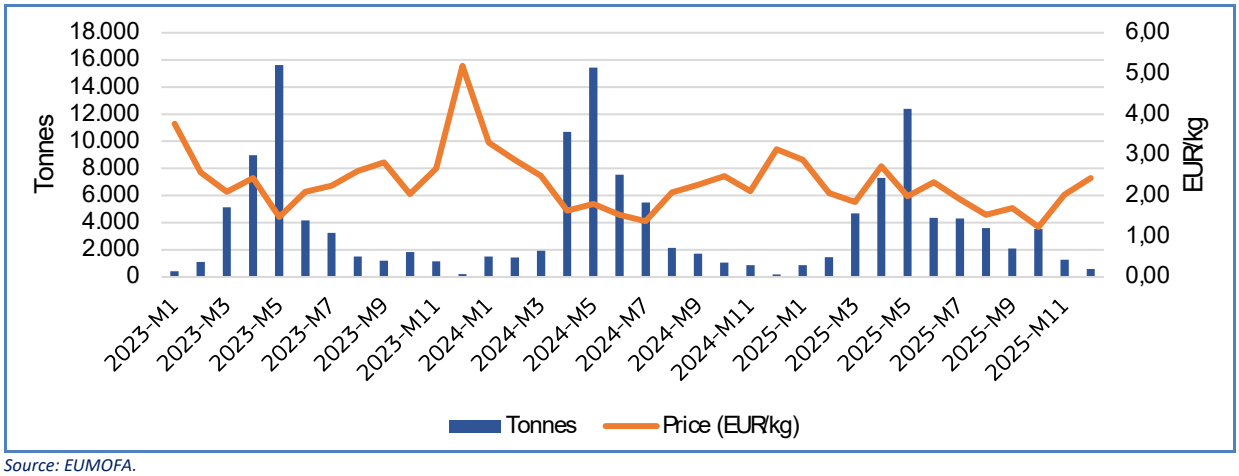
Source: EUMOFA
**From January to November (last month available in Portugal)*
*** Evolutions are given for the period from January to November for all years*

In all main reporting countries on the Atlantic seaboard, first-sales data show a strong seasonality. In Spain, the majority of first sales occur between April and July (on average 70% of annual first sales in volume), the peak fishing season being in May, while in Portugal most of the first sales occur between August and November (81%). In France, first-sale volumes are less significant, but a peak season is observed, with most sales occurring in summer between July and September (62%). In Spain, the variation in first-sale prices always seems to be correlated to first-sale volumes, with prices peaking each year from November to January when volumes are at their lowest levels, and low prices in summer and spring during the high-volume season. This correlation between price and volume is less clearly observed in Portugal and France with more price fluctuations all year round.

Nominal prices recorded in Spain between January 2023 and November 2025[53] (1,96 EUR/kg on average) were lower than nominal prices recorded in Portugal (2,39 EUR/kg) but higher than in France (1,33 EUR/kg).

In 2025[54], four of the five most important places of sale for European anchovy in volume terms located on the Atlantic seaboard were in Spain with Santoña, Gijón, Laredo, and A Coruña. Located in Portugal, Matosinhos was in second position in volume terms. La Turballe was the first French place of sale for European anchovy in 2025, ranking 15th in volume on the Atlantic seaboard.

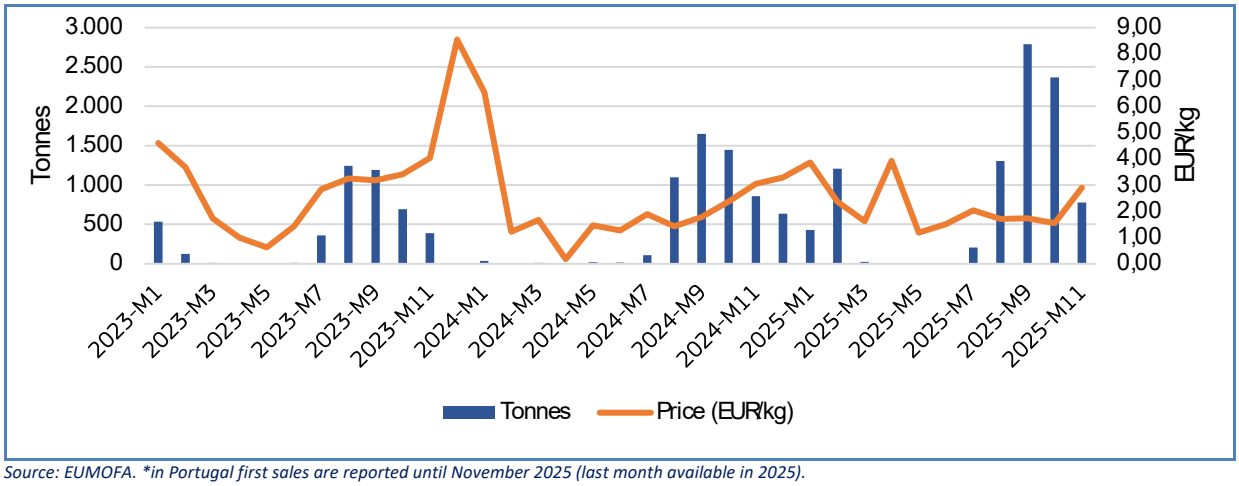
Figure 51. **FIRST SALES: EUROPEAN ANCHOVY IN SPAIN**



Source: EUMOFA.

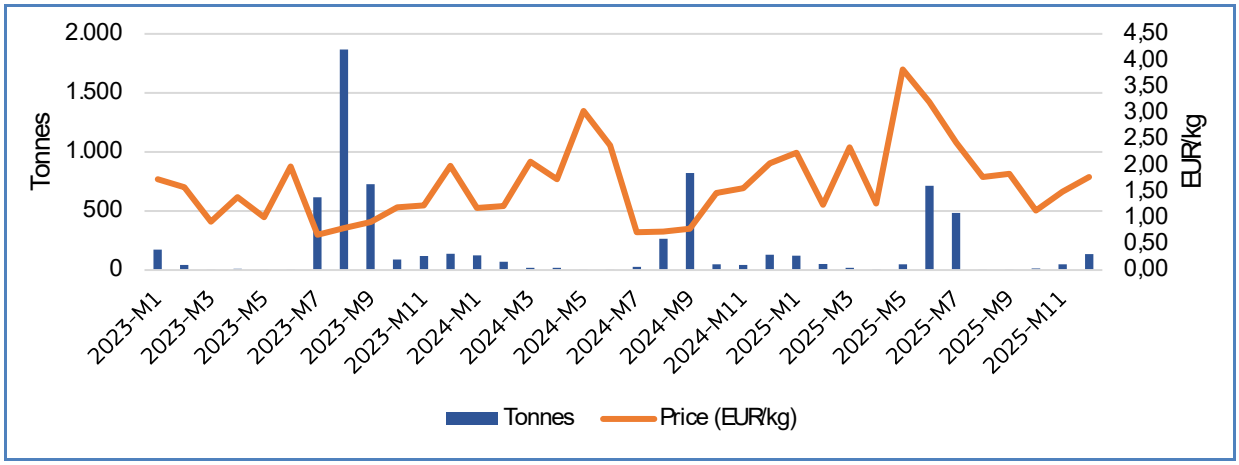
[52] https://lemarin.ouest-france.fr/peche/dans-le-golfe-de-gascogne-les-pecheurs-francais-font-une-tres-belle-saison-a-lanchois-7f8f77fa-5285-11f0-9865-cae506d28d23
[53] Last month available for first sale data in Portugal in 2025
[54] Over the period from January to November

Figure 52. **FIRST SALES: EUROPEAN ANCHOVY IN PORTUGAL***



*Source: EUMOFA. *in Portugal first sales are reported until November 2025 (last month available in 2025).*

Figure 53. **FIRST SALES: EUROPEAN ANCHOVY IN FRANCE**



Source: EUMOFA.

7. 4. International trade

EU trade flows and supply

In the CN nomenclature[55] used for registering EU import-export data, anchovy was specifically reported as fresh, prepared or preserved, salted or in brine, frozen and dried (even salted but not smoked)[56].

In 2025, the EU-27 imported 32.092 tonnes of anchovy at a value of EUR 257 million, mostly prepared or preserved (92% of total value of imports). The major provider of anchovy to the EU market was Morocco, accounting for 70% of the extra-EU import value, followed to a lesser extent by Albania (12%), Peru (8%), and Tunisia (6%). Spain received 44% of the anchovy extra-EU import value. Spain, Italy and France together account for 94% of extra-EU import value.

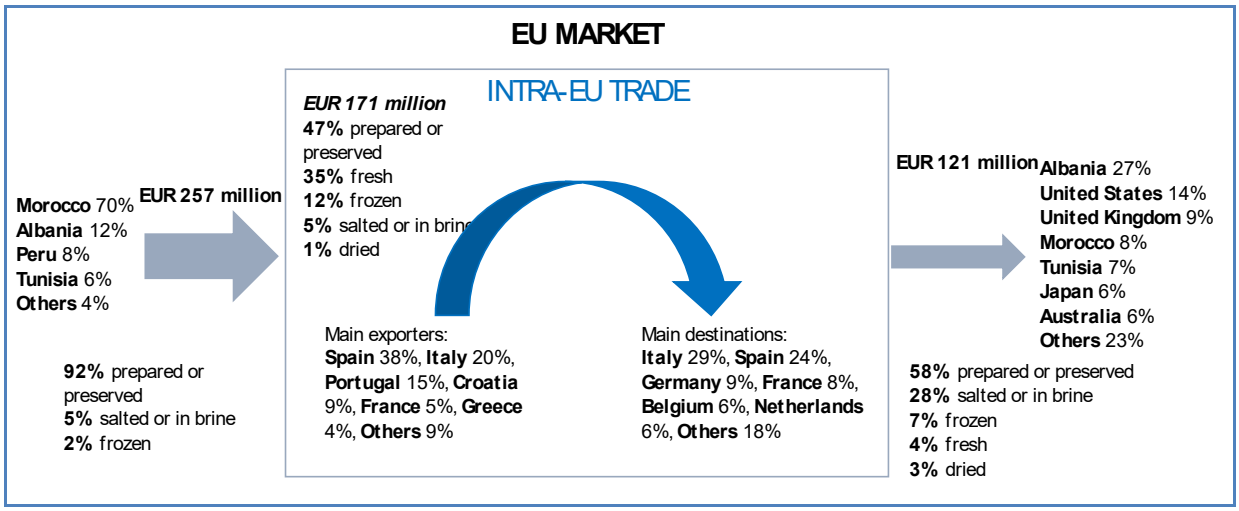
In the same year, EU exports to third countries amounted to 22.471 tonnes at a value of EUR 121 million. Prepared or preserved anchovy accounted for 58% of the total extra-EU export value whereas salted or in brine products accounted for 28% of the total export

[55] The Combined Nomenclaure (CN) is the EU's eight-digit coding system, comprising the Harmonised System (HS) codes with further EU sub-divisions. It serves the EU's common customs tariff and provides statistics for trade within the EU and between the EU and the rest of the world.
[56] 03024200 - Fresh or chilled anchovies "*Engraulis* spp."
03035910 - Frozen anchovies "*Engraulis* spp."
03055450 - Dried anchovies "*Engraulis* spp.", even salted but not smoked (excl. fillets and offal)
03056300 - Anchovies "*Engraulis* spp.", salted or in brine only (excl. fillets and offal)
16041600 - Prepared or preserved anchovies, whole or in pieces (excl. minced)
16042040 - Prepared or preserved anchovies (excl. whole or in pieces)

value. The main destination in value terms was Albania, accounting for 27% of the total extra-EU export value, followed by the United States (14%), the United Kingdom (9%), and Morocco (8%). Most of these exports to Morocco and Albania are probably destined for further processing (canning) and imported back into the EU. Spain and Italy were the main exporters of anchovy to third countries, each accounting for 44% of the total extra-EU export value.

In 2025, intra-EU exports amounted to 38.341 tonnes of European anchovy products at a value of EUR 171 million. The intra-EU trade was dominated by prepared or preserved anchovy, which accounted for 47% of the trade value, followed by fresh or chilled products (35%), and frozen products (12%). The main exporting countries within the EU were Spain (38% of the intra-EU export value) and Italy (20%), followed by Portugal (15%) and Croatia (9%). Italy (29% of the total intra-EU export value), Spain (24%), Germany (9%), and France (8%) were the main destinations for the intra-EU exports.

Figure 54. **THE ANCHOVY TRADE MARKET IN 2025 (from January to October), IN VALUE**



Source: EUMOFA elaboration of Eurostat-COMEXT data.

Spanish imports of anchovy comprised mainly prepared and preserved products (75% of the Spanish imported value in 2025) and fresh anchovy (16%). Spanish imports have increased overall by 60% in volume since 2020, driven by the rise in imports of prepared and preserved and fresh products by 54% and 68% respectively. In 2025, imports of prepared or preserved anchovy reached a nominal price of 9,74 EUR/kg (+14% since 2020), while fresh imports reached a nominal price of 2,26 EUR/kg (+28%). The same year, almost all French imports consisted of prepared or preserved products (92% of the imported value). The imported volume of prepared and preserved anchovy remained relatively stable since 2020 (+5%), but the nominal price rose by 24%, reaching 9,61 EUR/kg in 2025.

Table 49. **EVOLUTION OF IMPORTS OF ANCHOVY IN MS OF THE ATLATIC SEABOARD (tonnes, 1.000 EUR, NOMINAL PRICE IN EUR/kg)**

Product		2020	2021	2022	2023	2024	2025	Evol. 2025/2020
Spain - Fresh	Value	11.398	18.362	15.316	20.440	17.087	24.453	115%
	Volume	6.424	9.461	5.376	7.408	6.983	10.804	68%
	Price	**1,77**	**1,94**	**2,85**	**2,76**	**2,45**	**2,26**	**28%**
Spain – Prepared or preserved	Value	63.913	75.870	77.844	86.734	105.193	112.255	76%
	Volume	7.466	9.606	9.043	9.045	10.285	11.523	54%
	Price	**8,56**	**7,90**	**8,61**	**9,59**	**10,23**	**9,74**	**14%**
France – Prepared or preserved	Value	35.091	37.380	39.842	42.608	47.064	45.642	30%
	Volume	4.512	4.815	4.723	4.524	4.762	4.750	5%
	Price	**7,78**	**7,76**	**8,43**	**9,42**	**9,88**	**9,61**	**24%**

Source: *EUMOFA elaboration of Eurostat-COMEXT data*

Between 2020 and 2025 Spanish exports of anchovy increased by 13% in volume and by 45% in value. Exports of prepared and preserved products (55% of the exported value in 2025) increased by 12% in volume over the same period, reaching a nominal price of 17,64 EUR/kg (+27% since 2020). Fresh exports increased by 15%, reaching a nominal price of 3,10 EUR/kg, while salted exports experienced a 12% decline in volume over the same period. The same year, Portuguese exports comprised almost exclusively fresh

anchovy. Exported volume of fresh anchovy increased by 59% since 2020, reaching a nominal price of 2,47 EUR/kg (+21% since 2020). French exports fluctuated over the 2020-2025 period, peaking in 2023. Overall exports increased slightly in volume (10%). Since 2020 fresh exports have risen by 38% in volume, while salted exports have decreased by 36%. Nominal prices increased by 54% for fresh exports, and by 31% for salted exports.

Table 50. **EVOLUTION OF EXPORTS OF ANCHOVY FROM MS OF THE ATLATIC SEABOARD (tonnes, 1.000 EUR, NOMINAL PRICE IN EUR/kg)**

Product		2020	2021	2022	2023	2024	2025	Evol. 2025/2020
Spain - Fresh	Value	10.980	16.285	11.290	13.917	16.056	19.985	82%
	Volume	5.598	7.040	4.357	5.551	6.151	6.451	15%
	Price	**1,96**	**2,31**	**2,59**	**2,51**	**2,61**	**3,10**	**58%**
Spain – Prepared or preserved	Value	46.304	52.610	55.201	55.496	63.510	65.628	42%
	Volume	3.331	4.102	3.787	3.399	3.625	3.719	12%
	Price	**13,90**	**12,83**	**14,58**	**16,33**	**17,52**	**17,64**	**27%**
Spain - Salted	Value	16.570	17.202	14.120	15.295	19.670	17.286	4%
	Volume	6.917	7.052	5.606	6.219	6.933	6.023	-13%
	Price	**2,40**	**2,44**	**2,52**	**2,46**	**2,84**	**2,87**	**20%**
Portugal - Fresh	Value	12.496	21.971	15.040	19.731	18.626	24.125	93%
	Volume	6.142	10.239	4.210	5.515	6.850	9.785	59%
	Price	**2,03**	**2,15**	**3,57**	**3,58**	**2,72**	**2,47**	**21%**
France – Prepared or preserved	Value	6.951	6.822	6.861	7.727	9.594	5.852	-16%
	Volume	664	706	628	634	674	425	-36%
	Price	**10,47**	**9,66**	**10,93**	**12,18**	**14,23**	**13,76**	**31%**

Source: *EUMOFA elaboration of Eurostat-COMEXT data*

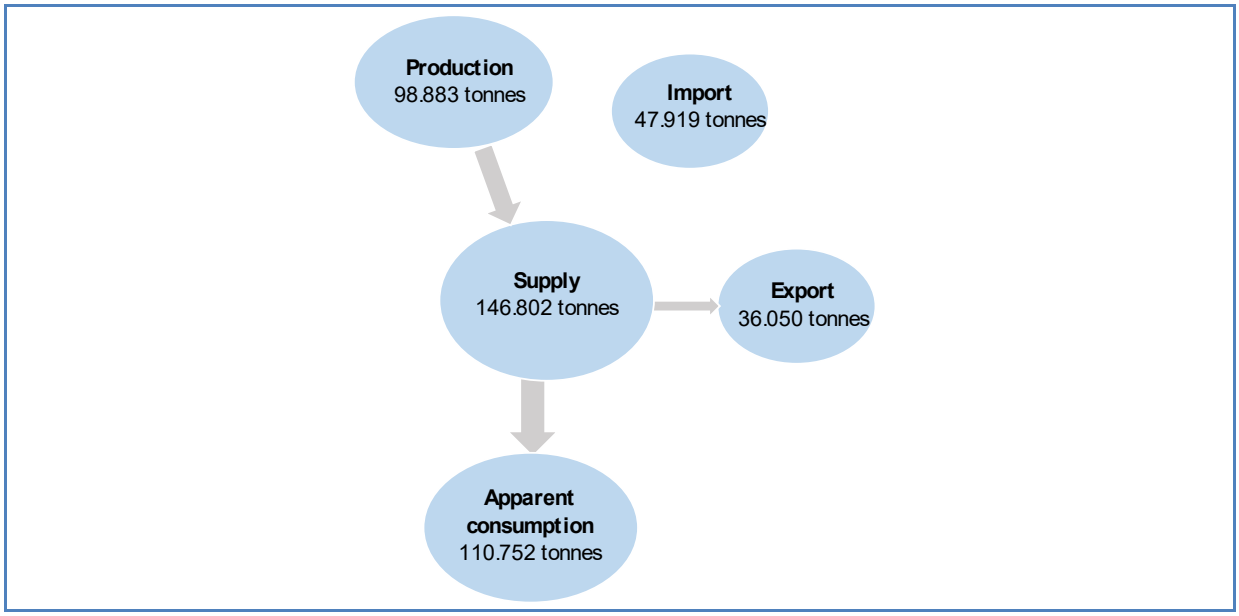
7. 5. Consumption

Apparent consumption of anchovy at EU level was estimated at 110.752 tonnes LWE in 2023 (-5% compared to 2020), equivalent to a per capita consumption of 0,25 kg. Supply reached 146.802 tonnes LWE, originating mainly from EU fisheries (67% of the volume), while imports accounted for the remaining 33% of the volume. One quarter of the EU supply was exported. Apparent consumption of anchovy was thus estimated at 110.752 tonnes LWE in 2025 (75% of the supply).

At MS level, the main consumption markets of anchovy were Spain with a consumption estimated at 48.186 tonnes LWE in 2023, equivalent to 1,002 kg per capita, followed by Italy (28.638 tonnes LWE; 0,485 kg per capita), and France (10.252 tonnes LWE; 0,150 kg per capita). Apparent consumption in Portugal is not given as the result was negative for 2023[57]. The French markets rely mostly on imports (74% of the supply in volume) and to a lower extent national catches (26%), whereas the Spanish supply of anchovy originates mainly from national catches (59%).

[57] Some discrepancies appear in the data. Indeed in 2023, Portuguese exports of fresh anchovy exceeded the national catches. This can be due to reporting errors, especially considering the significant flows between PT and ES.

Figure 55. **APPARENT CONSUMPTION OF ANCHOVY IN 2023 (tonnes, LWE)**



Source: EUMOFA elaboration of EUROSTAT and EUROSTAT-COMEXT 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: FishBase, Leroy, We are Aquaculture, Seafood Europe, FAOSTAT, Eurostat, Eurostat COMEXT, ICES, Fishbase, FishSource, Anchois | Guide des espèces, Ouest France.

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

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