European Commission



THE EU FISH MARKET

2026 EDITION



HIGHLIGHTS
THE EU IN THE WORLD
MARKET SUPPLY
CONSUMPTION
IMPORT – EXPORT
LANDINGS
AQUACULTURE

EUMOFA

European Market Observatory for Fisheries and Aquaculture Products

Maritime affairs and fisheries

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Scope

"The EU fish market" aims at providing an economic description of the whole European fisheries and aquaculture industry. It replies to questions such as what is produced/exported/imported, when and where, what is consumed, by whom and what are the main trends.

A comparative analysis allows to assess the performance of fishery and aquaculture products in the EU market compared with other food products. In this report, value and price variations for periods longer than five years are analysed by deflating values using the GDP deflator (base=2020); for shorter periods, nominal value and price variations are analysed.

This publication is one of the services delivered by the European Market Observatory for Fisheries and Aquaculture Products (EUMOFA).

This edition is based on data available as of November 2026. The analyses included in this report do not take into account possible updates occurred in the sources used after this date.

More detailed and complementary data are available in the EUMOFA database: by species, place of sale, Member State, partner country. Data are updated daily.

EUMOFA, developed by the European Commission, represents one of the tools of the Market Policy in the framework of the Common Fisheries Policy. [Regulation (EU) No 1379/2013 on the common organisation of the markets in fishery and aquaculture products, Article 42].

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

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

EUMOFA website, publicly available as from April 2013, can be accessed at https://fishery-aquaculture-market-observatory.ec.europa.eu/.

Foreword



Welcome to the EU Fish Market 2026.

This publication is crucial, as each year it offers a valuable snapshot of how Europe's fishery and aquaculture market is evolving in a changing economic and environmental context.

This edition shows a market under pressure, but also one that continues to adapt, innovate and create value across the supply chain.

Recent years have been marked by geopolitical, economic, and climate uncertainty, which put the European fishery and aquaculture sector under a continued pressure. High energy and production costs, a slight but persistent decline in consumption, to name a few challenges.

Nevertheless, the report highlights that the EU remains a major global player on the fishery and aquaculture products' market. It is the world's second-largest market in terms of trade, after China. In terms of consumption, it ranks fourth, after China, India and Indonesia.

Fisheries have shaped Europe's coastal communities and traditions for centuries. Yet, the latest data from the EU Fish Market confirm the EU remains highly dependent on imports from third countries to meet market demand.

It is in this context that the European Commission adopted the Vision 2040 for Fisheries and Aquaculture, aiming to support the sector's competitiveness and growth. The Vision sets out a long-term direction, providing fishers, aquaculture producers and the wider value chain with the predictability they need to thrive. It also aims to strengthen EU food security, maintain fish stocks at sustainable levels and ensure a level playing field with global competitors.

Going beyond the provision of market data, the EU Fish Market report, elaborated by the European Union Market Observatory for Fisheries and Aquaculture Products, will help you understand the complexity and interdependencies of a sector which employs tens of thousands of women and men across the EU and is vital for our long-term food security.

I wish you an insightful reading.

***Costas Kadis**, European Commissioner for Fisheries and Oceans*

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METHODOLOGICAL BACKGROUND

The present report is mainly based on consolidated and exhaustive volume and value data collected through different sources and published by EUMOFA at all stages of the supply chain. Within EUMOFA, data on fisheries and aquaculture products are harmonised into "Main commercial species", each referring to "Commodity groups", in order to allow comparisons along the different supply chain stages.
More information on the procedures adopted by EUMOFA to harmonise data are available the link https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/metadata.

MAIN SOURCES OF DATA

EUMOFA, EUROSTAT, national administrations of the EU, FAO, OECD, Europanel/Kantar/GFK, Trade Data Monitor (TDM) and Euromonitor. The sections below in this Methodological background provide detailed information on the sources used.

CATCHES

Catches include all products fished by a country's fleet in any fishing area (both marine and inland waters), independently from the area of landing/selling. Data excludes marine mammals, crocodiles, corals, pearls, mother-of-pearl, shells, and sponges. Catches data are provided in this report in live weight equivalent.

The main source used by EUMOFA for catches data of EU countries is Eurostat (online data code fish_ca_main, extraction made on 12 June 2026). For non-EU countries, data were collected from FAO. Information provided by the Russian Federation includes statistical data for the Autonomous Republic of Crimea and the city of Sevastopol, Ukraine, temporarily occupied by the Russian Federation (source: https://microdata.fao.org/index.php/catalog/3081). The same applies to aquaculture data. As catches data are available up to 2024, in line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, UK is excluded from the EU aggregations of each year.

For the purpose of properly conducting an analysis on EU catches, EUMOFA has integrated EU data with data collected from the FAO database, as Eurostat does not provide data on catches in inland waters. In addition, in case data for some species were confidential on Eurostat, figures from FAO were used, if available. The list below reports such instances (for all other instances not reported in this list, only Eurostat data were used):

- Denmark: 2018 and 2019 data on Northern prawn.
- Greece: 2016, 2017, and 2018 data on several species.
- Ireland: data on several species for the period 2018-2024, as well as 2010-2011 data on horse mackerels other than Atlantic horse mackerel.
- Latvia: 2021 data on cod and 2017, 2018, 2019, 2022 and 2023 data on several species.
- Portugal: 2023-2024 data on several species.

Moreover, other issues to consider are the following:

- data include FAO forecasts for most of non-EU and EU countries.
- for some EU Member States, Eurostat data include estimates and provisional figures, as below listed:
    - Bulgaria: 2017 and 2020 data are national estimates.
    - Denmark: data on Northern prawn are national estimates for 2017, while those of 2021, 2023 and 2024 are provisional.
    - Finland: 2016 and 2017 data are national estimates, and 2020 and 2021 data are provisional.
    - France: data for the period 2018-2021 data are provisional.
    - Germany: 2017 data for almost all species are provisional.
    - Ireland: 2017 data on saithe, haddock and "anglerfishes nei" are national estimates.
    - Italy: 2018, 2020 and most of 2019 data are provisional.
    - Romania: 2017 data are national estimates.

AQUACULTURE

The main source used by EUMOFA for aquaculture data of EU countries is Eurostat (online data codes fish_aq2a and fish_aq2b, extractions made on 28 May 2026). For non-EU countries and Luxembourg, data were collected from FAO.

As aquaculture data are available up to 2024, in line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, UK is excluded from the EU aggregations of each year.

For the purpose of properly conducting an analysis on aquaculture production in the EU, in some instances EUMOFA has integrated Eurostat EU data with data deriving from FAO, when available. The list below reports such instances, as well as those instances for which Eurostat data are estimates or provisional figures. For all other instances not reported in this list, only Eurostat data were used.

- Austria: For the period 2015-2019, data for some species were collected from FAO.
- Belgium
    - 2016 data for some species were collected from FAO.
    - For the period 2017-2022 and for 2024, data were collected from FAO.
- Bulgaria
    - 2016-2017 values for seaweed and eel were collected from FAO.
    - 2018 data for seaweed were collected from FAO.
    - 2019-2020 data for oyster were collected from FAO.
    - 2020 and 2024 data on the grouping "other freshwater fish" were collected from FAO.
- Croatia
    - 2020 data the grouping "other freshwater fish" were collected from FAO.
    - 2021 data were collected from FAO.
    - 2022 data on trout were collected from FAO.

  - 2024 data on oyster was collected from FAO.
- Czechia: 2020 data on freshwater catfish were collected from FAO.
- Denmark
  - Data on salmon were collected from FAO.
  - For the period 2015-2018, data for seaweed were collected from FAO.
  - 2015 and 2016 data for several species were collected from FAO.
  - 2017 and 2018 data for pike-perch and other salmonids were collected from FAO.
  - 2018 data on eel were collected from FAO.
  - 2019 and 2021 data on values were collected from FAO.
  - 2020, 2022, 2023 and 2024 data on most of the species were collected from FAO.
- Estonia: For the period 2015-2024 data for some species were collected from FAO.
- Finland: 2024 data for some species were collected from FAO.
- France
  - Data on sole for the period 2015-2023 were collected from FAO.
  - Data on salmon and turbot for the period 2015-2017 were collected from FAO.
  - 2016 and 2017 data on carp, catfish and other freshwater fish include National estimates available in Eurostat.
  - 2018 and 2019 data on carp, pike, pike-perch and on the grouping “other freshwater fish” include National estimates available in Eurostat.
  - 2019, 2020 and 2024 data for abalone were collected from FAO.
  - 2024 data for shrimps were collected from FAO.
- Germany: Data for several species were collected from FAO.
- Greece
  - 2015 and 2016 data on some species were collected from FAO.
  - 2017 data are National provisional figures available in Eurostat.
  - 2022 and 2024 data were collected from FAO.
- Hungary
  - 2016 data for the grouping “other freshwater fish” were collected from FAO.
  - 2020 data for freshwater catfish were collected from FAO.
- Ireland
  - 2015 and 2016 data of the grouping “Other molluscs and aquatic invertebrates” were collected from FAO.
  - 2017 and 2018 data are National estimates available in Eurostat.
  - 2020 data for molluscs were collected from FAO.

- Italy
    - 2015 data are National estimates and forecasts available in Eurostat.
    - 2017 data on grooved carpet shell were collected from FAO.
    - 2020 data for warmwater shrimps were collected from FAO.
- Latvia
    - 2015, 2017 and 2018 data for several species were collected from FAO. For 2023, this was made for freshwater fish only.
    - 2019 data for pike and pike-perch were collected from FAO.
- Lithuania: 2019 and 2020 data for pike-perch were collected from FAO.
- Malta: 2024 data were collected from FAO.
- Netherlands
    - For eel, freshwater catfish and the grouping “other marine fish”, 2015, 2018 and 2019 values are National estimates available in Eurostat.
    - For mussel, 2015 and 2016 data are National estimates available in Eurostat.
    - For turbot, data on the period 2015-2017 were collected from FAO.
    - For pike-perch, all data were collected from FAO.
    - 2019, 2020, 2023 and 2024 data on several species were collected from FAO.
- Poland
    - 2016 data on tilapia were collected from FAO.
    - 2019 and 2020 data on the grouping “other freshwater fish” were collected from FAO.
    - 2021 data were collected from FAO.
- Portugal
    - For 2015, data on trout and clam are National estimates available in Eurostat while data on all other species are National provisional figures available in Eurostat.
    - For the period 2015-2018, data on sea mussels were collected from FAO.
    - 2020 data on the grouping “other marine fish” were collected from FAO.
- Romania
    - 2015 data are National estimates available in Eurostat.
    - For turbot, 2015-2016 data were collected from FAO.
    - 2019 data are National estimates available in Eurostat.
    - 2020 data on freshwater catfish and on the grouping “other freshwater fish” were collected from FAO.
- Slovakia: For the period 2019-2021 and for 2024, data for several species were collected from FAO.

- Slovenia: For the period 2015-2024, data on several species were collected from FAO.
- Spain
  - 2019, 2020 and 2024 data on most of the species were collected from FAO.
  - 2021 data on bluefin tuna were collected from FAO.
  - 2022 data on bluefin tuna, eel and white-leg shrimps were collected from FAO.
- Sweden
  - Salmon data for 2016 were collected from FAO.
  - 2019, 2021 and 2022 data on several species were collected from FAO. For 2023, this was made for freshwater fish only.
  - Seaweed and trout data for 2024 were collected from FAO.

SUPPLY BALANCE SHEET

The supply balance is a proxy that allows to follow the evolutions of the EU internal supply of fishery and aquaculture products destined for human consumption and their "apparent consumption". In the light of this, the supply balance and apparent consumption should be used in relative terms (e.g. analysing trends) rather than in absolute terms. The supply balance is built on the basis of the following equation, calculated in live weight equivalent:

(catches + aquaculture production+ imports) – exports
=
apparent consumption

Data included in the supply balance available in EUMOFA are broken down by commodity group and main commercial species. Possible discrepancies in totals are due to rounding. The sources used are as follows:

- Catches: products caught by fishing vessels of the EU Member States. Amounts of catches not destined for human consumption were estimated using proxies based on destination use of landings (as available in EUROSTAT). Catches data are available in live weight equivalent. Source: EUROSTAT for catches in marine areas (reference dataset: fish_ca_main)[1], integrated with FAO for catches in inland areas.
- Aquaculture production: products farmed in the EU Member States. Aquaculture data are available in live weight equivalent. Source: EUROSTAT (reference dataset: fish_aq2a). The data cover the aquaculture sector from the point of view of farm-gate production available for human consumption. An exception from the "for human consumption" criteria is being made since the reference year 2016 for aquatic plants, which are included regardless of their final use. To be noted, however, that seaweed in the EU is almost exclusively harvested. Data are integrated with data from FAO and national administrations (for sources'

[1] These include catches in marine fishing areas that are legally covered, namely: 21 - Atlantic, Northwest, 27 - Atlantic, Northeast, 34 - Atlantic, Eastern Central, 37 - Mediterranean and Black Sea, 41 - Atlantic, Southwest, 47 - Atlantic, Southeast and 51 - Indian Ocean, Western.

details by year and country, please refer to the related section of this methodological background).

- Imports - Exports: fishery and aquaculture products imported/exported by the EU Member States from/to non-EU countries. Non-food use products are not included. Import and export data are available in net weight. For the supply balance purposes, net weight is converted into live weight equivalent in order to have a harmonized supply balance sheet (for conversion to live weight equivalent, please refer to the specific section below in this methodological background). Through the assessment of origin of imports and exports in terms of production method, it is possible to estimate the share of imports/exports originating from aquaculture and captures by making use of FAO data (for the method applied, please refer to the specific section below in this methodological background). Source: EUROSTAT–COMEXT (reference dataset: DS-045409).
- Apparent consumption (total and per capita): amount of fishery and aquaculture products estimated to be consumed in the EU. Per capita consumption indicates the amount by each individual person in the EU. The source of data on EU population is Eurostat (reference dataset: demo_pjan).

CONVERSION OF NET WEIGHT INTO LIVE WEIGHT EQUIVALENT

Since EUROSTAT provides production data in live weight, import/export net volumes are converted by using conversion factors (CF) for the purpose of building a harmonized supply balance sheet. Example of CF for the item whose CN8 code is 03044410: this item corresponds to "Fresh or chilled fillets of cod '*Gadus morhua, Gadus ogac, Gadus macrocephalus'* and of fish of the species *"Boreogadus saida"*". The CF is set at 2,85, representing an average of those found for skinned and boned fillets for this species in EUROSTAT and FAO publications. For the complete list of CFs used for the EUMOFA purposes, please refer to the Metadata DM-Annex 7 available at the link https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/metadata.

ASSESSMENT OF THE PRODUCTION METHOD OF IMPORTED AND EXPORTED FISHERY AND AQUACULTURE PRODUCTS

The objective of assessing the production method of imported and exported fishery and aquaculture products (FAPs) is to quantify the share (%) of aquaculture production in the EU supply balance analysis. For each EU Member State (MS), the production method of:

- products imported from extra-EU countries; and
- products exported to extra-EU countries

is assessed, on the basis of the production method for these products in the countries of origin (extra-EU countries for imports, MS for exports).
The assessment is made for the Main Commercial Species (MCS) for which CN-8 codes are available. Average production data in volume for the selected country of origin for a 3-year time series for both fisheries and aquaculture are calculated.
The assessment of the share of aquaculture of MCS is done by calculating a weighted average share of aquaculture production in the total production of aquatic food (aquaculture + fisheries), expressed as a coefficient (percentage). This coefficient, which quantifies the weight of aquaculture in both extra-EU imports and extra-EU exports, is used to calculate the supply balance sheet. By calculating the weight of aquaculture, it is possible to estimate the production methods of imported and exported FAPs and their relative share.

EXPENDITURE AND PRICES FOR FISHERY AND AQUACULTURE PRODUCTS

EU expenditure data are provided by EUROSTAT. These data are compiled basing on a common methodology elaborated within the "EUROSTAT – OECD PPP Programme"

(https://ec.europa.eu/eurostat/web/products-manuals-and-guidelines/-/ks-be-06-002).

In "The EU fish market" report, the "Nominal expenditure (in euro)" and the "Nominal expenditure per inhabitant (in euro)" have been used. The "expenditure" is taken as a component of the Gross Domestic Product and concerns the final consumption expenditures on goods and services consumed by individual households. To note, data on expenditure for 2025 are provisional for the following countries: Belgium, Bulgaria, Croatia, Cyprus, France, Germany, Greece, Hungary, Luxembourg, Portugal, Romania and Spain.

Expenditure is provided in Purchasing Power Parities (PPPs) which are spatial deflators and currency converters that eliminate the effects of the differences in price levels between Member States/countries, thus allowing volume comparisons of GDP components and comparisons of price levels. For the countries outside the Euro-zone, Price Level Indices (PLIs) are used for harmonising different currencies in a single currency (euro in this case). PLIs are obtained as ratios between PPPs and current nominal exchange rates, therefore, PPPs and PLIs values coincide in the Euro-zone countries.

Price indices refer to the Harmonised Index of Consumer Prices (HICP) which gives comparable measures of inflation (https://ec.europa.eu/eurostat/cache/metadata/en/prc_hicp_esms.htm). It is an economic indicator that measures the change over time of the prices of consumer goods and services acquired by households. In other words, it is a set of consumer price indices calculated according to a harmonised approach and a set of definitions as laid down in Regulations and recommendations.

"Food" is an aggregate of products, corresponding to ECOICOP 01.1 (https://showvoc.op.europa.eu/#/datasets/ESTAT_European_Classification_of_Individual_Consumption_according_to_Purpose_version_2_%28ECOICOP_2%29/data). It includes all food products purchased for consumption at home. In this report, analyses are provided for fish and meat the following ECOICOP that belong to the "Food" aggregate:

- "Fishery and aquaculture products", corresponding to ECOICOP 01.1.3 ("Fish and other seafood" on Eurostat). The individual items included in this aggregate can be consulted at the link https://showvoc.op.europa.eu/#/datasets/ESTAT_European_Classification_of_Individual_Consumption_according_to_Purpose_version_2_%28ECOICOP_2%29/data?resId=http:%2F%2Fdata.europa.eu%2Fed1%2Fecoicop2%2F0113.
- "Meat", corresponding to ECOICOP 01.1.2 ("Live animals, and meat and other parts of slaughtered land animals" on Eurostat). The individual items included in this aggregate can be consulted at the link https://showvoc.op.europa.eu/#/datasets/ESTAT_European_Classification_of_Individual_Consumption_according_to_Purpose_version_2_%28ECOICOP_2%29/data?resId=http:%2F%2Fdata.europa.eu%2Fed1%2Fecoicop2%2F0112.

HOUSEHOLD CONSUMPTION OF FRESH FISHERY AND AQUACULTURE PRODUCTS

Data are collected from EUROPANEL and refer to households' purchases of selected fresh species in 11 EU Member States, which are then aggregated for the EUMOFA purposes into "Main commercial species".

Households' purchases are recorded daily by a sample of households in supermarkets, discount shops, micro-markets, groceries, fishmongers and online sales (Amazon Fresh included), who reports to EUROPANEL many information, among which species, quantities and values.

The sample of households (i.e., "panel") is composed in order to be representative of the population of each country and to appropriately estimate its characteristics. Below, specifications regarding panels from which data derive are provided:

Member State	Sample size (Households)
Denmark	3.000
Germany	30.000
Ireland	5.650
Spain (excluding Canary Islands)	12.000
France	20.000
Italy	10.000
Hungary	4.000
Netherlands	10.000
Poland	8.000
Portugal (excluding Madeira and Azores Islands)	4.000
Sweden	4.000

For each country surveyed (except Hungary), household consumption data cover a selection of most consumed fresh species *plus* the additional item "other unspecified products", aggregating all other fresh species recorded by household panels but not available at disaggregated level. Products monitored include either packaged or loose fish, always without any additional ingredients.

Below the complete lists of "main commercial species" monitored for each country is reported:

Denmark	France	Germany	Ireland
Cod	Cod	Alaska pollock	Cod
Dab	Gilthead seabream	Carp	Haddock
Flounder	Hake	Cod	Hake
Halibut	Mackerel	Herring	Mackerel
Mackerel	Monk	Mussel *Mytilus*	Saithe (=Coalfish)
Mussel *Mytilus*	Saithe (=Coalfish)	Plaice	Salmon
Salmon	Salmon	Saithe (=Coalfish)	Shrimps
Trout	Sardine	Salmon	Other unspecified products
Other unspecified products	Trout	Shrimps	
	Whiting	Trout	
	Other unspecified products	Other freshwater fish	
		Other unspecified products	

Italy	**Netherlands**	**Poland**	**Portugal**
Anchovy	Cod	Carp	Clam
Clam	Herring	Mackerel	European seabass
European seabass	Mackerel	Salmon	Gilthead seabream
Gilthead seabream	Mussel *Mytilus*	Trout	Hake
Hake	Pangasius	Other unspecified products	Mackerel
Mussel *Mytilus*	Plaice		Octopus
Octopus	Salmon		Salmon
Salmon	Shrimp Crangon spp		Sardine
Squid	Other shrimps		Scabbardfish
Swordfish	Trout		Shrimps
Other unspecified products	Other unspecified products		Other unspecified products

Spain	**Sweden**	**Hungary**
Cod	Cod	Unspecified products
European seabass	Flounder	
Gilthead seabream	Haddock	
Hake	Halibut	
Mackerel	Herring	
Monk	Pike-perch	
Salmon	Salmon	
Sardine	Other salmonids	
Sole	Other unspecified products	
Tuna		
Other unspecified products		

RETAIL AND OUT-OF-HOME OUTLETS

As regards data for sales through retail and out-of-home outlets, this document includes source material that is the exclusive property of Euromonitor International Ltd and its licensors. All such source material is © Euromonitor International, Ltd, and is provided without any warranties or representations about accuracy or completeness. Further sharing, disclosure, publication or making available of all or part of the material contained in this document (or any data or other material derived from it) will require Euromonitor's prior written consent. Euromonitor International Ltd cannot be held liable for analysis or findings within this report and cannot be held liable for any reliance on such materials in any capacity and any reliance is done at the users risk

The data and estimates could be different from other statistics available at national level, as different methodological approaches may be used. They refer to "unprocessed" and "processed" products. Please note that this definition of unprocessed products differs from the definition provided in Regulation (EC) No 852/2004 on the hygiene of foodstuffs (https://eur-lex.europa.eu/eli/reg/2004/852/oj/eng).

- Unprocessed products: Data are provided for the category "fish and seafood", as well as for the sub-categories finfish, crustaceans and molluscs and cephalopods, more detailed below:
    - Fish and seafood: This is the aggregation of finfish, crustaceans and molluscs and cephalopods. Unprocessed fish and seafood includes fresh, chilled and frozen products, whether sold prepacked and non-

prepacked. Unprocessed fish and seafood can be cleaned, gutted, peeled/trimmed/filleted/cut to a different extent, but not cooked and no sauces, herbs or condiments can be added.

  - Crustaceans: includes all fresh, chilled and frozen but uncooked crustaceans (i.e. animals living in water with firm body and have a hard-outer shell) such as lobsters, shrimps and crabs, whether sold packaged or unpackaged.
  - Finfish: includes all fresh, chilled and frozen but uncooked freshwater and marine finfish , whether sold packaged or unpackaged, cut or whole.
  - Molluscs and cephalopods: includes all fresh, chilled and frozen but uncooked molluscs (shellfish such as oysters and clams) and cephalopods (such as the octopus, squid, cuttlefish), whether sold packaged or unpackaged.

- Processed products: Data are provided for the category “processed fish and seafood”, as well as for the subcategories shelf-stable seafood, chilled processed seafood and frozen processed seafood, more detailed below:
  - Fish and seafood: This is the aggregation of shelf-stable, chilled and frozen fish and seafood.
  - Shelf-stable: includes shelf-stable fish, shellfish and seafood typically sold in cans, glass jars or aluminium/retort packaging. It is also usually preserved in oil, brine, salt water or with a sauce (e.g. sardines in tomato sauce). Pickled fish/seafood sold ambient is also included. Product types include: cod, haddock, mackerel, sardines, tuna, prawns, crab, mussels, anchovies, caviar etc.
  - Chilled processed: includes all packaged processed chilled fish/seafood products and smoked fish sold in the self-service shelves of retail outlets. Processed fish/seafood products sold together with a sauce and cooked prawns are included. Note: herring products sold in chiller/refrigerator cabinets, and which have a shelf-life of more than 6 months are excluded. These products, which are very common in Scandinavian countries, are included in shelf-stable seafood as they have similar shelf-life to shelf-stable fish sold ambient.
  - Frozen processed: includes all processed fish and seafood products which are further prepared with the addition of other ingredients, including breading/batter, sauce, seasoning, etc. Product types include: fish fingers, fish pies, battered or breaded fish, fish with any type of sauce, fish balls, cuttlefish balls, scampi, calamari, etc.

IMPORT-EXPORT

The source used for collecting EU import-export data is EUROSTAT – COMEXT (online data code: ds-045409, extraction made on 19 May 2026), whereas for trade data between non-EU countries, data are collected from Trade Data Monitor. The trade flows of fishery and aquaculture products reported by EU and non-EU countries are analysed for the CN-8 codes and HS-6 codes listed in EUMOFA Metadata DM-Annex 4 and DM-Annex 9, respectively. Both are available at the link https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/metadata. For more information on the methodology and principles behind EUROSTAT's recording of "country of origin" and "country of destination", please visit EUROSTAT's "Quality Report on International Trade Statistics", at https://ec.europa.eu/eurostat/web/products-statistical-reports/w/KS-FT-24-001. It must be specified that data do not comprehend instances in which volumes or values are not reported due to confidentiality. The principal of statistical confidentiality of Eurostat is explained at the link: https://ec.europa.eu/eurostat/web/research-methodology/statistical-confidentiality.

EXTRA-EU TRADE FLOWS

They encompass all transactions between European Union (EU) Member States and countries outside the EU (non-member countries). The source used for these trade flows is EUROSTAT - COMEXT. In line Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, and since most recent reference period is year 2025, the UK is excluded from the EU aggregations of each year. This means that UK is dealt with as extra-EU country of origin/destination of EU-27 imports and exports. Finally, it is important to underline that while imports are reported as such by Eurostat-COMEXT according to flows recorded by national customs, in most cases the EU Member States are not the actual destinations. Rather, they are "points of entry" for the fisheries and aquaculture products imported to the EU, which are then traded within the internal market.

INTRA-EU TRADE FLOWS

They encompass all transactions declared by Member States of the European Union (EU) with one another. For the analysis of intra-EU trade, only export flows have been considered. The source used for these trade flows is EUROSTAT - COMEXT.

In general, bilateral comparisons between Member States of intra-EU flows reveal major and persistent discrepancies, thus comparisons dealing with intra-EU trade statistics and related results must be taken into account cautiously and should consider the existence of these discrepancies. Considering that the intra-EU trade data are based on common and largely harmonised rules, one might expect the intra-EU trade balance to be zero or at least close to it. However, it is worth underlining that a perfect match is made impossible first of all by the CIF/FOB approach: the import value should be higher than the mirror export value as it includes extra transport costs[2].

A close match could nevertheless be legitimately expected given that trading partners within the EU are often neighbouring countries, but deliveries to vessels and aircraft are another methodological reason preventing this: such movements of goods create asymmetries in intra-EU ITGS as specific legal provisions state that only dispatches[3] are to be reported. At global level, most methodological reasons for asymmetries disappear. The remaining issues are in data reporting (e.g. missing Intrastat declarations, and trade in specific goods like sea-going vessels and aircraft not being properly captured).

[2] See Eurostat Metadata at the link https://ec.europa.eu/eurostat/cache/metadata/en/ext_go_detail_sims.htm. Cost, Insurance and Freight (CIF) and Free on Board (FOB) are international shipping agreements used in the transportation of goods. The CIF rule places an obligation on the seller to arrange insurance for the consignment. If the FOB rule is used, once the goods have been loaded on board, risk transfers to the buyer, who bears all costs thereafter.

[3] Dispatch is the logistical process of organizing, packaging, and releasing goods to a carrier for transport.

LANDINGS

Eurostat data regarding landings (online data code: fish_ld_main, data collected on 12 June 2026) comprise the initial unloading of any fisheries products from on board a fishing vessel to land in a given EU Member State. As landings data are available up to 2024, in line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, UK is excluded from the EU aggregations of each year. Data include landings made by vessels from EU Member States and from Canada, Faroe Islands, Greenland, Kosovo, Iceland, Norway and the UK. Data also include landings of species not destined for human consumption and seaweed.

The following issues should be mentioned regarding data used for the "Landings" chapter:

- Confidentiality: As indicated by national data providers to Eurostat, landings are confidential when they originate from less than three vessels. Therefore, in some instances, Member States provide data at more aggregated level, in others data are just not available. The EUMOFA system discards the records having volume or value equal to zero, because such records would represent partial information invalidating any analysis of data. This regards the data on ladings of some species in some years in Denmark, Finland, Greece and Ireland, which are thus not included in the analyses as they are affected by confidentiality issues.
- Provisional data
    - France: For the period 2018-2021, volumes and values are provisional data available in Eurostat.
    - Italy: For the period 2018-2020, volumes and values are provisional data available in Eurostat.
- Estimates
    - Bulgaria: 2017 and 2020 volumes and values are national estimates available in Eurostat.
    - Denmark: Values for the period 2019-2022 and for 2024 include national estimates available in Eurostat.
    - Ireland: Volumes and values for 2017, and values for 2020, 2022 and 2024, include national estimates available in EUROSTAT.
    - Lithuania: Volumes and values for 2017 are national estimates available in EUROSTAT.
    - Netherlands: Volumes and values for the period 2017-2024 include national estimates available in Eurostat.
    - Portugal: Volumes and values for the period 2018-2024 include national estimates available in Eurostat.
    - Romania: Volumes and values for 2017 are national estimates available in Eurostat.

HIGHLIGHTS

HIGH PRICES SQUEEZE FRESH FISH CONSUMPTION

In 2025, EU[4] household expenditure on fishery and aquaculture products grew by 4% to reach EUR 63,2 billion[5], continuing a trend of persistently high prices that has driven down household consumption volumes of fresh fish in the main monitored countries[6] (-26% over the 2021–2025 period). However, total sales of processed[7] fish through retail and foodservice channels in the EU recorded a slight improvement from 2024.

SURGING EXPORTS FAIL TO STEM WIDENING EU TRADE DEFICIT

EU exports of fishery and aquaculture products to third countries increased significantly in volume, rising by 12% from 2024 to reach 2,3 million tonnes. This marked a clear reversal of the downward trend observed between 2021 and 2024 and brought export volumes to their highest level since 2020. Value also increased, although at a slower rate, rising by 5% from 2024 to EUR 8,2 billion. As regards imports, the EU had seen a general trend of falling import volumes combined with rising values, largely due to widespread price increases during 2022 and part of 2023. However, this trend has since reversed, with import values decreasing more significantly than volumes, both in 2023 and 2024. In 2025, there were again substantial increases in both volume and value. Consequently, the EU trade deficit widened by 7% to reach EUR 23,4 billion, with the largest deteriorations recorded for crustaceans, cephalopods, and groundfish.

IMPORTS RISE AS EU SELF-SUFFICIENCY DROPS

From 2023 to 2024, there was a 4% decrease in domestic production (including catches and aquaculture), accompanied by a 2% increase in imports and a 3% decline in exports. As a result, the EU apparent consumption[8] slightly increased to reach 10,3 million tonnes LWE (close to 23 kg per capita). Over the decade, wild products' share of apparent consumption eroded from 75% in 2018 down to around 71% in recent years, while the relative share of aquaculture products rose from 25% to 29%. The self-sufficiency rate dropped to a ten-year low of 36,5%, also due to heavy reliance on extra-EU imports which cover 70% of the EU supply.

RECENT DYNAMICS FOR SOME MAIN SPECIES

Higher Atlantic salmon production increased supply to the EU market in 2025. European production grew by 12% compared with 2024, supported by productivity improvements in Norway, the Faroe Islands and Iceland. EU salmon imports increased by 6% to 1,1 million tonnes, their highest volume over the 2016–2025 period. However, the average unit import value declined by 10% to 7,29 EUR/kg, bringing total import value down by 5% to EUR 8 billion. Norway remained the main supplier, accounting for 80% of import volumes. Greater availability and generally lower retail prices drove increases in fresh salmon purchases in most monitored markets, including Italy, France, Spain and Germany. Strong Norwegian supply continued into 2026: salmon export volumes increased by 12% year on year in the third quarter, with particularly strong September growth in shipments to Poland and Spain. In mid-

[4] In line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, since the most recent reference period is year 2025, UK is excluded from the EU aggregations of each year. In addition, EU data include Croatia since 2013, date of the EU's enlargement to this country.
[5] Source: Eurostat online data code: prc_ppp_ind_1. Purchasing Power Parities PPPs – nominal expenditure
[6] Spain, Italy, France, Portugal, Germany, Poland, the Netherlands, Ireland, Denmark, Sweden and Hungary
[7] Processed products are defined as the aggregation of shelf-stable, chilled processed and frozen finfish, crustaceans, molluscs and cephalopods. Please note that this definition of processed products differs from the legal definition, as set out in Regulation (EC) No 852/2004 on the hygiene of foodstuffs, available at the link: https://eur-lex.europa.eu/eli/reg/2004/852/oj/eng. For more details, see the Methodological background.
[8] The definition of "apparent consumption" is available in the "Supply balance sheet" section of the Methodological background.

October 2026, Norwegian export and European spot prices were above their year-earlier levels despite the higher volumes[9].

EU shrimp imports showed contrasting developments across the main categories in 2025. Imports of frozen warmwater shrimp of the genus *Penaeus* increased by 21% to approximately 400.000 tonnes, reaching their highest volume over the 2016–2025 period. A moderate 2% increase in the average unit import value to 6,19 EUR/kg, alongside higher volumes, drove import value up by 24% to EUR 2,5 billion. Growth was mainly supplied by Ecuador and India, whose volumes increased by 36% and 45%, respectively. By contrast, imports in the miscellaneous shrimp category declined by 3% to approximately 209.000 tonnes, as lower supplies from Argentina could only be partly offset by increases from other origins. In October 2026, reduced shrimp availability supported farm-gate prices in India and Vietnam. In Ecuador, prices declined as weaker seasonal demand coincided with increased supply from farmers harvesting part of their stocks. Rising feed and energy costs were also putting pressure on producers' margins[10].

Cod supply remained constrained by successive reductions in fishing opportunities. Extra-EU cod import volumes fell by 9% in 2025 to approximately 290.000 tonnes. The average import unit value rose by 22% to 8,44 EUR/kg, more than offsetting the volume decline and bringing total import value to EUR 2,5 billion, an 11% increase. Norway and Iceland remained the two largest suppliers. Higher unit values and lower volumes were also apparent in intra-EU trade and household purchases of fresh cod. Supply pressure continued in 2026, when the northeast Arctic cod quota was reduced by a further 16% to 285.000 tonnes, its lowest level since 1991. During the first nine months of 2026, tight Atlantic cod supply continued to constrain EU imports, while higher imports of haddock and hake indicated increased sourcing of alternative whitefish species[11].

Tuna remained the largest product category in terms of apparent consumption in the EU in 2024, reaching 3,12 kg LWE per capita, an increase of 16% from 2023. Imports continued to expand in 2025, particularly for skipjack tuna, the main imported tuna species. Skipjack imports increased by 6% to approximately 410.000 tonnes, marking their highest volume over the 2016–2025 period, while import value rose by 5% to EUR 1,8 billion. Prepared and preserved products accounted for 97% of imported skipjack volume, with Ecuador remaining the leading supplier. Market conditions changed in 2026. The FAO reported weaker global demand across fresh, frozen and processed tuna, while higher fuel costs put upward pressure on raw-material prices. Frozen skipjack delivered to Thailand during March–August was 15–38% more expensive than in the same months of 2025, indicating increased purchase costs for processors despite softer demand[12].

Alaska pollock imports rebounded strongly in 2025, increasing by 23% to approximately 292.000 tonnes, which was the highest volume recorded over the 2016–2025 period. The average import unit value increased by only 1% to 2,71 EUR/kg, while total import value rose by 25% to EUR 791 million. Growth was driven by Russia and the United States, which together supplied 86% of EU import volume. Imports from China declined by a further 16%, reducing its share to 14%. During the first nine months of 2026, EU import volumes remained broadly stable year on year, while average import unit values increased, indicating firmer prices following the strong volume recovery in 2025[13].

[9] Norwegian Seafood Council. September and Q3 export update, 5 October 2026; Kontali, Weekly Salmon Insights, week 43, 22 October 2026.
[10] Kontali, Weekly Shrimp Update, week 43, 20 October 2026.
[11] Norwegian Government, fisheries agreement for 2026; Kontali, Groundfish Market Update, October 2026.
[12] FAO GLOBEFISH, September 2026 tuna analysis, published 15 October. The Thailand prices are an international raw-material benchmark, rather than EU import unit values.
[13] Kontali, Groundfish Market Update, October 2026.

MACROECONOMIC TRENDS

Persistent energy price pressure affected the European economic environment in 2026. Annual inflation reached 3,8% in both the EU and the euro area in September, up from 3,2% in August. Energy was the largest contributor to euro area inflation, with prices increasing by 18,9% year on year and contributing 1,7% to the headline rate. By comparison, inflation for food, alcohol and tobacco stood at 1,3%. The acceleration in overall inflation was therefore primarily energy-driven, with potential implications for operating costs across fishing, aquaculture, processing and distribution[14]. The global geopolitical context, in particular the situation in the Middle East, remains the primary determinant of this trend.

Monetary policy also tightened. In September 2026, the European Central Bank (ECB) increased its key interest rates by 25 basis points, bringing the deposit facility rate to 2,5%. The ECB cited persistent inflation pressures associated with the Middle East conflict and projected average euro-area inflation of 3,0% in 2026. Higher financing costs and renewed energy pressure create a more challenging environment for investment and household purchasing power, although their effects vary across countries and sectors[15].

Exchange-rate movements remained relevant to seafood trade. The euro strengthened against the US dollar in 2025, while the Norwegian krone appreciated against the euro during the first half of 2026. These developments followed several years of cumulative increases in consumer prices. EU household expenditure on fishery and aquaculture products reached EUR 63,2 billion in 2025, up by 4% from 2024 and by 15% in nominal terms compared with 2021. Household purchases of fresh products in the main monitored countries were nevertheless 26% below their 2021 level.

[14] Eurostat, September 2026 inflation release, 16 October.
[15] ECB, monetary policy decision, 10 September 2026.

1/ THE EU IN THE WORLD

1.1 GLOBAL PRODUCTION

In 2024, total global production[16] from both fisheries[17] and aquaculture amounted to 234,6 million tonnes. This represented a ten-year peak and a growth of 3% or 6,8 million tonnes from 2023. Aquaculture drove the overall trend, reaching a ten-year high in 2024 with 141,6 million tonnes. This was 4% or 5,5 million tonnes higher than in 2023. Fisheries increased as well, although to a lesser extent, compared with the previous year, by 1% or 1,3 million tonnes.

As shown in Table 1, the top 15 producers showed a mixed picture, with half reporting growth and the other half a decline. China led in terms of both aquaculture and catches, with total production increasing by 4% or 3,5 million tonnes from 2023 to 2024. The most significant change was registered in Peru, where production surged by 62%. The dramatic increase in Peru's fisheries production in 2024 was primarily driven by the recovery after the El Niño climate phenomenon, which had severely impacted the marine ecosystem in 2023 and caused a drop in the harvest of *anchoveta* (*Engraulis ringens*).

Among the countries reporting decreased production, the most significant were the United States (-8% or -382.762 tonnes) and the Russian Federation (-7% or -404.430 tonnes). With these decreases, US total production reached the lowest amount in ten years, namely 4,2 million tonnes, while it totalled 5,4 million tonnes in the Russian Federation.

The EU ranked eighth in the world with 4,4 million tonnes, 77% or 3.394 tonnes of which constituted wild production and the remaining 23% or 1.013 tonnes of farmed production. In 2024, both wild and farmed production were at their lowest amounts in ten years. Compared with 2023, there was an overall drop in production by 4% or 190.757 tonnes. More in detail, wild production decreased by 5% or 160.878 tonnes, mostly due to drops in catches of skipjack tuna, whereas farmed production declined by 3% or 28.879 tonnes driven by decreased production of mussels.

[16] The source of production data for non-EU countries is FAO. In line with FAO database, data for Russia included in the European production encompass total production in Russia.
[17] Catches include all products fished by a country's fleet in any fishing area (both marine and inland waters), independently from the area of landing/selling. Data include catches for both food and non-food use. In line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, since the most recent reference period is year 2024, UK is excluded from the EU aggregations of each year.

TABLE 1

TOP 15 PRODUCERS IN 2024 (1.000 TONNES)

Source: Eurostat (online data codes: fish_ca_main and fish_aq2a) and FAO. Data include catches for both food and non-food use. Possible discrepancies in % changes and totals are due to rounding. More details can be found in the Methodological background.

	Catches	Aquaculture	Total production	% of total	% evolution of total production 2024/2023
China	13.262	81.949	95.211	41%	+4%
Indonesia	7.811	15.746	23.557	10%	+2%
India	6.356	12.094	18.451	8%	+5%
Vietnam	3.434	5.647	9.080	4%	+3%
Peru	5.765	118	5.882	3%	+62%
Russian Federation	5.012	342	5.354	2%	-7%
Bangladesh	2.040	2.979	5.019	2%	+2%
EU-27	**3.394**	**1.013**	**4.407**	2%	**-4%**
United States of America	3.762	468	4.229	2%	-8%
Norway	2.326	1.667	3.994	2%	-5%
Chile	2.528	1.420	3.948	2%	-4%
Philippines	1.623	2.221	3.845	2%	-6%
Japan	2.847	802	3.649	2%	-4%
Republic of Korea	1.273	2.282	3.555	2%	-2%
Myanmar	1.737	1.211	2.948	1%	+5%
Others	20.858	11.632	41.490	18%	+2%
TOTAL	**93.029**	**141.591**	**234.620**	**100%**	**+3%**

As shown in Chart 1, Asia is the only continent where farmed production prevails over fishery production, being home to the world's four top producing countries, where most production originates from aquaculture. Asian countries have indeed driven the global trend towards aquaculture, with its share of total production increasing continuously since 2000 and surpassing wild production from 2013.

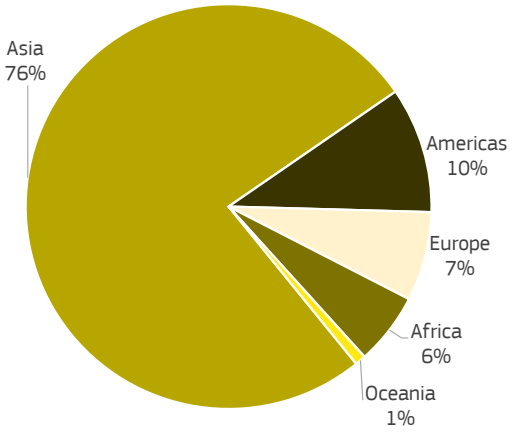
More in detail, in 2024, aquaculture production in Asia accounted for 92% of the world's total farmed production. It is worth noting that this applies to production of both animal products and seaweed and other algae. When only animal products are considered, aquaculture overtook fisheries production in 2021. By contrast, in the Americas, Europe (including EU and non-EU countries) and Africa, aquaculture only accounted for one fifth of total production. Aquaculture's share of total production was even lower in Oceania, where it only reached around 13%.

CHART 1

WORLD PRODUCTION BY CONTINENT IN 2024

Source: Source: Eurostat (online data codes: fish_ca_main and fish_aq2a) and FAO. More details can be found in the Methodological background.

Continent	Volume (1.000 tonnes)	% catches	% aquaculture
Asia	178,812	27%	73%
Americas	23,601	78%	22%
Europe	16,708	79%	21%
Africa	13,500	80%	20%
Oceania	1,998	87%	13%
World	**234,620**	**40%**	**60%**



This section provides an overview of world fisheries and aquaculture production by continent, ranking them by total volumes produced in 2024 and comparing their production with that of the EU.

ASIA

In addition to leading global aquaculture production, Asia also accounts for the largest share of fisheries production. In 2024, Asia's farmed production reached a decade peak of 130 million tonnes, marking a 4% rise from 2023. Catches increased by 1% and totalled 49 million tonnes.

China stands out as Asia's top producer in both aquaculture and fisheries, playing a key role in shaping overall regional trends. This dominance is much more pronounced in aquaculture compared with wild production. In 2024, farmed production reached 82 million tonnes in China alone, representing 63% of the regional total. Further, with its 13 million tonnes of catches, China accounted for 27% of the region's fishery production.

China's most farmed species, seaweed and carp, represented more than half of its total aquaculture production. Both recorded increases in production between 2023 and 2024, the most important being that of seaweed which grew by almost 6% from 23,1 million tonnes to 24,4 million tonnes and achieved a decade peak, with a surge by 56% from ten years before. Carp farming grew from 18,9 million tonnes in 2023 to 19,3 million tonnes in 2024. China dominates global aquaculture production of both seaweed and carp, accounting for 84% and 63% of production, respectively. By comparison, the EU farmed just 73.595 tonnes of carp in 2024, which represented only 0,3% of the global farmed production of this species. It also harvested almost 94.672 tonnes of seaweed, which represented a 12% increase in production since 2023. That said, EU seaweed production—which takes place almost entirely in France and Ireland—largely originates from wild harvesting and is mainly meant for non-food purposes, which limits the relevance of its comparison with Chinese production, that is destined for both food and non-food uses.

Aquaculture also grew in other major producing countries. The most notable improvements concerned Vietnam and India. More in detail, the Vietnamese strategic shift to value-added pangasius strengthened its position as the world leader in pangasius farming by shifting from raw fillets to processed products – a growth that is expected to continue in the future[18]. In India, *vannamei*[19] production continued its upward trend, reaching 1,2 million tonnes.

As regards fishery production, a significant portion of Asia's catches comes from bony fish (*Osteichthyes*, mostly including *Actinopterygii*), which makes up a quarter of the continent's total. Catches of bony fish are mainly made by China, Indonesia and Vietnam. Other notable increases included skipjack tuna, with higher catches in Vietnam and Japan, and mackerel, particularly in Indonesia and India.

AMERICAS

Production in the Americas—namely North, Central and South America—is the second highest of the five continents. In 2024, the region produced 23,6 million tonnes of fishery and aquaculture products (+8% from 2023).

Wild production, the major contributor to the overall growth, totalled 18,5 million tonnes in 2024, growing by 11% since 2023 after two consecutive years of decline. The recovery was largely driven by the Peruvian anchoveta (*Engraulis ringens*) fishery, with most of the catch destined for fishmeal production. Overall, wild fisheries account for close to 80% of total fish production in the Americas, while Peruvian anchoveta production alone represents around 30% of the region's total production. After Peru, the main fishing nations are the United States (3,8 million tonnes of catches in 2024),

[18] Source: https://seafood.vasep.com.vn/key-seafood-sectors/pangasius/news/sustainable-transformation-needed-for-vietnam-s-strategic-pangasius-sector-37153.html
[19] *Litopenaeus vannamei* and *Penaeus vannamei*.

Chile (2,5 million tonnes) and Mexico (1,9 million tonnes). Combined, these four countries accounted for 75% of total wild production in the Americas. In the US, production of Alaska pollock prevails, and totalled 1,4 million tonnes, in line with the previous year[20]. In Chile, catches mainly include jack mackerel - locally known as *jurel*. They totalled 1,1 million tonnes in 2024, recording a significant 27% increase from 2023 thanks to quota transfers from other SPRFMO[21] member nations[22]. Catches in Mexico mostly comprise small pelagics, especially anchovy (388.000 tonnes in 2024, -28% from 2023) and sardine (343.823 tonnes, +8%). By comparison, EU catches of sardine totalled 211.500 tonnes in 2024, and those of jack and horse mackerels totalled only 13.100 tonnes[23].

American aquaculture production achieved a decade-peak in 2024 at 5,1 million tonnes, which came after continued growth since 2016. This largely comprised 1,2 million tonnes of warmwater shrimp production in Ecuador and 934.520 tonnes of salmon production in Chile. The first was at its highest level in ten years, whereas the latter dropped by 11% from 2023. The primary cause of this decrease was a notable surge in mortality rates at sea, particularly during the fattening stage of Atlantic salmon, also associated with severe algal blooms linked to El Niño. By comparison, the EU's 2024 farmed production was much less, with only 345 tonnes of warmwater shrimp, mostly in France, and 13.414 tonnes of salmon, mostly consisting of organic production in Ireland.

EUROPE

Production of fishery and aquaculture products in Europe – including both EU and non-EU countries – is the third highest in the world. In 2024, it totalled 16,7 million tonnes, which represented a decade-low and a 6%-decline from the previous year. Close to 80% of total European production originates from fisheries, which accounted for the drop.

Specifically, total catches decreased from 14,4 million tonnes in 2023 to 13,2 million tonnes in 2024, which was their lowest amount in ten years. The most significant decreases included the Russian Federation, Icelandic and Norwegian production.

Catches in the Russian Federation[24] dropped to 5,4 million tonnes (-7% from 2023), due to decreased production of pink salmon[25], which totalled 136.218 tonnes, plummeting by 72% from the previous year. However, it should be considered that there were massive spawning runs in 2023, allowing the Russian Federation to harvest a record volume of close to 480.000 tonnes. When comparing 2024 with 2022 (namely, 147.222 tonnes), the decrease was minor (-7%). In Iceland, total catches dropped from 1,4 million tonnes in 2023 to 1,0 million tonnes in 2024. This drastic decline was primarily due to scientific zero-quota recommendations for capelin, based on environmental conditions and low spawning stock biomass[26]. Catches in Norway decreased from 2,5 million tonnes in 2023 to 2,3 million tonnes in 2024, due to herring and cod, whose production achieved their lowest levels in ten years (397.448 tonnes and 207.810 tonnes, respectively). Herring production dropped by 21% from 2023, as a consequence of the significant reduction in total allowable catches for Norwegian spring-spawning (NVG) herring recommended by the ICES. Cod production fell by 29%. The largest source of wild cod harvested by Norway comes from the Northeast Arctic (NEA) cod stock in the Barents Sea. For 2024, the joint Norwegian-Russian Fisheries

[20] It had dropped in 2022 due to precautionary management policies and quota reductions (TAC - Total Allowable Catch), based on scientific assessments of the species' biological cycle. Source: https://www.seafoodsource.com/news/premium/supply-trade/cut-to-alaska-pollock-allowable-catch-seems-more-likely-with-ssc-decision#:~:text=A%20stock%20assessment%20and%20fishery%20evaluation%20report,MT%2C%20or%2015%20percent%20below%20the%20ABC.
[21] South Pacific Regional Fisheries Management Organisation (https://www.sprfmo.int/)
[22] Source: https://www.sprfmo.int/fisheries/conservation-and-management-measures/jack-mackerel/cmm01-transfers/2024-transfers
[23] A comparison with EU catches of anchovy would not be relevant, as EU production of this species is mainly destined for human consumption.
[24] More details on the geographic coverage can be found in the Methodological background.
[25] *Oncorhynchus gorbuscha*
[26] Source: https://thefishingdaily.com/latest-news/icelandic-catch-drops-28-in-2024-but-value-still-over-1-billion/

Commission reduced the total cod quota by 20% compared to 2023, explaining the decline in production.

In the EU, catches decreased from 3,6 million tonnes in 2023 to 3,4 million tonnes in 2024, mostly due to decreased Spanish production of skipjack tuna. This reached its lowest amount in ten years at 81.815 tonnes, which was a drop by almost 40% from 2023. The Spanish tropical tuna fleet consists predominantly of industrial purse seiners that rely heavily on drifting fish aggregating devices (FADs) to catch skipjack tuna. To protect juvenile yellowfin and bigeye tunas often found aggregated with skipjack, regional fisheries management organisations (RFMOs) enforced tighter FAD regulations. Also, a substantial portion of Spain's distant-water tuna fleet operates in the Western Indian Ocean, where increased regulatory oversight regarding FAD deployments, satellite tracking compliance, and regional spatial restrictions limited total effective fishing effort for the European fleet across traditional fishing grounds[27].

As regards aquaculture, Norway ranks first in Europe, covering almost half of all European farmed production. In 2024, aquaculture production in Norway amounted to 1,7 million tonnes, of which salmon accounted for 93% and trout for 6%, both experiencing increased production from 2023 (+1% and +6%, respectively). The remaining 1% of farmed production in 2024 was represented by other species (mainly cod, mussel and Atlantic halibut). The EU, with more than 1,0 million tonnes, comes next. It has much more diversified species production, with the top five species in volume terms being mussel, trout, oyster, gilthead seabream and European seabass[28]. The Russian Federation ranks third at a distance, with its aquaculture production – mainly including trout and carp - totalling 342.450 tonnes in 2024.

AFRICA

Africa ranks fourth globally in fishery and aquaculture production, having reached 13,5 million tonnes in 2024. This represented a ten-year peak and a 3%-increase from 2023. Wild production accounts for 80% of the total. These catches largely consist of freshwater fishes in Uganda and sardines caught by Morocco[29] and Mauritania. Each of these countries saw reductions from 2023 to 2024, which were offset by increases registered for horse mackerels[30], mackerel[31], European anchovy and tunas[32].

Aquaculture in Africa, taking place almost entirely inland, is primarily focused on Nile tilapia in Egypt.

OCEANIA

Oceania contributes to less than 1% of the world's total fishery and aquaculture production. In 2024, its production was close to 2 million tonnes, 87% of which was wild caught. Skipjack tuna is by far the main species caught in Oceania, totalling 847.513 tonnes in 2024, which was the highest in ten years. By comparison, this was almost seven times larger than the EU's skipjack tuna production. Also to note, this represented more than 40% of the continent's overall fishery and aquaculture production. The major producers in the region are Papua New Guinea, New Zealand and Kiribati. Of these, only New Zealand is specialised in the fisheries of another species, namely grenadier. Indeed, Oceania is also responsible for more than 70% of the world's catches of grenadier. In 2024, New Zealand led Oceania's catch of grenadier, with 110.734 tonnes. Catches of grenadier in the EU were just above 2.000 tonnes in the same year. Aquaculture in Oceania mainly takes place in Australia, which had 117.540 tonnes of production in 2024 (mainly including Atlantic salmon), and New Zealand, which recorded close to 98.900 tonnes (primarily mussels).

[27] Sources: https://oceans-and-fisheries.ec.europa.eu/system/files/2023-11/2023-11-27-non-paper-updates-2024-fishing-opportunities-regulation-com-587-iccat-iotc_en.pdf and https://iotc.org/sites/default/files/documents/2025/12/IOTC-2025-WPDCS21-06_Rev2_Tropical_tuna_catch_limits.pdf
[28] Chapter 6 of this report presents detailed trend analyses of EU Member States' aquaculture by species.
[29] Morocco has the largest stock in the world of European sardine, which is particularly important for the EU canning sector.
[30] These mainly included cunene horse mackerel (*Trachurus trecae*) and jack and horse mackerels nei.
[31] Mainly including Atlantic chub mackerel (*Scomber colias*)
[32] Mainly including Atlantic bonito (*Sarda sarda*) and Atlantic black skipjack (*Euthynnus alletteratus*)

1.2 IMPORT-EXPORT

This section focuses on the trade flows of fishery and aquaculture products of the world's five largest non-EU traders: China, the US, Norway, Japan and Ecuador. These countries are ranked by trade value, and their trade flows are compared with those of the EU[33].

EU-27

The EU ranks second globally in terms of trade flows[34] of fishery and aquaculture products, after China. In 2025, these trade flows amounted to 8,78 million tonnes worth EUR 39,9 billion. More specifically, the EU's exports reached a peak in both volume and value terms, totalling 2,30 million tonnes worth EUR 8,22 billion, which represented increases by 12% in volume and by 5% in value compared with 2024. Imports also increased and, as in previous years, the EU-27 was confirmed its position as the geographical entity with the largest trade deficit in fishery and aquaculture products worldwide. Imports rose by 9% in volume and 6% in value, reaching 6,48 million tonnes and EUR 31,64 billion. As a result, the trade deficit reached EUR 23,42 billion in 2025, up 7% or EUR 1,50 billion compared with 2024. However, the deficit remained below the 2022 level of EUR 24,14 billion, when trade flows were significantly affected by sharp price increases and exchange rate volatility.
Chapter 4 of this report presents detailed trend analyses of EU Member States' imports and exports by species and partner countries, while also examining the development of exchange rates for the main currencies.

CHINA

In 2025, total trade flows of fishery and aquaculture products reached a five-year peak of 13,36 million tonnes, up 3% compared with 2024. However, in value terms, they continued the downward trend observed since 2023, declining by 1% to EUR 40,62 billion due to a drop of more than EUR 1 billion in export value.
Driven by increased exports of small pelagics to Africa, Chinese export volumes reached a five-year peak of 6,17 million tonnes. Nevertheless, export value declined by 5%, falling to EUR 19,15 billion, the lowest level registered during the five-year period under analysis. This decline should be viewed in relation to a drop in exports to the US, traditionally one of the major destinations for Chinese exports[35]: these declined by 23% in volume and by 20% in value, reaching their lowest levels in five years at 361.652 tonnes and EUR 1,73 billion. In general, non-food use products represent the majority of China's exports of fishery and aquaculture products, covering 27% of the total volumes exported in 2025 but only 8% of the total values. On the other hand, more than 30% of the total value of exports is represented by frozen and prepared/preserved marine fish and cephalopods[36] (19% and 13% of the total, respectively). The EU market received 13% of the fishery and aquaculture products exported by China in 2025, corresponding to a 12% share in value terms. More than half of Chinese exports to the EU comprised non-food use products and Alaska pollock fillets.
Looking at imports, 2025 was a peak-year in the period analysed. With a 1%-increase from 2024, they reached 7,19 million tonnes, worth a value of EUR 21,47 billion (+3%). Imports of fishery and aquaculture products in China are mainly supplied from Russia and Peru, and largely include frozen Alaska pollock and fishmeal, respectively. The latter increased significantly from 2024 to 2025 (+21%), reaching a five-year peak of 1,02 million tonnes and a value of EUR 1,32 billion (-2%). At the same time, a five-

[33] Sources used in this chapter are Eurostat for the EU (online data code DS-045409) and Trade Data Monitor for non-EU countries.
[34] The sum of its imports and exports with third countries.
[35] Chinese exports of fishery and aquaculture products to the US mainly consist of frozen and prepared/preserved marine fish (no further detail by species is available).
[36] No further detail by species is available.

year peak was also registered for imports of Alaska pollock from Russia, which grew by 9% and totalled 574.389 tonnes worth EUR 701 million (+35%).
Imports from the EU account for only a small portion of the total, namely only 2% in volume and 3% in value in 2025. These flows mainly include imports of non-food use products and blue whiting, which combined cover almost 60% of the total imports of fishery and aquaculture products from the EU (40% and 17%, respectively), both mainly supplied from the Netherlands. In value terms, Spain is the major EU supplier (22% of the total), as in this case imports mainly include higher valued species such as halibut, bluefin tuna and cephalopods. Spain is followed by France, the Netherlands and Germany, covering 13% of the total value of Chinese imports from the EU each.

UNITED STATES

The US ranks second after the EU among net importers of fishery and aquaculture products. Of the total 6,1 million tonnes traded in 2025, imports accounted for more than 60%, reaching 3,72 million tonnes. In value terms, imports amounted to EUR 24,27 billion, representing almost 80% of the total value of US trade in fishery and aquaculture products. Indeed, the US mainly imports high-value species such as salmon, primarily from Chile, and shrimps, mainly sourced from India, Ecuador, Indonesia and, to a lesser extent, Vietnam. Canada is also an important supplier, particularly of products not intended for human consumption.
From 2024 to 2025, total US imports grew by 2% in volume, driven by higher imports of the three main product groups mentioned above. In value terms, however, total import value declined by 1%.
By contrast, US exports increased in both volume and value between 2024 and 2025. Export volumes grew by 2%, reaching 2,38 million tonnes, while export value increased by 5% to EUR 6,76 billion. Non-food products accounted for the largest share of US exports, representing 43% of total export volumes in 2025 and close to 25% of total export value. Almost half of these exports were destined for Canada, China, Korea and Mexico. Exports of high-value products, and more specifically those of salmon and frozen marine fish[37], covered another 25% of the total value of US trade in fishery and aquaculture products, whereas their combined share of the total volumes was lower (21%).
In 2025, 14% of US exports of fishery and aquaculture products were destined for the EU market, a share that rises to 17% when considering the trade value. Most of these exports consist of frozen fillets of Alaska pollock entering the EU market in the Netherlands. On the other hand, only 5% of the total volumes and values of US imports of fishery and aquaculture products come from the EU. The main EU suppliers to the US are Spain (mainly octopus) and the Netherlands (mainly salmon).

NORWAY

Norway is the world's leading producer and exporter of salmon and therefore ranks second after China in terms of total exports of fishery and aquaculture products. In 2025, Norwegian exports reached 2,72 million tonnes, distributed almost equally between EU and non-EU destinations. In value terms, exports totalled EUR 15,32 billion, reaching a five-year peak, largely driven by a significant increase in frozen crab exports to the US market. Also in terms of value, EU and non-EU markets account for the same shares.
As mentioned above, salmon plays a dominant role in Norwegian trade, accounting for around half of total export volumes of fishery and aquaculture products and almost 70% of total export value.
Regarding imports, most supplies from abroad consist of fishmeal, fish oil and other non-food use products, likely intended for salmon production. In 2025, these products accounted for more than 80% of the total import volume and 72% of total import

[37] *Ibidem.*

value, out of overall imports of 1,22 million tonnes worth EUR 2,40 billion. Brazil, Denmark, the UK, Peru and Russia were the main suppliers, accounting for 20%, 14%, 12%, 11% and 10% of import volumes respectively. Overall, the EU accounts for 22% in volume and for 25% in value of the total imports of fishery and aquaculture products in Norway, whereas the shares are higher if considering non-food use products only (28% and 33% in volume and value, respectively).

JAPAN

Japan ranks third after the EU and the US among net importers of fishery and aquaculture products. It is worth noting though that in 2025, the trade deficit of EUR 10,25 billion was at its lowest since 2021, which was due to a 37% increase of exports of small pelagics species destined for other Asian countries. This followed two years of drops in exports which were likely caused by the Chinese ban on imports from Japan following the Fukushima water discharge[38].

More in detail, of the total 642.828 tonnes of fishery and aquaculture products exported by Japan in 2025, 55% of the total was represented by dispatches of frozen small pelagics (mainly mackerel). Compared with 2024, when they amounted to close to 164.000 tonnes, they grew by 117% and totalled 354.771 tonnes by the end of 2025. The increase in value terms was 73%, as they rose from EUR 151 million to EUR 263 million, accounting for 12% of the total value of Japanese exports (namely, EUR 2,19 billion). Scallop – largely destined for the Vietnamese market - also plays a significant role in the Japanese trade of fishery and aquaculture products. This species alone covered 27% of the 2025 exports in value, for a share of 8% in volume terms.

Looking at imports, a decrease by 3% from 2024 to 2025 brought the volumes to their lowest amount in five years, namely 2,21 million tonnes. At the same time, they grew to EUR 12,45 billion, which represented a 2%-increase in value terms. Most Japanese imports include frozen and prepared/preserved marine fish[39] from China, as well as shrimps[40] from Vietnam, India, Indonesia and Thailand.

The EU is not a significant trade partner for Japanese fishery and aquaculture products. In 2025, only 4% of the total value and 2% of the volume of Japanese exports, were represented by the EU market. The coverage is slightly higher for Japanese supplies, as 4% of imports originated from EU countries, in both value and volume terms.

ECUADOR

Ecuador ranks third globally in the export value of fishery and aquaculture products, after China and Norway. In 2025, exports totalled 2,02 million tonnes and reached a five-year peak value of EUR 9,61 billion, with more than one quarter destined for the EU market. China remained the main destination, receiving 37% of total export volumes, while the US followed the EU with a share of 16%. Notably, shrimps accounted for almost 70% of total export volumes and close to 80% of total export value in 2025[41].

Similarly, imports exhibit a low level of diversification in terms of both source countries and product categories. In 2025, total imports reached 432.105 tonnes valued at EUR 569 million, marking increases of 17% and 15%, respectively, compared with 2024. Due to a robust domestic aquaculture industry, the majority of fishery and aquaculture product imports into Ecuador consist of products not intended for human consumption used as fish feed. In 2025, these accounted for 77% of total fishery and aquaculture product imports into Ecuador in both volume and value terms, with the vast majority sourced from Peru.

[38] Source: https://www.euronews.com/2025/05/30/china-to-resume-seafood-imports-from-japan-suspended-after-fukushima-wastewater-discharge.
[39] *Ibidem.*
[40] *Ibidem.*
[41] *Ibidem.*

TABLE 2

EXPORTS OF FISHERIES AND AQUACULTURE PRODUCTS OF MAIN WORLD TRADERS (VOLUME IN MILLION TONNES AND NOMINAL VALUE IN EUR BILLION) AND % OF EXPORTS DESTINED FOR THE EU ON TOTAL IN 2025

Source: EUMOFA elaboration of data from EUROSTAT (for EU trade flows, online data code DS-045409) and Trade Data Monitor (for non-EU countries). Possible discrepancies in % changes are due to rounding.

	2021		2022		2023		2024		2025		2025 / 2024	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
China	4,86	19,24	4,87	22,97	5,06	19,77	5,89	20,16	6,17	19,15	+5%	-5%
Norway	3,10	11,94	2,95	15,03	2,86	15,13	2,76	14,98	2,72	15,32	-1%	+2%
Ecuador	1,46	6,12	1,63	8,86	1,74	8,44	1,84	8,61	2,02	9,61	+10%	+12%
EU-27	**2,29**	**6,41**	**2,18**	**7,68**	**2,10**	**7,71**	**2,06**	**7,84**	**2,30**	**8,22**	**+12%**	**+5%**
US	2,74	6,21	2,52	7,38	2,61	7,22	2,33	6,41	2,38	6,76	+2%	+5%
Japan	0,66	2,17	0,65	2,58	0,49	2,18	0,47	1,92	0,64	2,19	+37%	+14%

TABLE 3

IMPORTS OF FISHERIES AND AQUACULTURE PRODUCTS OF MAIN WORLD TRADERS (VOLUME IN MILLION TONNES AND NOMINAL VALUE IN EUR BILLION) AND % OF IMPORTS ORIGINATING FROM THE EU ON TOTAL IN 2025

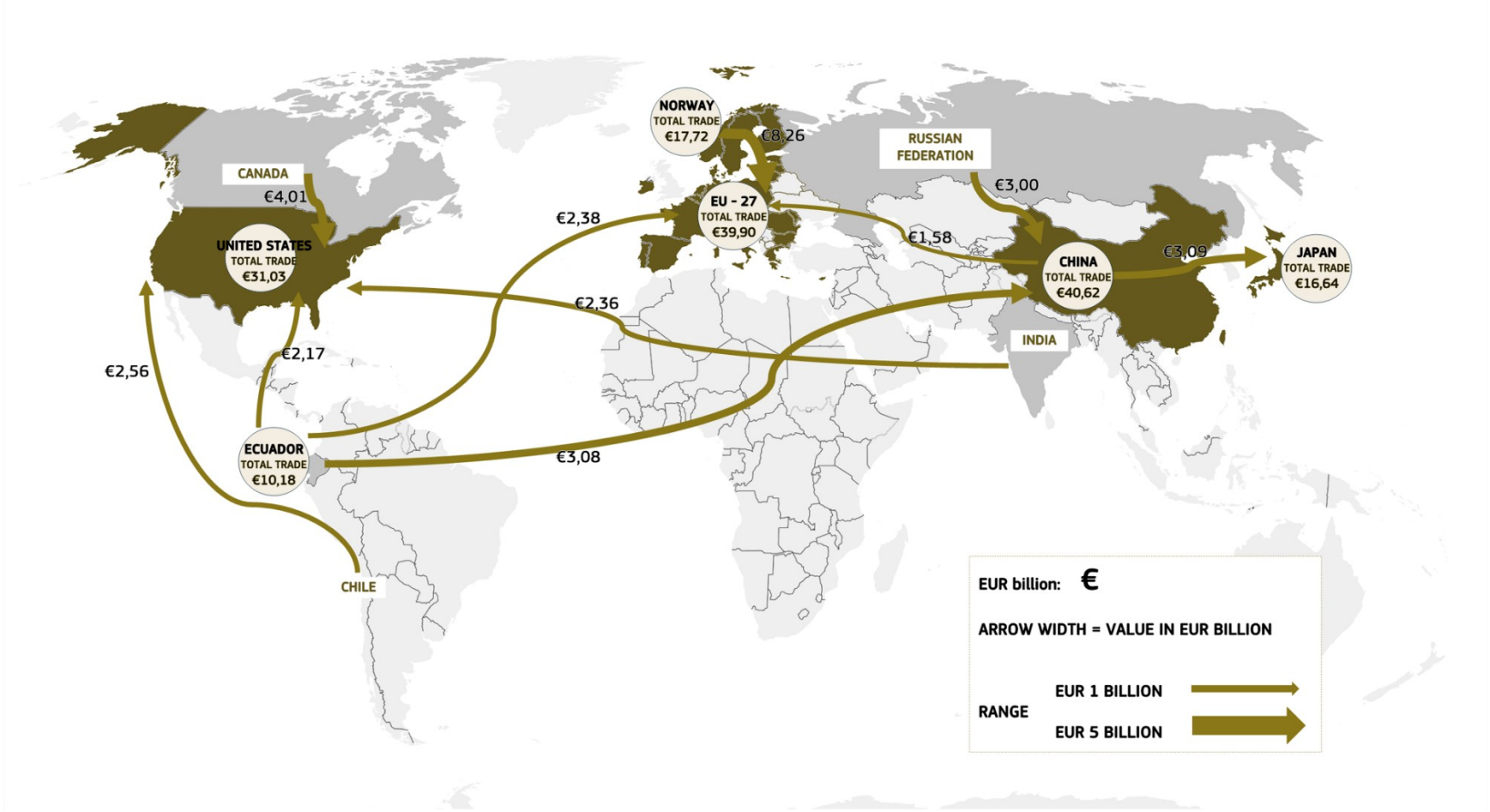
Source: EUMOFA elaboration of data from EUROSTAT (for EU trade flows, online data code DS-045409) and Trade Data Monitor (for non-EU countries). Possible discrepancies in % changes are due to rounding.

	2021		2022		2023		2024		2025		2025 / 2024	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
EU-27	6,21	25,77	6,09	31,82	5,90	30,08	5,93	29,79	6,48	31,64	+9%	+6%
US	3,80	24,63	3,84	29,41	3,53	24,32	3,64	24,44	3,72	24,27	+2%	-1%
China	5,89	15,14	6,62	22,15	7,03	21,57	7,13	20,86	7,19	21,47	+1%	+3%
Japan	2,36	12,33	2,38	14,80	2,27	12,84	2,29	12,25	2,21	12,45	-3%	+2%
Norway	1,19	1,88	1,22	2,42	1,20	2,53	1,17	2,57	1,22	2,40	+5%	-7%
Ecuador	0,31	0,37	0,43	0,68	0,39	0,61	0,37	0,50	0,43	0,57	+17%	+15%

CHART 2

TOP-10 TRADE FLOWS IN VALUE OF FISHERY AND AQUACULTURE PRODUCTS IN THE WORLD (2025, NOMINAL VALUES)

Source: EUMOFA elaboration of data from EUROSTAT (for EU trade flows, online data code DS-045409) and Trade Data Monitor (for non-EU countries).



1.3 CONSUMPTION

Based on the OECD-FAO Agricultural Outlook forecasts 2026-2035[42], the EU ranked 16th globally in per capita consumption of fish[43] in 2025. As shown in Table 4, consumption has remained below 20 kg per capita since 2022, and, according to these forecasts, is expected to decrease further. More specifically, it is projected to stay beneath the threshold of 19 kg per capita starting in 2027 and for the remainder of the forecast period.

TABLE 4

PER CAPITA HUMAN CONSUMPTION OF FISH. (VOLUMES IN KG).

Top-20 countries are ranked according to 2025 per capita consumption.

Source: OECD. Data marked with * are forecasts.

	2019	2020	2021	2022	2023	2024	2025	2026*	2027*	2028*
Malaysia	53.00	50.72	53.12	55.57	54.88	55.01	55.39	51.28	49.66	50.12
Korea	54.56	54.64	53.51	53.50	54.77	52.37	54.85	57.43	56.00	56.54
Norway	51.75	51.78	51.71	55.21	52.29	53.41	53.05	56.67	54.60	55.00
China	40.82	41.32	41.78	43.69	45.25	46.52	47.58	48.24	49.08	49.71
Indonesia	42.37	38.78	40.90	41.72	43.20	42.26	42.90	42.43	42.58	42.93
Viet Nam	40.60	40.69	41.14	40.58	43.23	42.92	42.40	46.22	44.91	45.39
Japan	44.58	42.58	41.74	40.62	41.02	40.16	40.36	41.81	40.52	41.18
Thailand	30.28	31.20	32.26	33.41	32.91	31.04	32.65	34.25	33.42	33.94
Israel	23.15	22.61	25.62	28.22	24.51	32.00	30.15	25.18	24.26	24.57
Peru	27.08	27.43	26.47	27.06	25.57	23.94	26.15	27.50	25.10	26.29
Russia	21.79	21.13	23.11	21.51	22.95	22.34	23.75	24.59	23.85	24.12
New Zealand	25.64	25.96	22.49	24.55	23.24	21.70	22.81	23.12	22.30	22.64
Philippines	26.61	25.52	26.53	25.16	23.99	22.00	22.69	24.22	23.95	24.21
United States	22.39	22.08	24.25	24.23	22.38	21.64	21.85	23.23	23.26	23.54
Egypt	25.72	23.99	21.15	21.56	20.24	20.31	20.62	20.90	20.69	20.89
EU	**21.30**	**19.92**	**20.32**	**19.99**	**19.27**	**19.37**	**19.93**	**19.50**	**18.64**	**18.66**
Canada	23.04	21.23	21.12	20.66	19.90	19.20	19.11	19.38	21.93	21.51
United Kingdom	17.91	17.44	18.77	18.44	17.95	18.34	18.87	17.11	16.52	16.61
Chile	15.45	15.23	15.85	16.14	16.31	17.05	17.07	18.08	17.72	17.86
Saudi Arabia	13.51	14.88	13.58	13.84	15.09	15.82	15.62	14.30	13.83	13.92
World	**20.45**	**20.09**	**20.43**	**20.76**	**21.14**	**21.34**	**21.70**	**21.70**	**21.55**	**21.59**

[42] Data in this section are collected from the OECD website (Organization for Economic Co-operation and Development). More details available at the link https://www.oecd.org/en/publications/oecd-fao-agricultural-outlook-2026-2035_47874669-en.html. These data are not directly comparable with other data in this report.
[43] This refers to the commodity "Fish and other fishing products".

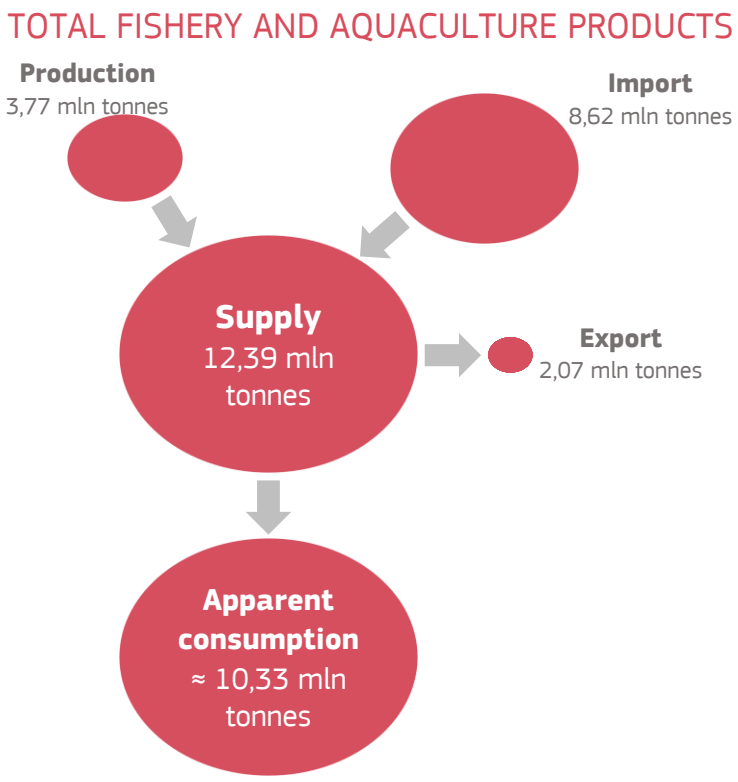
2/ MARKET SUPPLY

2.1 SUPPLY BALANCE AND SELF-SUFFICIENCY OVERVIEW

In 2024, the EU's[44] supply of fishery and aquaculture products for human consumption – including both domestic production and imports – totalled 12,39 million tonnes in live weight equivalent (LWE), remaining close to the ten-year low recorded in 2023. Overall supply has generally declined since 2018, with the exception of a temporary rebound in 2021 following the COVID-19 pandemic.

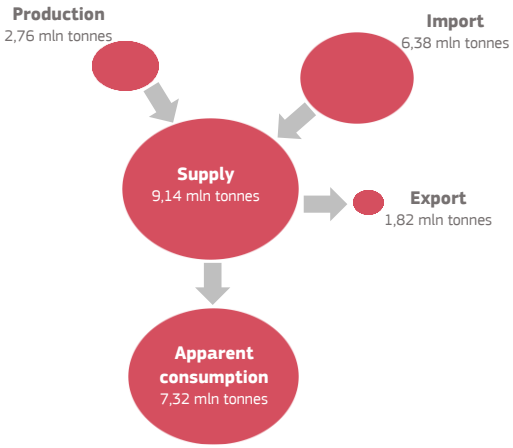
Between 2023 and 2024, domestic production decreased by 4%, whereas supply from non-EU countries rose by 2%. More in detail, catches[45] dropped by 104.574 tonnes LWE, aquaculture decreased by just above 36.000 tonnes LWE, and imports increased by 139.184 tonnes LWE. Exports fell by 3% (-73.435 tonnes LWE), reaching their lowest point in ten years. As a result, apparent consumption[46] in the EU in 2024 saw a modest 1% uptick (+71.951 tonnes LWE), reaching 10,33 million tonnes LWE.

CHART 3
EU SUPPLY BALANCE (2024, LIVE WEIGHT EQUIVALENT, FOOD USE ONLY)
Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.



[44] In line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, since the most recent reference period is year 2024, the UK is excluded from the EU aggregations of each year. In addition, EU data include Croatia since 2013, date of the EU's enlargement to this country.
[45] The available data on catches do not distinguish between catches destined for human consumption and catches destined for non-food uses. Thus, EUMOFA elaborates estimates based on proxies. The figures on catches presented in this chapter refer to estimated catches intended for human consumption, as included in the EU supply balance. Details on the approach used to elaborate these estimates can be found in the Methodological background.
[46] The definition of "Apparent consumption" is available in the "Supply balance sheet" section of the Methodological background.

FISHERY PRODUCTS



AQUACULTURE PRODUCTS

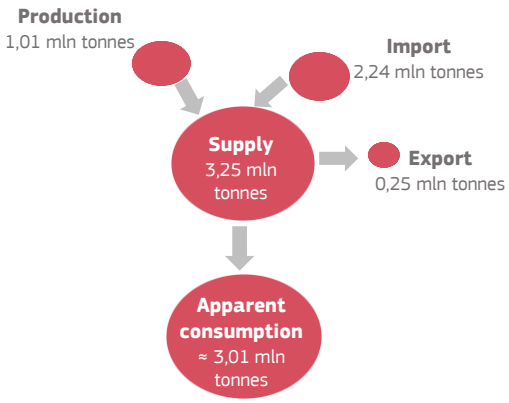


TABLE 5

EU SUPPLY BALANCE FOR FISHERY AND AQUACULTURE PRODUCTS BY COMMODITY GROUP AND PRODUCTION METHOD (2024, LIVE WEIGHT EQUIVALENT, FOOD USE ONLY)

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.

Commodity group	Production (tonnes)		Import (tonnes)		Export (tonnes)		Apparent consumption (tonnes)			Apparent consumption per capita (kg)		
	Wild	Farmed	Wild	Farmed	Wild	Farmed	Wild	Farmed	Total	Wild	Farmed	Total
Bivalves and other molluscs and aquatic invertebrates	147.426	444.842	155.697	190.897	27.042	23.373	276.081	612.366	888.448	0,61	1,36	1,98
Cephalopods	88.505	0	652.709	0	74.210	0	667.004	0	667.001	1,48	0	1,48
Crustaceans	121.411	446.000	430.741	445.500	154.773	4.332	397.379	441.614	838.995	0,88	0,98	1,87
Flatfish	63.698	15.863	145.629	793.000	78.440	441.000	130.887	16.215	147.100	0,29	0,04	0,33
Freshwater fish	88.217	102.246	60.420	217.292	5.806	5.610	142.831	313.928	456.760	0,32	0,70	1,02
Groundfish	566.502	0	2.224.958	439.000	486.363	0	2.305.097	439.000	2.305.536	5,13	0	5,13
Miscellaneous aquatic products	90.269	1.604	278.004	0	72.947	0	295.326	1.604	296.930	0,66	0	0,66
Other marine fish	209.659	216.513	399.600	127.253	136.423	41.697	472.836	302.069	774.904	1,05	0,67	1,72
Salmonids	10.318	200.520	64.660	1.258.283	438.000	162.405	74.540	1.296.398	1.370.940	0,17	2,88	3,05
Small pelagics	1.014.421	0	636.692	0	518.899	0	1.132.214	0	1.132.214	2,52	0	2,52
Tuna and tuna-like species*	356.200	31.171	1.333.251	642.000	264.206	10.829	1.425.245	20.984	1.446.230	3,17	0,05	3,22
Total	**2.756.626**	**1.013.205**	**6.382.361**	**2.241.099**	**1.819.547**	**248.689**	**7.319.440**	**3.005.615**	**10.325.058**	**16,28**	**6,69**	**22,97**

Estimates based on data available as of August 2026. The figures in this table may differ from those currently available on the EUMOFA website, which are constantly updated. Possible discrepancies in totals are due to rounding.
* Apparent consumption of the commodity group "tuna and tuna-like species" includes 97% tuna and 3% swordfish.

Per capita apparent consumption of fishery and aquaculture products in the EU reached an estimated 22,97 kg LWE in 2024. Wild products comprised over 70% of this total (an estimated 16,36 kg LWE per capita), with farmed products accounting for the remaining estimated 6,53 kg LWE.

Driven by the decline in human consumption catches since 2018, the EU market remains heavily dependent on external supply: imports from non-EU countries were estimated to cover 62% of overall EU apparent consumption in 2024.

Meanwhile, catches for non-food uses showed higher fluctuation, dropping by 8% in 2024 after a sharp 11% increase between 2022 and 2023.

TABLE 6

EU PRODUCTION (TONNES, LIVE WEIGHT)

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main and fish_aq2a) and FAO data. Details on the sources and on the methodological approach used to assess the destination use of catches can be found in the Methodological background. Possible discrepancies in totals are due to rounding.

		2020	2021	2022	2023	2024
Food use	Catches	2.963.236	2.920.197	2.838.521	2.861.200	2.756.626
	Aquaculture	1.088.398	1.129.157	1.087.776	1.043.081	1.013.205
Total production destined for food use		**4.051.634**	**4.049.354**	**3.926.297**	**3.904.281**	**3.769.831**
Non-food use	Catches	905.728	671.05	627.202	693.636	637.336

The EU maintains a high level of apparent consumption of fishery and aquaculture products mainly due to imports from third countries.

Self-sufficiency, defined as the capacity of EU Member States to meet demand through their own production, can be estimated by calculating the ratio of domestic production to domestic apparent consumption.

TABLE 7

SELF-SUFFICIENCY RATES BY COMMODITY GROUP

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources used can be found in the Methodological background.

Commodity groups and share of total apparent consumption in 2023	Self-sufficiency rates									
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Groundfish (22%)	26%	23%	26%	24%	23%	22%	21%	20%	24%	25%
Tuna and tuna-like species (14%)	32%	34%	32%	38%	33%	29%	32%	30%	35%	27%
Salmonids (13%)	17%	19%	18%	18%	17%	17%	16%	15%	15%	15%
Small pelagics (11%)	115%	103%	104%	101%	98%	96%	95%	95%	86%	90%
Bivalves and other molluscs and aquatic invertebrates (9%)	63%	65%	75%	77%	80%	73%	74%	70%	71%	67%
Crustaceans (8%)	17%	17%	16%	19%	17%	16%	14%	15%	14%	15%
Other marine fish[47] (8%)	68%	66%	65%	61%	60%	59%	60%	58%	60%	55%
Cephalopods (6%)	18%	14%	13%	12%	12%	13%	12%	16%	14%	13%
Freshwater fish (4%)	36%	38%	42%	39%	39%	45%	47%	43%	43%	42%
Miscellaneous aquatic products (3%)	7%	17%	14%	14%	24%	17%	25%	22%	26%	31%
Flatfish (2%)	70%	65%	66%	63%	64%	67%	62%	57%	55%	54%
Total	**44,6%**	**44,0%**	**44,6%**	**43,4%**	**41,7%**	**38,9%**	**38,2%**	**37,5%**	**38,1%**	**36,5%**

Between 2015 and 2024, the EU self-sufficiency in fishery and aquaculture products varied considerably. High domestic output, especially from wild catches, maintained the rate near 45% in 2015 and 2017. A continuous reduction in domestic production then triggered a steady decline starting in 2018.

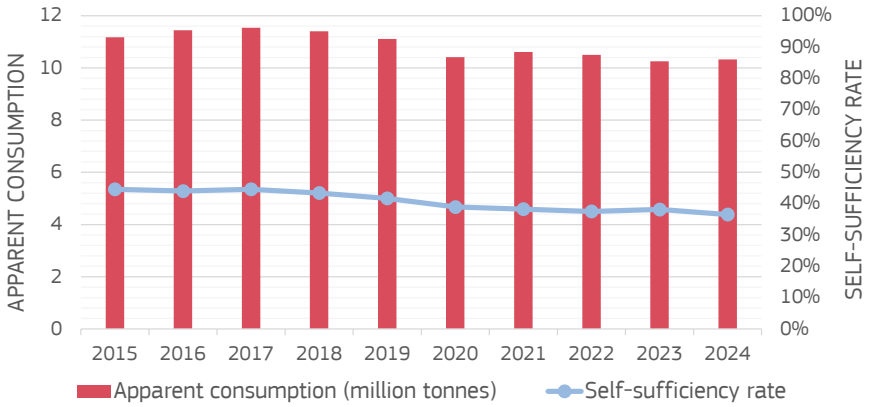
[47] Species of this group are gilthead seabream and other seabreams, seabass, monk, sharks, ray, red mullet, gurnard, scabbardfish, cusk-eel, dogfish, picarel, John Dory, smelt, ray's bream, weever, cobia, and marine species not included in other commodity groups. For more information, please consult the Metadata at the link https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/metadata.

Consequently, self-sufficiency dropped to 37,5% in 2022. Following a modest recovery to 38,1% in 2023, the rate experienced a further sharp decline of 4% in 2024, reaching an estimated ten-year low of 36,5%.

CHART 4

EU APPARENT CONSUMPTION AND SELF-SUFFICIENCY RATES FOR FISHERIES AND AQUACULTURE PRODUCTS

Source: EUMOFA, based on EUROSTAT (online data codes: online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources used can be found in the Methodological background.



2.2 ANALYSIS BY MAIN SPECIES

TABLE 8

SELF-SUFFICIENCY RATES OF TOP-15 MOST CONSUMED PRODUCTS IN THE EU (2024)

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources used can be found in the Methodological background.

Products[48] and share of total apparent consumption	Per capita consumption (kg, live weight equivalent)	Self-sufficiency rate
Tuna (14%)	3,12	26%
Salmon (11%)	2,54	1%
Shrimps (7%)	1,64	10%
Alaska pollock (6%)	1,47	0%
Cod (6%)	1,41	6%
Mussel (5%)	1,09	71%
Hake (4%)	1,02	42%
Herring (4%)	0,82	89%
Squid (3%)	0,74	15%
Sardine (3%)	0,60	77%
Surimi[49] (2%)	0,52	n.a.
Mackerel (2%)	0,51	76%
Trout (2%)	0,48	85%
Saithe (=Coalfish) (2%)	0,38	11%
Scallop (1%)	0,33	34%

Meeting the EU's demand for fishery and aquaculture products chiefly relies on imports – mainly of tuna, salmon, shrimps, Alaska pollock and cod. In 2024, the combination of these five species accounted for 44% of the EU's total apparent consumption of fishery and aquaculture products. For this group, the EU's overall self-sufficiency rate was only 11%.

The segments below focus on the evolution of self-sufficiency for the 15 products with the highest apparent consumption in the EU.

[48] Some species are grouped in a single product, namely: mussel (*Mytilus* spp. + other mussels), tuna (skipjack, yellowfin, albacore, bigeye, bluefin and miscellaneous) and shrimp (warmwater shrimps, coldwater shrimps, deep-water rose shrimps, shrimp *Crangon* spp. and miscellaneous shrimps).

[49] Due to the multi-species composition of surimi and the absence of specific production statistics, no self-sufficiency rate can be estimated for this product.

TUNA

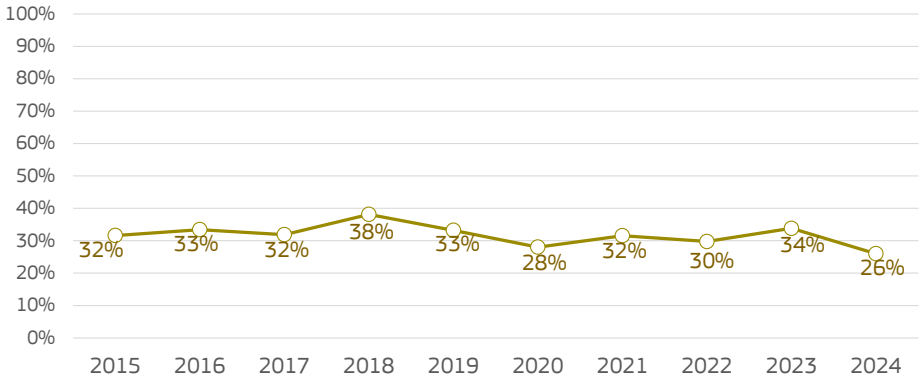
In 2024, the apparent consumption of the commodity group "tuna and tuna-like species" included 97% tuna and 3% swordfish. The self-sufficiency rate of this category reached 27%, or 26% when considering tuna only. It is worth noting, however, that tuna imported to the EU is likely to include a significant share of EU catches by distant water fleets that are landed in third countries and then imported again.

Over the 2015–2024 decade, the EU's self-sufficiency rate for tuna peaked at an estimated 38% in 2018. After remaining relatively stable until 2017, the rate rose in 2018 driven by higher skipjack tuna catches by Spanish and French fleets alongside a reduction in imports. Production subsequently declined, bringing self-sufficiency to an estimated average of 30% between 2019 and 2022. In 2023, the self-sufficiency rate recovered to 34%, largely due to an 11% drop in imports. However, in 2024 the rate contracted sharply to an estimated 26%. This marked drop resulted from a 17% surge in imports - which reached a near-record 1,31 million tonnes LWE[50] and contributed to achieve a 10-year peak in tuna apparent consumption - combined with an 11% decline in catches, which fell to their lowest level of the decade.

CHART 5

SELF-SUFFICIENCY RATE FOR TUNA

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources used can be found in the Methodological background.



SALMONIDS

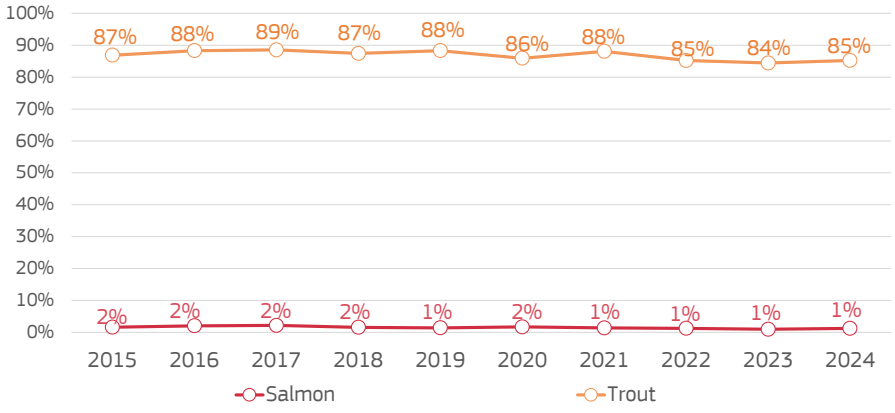
SALMON, TROUT

In 2024, only 1,2% of the salmon consumed in the EU was produced domestically. Most EU salmon imports originated from Norway, which accounted for 80% of total import volumes. Additionally, a large share of intra-EU salmon trade consists of re-exports of products originally imported from third countries. By contrast, thanks to well-established aquaculture production, the EU maintained a high level of self-sufficiency for trout[51], averaging at 87% throughout the 2015–2024 decade.

CHART 6

SELF-SUFFICIENCY RATE FOR MOST CONSUMED SALMONIDS

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources used can be found in the Methodological background



[50] Their peak was in 2020, at 1,35 million tonnes LWE.
[51] This consists of freshwater and ocean farmed trout.

GROUNDFISH

ALASKA POLLOCK, COD, HAKE, SAITHE

Four groundfish species – namely Alaska pollock, cod, hake and saithe – had a combined per capita apparent consumption of 4,27 kg LWE in 2024, which accounted for more than one quarter of the EU's total apparent consumption of wild products. When farmed products are also considered, this share corresponds to nearly 20% of total apparent consumption.

As Alaska pollock is not targeted by the EU fleet, Member States rely entirely on non-EU suppliers to meet demand, resulting in a self-sufficiency rate of 0%. For the other three groundfish species – cod, hake and saithe – the EU's combined self-sufficiency rate was 19% in 2024.

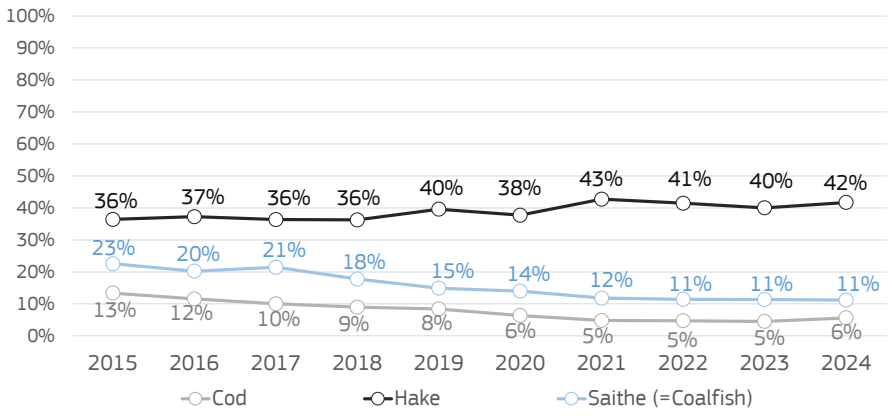
For cod and saithe, the self-sufficiency rates were 6% and 11%, respectively, in 2024, reflecting no significant change year-on-year. Both species showed higher self-sufficiency levels during the initial years of the decade before declining as production decreased. For cod, this longer-term decline reflects the contraction of EU production amid poor stock conditions and increasingly restrictive fishing opportunities in several important fisheries[52]. This has been particularly pronounced in the Baltic Sea, where targeted fisheries for Eastern and Western Baltic cod have been closed and fishing opportunities are limited to by-catches[53]. For saithe, declining production has similarly occurred against a background of lower stock biomass and corresponding changes in fishing opportunities in the main North-East Atlantic fisheries.

On the other hand, the EU holds a stronger self-sufficiency position for hake, with a ten-year average close to 40%. This comparatively stronger position is supported by more favourable stock conditions in important EU fisheries, including the Northern hake stock, which has remained above the relevant biomass reference points in recent years[54]. From 2023 to 2024, higher Spanish catches drove a 5% increase in domestic production which, together with a slight decrease in imports, pushed self-sufficiency up to 42%.

CHART 7

SELF-SUFFICIENCY RATE FOR MOST CONSUMED GROUNDFISH

Source: EUMOFA, based on EUROSTAT data (online data codes: fish_ca_main and DS-045409). Details on the sources used can be found in the Methodological background.



SMALL PELAGICS

HERRING, MACKEREL, SARDINE

In 2024, catches of small pelagics stood at 1,01 million tonnes LWE, representing 27% of total EU fishery and aquaculture production intended for human consumption. Looking solely at wild production, their share reached 37%. This output significantly exceeded EU imports of small pelagics - which remained below 637.000 tonnes LWE in the same year - meaning that the EU is largely self-sufficient in meeting demand for these species. However, self-sufficiency dynamics varied considerably across the most consumed small pelagic species.

[52] https://oceans-and-fisheries.ec.europa.eu/news/eu-reaches-agreements-norway-and-uk-and-bilaterally-norway-fishing-opportunities-and-access-waters-2023-12-08_en
[53] https://oceans-and-fisheries.ec.europa.eu/news/new-selective-gears-baltic-help-rebuild-cod-stocks-2024-12-13_en
[54] https://standardgraphs.ices.dk/ViewSourceData.aspx?key=19042

In the early years of the decade under review, the EU enjoyed a self-sufficiency rate exceeding 100% for mackerel. The rate subsequently dropped below 90%, before falling to a decade low of 76% in 2024. The long-term decline in mackerel self-sufficiency reflects lower EU catches, linked to reduced fishing opportunities and, for some Member States, changes in quota allocation following Brexit[55]. In 2024, the North-East Atlantic mackerel TAC was reduced by 5% compared with 2023[56]. Ireland, one of the main EU producers, has also been particularly affected by the progressive transfer of mackerel quota to the UK under the EU–UK TCA[57].

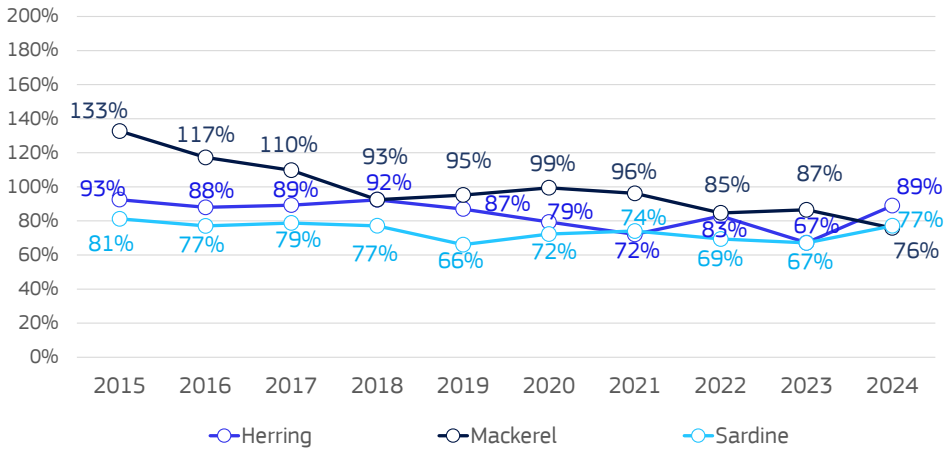
Conversely, the self-sufficiency for herring rebounded from its decade low of a 67% in 2023 to 89% in 2024. This recovery was driven by increased catches across the three main producing Member States (the Netherlands, Denmark, and Germany).

The self-sufficiency for sardine likewise improved, rising from 67% in 2023 to 77% in 2024. This growth was largely propelled by a strong surge in Portuguese catches, which reached a ten-year peak of nearly 100.000 tonnes LWE. The increase in sardine self-sufficiency was supported by the continued recovery of the Iberian sardine stock. Stock biomass has remained above MSY Btrigger[58] since 2020, while recruitment strengthened markedly in 2024[59], supporting higher fishing opportunities and catches, particularly in Portugal[60].

CHART 8

SELF-SUFFICIENCY RATE FOR MOST CONSUMED SMALL PELAGICS

Source: EUMOFA, based on EUROSTAT data (online data codes: fish_ca_main and DS-045409). Details on the sources used can be found in the Methodological background.



BIVALVES

MUSSEL, SCALLOP

Among the EU's most consumed species, mussel - alongside small pelagics - represents one of the few species exhibiting high self-sufficiency rate, largely supported by well-established aquaculture infrastructure. However, self-sufficiency contracted between 2023 and 2024, falling from 74% to 71%. This was primarily driven by a sustained decline in EU farmed mussel production in recent years, which has contributed to an overall contraction in total EU aquaculture output.

Scallop self-sufficiency was more volatile during the ten-year period analysed. Peaking in 2018 due to stronger French production, it averaged 33% over the subsequent six years. From 2023 to 2024, it dropped from 38% to 34%, driven by lower Irish production and higher imports.

[55] https://www.gov.ie/en/department-of-agriculture-food-and-the-marine/press-releases/minister-mcconalogue-calls-on-the-eu-to-firmly-reject-norways-unilateral-opportunistic-and-unsustainable-claim-for-a-55-increase-in-its-share-of-the-mackerel-stock/ and https://www.gov.ie/en/department-of-agriculture-food-and-the-marine/press-releases/minister-mcconalogue-secures-additional-mackerel-quota-for-irish-fishers/

[56] https://oceans-and-fisheries.ec.europa.eu/news/north-east-atlantic-coastal-states-reach-agreement-mackerel-blue-whiting-and-atlanto-scandian-2023-10-23_en

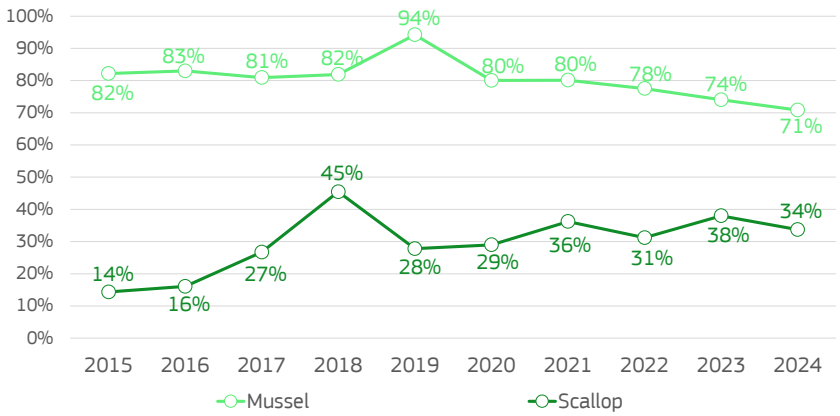
[57] Trade and Cooperation Agreement.

[58] The MSY Btrigger is a reference point in fisheries management used by organizations like the International Council for the Exploration of the Sea (ICES).

[59] https://www.ipma.pt/pt/pescas/recursos/sardinha/estado/?page=estadoatual.xml

[60] https://www.ipma.pt/pt/media/noticias/news.detail.jsp?f=noticia_sociedade_civil.html&y=2024

CHART 9
SELF-SUFFICIENCY RATE FOR MOST CONSUMED BIVALVES
Source: EUMOFA, based on EUROSTAT data (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources used can be found in the Methodological background.



OTHER PRODUCTS OF DIFFERENT COMMODITY GROUPS

SHRIMPS, SQUID, SURIMI

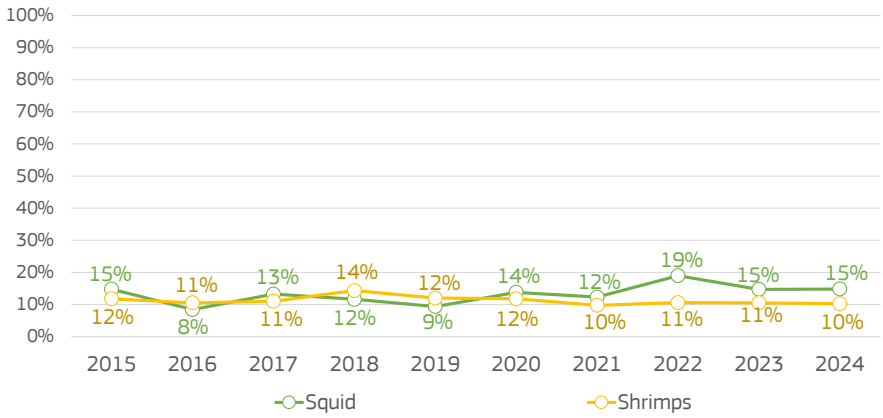
Other highly consumed products in the EU include shrimps (belonging to the Crustaceans group), squid (Cephalopods), and surimi (classified under Miscellaneous aquatic products).

The EU relies heavily on imports for its supply of shrimps and squid. Over the decade under review, the self-sufficiency rate for shrimps averaged 11%, showing no notable fluctuations. Warmwater shrimps and Argentine red shrimp - primarily imported in frozen or prepared/preserved forms - account for the majority of consumption.

By contrast, self-sufficiency for squid exhibited significant variation in recent years. After reaching a decade high of 19% in 2022 – which was a 12-percentage-point surge from 2021 - it fell to 15% in both 2023 and 2024. These shifts closely mirrored fluctuations in Spanish fleet catches.

With regard to surimi, the self-sufficiency rate cannot be estimated, as it is a processed product for which dedicated production statistics are unavailable, being derived from multiple species[61]. EU surimi production, and consequently apparent consumption, remain highly dependent on imports of surimi base from non-EU countries, particularly Alaska pollock sourced from the United States. France, Spain, and Italy represent the primary EU markets for surimi.

CHART 10
SELF-SUFFICIENCY RATE FOR OTHER MOST CONSUMED PRODUCTS
Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources used can be found in the Methodological background.



[61] Mainly Alaska pollock and blue whiting.

3/ CONSUMPTION

3.1 OVERVIEW FOR TOTAL FISHERY AND AQUACULTURE PRODUCTS

APPARENT CONSUMPTION

From 2023 to 2024, apparent consumption in the EU was estimated to grow by 1% and reach 10,33 million tonnes LWE.

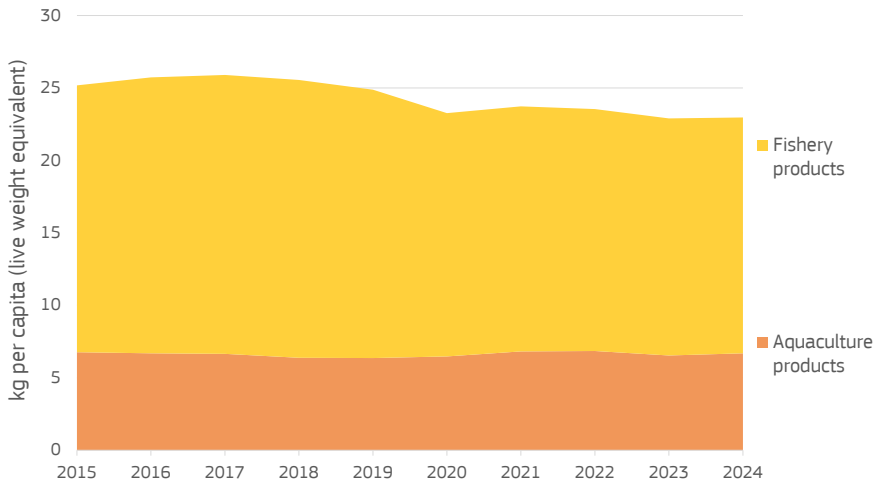
The EU's apparent consumption of fishery and aquaculture products averaged close to 10,9 million tonnes LWE, or 24,37 kg LWE per capita, over the 2015-2024 period. In 2024, it was estimated at 10,33 million tonnes LWE, corresponding to 22,97 kg LWE per capita. This represented a 1% increase from the lowest level of the period, recorded in 2023. Both EU aquaculture production and catches decreased, but higher imports and lower exports more than offset the reduction in domestic production.

Apparent consumption of wild products remained broadly stable compared with 2023, decreasing marginally, by 0,1%, to 7,32 million tonnes LWE, its lowest level over the 2015-2024 period. This corresponded to 16,28 kg LWE per capita. The decline in catches was largely offset by lower exports of wild products and, to a lesser extent, by slightly higher imports. By contrast, apparent consumption of farmed products increased by 3% to 3,01 million tonnes LWE, or 6,69 kg LWE per capita, reversing the decline recorded in 2023 and returning slightly above its ten-year average. This increase was driven by higher imports, which more than offset the decline in EU aquaculture production.

Wild products accounted for 71% of total apparent consumption in 2024, compared with 29% for farmed products. Over the 2015-2024 period, wild products represented, on average, around 73% of apparent consumption. However, their share has generally declined since reaching 75% in 2018, falling to around 71% in recent years. This erosion of wild fish quantities consumed in the EU led to an increase in the relative share of aquaculture products, which increased from 25% in 2018 to 29% in 2024.

CHART 11
PER CAPITA APPARENT CONSUMPTION OF FISHERY AND AQUACULTURE PRODUCTS

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.

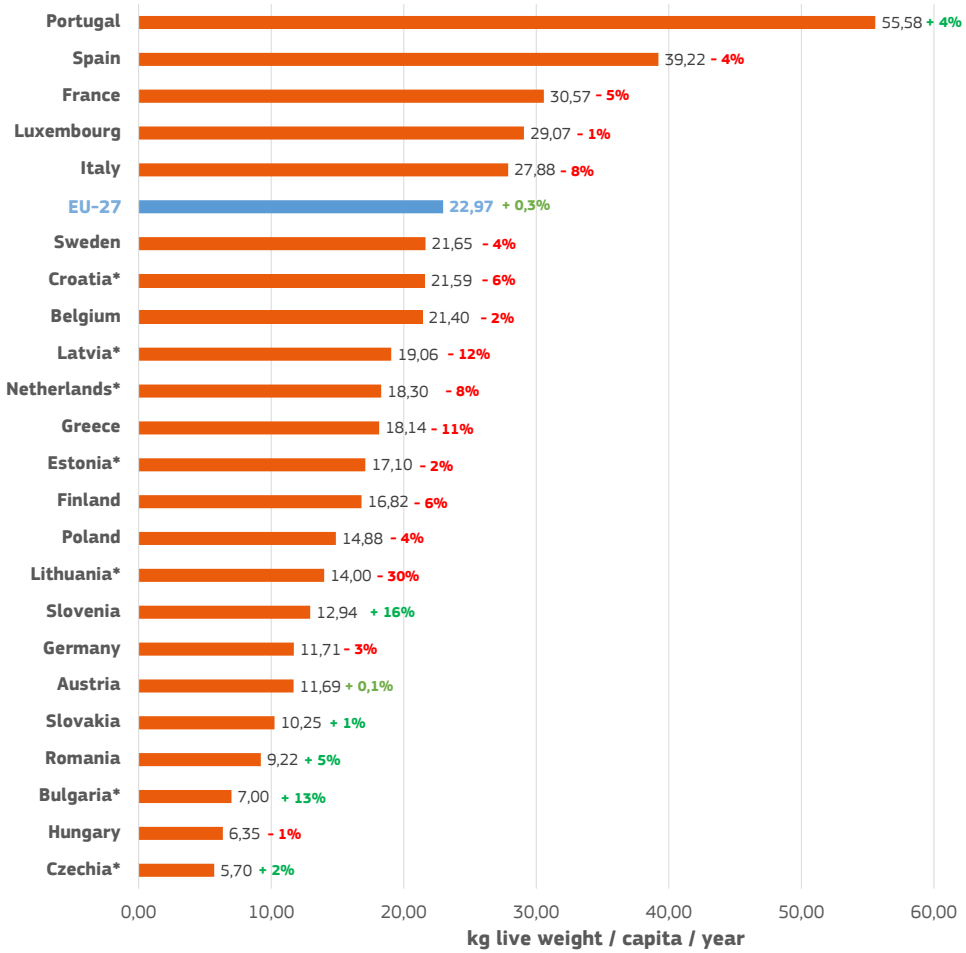


According to EUMOFA and national estimates[62], Portuguese consumers continue to record the highest per capita apparent consumption of fishery and aquaculture products in the EU . Their per capita apparent consumption followed a downward trend after peaking at approximately 61 kg LWE in 2018, reaching 53,61 kg LWE in 2023. However, in 2024, it increased by 4% to 55,58 kg LWE. At the same time, apparent consumption declined in several traditionally high-consuming countries, including Spain, France, Italy and Greece, while increases were recorded in a smaller group of Member States, most notably Bulgaria and Slovenia.

CHART 12

PER CAPITA APPARENT CONSUMPTION OF FISHERY AND AQUACULTURE PRODUCTS BY MEMBER STATE IN 2024 AND % VARIATION 2024/2023

Source: EUMOFA estimates and National sources for a selection of countries (see box below)



*Data were provided or confirmed by the following national sources: Bulgaria: Executive Agency for Fisheries and Aquaculture, using the methodology of the Bulgarian National Statistical Institute's Household Budget Survey; Croatia: Ministry of Agriculture, Forestry and Fisheries; Czechia: Ministry of Agriculture of the Czech Republic; Estonia: Estonian Institute of Economic Research (EKI); Latvia: Latvia University of Life Sciences and Technologies and Ministry of Agriculture; Lithuania: Ministry of Agriculture of the Republic of Lithuania; Netherlands: Visfederatie (Dutch Fish Industry Association). Denmark, Ireland, Malta and Cyprus are not included in this Chart. 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 20-25 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; Malta: due to the relevance of imports of frozen fish likely used directly as fish feed in the bluefin tuna fattening industry, available data for Malta do not allow to produce precise estimates. Also, in small countries such as Malta, tourism has a significant impact on total consumption. Considering this, annual per capita apparent consumption can be estimated between 30-40 kg LWE. For Cyprus, no estimates were available for 2024, but per capita apparent consumption was estimated at between 25-30 kg LWE over the previous three years.

[62] The methodologies for estimating apparent consumption at EU and Member State levels are different. The former is based on data and estimates as described in the Methodological background, while the latter also requires adjustments for abnormal trends arising from the higher impact of stock changes. Where EUMOFA estimates of 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 Chart 12.

Salmon was the individual species with the highest apparent consumption throughout the 2015-2024 period. That being said, the product category "tuna" includes several main commercial tuna species[63], which explains why its combined apparent consumption exceeds that of salmon. The same applies to the "shrimps" category, which aggregates various species of shrimps and prawns.

Table 9 shows EUMOFA's estimates of per capita apparent consumption for the 15 most consumed fishery and aquaculture products in the EU.

TABLE 9

PER CAPITA APPARENT CONSUMPTION OF TOP 15 MOST CONSUMED PRODUCTS (2024)

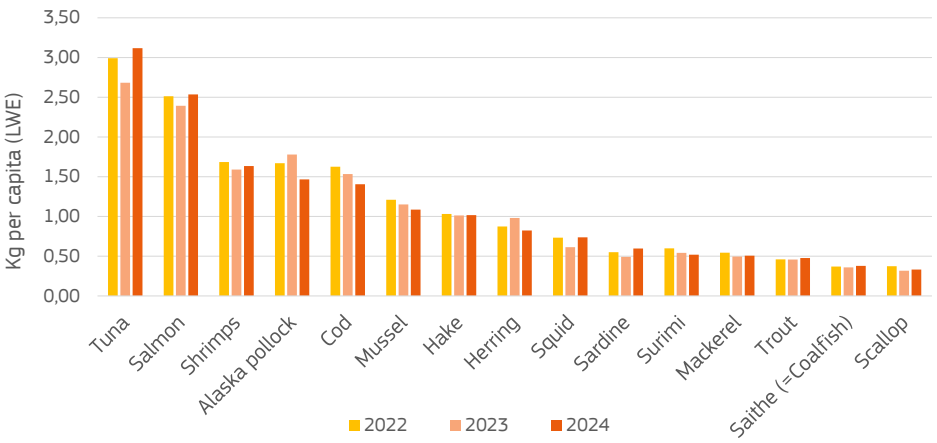
Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.

Products	Per capita consumption (kg, LWE)	Consumption evolution 2024/2023	% wild	% farmed
Tuna	3.12	+16%	98.5%	1.5%
Salmon	2.54	+6%	5.6%	94.4%
Shrimps	1.64	+3%	42.0%	58.0%
Alaska pollock	1.47	-18%	100%	0%
Cod	1.41	-8%	99.9%	0.1%
Mussel	1.09	-6%	6.1%	93.9%
Hake	1.02	+0.4%	100%	0%
Herring	0.82	-16%	100%	0%
Squid	0.74	+20%	100%	0%
Sardine	0.60	+21%	100%	0%
Surimi	0.52	-4%	100%	0%
Mackerel	0.51	+2%	100%	0%
Trout	0.48	+4%	0.8%	99.2%
Saithe (=Coalfish)	0.38	+5%	100%	0%
Scallop	0.33	+5%	82.3%	17.7%
Other products	6.33	-3%	72.5%	27.5%
Total	**22.97**	**+0.3%**	**70.9%**	**29.1%**

CHART 13

PER CAPITA APPARENT CONSUMPTION OF TOP 15 MOST CONSUMED PRODUCTS, THREE-YEAR TREND

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.



TUNA

Tuna's apparent consumption in the EU reached 3,12 kg LWE per capita in 2019, driven by a significant increase in imports. In 2020 and 2021, consumption declined, primarily due to lower catches in 2020 and decreased imports in 2021. In 2022, the trend reversed and apparent consumption rose to 2,99 kg LWE per capita, mainly driven by higher imports and lower exports. In 2023, apparent consumption fell by 10% to 2,68 kg LWE per capita. An 11% decline in imports more than offset the increase in catches

[63] Skipjack, yellowfin, albacore, bigeye, bluefin and miscellaneous tunas.

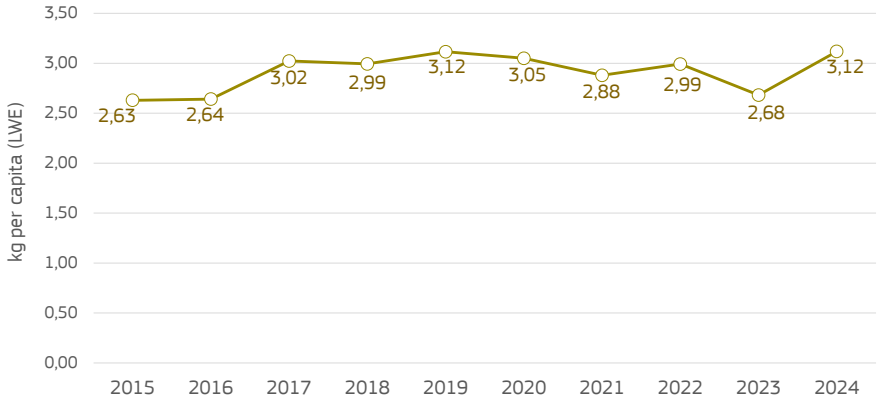
over that year. In 2024, this decline was fully reversed: apparent consumption increased by 16% to 3,12 kg LWE per capita, marginally exceeding the 2019 level and reaching its highest level of the 2015-2024 period. The increase was mainly driven by a 17% surge in imports and a 16% decrease in exports, which more than offset an 11% decline in catches.

More broadly, tuna apparent consumption in the EU is strongly influenced by import flows, reflecting the EU's relatively low level of self-sufficiency for this product. In 2024, the self-sufficiency rate for tuna fell to 26%, its lowest level over the 2015-2024 period. The market is largely supplied by skipjack and yellowfin tuna, much of which reaches EU consumers as prepared or preserved products, particularly canned tuna. Part of these imports also originates from catches by EU distant-water fleets that are landed and processed in third countries before being imported into the EU. Consequently, the EU's dependence on imports does not necessarily imply an equivalent dependence on catches by non-EU fleets.

CHART 14

PER CAPITA APPARENT CONSUMPTION OF TUNA

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.



SALMONIDS

SALMON, TROUT

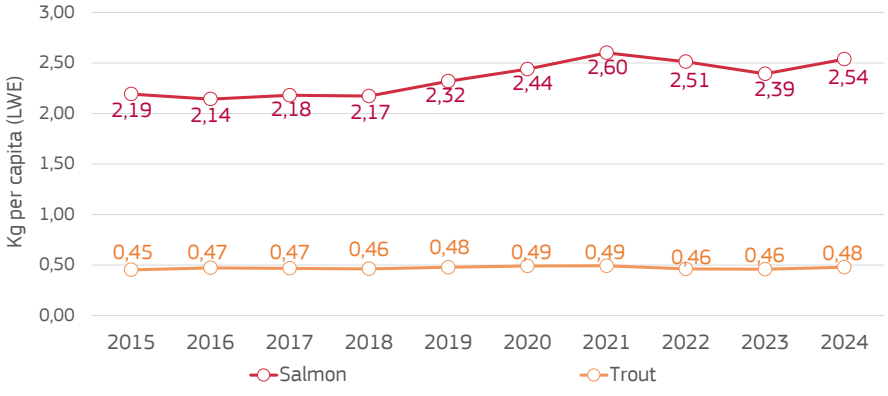
Apparent consumption of salmon increased over most of the 2015–2021 period, reaching a decade high of 2,60 kg LWE per capita in 2021. It declined in 2022 and 2023, as a result of reduced imports, before recovering by 6% in 2024 to 2,54 kg LWE per capita, the second-highest level of the decade. Indeed, the EU market remains highly dependent on imports, primarily from Norway and, to a much lesser extent, from the United Kingdom, particularly Scotland, while EU aquaculture production is concentrated mainly in Ireland. In 2024, only around 1% of salmon consumed in the EU was produced domestically, while Norway accounted for 80% of import volumes.

Apparent consumption of trout in the EU remained relatively stable at close to 500 grams LWE per capita during the decade analysed. Unlike salmon, trout consumption relies predominantly on EU production: the EU self-sufficiency rate reached 85% in 2024 and averaged around 87% over the 2015-2024 period.

CHART 15

PER CAPITA APPARENT CONSUMPTION OF MOST CONSUMED SALMONIDS

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.



GROUNDFISH

COD, ALASKA POLLOCK, HAKE, SAITHE (=COALFISH)

Four groundfish species – cod, Alaska pollock, hake and saithe – together accounted for nearly one fifth of the EU's total apparent consumption of fishery and aquaculture products in 2024, with a combined 4,27 kg LWE per capita.

EU apparent consumption of cod is mainly supplied by imports from Norway, Iceland and Russia – with a self-sufficiency rate of 6% in 2024. Since peaking at 2,06 kg LWE per capita in 2016, apparent consumption has generally declined. In 2024, it fell by a further 8% to 1,41 kg LWE per capita, the lowest level of the decade, mainly due to lower imports and higher exports which were partly offset by a 14% increase in catches. Nevertheless, cod catches in 2024 were less than one third of those recorded in 2015.

Since the EU does not catch Alaska pollock, apparent consumption is estimated as total imports *minus* exports. During the analysed decade, this averaged 1,68 kg LWE per capita. In 2024, it decreased by 18% to 1,47 kg LWE per capita, also the lowest level of the decade.

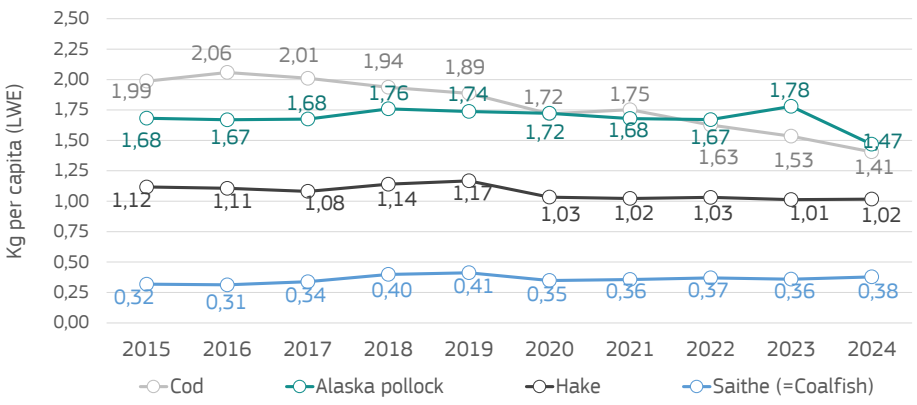
Apparent consumption of hake remained relatively stable at around 1,1 kg LWE per capita between 2015 and 2019, reaching a decade high of 1,17 kg in 2019. In 2020, it fell markedly to 1,03 kg LWE per capita, following simultaneous declines in catches and imports. Since then, consumption has stabilised at a lower level of around 1,02 kg LWE per capita, as the partial recovery in EU catches has been accompanied by imports remaining below their pre-2020 levels. In 2024, apparent consumption stood at 1,02 kg LWE per capita, broadly unchanged from the previous years. Hake continued to have the highest self-sufficiency rate among the four species, reaching 42% in 2024.

Apparent consumption of saithe, which is largely supplied by imports from Norway and Iceland, remained relatively stable over the 2019-2024 period, averaging 350 grams LWE per capita.

CHART 16

PER CAPITA APPARENT CONSUMPTION OF MOST CONSUMED GROUNDFISH

Source: EUMOFA, based on EUROSTAT data (online data codes: fish_ca_main and DS-045409). Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.



SMALL PELAGICS

HERRING, MACKEREL, SARDINE

The EU produces significant quantities of small pelagics, including: herring, mainly caught by Dutch and Danish vessels; mackerel, mainly caught by Irish vessels; and sardine, primarily caught by the Croatian and Spanish fleets. Imports from non-EU countries also contribute significantly to the availability of these species on the EU market, particularly imports from Norway and the UK for herring and mackerel, and Morocco for sardine. EU exports also play an important role in shaping the supply balance for these species.

Apparent consumption of herring has generally declined from the higher levels recorded in the first half of the 2019-2024 period. After recovering to 980 grams LWE per capita in 2023, it fell by 16% in 2024 to 820 grams LWE per capita, the lowest level of the decade. This occurred despite higher EU catches, as imports declined by

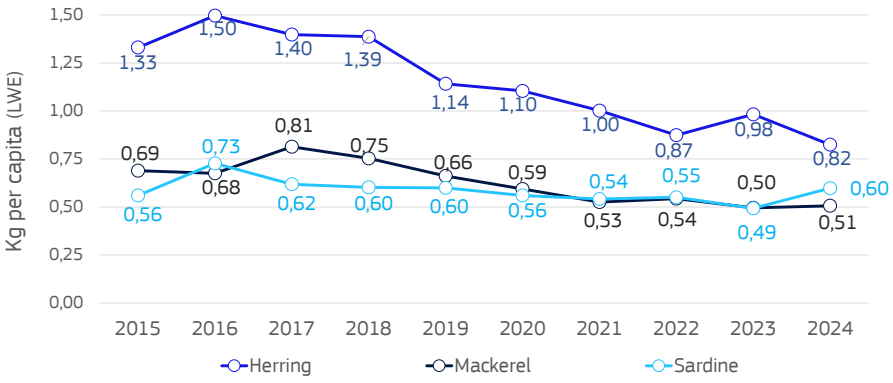
18% and exports increased by 24%. At the same time, the herring self-sufficiency rate increased markedly, from 67% in 2023 to 89% in 2024.

For mackerel and sardine, per capita apparent consumption remained relatively stable over the 2019-2024 period, averaging around 650 and 600 grams LWE per capita, respectively. In 2024, apparent consumption increased for both species, only marginally for mackerel but more markedly for sardine, which returned to pre-pandemic levels.

CHART 17

PER CAPITA APPARENT CONSUMPTION OF MOST CONSUMED SMALL PELAGICS

Source: EUMOFA, based on EUROSTAT data (online data codes: fish_ca_main and DS-045409). Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.



BIVALVES

MUSSEL, SCALLOP

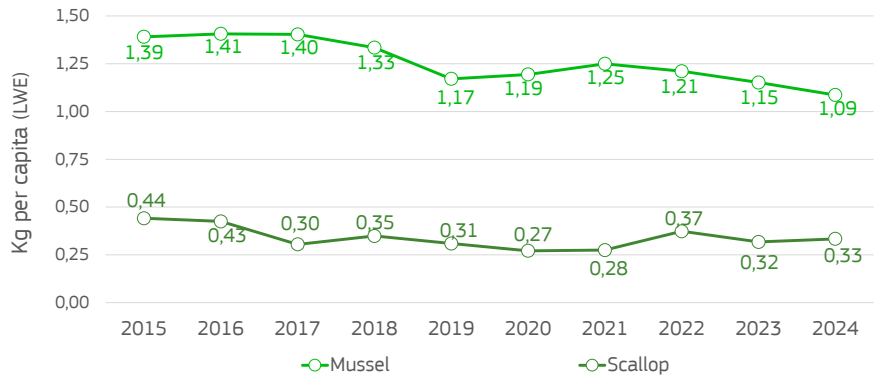
Mussel is by far the largest EU aquaculture product in volume terms, with Spain being the main producing Member State. Its apparent consumption has generally declined over the 2019-2024 period, from around 1,4 kg LWE per capita in 2015-2017 to 1,09 kg in 2024, the lowest level of the period. Compared with 2023, apparent consumption fell by 6%, coinciding with a further decline in EU aquaculture production.

Apparent consumption of scallop showed greater year-to-year variability, averaging 340 grams LWE per capita over the 2015-2024 period. In 2024, it reached 330 grams LWE per capita, up 5% from 2023 and broadly in line with its ten-year average. EU production is almost entirely based on wild catches, while aquaculture production is negligible. In 2024, catches declined by 7%, but higher imports and lower exports more than offset this reduction, resulting in an increase in apparent consumption.

CHART 18

PER CAPITA APPARENT CONSUMPTION OF MOST CONSUMED BIVALVES

Source: EUMOFA, based on EUROSTAT data (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.



OTHER PRODUCTS OF DIFFERENT COMMODITY GROUPS

SHRIMPS, SQUID, SURIMI

Apparent consumption of shrimps in the EU comprises both farmed and wild products, which accounted for 58% and 42% of the total, respectively, in 2024. Imports play a crucial role in supplying the EU market, with the main suppliers including Ecuador, India, Vietnam, Thailand, Indonesia, Argentina and Greenland.

After peaking at close to 1,60 kg LWE per capita in 2018, apparent consumption of shrimps in the EU dropped below 1,50 kg LWE per capita in 2019 and 2020, primarily due to reduced production of *Crangon* shrimp in the Netherlands and Germany. However, consumption of the main imported shrimp products, including frozen or prepared and preserved warmwater shrimps and Argentine red shrimp, remained relatively stable.

In 2021, apparent consumption of shrimps began to recover, reaching 1,63 kg LWE per capita, driven by increased imports from Ecuador and Argentina. In 2022, it reached a new peak of 1,68 kg LWE per capita, supported by higher catches in the Netherlands, Spain and Estonia, alongside a surge in imports. In 2023, apparent consumption declined to 1,59 kg LWE per capita, reflecting lower production and imports. In 2024, it increased again by 3% to 1,64 kg LWE per capita, mainly supported by higher imports.

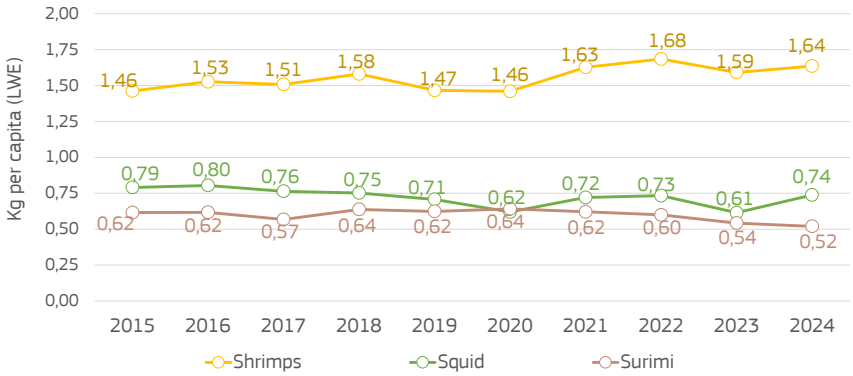
Apparent consumption of squid in the EU is also largely dependent on imports. After declining in 2020 due to lower imports from the Falkland Islands, the EU's main supplier, apparent consumption recovered in 2021 and 2022, reaching 730 grams LWE per capita, before falling to a low of around 600 grams in 2023 as imports decreased. In 2024, apparent consumption rebounded by 20% to 740 grams LWE per capita, supported by higher imports, especially from Argentina, Morocco and the Falkland Islands, as well as higher catches and lower exports.

For surimi, no separate production statistics are available, as it is a processed product manufactured from several fish species; apparent consumption is therefore estimated on the basis of imports *minus* exports. In 2024, it decreased by 4% to around 500 grams LWE per capita, the lowest level of the decade and below its ten-year average of around 600 grams. EU consumption remains highly dependent on imported surimi from the United States.

CHART 19

PER CAPITA APPARENT CONSUMPTION OF OTHER MOST CONSUMED PRODUCTS

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.

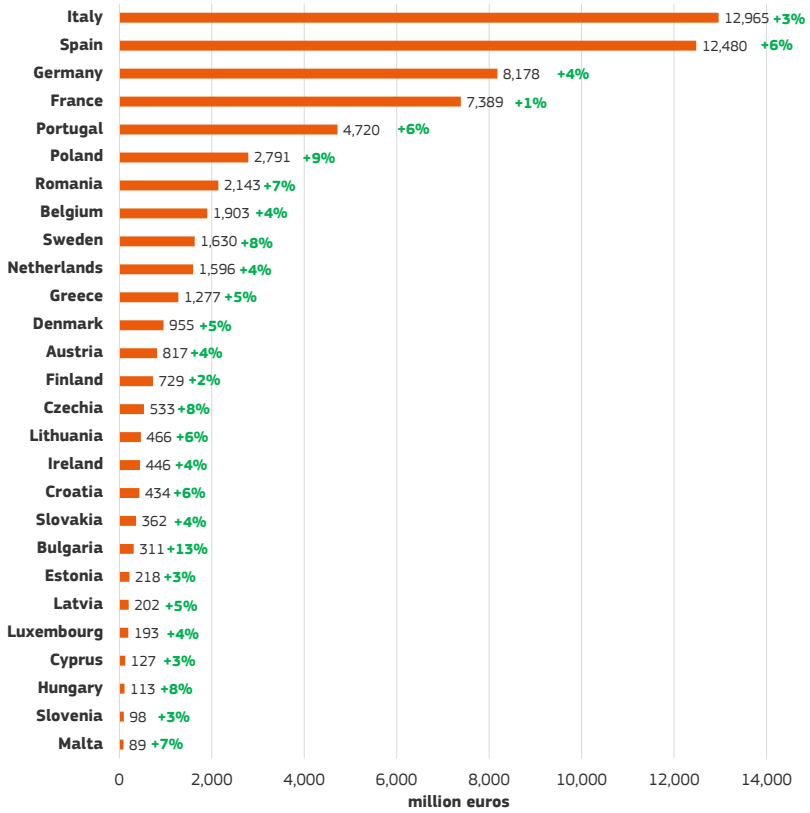


HOUSEHOLD EXPENDITURE AND PRICES

From 2024 to 2025, household expenditure on fish in the EU grew by 4% or EUR 2,7 billion.

From 2024 to 2025, household expenditure on fish grew in all EU Member States to reach a total of EUR 63,2 billion, which corresponded to an average growth of 4% compared with the 2024-level (+ EUR 2,7 billion). To note, this increase was two times that registered from 2023 to 2024, when expenditure grew by 2% or EUR 1,3 billion[64]. Indeed, fish prices across the EU remained high, continuing a trend that started after the COVID-19 pandemic and, in more recent years, reflected wider economic and geopolitical factors. Compared with 2021, household expenditure on fish grew by 14% in nominal values. According to Europanel/Kantar/GfK data, this resulted in lower consumption in volume terms, with consumption of fresh fish at home in the highest consuming EU countries dropping by 26% from 2021 to 2025. As shown in Chart 20, expenditure increased in all EU countries from 2024 to 2025 whereas, in a longer perspective, decreases from 2021 to 2025 were registered in two Member States, namely Germany (-4%) and Cyprus (-16%).

CHART 20
HOUSEHOLD NOMINAL EXPENDITURE ON FISHERY AND AQUACULTURE PRODUCTS IN 2025 AND % VARIATION 2025/2024 (out-of-home consumption is excluded)
Source: EUROSTAT (online data code: prc_ppp_ind_1)
Purchasing Power Parities PPPs – nominal expenditure



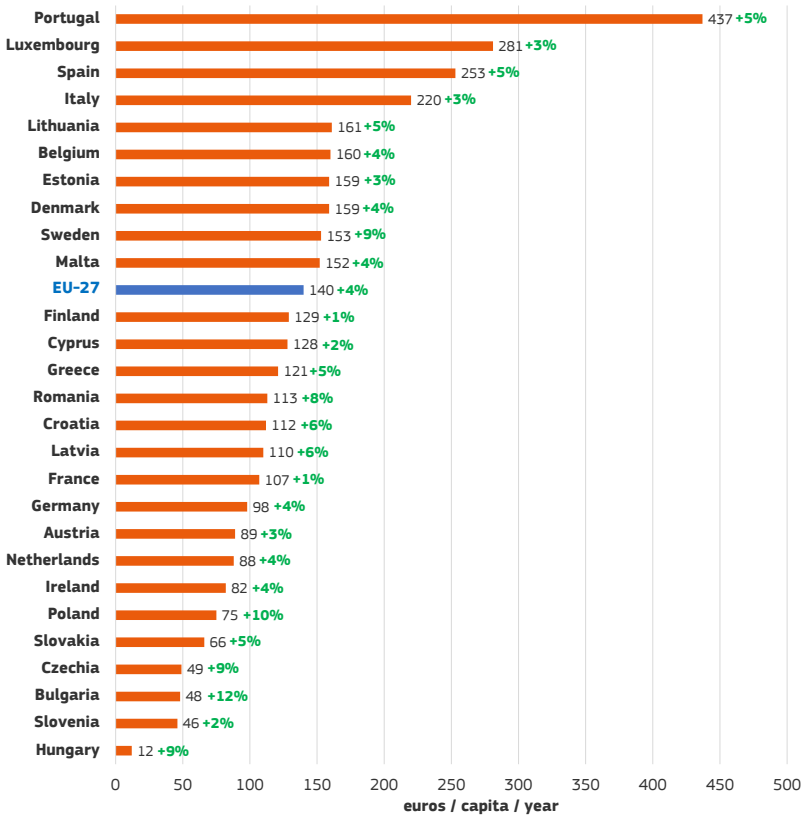
In terms of per capita spending, Portugal remained the highest in the EU, reaching 437 euros per person in 2025. This was more than three times the EU average of 140 euros and 156 euros higher than Luxembourg, which ranked second. Spain was third, with per capita spending of 253 euros. All EU countries recorded increases in per capita household expenditure from 2024 to 2025, whereas on a longer perspective, Hungary was the only Member State showing a drop from 2021 (-33%).

[64] In this report, value and price variations for periods longer than five years are analysed by deflating values using the GDP deflator (base=2020); for shorter periods, nominal value and price variations are analysed.

CHART 21

PER CAPITA HOUSEHOLD NOMINAL EXPENDITURE ON FISHERY AND AQUACULTURE PRODUCTS IN 2025 AND % VARIATION 2025/2024 (out-of-home consumption is excluded)

Source: EUROSTAT (online data code: prc_ppp_ind_1)
Purchasing Power Parities PPPs – nominal expenditure per inhabitant



FISHERY AND AQUACULTURE PRODUCTS VS. MEAT AND FOOD IN GENERAL

In all EU countries, expenditure on meat is historically higher than expenditure on fishery and aquaculture products – a pattern that also holds true for consumption volumes[65]. On average, EU households' expenditure on fishery and aquaculture products is about one fourth of what they spend on meat.

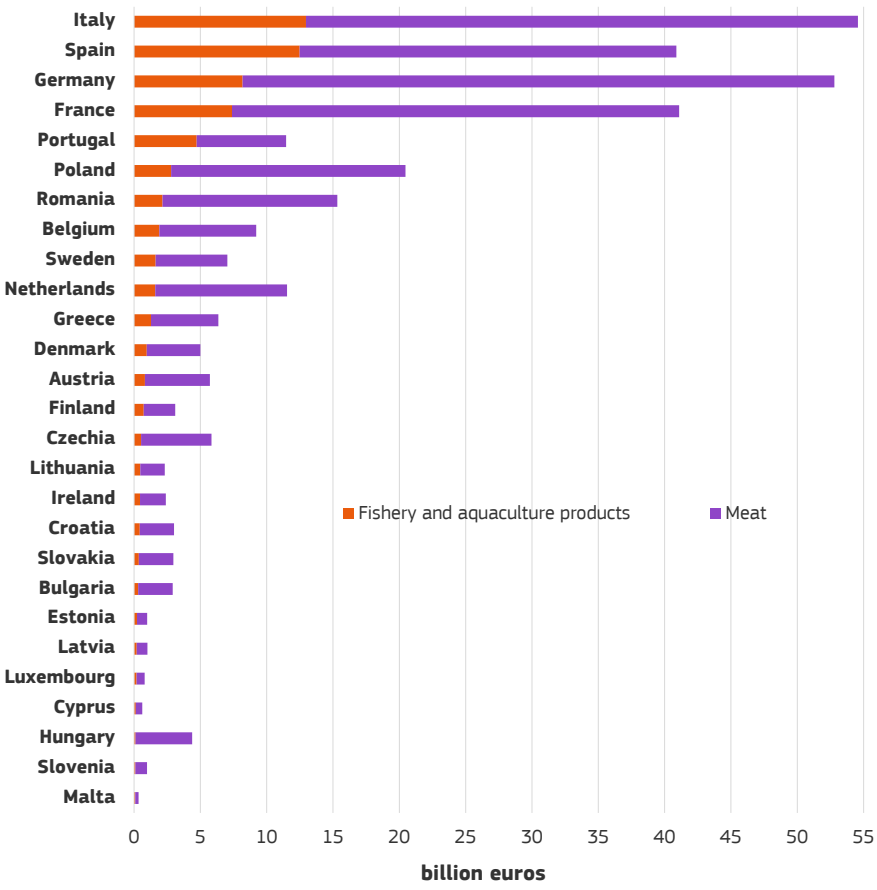
In 2025, EU households allocated close to EUR 250 billion to meat and EUR 63 billion to fishery and aquaculture products. Among the Member States, Portugal showed the most balanced spending ratio between these two categories, as illustrated in Chart 22 (41% on fish *vs.* 59% on meat). Spanish and Maltese households followed, with 31% of spending going to fish and 69% to meat in the case of Spain, and 26% and 73% on meat in the case of Malta. In all other EU countries, the share of spending on fish remained below 25%. The widest gaps were observed in Hungary, where only 3% of household expenditure in this category went to fishery and aquaculture products, followed by Czechia at 9% and Slovenia at 10%.

In the four countries with the highest nominal fish consumption – namely Italy, Spain, Germany and France – different spending habits emerge. As mentioned above, slightly less than one third of the total spending for fish and meat by Spanish households is dedicated to fish. Italy is more in line with the EU average, spending close to one quarter on fish. In France, fish accounts for less than one fifth of household spending compared with meat, while in Germany it is even lower, at around one seventh.

[65] This is confirmed by OECD (link: https://stats.oecd.org/viewhtml.aspx?datasetcode=HIGH_AGLINK_2019&lang=en#).

CHART 22
HOUSEHOLD NOMINAL EXPENDITURE ON FISHERY AND AQUACULTURE PRODUCTS VS. MEAT IN THE EU IN 2024 (out-of-home consumption is excluded)

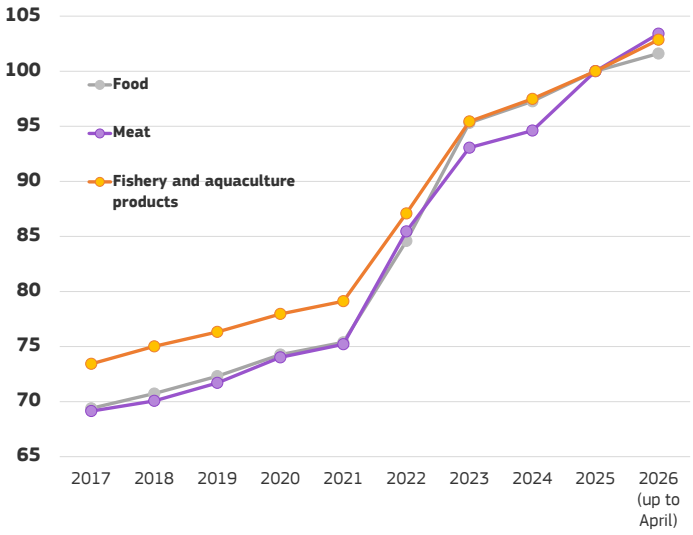
Source: EUROSTAT (online data code: prc_ppp_ind)
Purchasing Power Parities PPPs – nominal expenditure



Graph 23 and Table 10 show how fish prices[66] followed a relatively steady upward path from 2017 to 2021, with an average annual growth of 1,9%. Then, they rose sharply throughout 2022 and 2023, also due to the inflation observed for domestic products but more importantly, to the rising cost of imported products, as the EU relies heavily on imports to meet consumer demand for fishery and aquaculture products. Prices continued to grow, although at slower paces, throughout 2024 and 2025 and data for the first four months of 2026 indicate even higher inflation. The same can be observed for meat and for food in general.

CHART 23
CONSUMER PRICES INDICES (2025=100)

Source: EUROSTAT (online data code: prc_fpmt_m)
Harmonised Index of Consumer Prices



[66] Price indices refer to the Harmonised Index of Consumer Prices (HICP) which gives comparable measures of inflation (https://ec.europa.eu/eurostat/cache/metadata/en/prc_hicp_esms.htm)

TABLE 10
YEARLY EVOLUTION OF CONSUMER PRICES (2025=100)
Source: EUROSTAT (online data code: prc_fpmt_m) Harmonised Index of Consumer Prices

Sector	2021	2022	2023	2024	2025	2026 (up to April)	2026 / 2021
Food	+2,7%	+1,5%	+12,2%	+12,7%	+2,1%	+2,8%	**+1,6%**
Meat	+3,2%	+1,6%	+13,6%	+8,9%	+1,7%	+5,7%	**+3,4%**
Fishery and aquaculture products	+2,1%	+1,5%	+10,1%	+9,6%	+2,2%	+2,6%	**+2,8%**

RELEVANCE BY PRESERVATION STATE

With regard to statistics concerning household expenditure for fishery and aquaculture products, Eurostat provides shares for the four categories[67] listed in Table 11.

TABLE 11
ITEM WEIGHTS OF EU HOUSEHOLD EXPENDITURE ON TOTAL GOODS AND SERVICES
Source: EUROSTAT (online data code: prc_hicp_iw) Harmonised Index of Consumer Prices

Category	2024	2025
FOOD (Meat + Fish and other seafood + Other food)	15,3%	14,9%
Meat	3,4%	3,3%
Fish and other seafood	0,9%	0,8%
Live, fresh, chilled or frozen	*63,2%*	*62,9%*
Preparations	*25,1%*	*25,5%*
Dried, salted, in brine or smoked	*11,2%*	*11,1%*
Livers, roes and other offal of fish and of other seafood in all forms	*0,5%*	*0,5%*
Other food	11,0%	10,8%
OTHER GOODS AND SERVICES	84,7%	85,1%
TOTAL GOODS AND SERVICES	100%	100%

From 2024 to 2025, the share of household expenditure for food on total goods and services decreased from 15,3% to 14,9%. A downward trend, although less significant, can also be observed for the share of household expenditure for fish and for meat on total goods and services, which went from 0,9% to 0,8% and from 3,4% to 3,3%, respectively.

At national level, the sharpest relative drops for fish were observed in Slovakia, Estonia and the Netherlands, where relative spending fell by 16%, 12% and 10%, respectively. On the other hand, the most significant increase was registered in Bulgaria (+22%), followed by Slovenia (+11%), Poland and Ireland (+9% each).

Portugal showed a 3%-increase, whereas in the other countries with the highest fish expenditure in the EU, such as Italy, Spain and France, the declines were of 4%, 4% and 7%, respectively.

Early 2026 data[68] suggest a downturn in Portugal, with household spending on fish declining by 6% from 2025, as well as new decreases in Italy (-3%), Spain (-5%) and France (-6%).

[67] In the Harmonised indices of consumer prices (HICP), item weights are assigned to all goods and services as well as special aggregates, determining their share in the calculation of the higher-level indices.
[68] Data as of 20 June 2026.

3.2 HOUSEHOLD CONSUMPTION OF FRESH FISHERY AND AQUACULTURE PRODUCTS

OVERVIEW

The household consumption[69] of fresh fishery and aquaculture products is monitored in 11 EU Member States, namely Spain, Italy, France, Portugal, Germany, Poland, Netherlands, Ireland, Denmark, Sweden and Hungary. Ranked according to their volumes of fish consumption, these 11 countries[70] accounted for 84% of the total EU expenditure on fishery and aquaculture products in 2025[71].

From 2021 to 2025, household consumption of fresh products decreased by 26%.

As shown in Table 12, household consumption of fresh fish in the EU has declined steadily since 2021, dropping 26% in volume during the five-year period under analysis. After a sharp 16%-contraction in 2022, likely linked to the end of quarantine restrictions and the normalisation of consumption patterns after the COVID-19 outbreak, the pace of decline moderated. Volumes fell by a further 5% in both 2023 and 2024, before decreasing by 2% in 2025, when household consumption reached its lowest level of the period at 1.069.985 tonnes. At national level, the 2025 picture was more mixed than in previous years, when declines had been recorded in most of the surveyed countries. From 2024 to 2025, household consumption declined by 5% in France and Portugal, followed by Hungary at 4%, Spain at 3% and the Netherlands at 2%. Italy remained broadly stable, only increasing by 0,2%. By contrast, several countries recorded modest increases. Ireland showed the strongest growth at 7%, followed by Sweden at 4%, Germany at 3%, and both Poland and Denmark at 2%. In some cases, this improvement started before 2025. Denmark had already been on an upward path since 2023, while Poland and Sweden, both of which recorded increases in 2024, extended that positive trend into 2025.

Household consumption volumes have declined consistently, while the total nominal value of household purchases of fresh products has also decreased, although less sharply. Overall, between 2021 and 2025, the value fell by 8%. The most significant drop over the period under analysis was recorded from 2021 to 2022, where value declined by 10% to EUR 13,3 billion. In 2023, value increased marginally by 1%, but this did not amount to a recovery, as it declined again in 2024 by a slight 1%, reaching the lowest level of the five-year period. In 2025, however, the trend reversed, with total value increasing by 3% to reach EUR 13,7 billion. The divergence between declining consumption volumes and the more resilient evolution of value reflects the increase in average unit values observed across most key species over the period analysed[72]. Indeed, the data show a generalised increase in unit values across key species, with most products reaching their highest prices in 2025. This upward trend, which is more pronounced since 2022, continued throughout the period, albeit at a more moderate pace in the most recent years.

[69] Data analysed in this chapter originate from representative household panels that record volumes and values of every item purchased. More details can be found in the Methodological background.
[70] For ten of these countries (namely Denmark, Germany, Spain France, Italy, Ireland, the Netherlands, Poland, Portugal and Sweden) as well as for Austria, Belgium, Greece, Finland and Romania, EUMOFA also collects online shops retail prices of a selection of products. Data can be consulted at https://eumofa.eu/online-retail-prices.
[71] EU expenditure data are provided by EUROSTAT. These data are compiled based on a common methodology elaborated within the "EUROSTAT – OECD PPP Programme" (http://www.oecd.org/std/prices-ppp/eurostat-oecdmethodologicalmanualonpurchasingpowerparitiesppps.htm). More details can be found in the Methodological background.
[72] For a general overview on the latest trends on inflation and EU household expenditure on fishery and aquaculture products, please see Chapter 3.1 of this report.

In particular, species such as gilthead seabream, European seabass and hake showed a consistent and marked increase in unit values over the five-year period, with prices in 2025 significantly above their 2021-levels. Cod also stood out, with a sharp increase in 2025 bringing its unit value to 15,05 EUR/kg, well above previous years. Regarding cod, it should be underlined that the volumes decreased in all surveyed countries, which is a consequence of reduction in quotas in the North Atlantic from 2024 to 2025.

Salmon remained the major species, both in terms of volume and value. It is worth mentioning that Atlantic salmon production in Europe grew by 12,1% from 2024 to 2025[73], making the fundament for growth in fresh salmon consumption in most of the surveyed countries[74]. The unit value of fresh salmon consumed by EU households increased from 14,00 EUR/kg in 2021 to 17,90 EUR/kg in 2025, corresponding to a rise of 28% over the period, despite a slight decrease of 2% compared with 2024. The most notable decreases for fresh salmon from 2024 to 2025 were recorded in Germany, where the unit value fell from 20,58 EUR/kg to 19,61 EUR/kg (-5%), and in Italy, from 19,48 EUR/kg to 18,69 EUR/kg (-4%). France also saw a decline from 20,77 EUR/kg to 20,09 EUR/kg (-3%). By contrast, some markets continued to register increases, particularly Ireland, where the unit value rose from 20,68 EUR/kg to 21,35 EUR/kg (+3%), and Poland, from 17,77 EUR/kg to 18,27 EUR/kg (+3%). Overall, despite these adjustments, fresh salmon prices remained at historically high levels across countries

TABLE 12

HOUSEHOLD CONSUMPTION OF FRESH FISHERY AND AQUACULTURE PRODUCTS, IN VOLUME (TONNES) AND NOMINAL VALUE (1.000 EUR)

Source: EUMOFA elaboration of Europanel/Kantar/GfK data. Possible discrepancies in totals and % changes are due to rounding.

Member state	2021		2022		2023		2024		2025		2025 / 2024	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Spain	5,156,691	590,616	4,515,005	486,606	4,741,384	480,277	4,708,159	453,473	4,798,040	438,799	1.9%	-3.2%
Italy	3,548,918	324,426	3,262,448	279,537	3,005,536	245,113	2,941,068	228,001	3,118,098	228,430	6.0%	0.2%
France	2,763,768	231,195	2,504,751	196,749	2,492,463	188,083	2,461,237	186,111	2,462,055	177,431	0.0%	-4.7%
Germany	1,217,255	84,157	974,192	60,663	1,019,375	58,424	969,413	55,013	976,983	56,557	0.8%	2.8%
Netherlands	665,126	40,532	638,719	35,332	641,577	32,775	604,850	30,288	601,386	29,560	-0.6%	-2.4%
Poland	344,837	50,186	373,745	47,723	455,157	47,527	517,238	48,067	573,870	48,823	10.9%	1.6%
Portugal	504,384	73,639	464,766	61,567	464,999	60,072	462,894	56,273	474,889	53,394	2.6%	-5.1%
Denmark	238,041	13,819	213,284	11,703	235,809	11,848	246,816	12,483	258,573	12,753	4.8%	2.2%
Ireland	197,572	12,847	190,649	11,577	201,782	11,302	201,149	11,085	219,793	11,811	9.3%	6.6%
Sweden	145,468	11,016	114,718	7,745	116,341	7,474	121,610	7,966	127,965	8,251	5.2%	3.6%
Hungary	36,869	6,035	32,347	4,395	35,182	3,846	37,218	4,345	40,092	4,176	7.7%	-3.9%
Total	**14,018,929**	**1,430,460**	**13,284,624**	**1,203,590**	**13,409,606**	**1,146,741**	**13,271,652**	**1,093,104**	**13,651,745**	**1,069,985**	**2.9%**	**-2.1%**

FOCUS ON THE TOP THREE CONSUMING COUNTRIES

In 2025, Spain, Italy and France together accounted for 79% of the total volume and more than 75% of the total value of fresh fishery and aquaculture products consumed by households in the 11 countries surveyed.

SPAIN

Spain alone accounted for 41% of the total volume and 35% of the total value of household consumption of fresh products in the 11 countries under analysis. In 2025, Spanish households consumed 438.799 tonnes of fresh fish with a value of EUR 4,80 billion. Over the 2021 to 2025 period, household consumption of fresh fishery and aquaculture products in Spain followed a clear downward trend, with volumes and value declining by 26% and 7%, respectively. Volumes fell sharply in 2022, by 18% compared with 2021, and continued to decline in the following years, though at a slower pace, with a further 1% decrease in 2023, 6% in 2024 and 3% in 2025. In value terms, household consumption dropped by 12% in 2022, recovered by 5% in

[73] Source: https://openknowledge.fao.org/items/74152c8f-981a-4410-8487-ef0aff69b6f1
[74] Only the Netherlands recorded a slight decrease in the volumes consumed.

2023, declined slightly in 2024, and increased again in 2025 by 2%, pointing to a gradual stabilisation driven by price effects.

When examining the consumption of key monitored species in Spain, trends diverged. Salmon, which is the most consumed fresh species in Spain, reached a peak of 68.449 tonnes in 2021. Consumption then fell in 2022, by a staggering 28% in volume from the previous year, reaching just under 50.000 tonnes. This sudden drop, observed in all the countries surveyed in 2022 for salmon, was mainly due to a price increase for salmon[75], as well as to the notable inflation that affected all food commodities in that period. Other contributing factors included a modest reduction in European salmon production, an increased share of that production being exported to non-EU markets, and the reopening of the HoReCa sector following the lifting of COVID-19 restrictions. Moreover, one should bear in mind that the prices in 2021 were exceptional low, as Large Scale Retail was one of very few distribution/supply channels. By 2023, salmon's consumption showed signs of recovery, increasing in Spain by 4%. The upward trend continued in 2024 and was confirmed in 2025, with consumption reaching 60.896 tonnes, up 11% over the previous year and the second-highest volume of the 5 years under analysis. Of note, salmon imports into Spain rose by 13% between 2024 and 2025, reaching their highest level of the decade.

When looking at its unit value, it rose consistently from 2022 to 2024, reaching its pinnacle at 14,16 EUR/kg, while in 2025 it slightly decreased to 13,91 EUR/kg, down 2% over 2024.

Sardine consolidated its position as the second most consumed fresh species, after overtaking hake in 2024. In 2025, consumption increased for the second consecutive year, rising by 5% to 49.091 tonnes. At the same time, its unit value reached a 5-year high of 6,44 EUR/kg, up 3% from 2024. Sardines accounted for 11% of total consumption, compared with 14% for salmon and 9% for hake, while in value terms they represented 7% of the total.

Hake remained the third most consumed species, although its consumption has declined significantly since 2021. Volumes fell from 62.496 tonnes in 2021 to 37.601 tonnes in 2025, corresponding to a decrease of 40% over the period. This sustained decline may be associated with rising prices, possibly driven by a reduction in the European hake quota and lower availability of imported hake. The unit value has increased each year since 2022, rising 25% from 9,25 EUR/kg in 2021 to 11,53 EUR/kg in 2025. However, despite this price increase, the total value of hake consumption fell by 5% from 2024 to 2025, reaching its lowest point over the period analysed.

Gilthead seabream and European seabass account for 6% each of total fresh fish consumption by Spanish households. In 2025, gilthead seabream consumption increased 6% from 2024, while its unit value rose by 7% reaching a 5-year high of 10,72 EUR/kg. By contrast, European seabass recorded a decline in consumption of 11%, while its unit value increased significantly by 12% to 11,89 EUR/kg, also reaching a five-year high.

Cod consumption plummeted in 2025, decreasing a staggering 34% to reach a 5-year low both in volume and value. Its share of Spanish household consumption of fresh fish decreased from 7% in 2021 to 5% in 2025, namely a 44% drop over the period analysed. Its unit value, on the other hand, rose by 11% over 2024 and reached 8,97 EUR/kg.

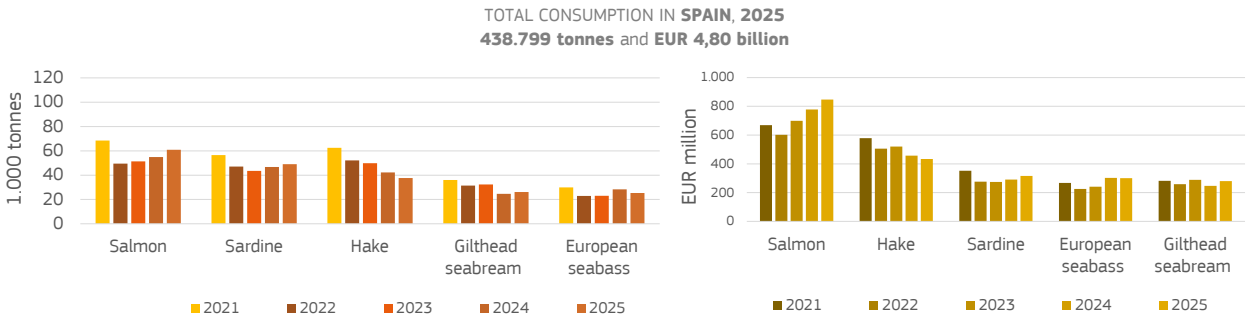
[75] The average unit value for salmon, in the 11 countries included in this analysis, increased by 18% over 2022, reaching 16,70 EUR/kg.

Among other species, including sole, tuna, monk and mackerel, which together accounted for around 12% of total fresh consumption, tuna was the only species to record a slight increase in 2025, with volumes rising by 3%. In contrast, consumption declined for sole, monk and mackerel by 7%, 11% and 20%, respectively. Unit values increased across all species, reaching five-year highs in most cases, with the exception of mackerel.

CHART 24

TOP-FIVE FRESH SPECIES (IN VOLUME AND NOMINAL VALUE) CONSUMED BY HOUSEHOLDS IN SPAIN

Source: EUMOFA elaboration of Europanel/Kantar/GFK data



ITALY

Similarly to Spain, household consumption of fresh fishery and aquaculture products in Italy followed a continuous downward trend over most of the period analysed. In 2025, Italian households consumed 228.430 tonnes of fresh products, virtually unchanged from 2024, when volumes stood at 228.001 tonnes. This stabilisation followed three consecutive years of decline, with volumes falling by 14% in 2022, 12% in 2023 and 7% in 2024. Overall, between 2021 and 2025, household consumption in Italy declined by 30% in volume terms. In value terms, however, the trend was more resilient. After decreasing by 8% in both 2022 and 2023 and by a further 2% in 2024, household expenditure recovered in 2025, increasing by 6% to EUR 3,12 billion. From 2021 to 2025, total values decreased by 12%. Overall, in the 5-year under analysis, the value decreased by 12%.

Among species, gilthead seabream remained the most consumed fresh species in Italian households, accounting for 11% of total volumes in 2025. From 2021 to 2025, consumption of gilthead seabream declined by 34%. From 2024 to 2025, it continued to decline, although at a slower pace than in previous years, falling by 4% from 2024 to 25.940 tonnes. Its unit value rose 8%, which reached 11,78 EUR/kg, the highest level recorded over the 5-year period analysed.

Salmon, which ranked second in volume terms among monitored species, overtaking mussels for the first time in the period under analysis, and first in value terms, recorded the most notable recovery in 2025. Household consumption increased by 26% from 2024, reaching 20.729 tonnes, while its value rose by 20% to EUR 387 million. This occurred despite a 4% decrease in unit value, from 19,48 EUR/kg in 2024 to 18,69 EUR/kg in 2025. As a result, salmon's growth in 2025 was mainly volume-driven, in contrast with most other species. Of note, Italy as well as Portugal are the only countries among those surveyed where salmon is not the most consumed species.

Mussels *Mytilus* spp., the third most consumed species, moved in the opposite direction. Consumption decreased by 11% from 2024, reaching 18.189 tonnes, its lowest level over the 5-year period under analysis. However, the unit value increased sharply by 27%, from 4,25 EUR/kg to 5,41 EUR/kg, pushing total value up by 13% despite the fall in

volumes. European seabass also performed positively from 2024 to 2025: volumes rose by 4% to 14.802 tonnes and its unit value by 11% to 13,35 EUR/kg.

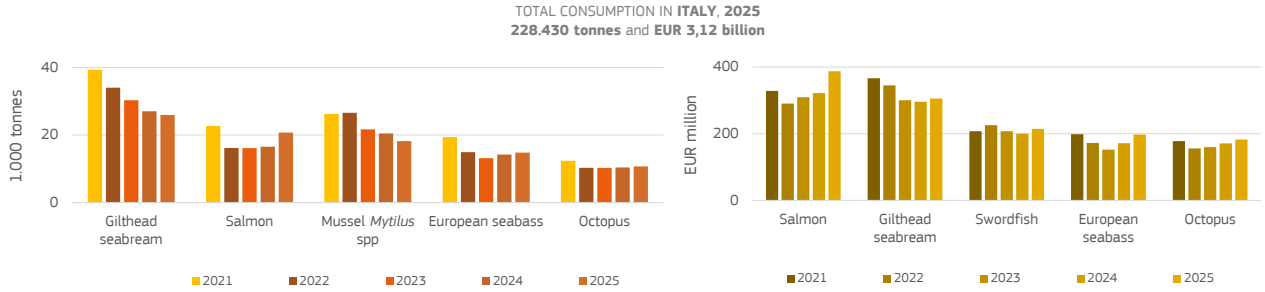
Hake also showed signs of recovery in 2025, after the decline recorded in 2024. Consumption increased by 5% to 10.560 tonnes and its unit value increased by 3% to 14,61 EUR/kg. Octopus and swordfish both recorded higher volumes and values in 2025, although with different price dynamics. Octopus consumption rose by 3% and its unit value increased by 4% to 17,07 EUR/kg, while swordfish volumes increased by 15%, but its unit value fell by 7% to 20,21 EUR/kg.

Anchovy also recovered after several years of decline, with consumption increasing by 12% from 2024 and value rising by 21%, supported by an 8% increase in unit value to 8,25 EUR/kg. By contrast, clam consumption declined slightly by 2%, while value remained broadly stable, as its unit value rose by 2% to 7,61 EUR/kg. Squid consumption increased by 9%, while recording a slight 2% decrease in unit value to 16,87 EUR/kg.

CHART 25

TOP-FIVE FRESH SPECIES (IN VOLUME AND NOMINAL VALUE) CONSUMED BY HOUSEHOLDS IN ITALY

Source: EUMOFA elaboration of Europanel/Kantar/GfK data



FRANCE

In 2025, household consumption of fresh fishery and aquaculture products in France declined further, reaching 177.431 tonnes, with a total value of EUR 2,46 billion. This represented a decrease of 5% in volume compared with 2024, while value remained broadly stable, increasing marginally by less than 1%.

Among the main monitored species, salmon remained by far the leading product in French household consumption, both in volume and value terms, and the only one to record an increase from 2024 to 2025. Indeed, salmon consumption increased by 12% from 2024, reaching 33.459 tonnes in 2025. Its value also rose, by 9%, to EUR 672 million, accounting for 19% of total volume and 27% of total value. This increase occurred despite a 3% decline in unit value, from 20,77 EUR/kg in 2024 to 20,09 EUR/kg in 2025.

Cod, by contrast, recorded a marked contraction. Consumption fell by 19% from 2024, reaching 10.016 tonnes, while value decreased by 9% to EUR 237 million. The decline in value was less pronounced than the fall in volume, as cod's unit value increased by 12%, from 21,11 EUR/kg in 2024 to 23,70 EUR/kg in 2025.

A similar pattern was observed across the other monitored species, which generally reached their lowest consumption levels over the 2021–2025 period, while their unit values peaked. Between 2024 and 2025, saithe consumption declined by 13% to 8.086 tonnes, while trout fell by 5% to 5.535 tonnes. In both cases, rising unit values partially offset the drop in volumes, increasing by 5% for saithe and 4% for trout, reaching 12,87 EUR/kg and 18,60 EUR/kg, respectively.

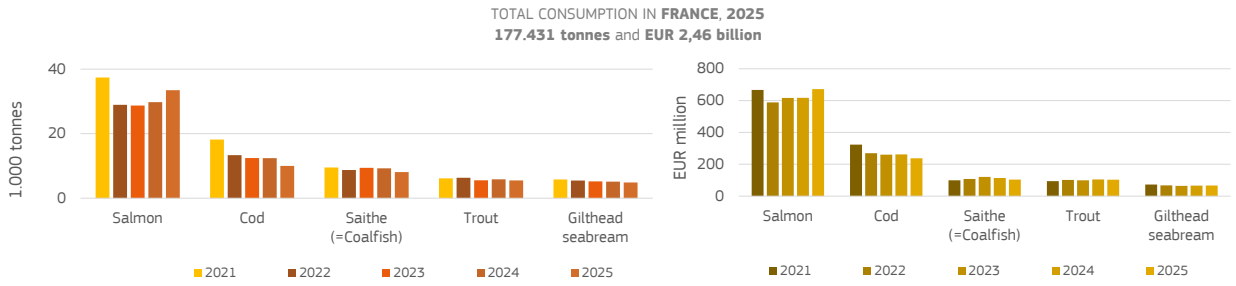
Lower-volume species also recorded significant declines in 2025. Sardine consumption fell by 16%, whiting by 14% and mackerel by 16% compared with 2024. In parallel, unit

values increased across all three species, with sardine rising by 9% to 7,16 EUR/kg, whiting by 6% to 17,18 EUR/kg and mackerel by 13% to 9,73 EUR/kg. Monk also recorded a sharp contraction, with consumption down by 26% and value by 20%, although unit value increased by 8% to 21,16 EUR/kg.

CHART 26

TOP-FIVE FRESH SPECIES (IN VOLUME AND NOMINAL VALUE) CONSUMED BY HOUSEHOLDS IN FRANCE

Source: EUMOFA elaboration of Europanel/Kantar/GFK data



MAIN TRENDS IN OTHER COUNTRIES

GERMANY

In 2025, household consumption of fresh fishery and aquaculture products in Germany showed a slight recovery in volume after reaching a five-year low in 2024. Consumption increased by 3% compared with 2024, reaching 56.557 tonnes, while total value rose by 1% to EUR 977 million. Despite this modest rebound, volumes remained well below pre-2022 levels, before they dropped 28% from 2021 to 2022.

A notable trend in 2025 was the continued growth in salmon consumption, which remained the dominant species, accounting for around 41% of total volume. Following the increase recorded in 2024, salmon consumption rose further by 9%, reaching approximately 23.400 tonnes. This growth occurred together with a decline in unit value, which fell by 5% from 20,58 EUR/kg in 2024 to 19,61 EUR/kg in 2025. This could be linked with the increase recorded by German imports of salmon: in the same period, they grew by 14%, driven by increased imports from the United States which almost totalled the same volumes of the salmon supplies from Norway, traditionally the main German supplier of salmon.

Trout recorded an even stronger increase in relative terms, rising by 27% to 5.769 tonnes, while its value increased by 23% to EUR 85 million. As with salmon, also trout's unit value decreased, by 3%, from 15,33 EUR/kg in 2024 to 14,82 EUR/kg in 2025.

Cod, by contrast, continued to decline in volume, falling by 4% from 2024 to 4.377 tonnes. Its value remained broadly stable, supported by a 5% rise in unit value, from 21,58 EUR/kg to 22,56 EUR/kg. Mussels *Mytilus* spp. also declined slightly in volume, by 2%, reaching 2.820 tonnes, while value remained stable as the unit value increased by 2% to 4,48 EUR/kg.

Among the remaining species, Alaska pollock recorded a modest recovery, with volumes increasing by 3% from 2024, while its unit value decreased by 2%, limiting value growth. Tuna consumption declined by 6%, while its unit value increased by 4%, partially offsetting the reduction in volumes. Mackerel showed a similar pattern, with consumption falling by 8% and unit value increasing by 6%. Shrimps also declined in volume, by 5%, while their unit value rose by 3%, helping to sustain total value.

NETHERLANDS

In 2025, Dutch household consumption of fresh fishery and aquaculture products continued to decline, although at a slower pace than in 2024. Consumption fell by 2% from 2024, reaching 29.560 tonnes, the lowest level of the 2021-2025 period. In value terms, the decrease was more moderate, down 1% to EUR 601 million.

Salmon remained by far the leading species in Dutch household consumption, accounting for 35% of total volume and 46% of total value. However, after being the only species to increase in 2024, salmon consumption declined by 3% in 2025, reaching 10.451 tonnes. Its value also fell by 3%, to EUR 274 million, while its unit value remained broadly stable, edging up from 26,22 EUR/kg in 2024 to 26,26 EUR/kg in 2025. The Netherlands therefore continued to record one of the highest salmon unit values among the countries surveyed, second only to Denmark.

Among the other main species, mussels *Mytilus* spp. remained the second most consumed monitored fresh product, with volumes decreasing slightly by 1% to 3.346 tonnes. Its value, however, increased by 4%, supported by a 5% rise in unit value to 4,69 EUR/kg. Herring also performed positively, with consumption increasing by 1% to 2.669 tonnes and value rising by 4%, as its unit value increased by 3% to 19,59 EUR/kg.

Pangasius recorded the strongest increase among the higher-volume species, with consumption rising by 5% to 1.841 tonnes. However, its value remained broadly stable, decreasing slightly by less than 1%, as its unit value fell by 5% to 12,55 EUR/kg. By contrast, cod continued to decline, with volumes falling by 5% to 1.580 tonnes and value by 3%, despite a 3% increase in unit value to 21,44 EUR/kg. Mackerel recorded the sharpest contraction among the main species, with consumption falling by 17% and value by 8%, although its unit value increased by 11% to 15,63 EUR/kg.

POLAND

In Poland, household consumption of fresh fishery and aquaculture products continued to show a relatively stable trend in 2025, in contrast with the declines observed in most other countries. Consumption increased by 2% compared with 2024, reaching 48.823 tonnes, worth EUR 574 million, up 11% from the previous year.

Salmon remained the most important species in Polish household consumption and recorded the strongest growth in 2025. Consumption increased by 15% from 2024, reaching 14.806 tonnes, while value rose by 19% to EUR 270 million. Its unit value increased by 3%, from 17,77 EUR/kg to 18,27 EUR/kg. As a result, salmon accounted for around 30% of the total volume and 47% of the total value of the monitored species and drove the overall increase.

Another species which recorded growth from 2024 to 2025 was trout, with consumption increasing by 10% to 5.545 tonnes and value rising by 12% to EUR 59 million. Its unit value increased by 2%, from 10,46 EUR/kg to 10,67 EUR/kg. Trout accounted for approximately 11% of total volume and 10% of total value.

Mackerel remained the second most consumed species, although it continued its downward trend. Consumption fell by 11% to 8.781 tonnes, while value increased by 8% to EUR 64 million, driven by a strong 21% rise in unit value, from 6,04 EUR/kg to 7,29 EUR/kg. Also, consumption of carp decreased slightly by 2% to 6.032 tonnes, while value declined by 4% to EUR 41 million, reflecting a marginal decrease in unit value of 1% to 6,72 EUR/kg

PORTUGAL

In Portugal, household consumption of fresh fishery and aquaculture products continued its downward trajectory in 2025, reaching 53.394 tonnes, a decrease of 5% compared with 2024 and the lowest level of the 2021-2025 period. In value terms, however, the market increased by 3%, reaching EUR 475 million.

Salmon recorded the only increase among the main monitored species. Consumption rose by 25% from 2024, reaching 4.818 tonnes, while value increased by 24% to EUR 57,54 million. Its unit value decreased slightly, by 1%, from 12,03 EUR/kg in 2024 to 11,94 EUR/kg in 2025. Of note, Portugal and Italy are the only two countries among those monitored where salmon is not the most consumed species; in 2025, it accounted for 9% of total volume and 12% of total value.

Among the remaining species, gilthead seabream remained the most consumed fresh product, despite a continued decline in volumes. Consumption decreased slightly by 2% compared with 2024 and stood at 7.689 tonnes, while value increased by 8% to EUR 65 million, supported by a 10% rise in unit value to 8,49 EUR/kg. Shrimps, the second most consumed species, also recorded a decline in consumption of 5% and attested at 5.368 tonnes, while the unit value increased by 3% to 11,10 EUR/kg.

European seabass, which had recorded strong growth in 2024, showed a marked reversal in 2025. Consumption fell by 20%, while value declined by only 4%, reflecting a sharp increase in unit value of 21%, reaching 9,55 EUR/kg. Hake followed a similar pattern, with consumption decreasing by 12% and value by 7%, while its unit value increased by 5% to 8,51 EUR/kg.

DENMARK

In 2025, Danish household consumption of fresh fishery and aquaculture products continued to grow, although at a slower pace than in 2024. Consumption increased by 2% in volume compared with 2024, reaching 12.753 tonnes, while value rose by 5% to EUR 259 million, marking a new 5-year high.

As in previous years, consumption in Denmark remained strongly dominated by salmon. In 2025, salmon consumption increased by 12% from 2024, reaching 4.842 tonnes, while value rose by 11% to EUR 135 million. Despite this increase, its unit value decreased slightly by 1%, from 28,12 EUR/kg in 2024 to 27,82 EUR/kg in 2025, although it remained by far the highest among the countries surveyed. Salmon accounted for 38% of total volume and just over half of total value among the monitored species in Danish households consumption.

Flounder remained the second most consumed species and continued its recovery in 2025. Consumption increased by 15% compared with 2024, reaching 625 tonnes, while value rose by 14% to EUR 12 million. Its unit value remained broadly stable, decreasing slightly by 1% to 18,98 EUR/kg. However, despite this recent growth, consumption levels remained significantly below those observed at the beginning of the period. Indeed, from 2021 to 2025, its consumption decreased by 32%.

Among the remaining species, trends were more mixed. Trout consumption declined by 5% compared with 2024, while value remained stable, supported by a 5% increase in unit value to 24,91 EUR/kg. Mackerel also recorded a decline in volume of 10%, while value decreased slightly by 1%, as its unit value increased by 9% to 14,77 EUR/kg. Cod continued its long-term downward trend, with consumption falling by 21% from 2024 to 227 tonnes, while value decreased by 14%, despite a 9% increase in unit value to 22,69 EUR/kg. Mussel *Mytilus* spp. recorded the steepest decline among the monitored species, with consumption falling by 28%, while value decreased by 9%, as unit value rose sharply by 27% to 5,49 EUR/kg.

IRELAND

In Ireland, household consumption of fresh fishery and aquaculture products showed a recovery in 2025, following three consecutive years of decline. Consumption increased by 7% in volume compared with 2024, reaching 11.811 tonnes, while value rose by 9% to EUR 220 million.

Salmon remained by far the dominant species in Irish household consumption. In 2025, consumption increased by 9% compared with 2024, reaching 6.446 tonnes, while value rose by 12% to EUR 138 million. Its unit value peaked, increasing by 3%, from 20,68 EUR/kg to 21,35 EUR/kg. Salmon accounted for 55% of total volume and 63% of total value among the monitored species, driving the overall growth recorded from 2024 to 2025.

Cod, the second most consumed species – although representing a much smaller share of the total, around 8%, continued its downward trend. Consumption declined by 6% from 2024, reaching 953 tonnes, while value remained broadly stable, decreasing by less than 1% to EUR 15 million. This was supported by a 6% increase in unit value, from 14,62 EUR/kg to 15,49 EUR/kg. Shrimp showed a positive development in 2025, with volumes and value increasing by 6% over 2024. Its unit value remained broadly stable, attesting at 20,89 EUR/kg.

SWEDEN

In 2025, household consumption of fresh fishery and aquaculture products in Sweden continued its recovery, increasing by 4% from 2024 to reach 8.251 tonnes, while value rose by 5% to EUR 128 million. Salmon remained the main driver of the market, with consumption increasing by 10% to 5.230 tonnes and value by 8%, despite a slight 2% decrease in unit value to 13,75 EUR/kg. It accounted for 63% of total volume and 56% of total value. Overall, the recovery in Sweden in 2025 was driven mainly by salmon, while most other species showed diverging trends. Herring and other salmonids recorded increases in volume of 9% and 16%, respectively. By contrast, cod and haddock declined in volume by 11% and 12%, respectively, although both recorded higher unit values. Halibut showed the sharpest contraction, with consumption falling by 43%.

HUNGARY

In 2025, household consumption of fresh aquatic food[76] in Hungary declined again after the recovery observed in 2024. Consumption fell by 4% from 2024, reaching 4.176 tonnes, while value increased by 8% to EUR 40 million.

Despite the setback in volume, consumption levels remained above those recorded in 2023, confirming a partial stabilisation following the sharp declines observed between 2021 and 2023. However, volumes in 2025 were still around 31% below 2021 levels, indicating that the market has not yet fully recovered.

[76] For Hungary, total consumption is monitored without details by species. According to EUMOFA estimates on "apparent consumption", carp is by far the main species consumed in the country.

3.3 RETAIL AND OUT-OF-HOME OUTLETS

The fishery and aquaculture industry supplies aquatic food to consumers through three sales channels: retail, which mostly includes fishmongers and large-scale retailers (LSRs); foodservice, which involves catering, restaurants and take-away sales; and institutional, which includes schools, canteens, hospitals and prisons. Foodservices and institutional channels are referred to as "out-of-home" outlets.

This section[77] of The EU Fish Market analyses the sales of processed[78] products through the retail and foodservice channels of all EU countries[79]. It also analyses unprocessed[80] fishery and aquaculture products, through the retail, foodservice and institutional channels in five of the highest consuming EU countries – Spain, Italy, France, Germany, Poland – and in the UK.

TABLE 13
COVERAGE OF THE DATA AND ESTIMATES ANALYSED IN THIS SECTION
Source: EUMOFA

	Processed products	Unprocessed products
Retail	All EU countries	Spain, Italy, France, Germany, Poland, *plus* the UK
Foodservices		
Institutional channels	Not covered	

PROCESSED PRODUCTS THROUGH RETAIL AND FOODSERVICES

In the EU, sales of processed fishery and aquaculture products through foodservices and retail reached close to 2,2 million tonnes in 2025, an increase of 0,6% from 2024. This marked a continuation of the recovery initiated in 2021, after the drop registered in 2020 due to the outbreak of COVID-19. According to Euromonitor estimates[81], the upward trend is expected to continue, and by 2030, sales could be 5% higher than in 2025.

The sales are highly concentrated in Germany, Spain, France and Italy, which together accounted for 72% of the 2025 total. Germany alone accounted for almost 30% of the total, followed by Spain with 19%, France with 13% and Italy with 11%. In terms of sales per capita, the situation was more diversified. The main markets were Spain (just above 8,5 kg), Sweden and Germany (more than 7,5 kg), followed by Denmark (just above 6 kg) and Lithuania (5 kg). France and Italy ranked only 10th and 12th, with sales per capita of less than 4,5 kg, whereas Poland followed at a distance with just above 2,5 kg.

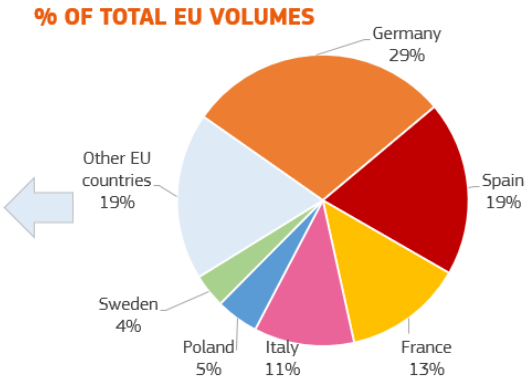
[77] Data analysed in this section are collected from Euromonitor international (https://www.euromonitor.com/). For more details, see the Methodological background.
[78] Processed products are defined as the aggregation of shelf-stable, chilled processed and frozen finfish, crustaceans, molluscs and cephalopods. Please note that this definition of processed products differs from the legal definition, as set out in Regulation (EC) No 852/2004 on the hygiene of foodstuffs, available at the link: https://eur-lex.europa.eu/eli/reg/2004/852/oj/eng. For more details, see the Methodological background.
[79] The UK is excluded from the EU aggregate each year.
[80] Unprocessed products are defined as the aggregation of fresh, chilled and frozen finfish, crustaceans, molluscs and cephalopods, packaged and unpackaged. Please note that this definition of unprocessed products differs from the legal definition as set out in Regulation (EC) No 852/2004 on the hygiene of foodstuffs, available at the link: https://eur-lex.europa.eu/eli/reg/2004/852/oj/eng. For more details, see the Methodological background.
[81] Euromonitor International blends statistical modelling with local market observations and judgment-based predictions. Euromonitor analysts firstly identify factors driving the growth in the past: both hard/macro drivers (demographics, GDP, taxation, inflation, population etc.) and soft drivers (category growth trends, product life cycle, consumer lifestyles, price, manufacturer perspective, weather, regulation etc.). Combined with their knowledge of the market, Euromonitor then speaks to the industry players about these factors along with gauging the potential for new factors to arise. Finally, the analysts further gather information about projected sales of major players in the next five years and/or projected forecasts of industry growth and begin to generate a consensus estimate of industry growth in the forecast period.

CHART 27

LARGEST EU CONSUMING COUNTRIES OF PROCESSED PRODUCTS IN 2025: % OF TOTAL VOLUMES SOLD THROUGH RETAIL AND FOODSERVICES

Source: Euromonitor International, Staple Foods, Industry Edition, 2026

Czechia, Portugal, Austria, Belgium, Denmark	2% each
The Netherlands, Romania, Finland, Greece, Slovakia, Ireland, Croatia, Lithuania	1% each
Hungary, Latvia, Bulgaria, Estonia, Slovenia, Cyprus, Malta, Luxembourg	less than 1% each



The retail channel accounted for the largest shares of total sales of processed fishery and aquaculture products in almost all countries, with market shares ranging from 61% in Germany to 91% in Poland. The only country where sales through foodservices were higher than retail was Greece, where retail was 43% and foodservices reached 57%.

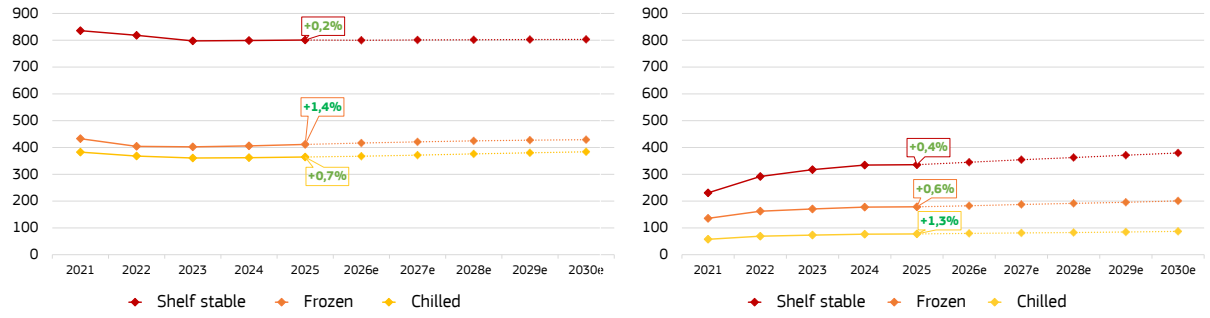
Charts 28 and 29 shows that retail sales declined from 2021 to 2023, as opposed to the increases seen for foodservice channels, which reflects the gradual re-openings that followed the outbreak of COVID-19 in early 2020. In more recent years, both retail sales and sales through foodservice channels grew, each recording increases by 0,6% from 2024 to 2025 – all categories[82] included. Retail sales decreased in only five EU Member States – namely Greece (-4%) and Italy, Belgium, Finland and Slovakia (-1% each) – whereas Germany was the only country where sales through foodservice decreased (-2%).

Euromonitor estimates[83] that sales of processed products through foodservices in 2030 might reach their highest level yet at more than 667.000 tonnes, representing a 13% growth from 2025.. Retail sales are expected to grow as well, but by just 3%, and reach almost 1,62 million tonnes.

CHARTS 28 AND 29

SALES OF PROCESSED PRODUCTS THROUGH RETAIL (LEFT) AND FOODSERVICES (RIGHT) BY CATEGORY. VOLUMES IN 1.000 TONNES. % VARIATIONS ARE FOR 2025 VS. 2024

Source: Euromonitor International, Staple Foods, Industry Edition, 2026

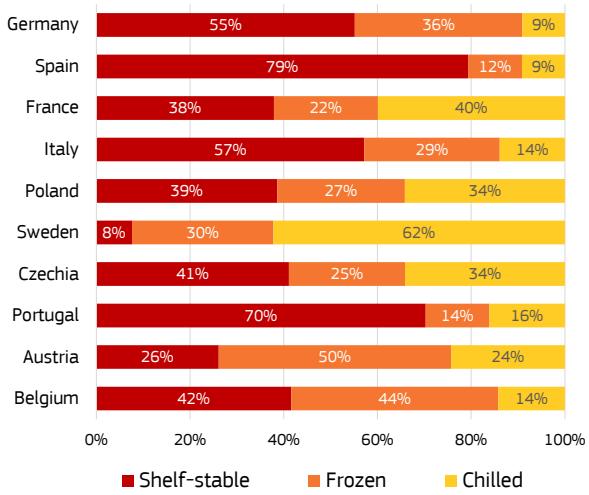


[82] Shelf stable, frozen and chilled products. To note, shelf-stable products include products typically sold in cans, glass jars or aluminium/retort packaging and usually preserved in oil, brine, salt water or with a sauce. Pickled products sold ambient are also included.
[83] *Ibidem.*

Shelf-stable products, the main category of processed fishery and aquaculture products sold via retail and foodservice channels, had more than 1,1 million tonnes of sales across the EU in 2025, followed by more than 590.000 tonnes of frozen products and more than 440.000 tonnes of chilled products. The median share of sales of shelf-stable products in EU countries in 2025 was 39%, indicating a broad preference for these products. In four out of the 27 EU countries, shelf-stable products covered more than half of retail sales and foodservice sales of processed aquatic products. In Spain, this was 79% of the total, in Portugal 70%, in Slovenia 62% and in Italy 57%. On the other hand, the shelf-stable products were the least preferred in four of the 27 EU countries, namely Sweden, Croatia, Estonia and Latvia, where they accounted for 9%, 11%, 19% and 29% of sales, respectively.

As concerns sales of chilled and frozen products, their median shares of the total were 29% and 32%, respectively. To note, Croatia, with 56%, was the only country where sales of frozen products covered more than half of retail and foodservice sales of processed aquatic products. In the case of chilled products, this applies to Estonia (71%), Lithuania (65%) and Sweden (62%).

CHART 30
MAIN CATEGORIES OF PROCESSED PRODUCTS SOLD THROUGH RETAIL AND FOODSERVICES IN 2025 (% OF TOTAL VOLUMES IN TOP 10 EU COUNTRIES IN TERMS OF TOTAL SALES)
Source: Euromonitor International, Staple Foods, Industry Edition, 2026



UNPROCESSED PRODUCTS IN ES, IT, PL, FR, DE AND THE UK

As mentioned at the beginning of this chapter, sales of unprocessed products through all channels – retail, foodservice, institutional – were analysed in France, Germany, Italy, Poland, Spain and the UK[84].

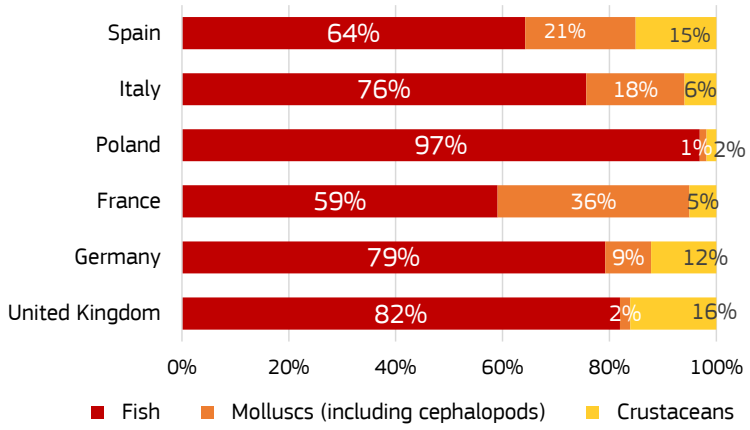
Finfish[85] had a pivotal role in all countries surveyed, followed at a distance by molluscs, which include cephalopods, and by crustaceans. The mollusc products played a more notable role in the southern Member States: cephalopods and mussels in Spain, oysters and mussels in France, and clams, mussels and cephalopods in Italy. Crustaceans, on the other hand, commanded relatively low shares.

[84] Ranked in descending order in terms of 2025 sales.
[85] Henceforth "Fish".

CHART 31

SALES OF UNPROCESSED IN ES, IT, PL, FR, DE AND UK PRODUCTS THROUGH RETAIL, FOODSERVICE AND INSTITUTIONAL CHANNELS IN 2025 (% OF TOTAL VOLUME)

Source: Euromonitor International, Fresh Food, Industry Edition, 2026

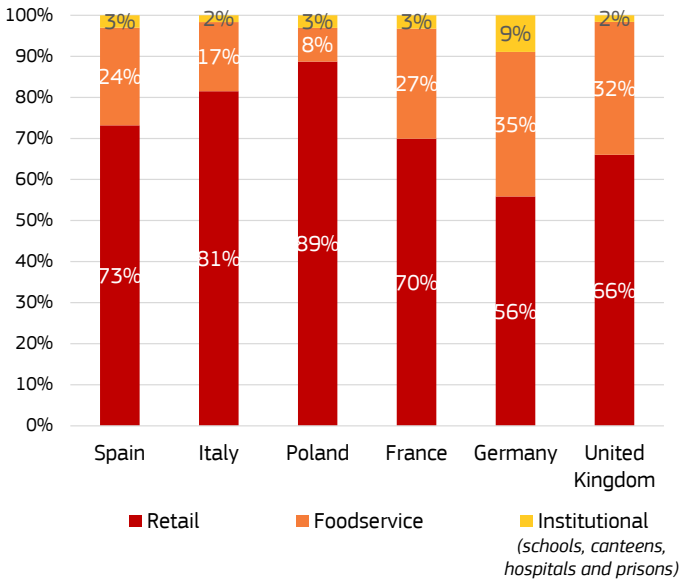


The retail channel accounted for the largest shares of total sales for unprocessed products in all the surveyed countries. However, as opposed to what we observed for processed products, when it comes to retail sales of unprocessed fish the situation is more diversified. In Spain, they have been decreasing over the last five years, most likely due to inflation, and are expected to follow a downward trend also in the future. A decreasing trend from 2021 to 2025 was recorded in France, Germany and the UK as well, although France showed a slight recovery from 2024 to 2025. In any case, in each of them, the 2030 retail sales are expected to be at their lowest levels in ten years. In Italy and Poland, retail sales have been increasing since 2021, and they are expected to reach a ten-year peak in 2030. In terms of out-of-home outlets, all six countries have been showing upward trends which are expected to continue at least until 2030.

CHART 32

SALES OF UNPROCESSED FISHERY AND AQUACULTURE PRODUCTS BY CHANNEL IN 2025 (% OF TOTAL VOLUME)

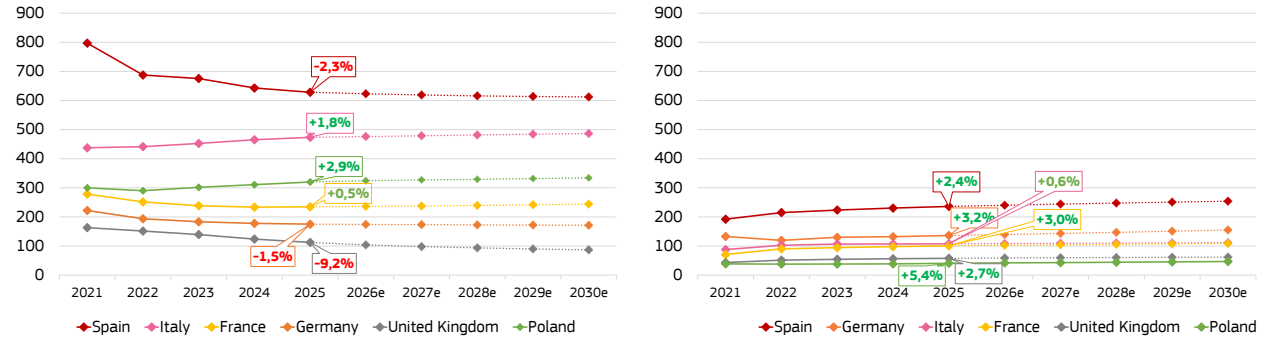
Source: Euromonitor International, Fresh Food, Industry Edition, 2026



CHARTS 33 AND 34

SALES OF UNPROCESSED PRODUCTS THROUGH RETAIL (LEFT) AND OUT OF-HOME OUTLETS (FOODSERVICE+ INSTITUTIONAL CHANNELS, RIGHT). VOLUMES IN 1.000 TONNES. % VARIATIONS ARE FOR 2025 VS. 2024

Source: Euromonitor International, Fresh Food, Industry Edition, 2026



FOCUS ON ORGANIC PRODUCTS IN DE, ES, FR, IT, PL AND THE UK

Organic products represent a niche market for seafood in the EU. This section focuses on five EU countries among those with the highest sales of fishery and aquaculture products – Germany, Spain, France, Italy and Poland – as well as the UK, which has a leading role in European production of organic salmon and is a major salmon supplier to the EU market.

According to Euromonitor[86], an average 2% of the total sales of unprocessed[87] aquatic products through retail, foodservice and institutional channels was organic in these six countries in 2025. More specifically, the coverage was 3,4% in Poland, 2,7% in Germany, 2,6% in the UK, 2,1% in France, 0,6% in Italy, and 0,3% in Spain. According to Euromonitor, these shares either increased or remained unchanged since the previous year, and they are all expected to be even higher by the end of 2030 - except for France, where it is expected to decrease to 2%. In absolute terms, 2025 sales of organic fish were the highest in Poland, corresponding to more than 12.000 tonnes, followed by Germany with 8.500 tonnes, France with 7.000 tonnes, the UK with 4.500 tonnes, Italy with 3.800 tonnes and Spain with 2.600 tonnes.

On the production side, according to Eurostat[88], the total organic aquaculture production in the EU was 61.830 tonnes in 2024[89], 70.928 tonnes in 2023 and 94.975 tonnes in 2022[90]. In general, it is worth reporting that traditionally, the largest organic production in the EU takes place in three countries, namely Ireland, Italy and the Netherlands.

[86] Source: Euromonitor International, Fresh Food, Industry Edition, 2026
[87] The most important organic species in these countries are salmon and trout, and to a lesser extent tropical shrimps and mussel, which are for a large share marketed as processed products (such as smoked salmon, smoked trout, cooked shrimp, etc.), so not included in the data analysed in this report.
[88] Source: Eurostat (online data code: org_aqtspec, data as of 27 April 2026
[89] To note, organic fish and seafood is by definition farmed.
[90] It should be considered that the data for Sweden are confidential, the data for Denmark are only available up to 2022, the data for Germany are confidential for 2023, and the data for Greece are not available for 2022

3.4 EU QUALITY SCHEMES: GEOGRAPHICAL INDICATIONS AND TRADITIONAL SPECIALTIES

The quality schemes registered in the EU recognise and promote the geographical or traditional aspects of specific agricultural or food products. Currently, two of the quality schemes have geographical indications (GIs), namely the Protected Designations of Origin (PDOs) and Protected Geographical Indications (PGIs). A third scheme – the Traditional Specialties Guaranteed (TSG) – recognises the traditional methods of production and recipes. According to the EU's 2026[91] register, 82 names are registered under EU quality schemes in the fishery and aquaculture sector[92], 4 of which were registered in 2026. Of these 82 names, 51 or 62,2% are PGIs, 25 or 30,5% are PDOs, and 6 or 7,3% are TSGs. The number of registered names in the sector increases each year. In 2026, they were more than three times higher than in 2011 (82 names in 2026 vs. 23 names in 2011). Beyond the fishery and aquaculture sector, the number of GIs/TSGs registered across the EU has also risen for all agricultural and food products, almost doubling their number between 2011 and 2026 (1.873 names registered in September 2026).

The 4 names registered under EU quality schemes in 2026 for fishery and aquaculture products are:

- "Batog de sturion": Romanian PGI covering a smoked sturgeon product made from the dorsal fillet of farmed sturgeon. It is produced in Tulcea county, which includes the Danube Delta and the mouths of Danube flowing into the Black Sea, although the farmed sturgeon used as raw material may come from inside or outside this area. The fillet is salted with a mixture of rock salt and sugar, dried to at least 35% residual moisture, then smoked with hardwood. The product relies exclusively on farmed raw material, since Romania has banned wild sturgeon fishing in its natural habitats since 2006 to protect the species. This is Romania's 6th product recognised under an EU quality scheme.
- "Norrlandsströmming": Swedish PDO covering Baltic herring fished along the coast from the mouth of the Dalälven river in the South to Haparanda in the North, within the Bothnian Sea and Bothnian Bay. The fish must be caught with passive gear such as nets, hand lines, trap nets or jigging equipment. It then has to be landed and sorted within 24 hours of the fishing gear being emptied. It can be sold whole or filleted, and chilling, freezing, gutting and filleting must take place within the area.
- "Ostkustströmming": Swedish PDO covering Baltic herring fished along the Baltic coast between Kristianopel in the south and Öregrund in the North, an area that includes the islands of Öland and Gotland. The fish must be caught with passive gear or with trawl nets, then landed and sorted within 24 hours, and can be sold whole or filleted. Its quality depends on the low salinity of the area.
- "Simojärven muikku": Finnish PGI covering vendace fished from Lake Simojärvi, in Ranua municipality in southern Lapland. The harsh, nutrient-poor conditions of this remote lake give the fish its small size and its characteristic bright silver colour, as well as an orange-red roe that distinguishes it from the typically yellowish roe of other vendace. It is sold fresh or frozen. Annual catch from Lake Simojärvi currently stands at less than 20 tonnes, a level considered by the applicant to be well below the lake's sustainable potential[93].

[91] Source: EU register eAmbrosia, September 2026 – https://ec.europa.eu/info/food-farming-fisheries/food-safety-and-quality/certification/quality-labels/geographical-indications-register/
[92] Fishery and aquaculture products are included in "Agricultural products and foodstuffs" category in the EU Register.
[93] Source: https://iprinfo.fi/uutiset/simojarven-muikku-on-rekisteroity-eun-nimisuojajarjestelmaan/

In 2026, among the 82 registered GIs, 61 or 74% originated from EU countries and 21 or 26% originated from non-EU countries. All six TSG applications originated from EU countries. The EU countries with the largest number of names registered are Sweden (9 names), followed by France and Germany (8 and 7 names each), Spain, Italy and Romania (6 names each), Hungary (4 names) and Finland (3 names). These are followed by Czechia, Croatia, and Latvia, which each have two names. Belgium, Ireland, Greece, the Netherlands, Poland and Portugal each have one name. In non-EU countries, 14 of the registered names come from the UK, followed by China with five, and Norway and Vietnam with one each.

Among the 82 current denominations, 61 or 74% cover finfish, 18 or 22% cover molluscs, and three or 4% cover crustaceans and cephalopods. Further, of these denominations, 38 or 47% refer to marine species, 33 or 41% refer to freshwater species, and 10 or 12% refer to migratory species with life cycles that alternate between the marine environment and fresh water. One GI, the Belgian PGI "Escavèche de Chimay", includes both marine and freshwater fish.

The main species covered by GIs and TSGs include carp with 13 names registered, notably in Germany and Hungary; mussels with 8 names in France, Italy, Spain, Sweden, Croatia, the UK, and China; oyster with 6 names, notably in France and the UK; salmon with 5 names, including 4 in the UK and 1 in Ireland; anchovy and vendace each with 4 products; and trout and tuna, each with 3 products.

TABLE 14

QUALITY SCHEMES IN THE FISHERY AND AQUACULTURE PRODUCTS REGISTERED UP TO SEPTEMBER 2026

Source: eAmbrosia, DG AGRI

Country	Protected Designations of Origin (PDO)		Protected Geographical Indications (PGI)		Traditional Specialties Guaranteed (TSG)		TOTAL
	Number	Species concerned	Number	Species concerned	Number	Species concerned	
Sweden	8	Vendace (roes), whitefish (*Coregonus* spp.), oyster, mussel, sprat, herring	1	Arctic char			**9**
France	1	Mussel	6	Oyster, Anchovy, Scallop, Whelk, Sturgeon (caviar)	1	Mussel	**8**
Germany			7	Carp (5 PGIs), Herring, Trout			**7**
Spain	1	Mussel	4	Tuna (mojama) (2 PGIs), Tuna, Mackerel	1	Octopus	**6**
Italy	3	Mussel, Tench, Anchovy	3	Trout, Arctic char, Anchovy			**6**
Romania			4	Carp, Pontic shad, other Danube delta species (roes), sturgeon	2	Carp, sprat	**6**
Hungary	1	Carp	3	Brown trout, Carp, Carp & pike-perch			**4**
Finland	1	Vendace	2	Vendace			**3**
Czechia	1	Carp	1	Carp			**2**
Croatia	2	Oyster, mussel					**2**
Latvia			2	Lamprey			**2**
Belgium			1	Several species			**1**
Ireland			1	Salmon			**1**
Greece	1	Grey mullet (roes)					**1**
Netherlands					1	Herring	**1**
Poland	1	Carp					**1**
Portugal					1	Cod	**1**
United Kingdom	4	Pollan, Mussel, Oyster, Scallop	10	Salmon (4 PGIs), Sea trout, Eel, Sardine, Cod, Haddock, Oyster			**14**
China			5	Freshwater crayfish (2 PGIs), Mussel, Clam, Japanese seabass			**5**
Norway			1	Cod			**1**
Vietnam	1	Anchovy (sauce)					**1**
TOTAL	**25**		**51**		**6**		**82**

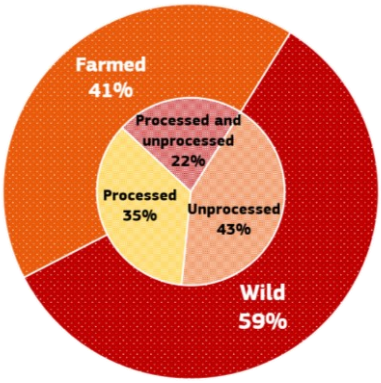
More than half or 57% of the products covered by GIs/TSGs are wild products, mainly consisting of anchovy, cod, tuna, and vendace, while 43% are farmed products, mainly including carp, shellfish and salmon[94]. Three names or 4% of the total cover both wild and farmed products, all of them being processed products. For instance, the Romanian PGI "Salată tradițională cu icre de crap" covers carp roes (and roes from other freshwater fish) from either wild or farmed carp.

43% of the names refer to unprocessed products (for instance the French PGI "Huîtres Marennes Oléron" (oyster), even if some of them may be used as ingredients in processed products, such as the Spanish PDO "Mejillón de Galicia" (mussel) used by the canning industry. More than one third (35%) of the names cover specifically processed products, for example the two new registered names in 2025 ("Caviar d'Aquitaine" and "Pulpo Seco de Adra"). Further, 22% of the names cover both processed and unprocessed products[95], such as the Czech PGI "Třeboňský kapr", which is placed on the market live, fresh or processed (smoked or marinated).

CHART 35

TYPES OF PRODUCTS UNDER EU QUALITY SCHEMES IN THE FISHERY AND AQUACULTURE SECTOR (SEPTEMBER 2026)

Source: eAmbrosia, DG AGRI



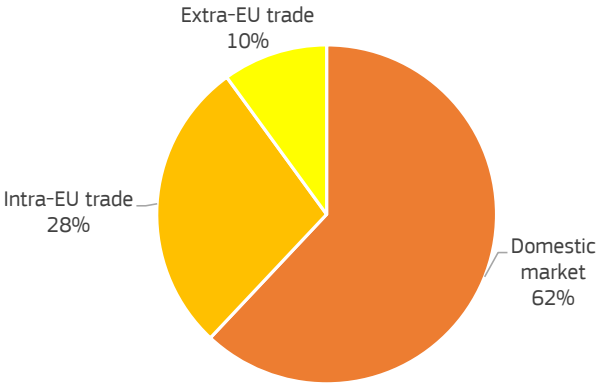
	Unprocessed	Processed	Processed and unprocessed	Total
Wild	13	26	9	**48**
Farmed	22	3*	9	**34**
Total	**35**	**29**	**18**	**82**

*The PGIs "London Cure Smoked Salmon" (2017, the United Kingdom), "Escavèche de Chimay" (2021, Belgium) and TSG "Salată tradițională cu icre de crap"(2021) are based on both wild caught and farmed products; they are considered in "wild" in the present table.

Sales of fishery and aquaculture products under GI/TSG reached an estimated 246.709 tonnes and EUR 1,42 billion at the EU-28 level[96,97] in 2017. This accounted for about 4% of the sales value in the EU-28 seafood sector[98]. The domestic market accounted for EUR 0,88 billion or 62% of the sales value, followed by intra-EU trade which reached EUR 0,4 billion or 28%, and extra-EU trade which reported EUR 0,14 billion, or 10%.

[94] This includes three names which cover both farmed and wild fish.
[95] Processed products cover filleted, smoked, dried, salted or preserved products, as well as other types of preparations (for instance fish roes or fish-based products). Unprocessed products may be live, fresh (gutted or not) or frozen.
[96] Source: Study on economic value of EU quality schemes, geographical indications (GIs) and traditional specialties guaranteed (TSGs), AND International for DG AGRI, 2019 - https://op.europa.eu/en/publication-detail/-/publication/a7281794-7ebe-11ea-aea8-01aa75ed71a1 and country fiches - https://op.europa.eu/fr/publication-detail/-/publication/73ad3872-6ce3-11eb-aeb5-01aa75ed71a1/language-fr
[97] This covers the 43 GIs/TSGs registered at EU-28 level before 2017.
[98] Based on EUROSTAT and EUMOFA data, sales value of the fishery and aquaculture sector at EU-28 level can be estimated between EUR 28 billion (processing and preserving activities only) and EUR 40 billion (processing and preserving activities + landings + aquaculture; this is however an overestimate with double counts).

CHART 36
SHARE OF SALES VALUE BY MARKET FOR FISH, MOLLUSCS AND CRUSTACEANS UNDER GI/TSG IN 2017 (EU-28)
Source: Study on economic value of EU quality schemes, geographical indications (GIs), and traditional specialties guaranteed (TSGs), AND International for DG AGRI, 2019



PGIs accounted for 71% of the sales value, followed by TSGs with 22%, and PDOs with 7%. The average economic size of each TSG and PGI tended to be higher than the average size of each PDO, with TSGs amounting to EUR 36 million, PGIs to EUR 32 million, and PDOs to EUR 8 million in 2017.
More recent data are available for France and Spain:

- In France[99], sales of fishery and aquaculture products under quality schemes[100] reached EUR 395 million in 2024, accounting for 9,4% of the total sales of the French seafood sector. The most relevant products are registered in the shellfish sector: PGI "Huîtres Marennes Oléron" (oyster), TSG "Moules de Bouchot" (mussel), PDO "Moules de bouchot de la baie du Mont-Saint-Michel" (mussel) and PGI "Huître de Normandie" (oyster).
- In Spain, [101] sales of fishery and aquaculture products under GIs reached EUR 38,2 million in 2025. The main designations are the PGI "Mejillón de Galicia" (mussel) with EUR 14,8 million and the PGI "Caballa de Andalucía" (preserved mackerel fillets) with EUR 13,6 million. The other names registered are PGIs for tuna products ("Melva de Andalucía", "Mojama de Barbate", and "Mojama de Isla Cristina"), whose sales ranged from EUR 2 million to EUR 5 million each. A strong decrease of sales under GI in Spain was registered since 2020 (-53%), mainly due to the drop in the sales of the "Mejillón de Galicia" caused by decreased mussel production in Spain[102].

[99] DataSIQO - https://datasiqo.fr/territoire/pays/France/99100
[100] PDO, PGI, TSG and the French scheme « Label Rouge », which may be used jointly with a PGI.
[101] Source: Ministerio de Agricultura, Pesca y Alimentación - https://www.mapa.gob.es/es/alimentacion/temas/calidad-diferenciada/
[102] More details on mussel production in Spain can be found in Chapter 6 of this report.

4/ IMPORT - EXPORT

In the decade from 2016 to 2025[103], the value of EU trade flows[104] of fishery and aquaculture products increased at a compound annual growth rate of 1% in real terms[105]. This included imports and exports between the EU and the rest of the world, as well as exchanges between EU Member States. Compared with 2016, the value in 2025 was 10% higher in real terms, while total traded volume grew by 7%. Between 2024 and 2025, trade volume increased by 3%, while nominal value by 6%.

From 2024 to 2025, both trade flows within the EU and with non-EU countries increased in volume and in value.

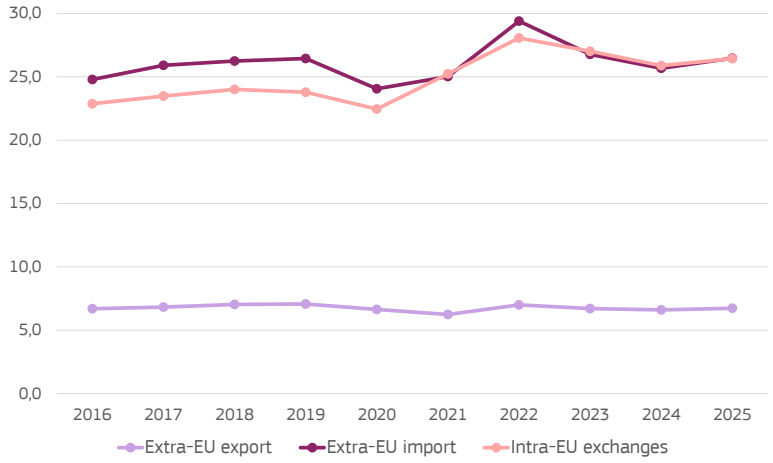
Of the three flows analysed, extra-EU imports are the largest. In 2025, they reached 6,5 million tonnes, which marked the first year of growth since 2021 while also recording the highest volume of the decade. In nominal value terms, they amounted to EUR 31,7 billion, accounting for 44% of total EU trade value and 45% of total trade volume. Compared with 2024, extra-EU imports increased strongly, rising by 9% in volume and by 6% in nominal value. Over the longer 2016-2025 period, extra-EU import volumes increased by 9%, while their real value grew by 7%. Intra-EU exchanges followed closely in volume terms but were the largest flow in nominal value terms in 2025. They reached 5,7 million tonnes, reaching a 10-year peak, and EUR 32,3 billion, representing 39% of total trade volume and 45% of total trade value. Compared with 2024, intra-EU trade increased by 3% in volume and by 5% in nominal value. Over the longer 2016-2025 period, intra-EU volumes grew by 7%, while real value increased by 16%, showing stronger long-term value growth than extra-EU imports.

By contrast, extra-EU exports continued to play a much smaller role, confirming the EU's position as a net importer of fishery and aquaculture products. In 2025, extra-EU exports reached 2,3 million tonnes and EUR 8,2 billion in nominal value, accounting for 16% of total trade volume and 11% of total trade value. Compared with 2024, they increased by 12% in volume and by 5% in nominal value, reversing the decline observed in volume terms since 2020. Over the longer 2016-2025 decade, their real value remained broadly stable.

CHART 37

EU TRADE FLOWS OF FISHERY AND AQUACULTURE PRODUCTS, IN VALUE (EUR BILLION)

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020).



[103] In line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, since the most recent reference period is year 2025, UK is excluded from the EU aggregations of each year. This means that UK is dealt with as country of origin/destination of EU imports and exports.

[104] Sum of extra-EU imports, extra-EU exports and intra-EU exchanges. Intra-EU exchanges are based on intra-EU exports. For more details, please refer to the Methodological background.

[105] In this report, value and price variations for periods longer than five years are analysed by deflating values using the GDP deflator (base=2020). For shorter periods, nominal value and price variations are analysed.

This chapter of The EU Fish Market provides detailed data and analyses of extra-EU imports, extra-EU exports and intra-EU exchanges, focusing on the major species traded and countries involved. Before moving on, it is also important to note that the value of imports and exports in this report is presented in EUR, regardless of the currency used in the transactions, which can be made in different currencies. The charts below show the trend of the USD/EUR exchange rate during the 2021-2026 period. Further, given the relevance of EU imports from Norway, they also show the NOK/EUR exchange rate.

Charts 38 and 39 illustrate the trends of monthly exchange rates. In 2022, the EUR experienced a sharp depreciation against the US, partly due to concerns over the economic impact of Russia's war of aggression against Ukraine. The USD/EUR exchange rate fell below parity in September and October 2022, before recovering gradually in 2023. After remaining broadly stable in 2024, the euro strengthened in 2025 and stood at 1,16 in June 2026.

The NOK/EUR exchange rate increased from an annual average of 10,16 in 2021 to above 11.60 in 2024 and 2025, indicating a depreciation of the Norwegian krone. This trend reversed in the first half of 2026, with the rate falling from 11,67 in January to 10,86 in June, reflecting a marked appreciation of the NOK.

CHARTS 38 AND 39
EXCHANGE RATES US DOLLAR/EUR AND NOK/EUR
Source: European Central Bank

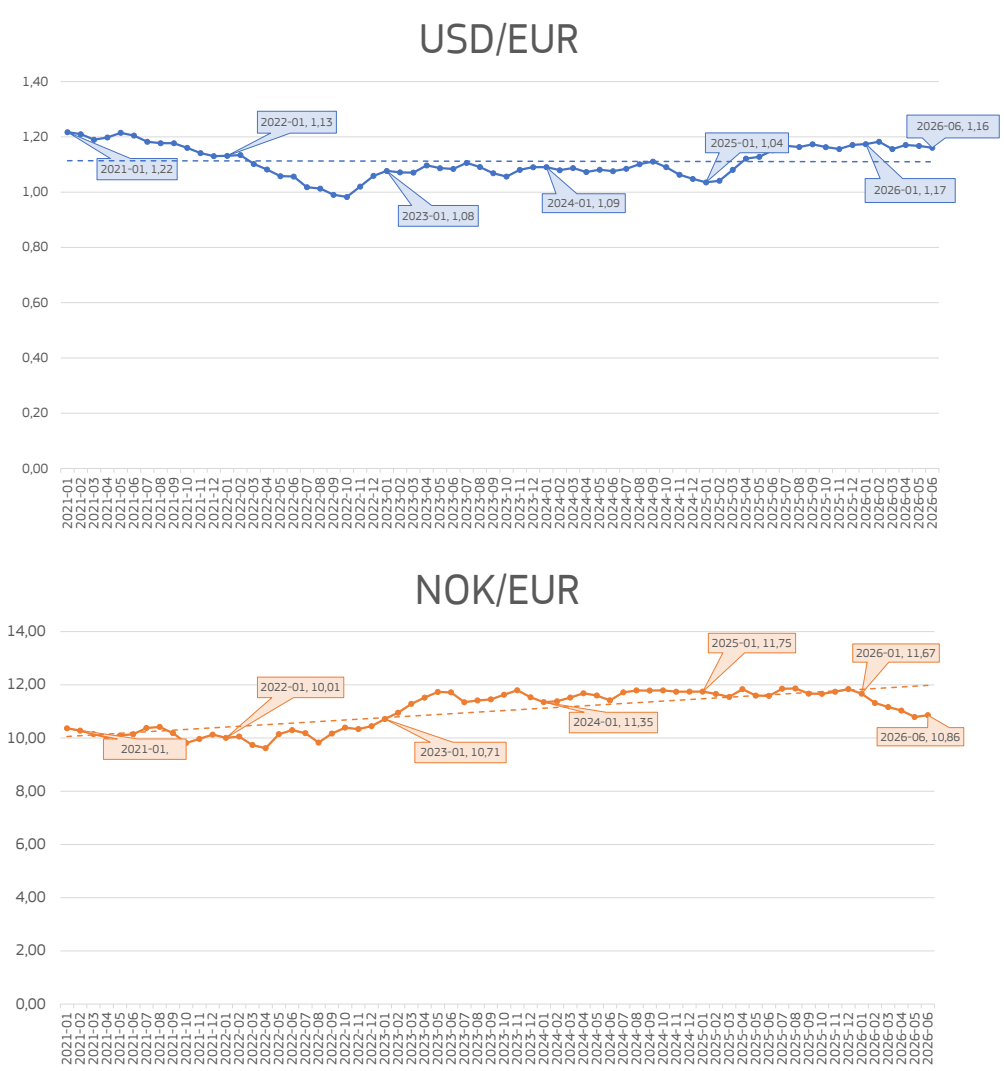


CHART 40

TOP-10 EXTRA-EU TRADE FLOWS IN 2025, IN NOMINAL VALUE (EUR BILLION)

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409).

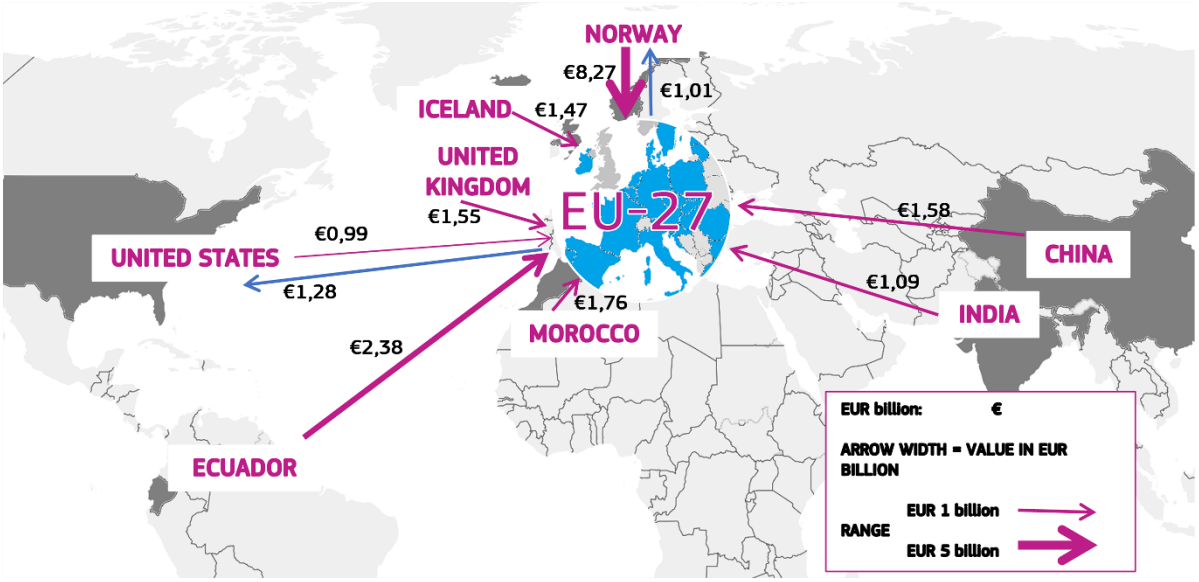
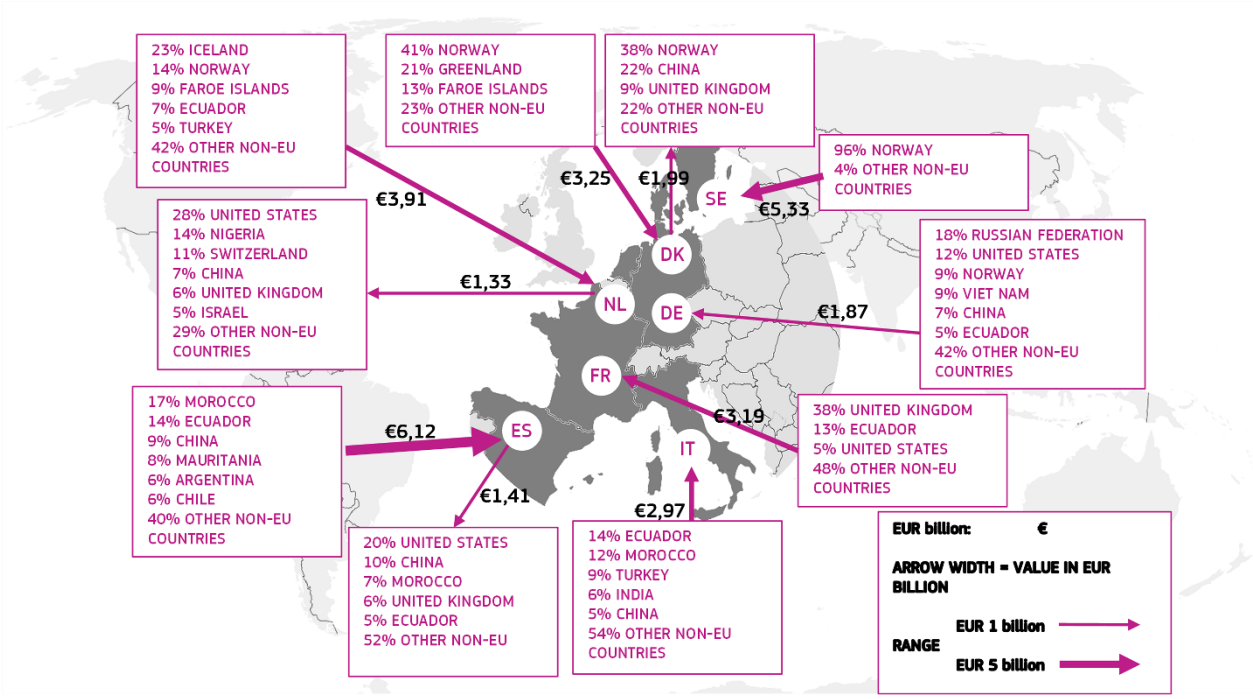


CHART 41

MOST RELEVANT EXTRA-EU TRADE FLOWS BY MEMBER STATE IN 2025, IN NOMINAL VALUE (EUR BILLION)

Source: EUMOFA elaboration of Eurostat-COMEXT data



4.1 EXTRA-EU TRADE BALANCE

In 2025, the extra-EU trade balance[106] widened by 7%, from EUR 21,95 billion to EUR 23,43 billion. The value of imports increased by 6%, compared with a 5% rise in exports. In the longer perspective, the deficit grew by 9% in real terms from 2016 to 2025. In volume terms, exports grew by 12%, while imports increased by 9%. Among Member States[107] with deficits exceeding EUR 1 billion, Sweden recorded the largest deficit, at EUR 5,24 billion, followed by Spain, at EUR 4,71 billion. Spain recorded the largest deterioration compared with 2024, while the deficits of Germany, the Netherlands, Italy and Sweden also widened. By contrast, Denmark and France registered modest improvements. To note, the countries listed in Table 15 are also major entry points for high-value products originating outside the EU and destined for the internal market. Sweden, for example, is the key entry point for high-value Norwegian products destined for the EU market. In addition, some catches by the EU external fleet are processed at source, although a significant share will be imported into the EU as prepared-preserved products or frozen loins – landings that are likewise recorded as exports.

TABLE 15
EXTRA-EU TRADE BALANCE FOR FISHERY AND AQUACULTURE PRODUCTS OF THE EU AND MAIN EU NET IMPORTERS (NOMINAL VALUE IN EUR BILLION)
Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409).

	2024	2025	VARIATION 2025-2024
EU-27	**-21,95**	**-23,43**	**-1,48**
Sweden	-5,17	-5,24	-0,08
Spain	-4,33	-4,71	-0,38
France	-2,81	-2,78	+0,03
Italy	-2,37	-2,61	-0,24
Netherlands	-2,26	-2,59	-0,32
Germany	-1,15	-1,47	-0,33
Denmark	-1,36	-1,26	+0,10

The United States and Japan – the second and third largest net importers of fishery and aquaculture products after the EU –reported an improvement of their trade balances. It is worth noting that, in absolute terms, China ranks as the world's third largest importer after the EU and the US. However, it is not included in this comparison, as its trade balance is in minor deficit compared to the other countries. For a more detailed comparative analysis of EU trade and the trade of other main players in the world, see Chapter 1.3.

[106] Extra-EU exports *minus* extra-EU imports.
[107] These calculations do not take into account the intra-EU exchanges flow.

TABLE 16
TRADE BALANCE FOR FISHERY AND AQUACULTURE PRODUCTS OF MAJOR NET IMPORTERS (NOMINAL VALUE IN EUR BILLION)
Source: EUMOFA elaboration of Eurostat-COMEXT (online data code: ds-045409) and Trade Data Monitor data.

	2024	2025	VARIATION 2025-2024
EU-27	**-21,95**	**-23,43**	**-1,48**
United States	-18,03	-17,51	0,52
Japan	-10,33	-10,25	0,08

The deterioration of the EU-27 extra-EU trade balance is also evident from the breakdown by commodity group, as shown in Table 17.
The largest deteriorations were recorded for crustaceans, cephalopods and groundfish, whose deficits widened by around EUR 0,50 billion each. Only salmonids and flatfish recorded improvements in their trade balances, while smaller deteriorations were observed for the rest of the commodity groups. Non-food use products remained the only commodity group with a surplus, although this declined from EUR 0,10 billion in 2024 to EUR 0,06 billion in 2025.

TABLE 17
TRADE BALANCE FOR FISHERY AND AQUACULTURE PRODUCTS BY COMMODITY GROUPS (NOMINAL VALUE IN EUR BILLION)
Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409).

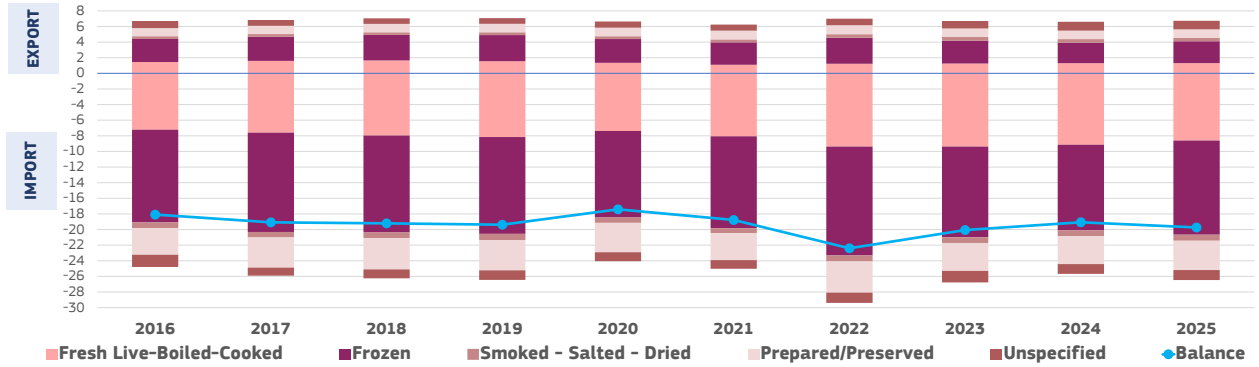
	2024	2025	VARIATION 2025-2024
EU-27	**-21,95**	**-23,43**	**-1,48**
Salmonids	-7,24	-6,85	+0,39
Non-food use	0,10	0,06	-0,04
Small pelagics	-0,21	-0,29	-0,09
Other marine fish	-0,95	-1,00	-0,05
Tuna and tuna-like species	-2,40	-2,49	-0,09
Groundfish	-3,75	-4,23	-0,48
Crustaceans	-3,78	-4,29	-0,51
Cephalopods	-2,51	-3,01	-0,50
Flatfish	-0,14	-0,11	+0,03
Miscellaneous aquatic products	-0,10	-0,15	-0,05
Bivalves and other molluscs and aquatic invertebrates	-0,50	-0,56	-0,06
Freshwater fish	-0,49	-0,52	-0,02

Frozen products accounted for the largest share of the extra-EU trade deficit in 2025, reaching EUR 9,26 billion, or 47% of the total. Fresh, live, boiled and cooked products followed, with a deficit of EUR 7,30 billion, equivalent to 37% of the total, while prepared and preserved products recorded a deficit of EUR 2,65 billion, or 13%.

CHART 42

EXTRA-EU TRADE BALANCE FOR FISHERY AND AQUACULTURE PRODUCTS BY PRESERVATION STATE, (EUR BILLION)

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409. Values are deflated by using the GDP deflator (base=2020).



4.2 COMPARISON BETWEEN IMPORTS OF FISHERY AND AQUACULTURE PRODUCTS AND MEAT

In 2025, the combined value of extra-EU imports of agri-food *plus* fishery and aquaculture products reached EUR 220,22 billion[108]. Of this, fishery and aquaculture products accounted for 11% and meat for 2%[109]. The EU is a net importer of fishery and aquaculture products, but a net exporter of meat.

Chart 43 compares the values of fish and meat imports from 2016 to 2025, excluding prepared and non-edible products[110]. It also illustrates, via the blue line, the evolution of the ratio between fish and meat import values. This ratio dropped sharply in 2022 to just over 5, indicating that the value of imported fish was five times higher than that of imported meat.

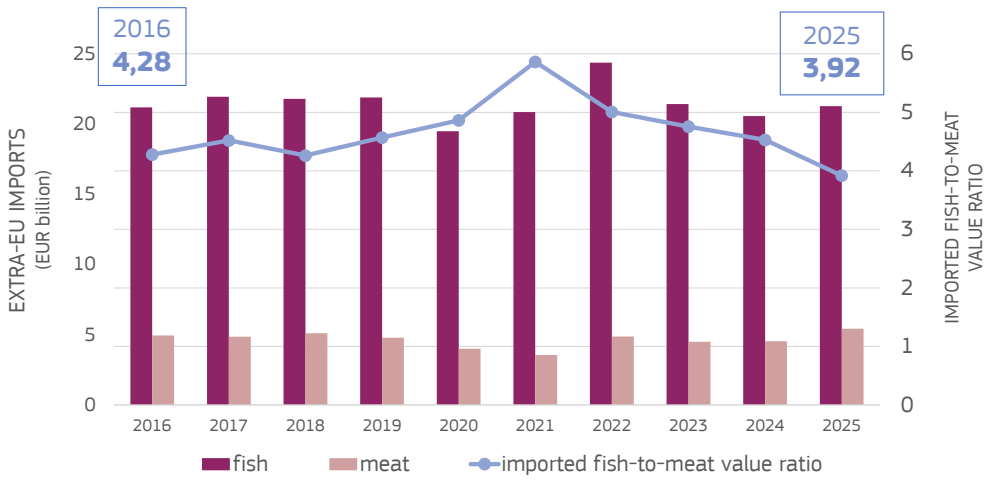
The increase in the ratio between 2018 and 2021 was driven by a sharper decline in the value of meat imports compared with that of fish imports. In 2022, imports of both categories increased substantially, but meat imports grew by 45%, compared with 23% for fish, causing the ratio to decline markedly. In 2024, meat import value increased by 4%, while fish imports declined slightly, by 1%, bringing the ratio back towards its pre-pandemic level. In 2025, both categories recorded increases, but meat imports rose by 23%, compared with 6% for fish. Consequently, the ratio fell to just under 4 for the first time during the ten-year period analysed.

[108] This includes extra-EU imports of the items referring to fishery and aquaculture products monitored by EUMOFA (list by CN-8 code available at the link https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/metadata) and extra-EU imports of agri-food products (source: DG AGRI).

[109] For the sake of clarity, the comparison refers to "Fish" (which includes all items reported under chapter "03 - Fish and crustaceans, molluscs and other aquatic invertebrates" of the Combined Nomenclature commodities) and "Meat" (which includes all items reported under chapter "02 - Meat and edible meat offal") of Section I "Live animals; animal products" of the Combined Nomenclature commodities.

[110] For methodological issues, this paragraph compares EUROSTAT codes 02 (meat) and 03 (fish) and not other codes for prepared and non-edible products.

CHART 43
EXTRA-EU IMPORTS TREND AND RATIO OF IMPORTED FISHERY AND AQUACULTURE PRODUCTS VS. MEAT, IN VALUE
Source: EUMOFA elaboration of Eurostat-COMEXT (online data code: ds-045409) and DG AGRI data. Values are deflated by using the GDP deflator (base=2020).



4.3 EXTRA-EU IMPORTS

The increase in volume was broad-based across several important imported species. For example, salmon import volumes rose by 6%, despite a 5% decline in value, while fish oil volumes increased by 44% even as their value fell by 17%. These developments indicate a substantial decline in average import prices. By contrast, cod import volumes decreased by 9%, while their value increased by 11%, pointing to higher unit prices.

In nominal terms, the increase in import value was also driven by several key species. For instance, the value of warmwater shrimp imports rose by 24%, octopus by 27%, Alaska pollock by 25%, cod by 11%, and tuna[111] by around 7%. Fishmeal imports also increased substantially in value terms, by 37%. As mentioned before, salmon import value declined by 5%, that of fish oil by 17%, while the value of imported squid remained broadly stable.

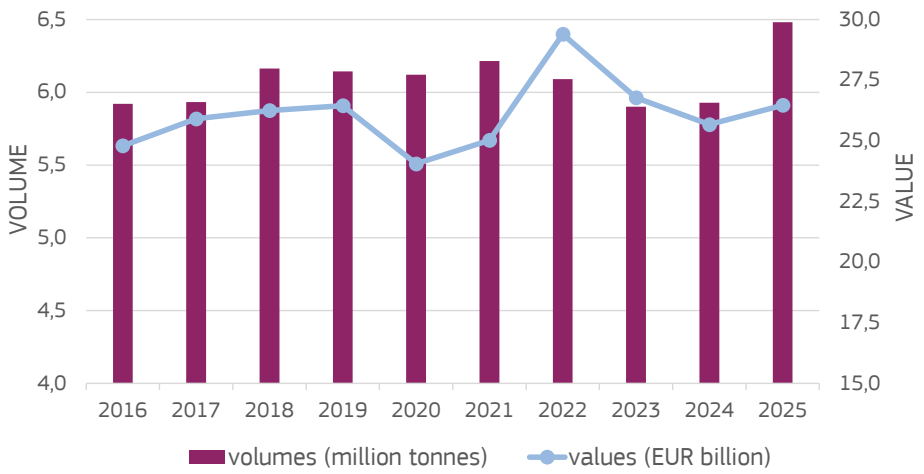
In recent years, the EU had seen a general trend of falling import volumes combined with rising values, largely due to widespread price increases during 2022 and part of 2023. However, this trend has since reversed, with import values decreasing more significantly than volumes, both in 2023 and 2024. In 2025, there were again substantial increases in both volume and value. This shift can be attributed to several factors, including fluctuations of the EUR against the USD and the NOK in recent years. As a significant share of extra-EU imports originates from Norway, these exchange rate movements played a key role in the value increases from 2022 onwards. To note, the EU market of fishery and aquaculture products relies heavily on imports from third countries, especially for the raw material used in the processing sector, such as canned tuna and sardines, frozen tropical shrimps, frozen cod and Alaska pollock, as well as fresh salmon, fresh cod and fresh saithe.

[111] The "tuna" category comprises skipjack tuna, which accounted for 56% of the total volume, followed by yellowfin tuna at 26% and miscellaneous tuna at 15%. Bluefin, albacore and bigeye tuna each represented around 1%. The overall increase was driven mainly by skipjack tuna, whose import value rose by 5% between 2024 and 2025.

CHART 44

EXTRA-EU IMPORTS OF FISHERY AND AQUACULTURE PRODUCTS

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020).



Salmon remained by far the main species imported into the EU in 2025, accounting for 25% of the total value and 17% of the volume of extra-EU imports of fishery and aquaculture products. Norway supplied around 80% of the total, followed by the Faroe Islands (around 10%) and the United Kingdom (around 5%).

After reaching a previous peak in 2021, salmon import volumes declined in 2022 and 2023, before recovering in 2024 and increasing by a further 6% in 2025 to their highest level in the period analysed. On the other hand, import value declined by 5% in 2025, after reaching a nominal peak of EUR 8,4 billion in 2024. Over the longer period from 2016 to 2025, salmon import volumes increased by 24%, while their value rose by 15% in real terms.

Shrimps were the second most imported species, accounting for 9% of total extra-EU import volume and 13% of value. This category comprises warmwater shrimps – frozen shrimps of the genus *Penaeus*, mainly imported from Ecuador – and miscellaneous shrimps and prawns[112], mainly imported from Argentina, India, Vietnam and Greenland. It does not include the coldwater shrimps of the family Pandalidae, including *Pandalus* species (mainly from Greenland, Canada, the Faroe Islands and Norway,) *Crangon* species (mainly from the United Kingdom) and deep-water rose shrimp (Parapenaeus longirostris) – mainly supplied by Morocco, Senegal and Tunisia.

Norway remained the largest country of origin of EU imports of fishery and aquaculture products, covering 24% of total volume and 26% of value. Its exports to the EU consisted mainly of salmon, as well as cod and herring. Norway was followed in value terms by Ecuador, Morocco, China, the United Kingdom and Iceland. Imports from Ecuador consisted primarily of warmwater shrimps and tuna. Morocco supplied mainly sardines and fishmeal in volume terms, while octopus and squid were its leading products by value. From China, imports mostly consisted in frozen fillets of Alaska pollock and frozen fillets of cod. Salmon was the most valuable product imported from the United Kingdom, while blue whiting ranked first in volume. Iceland supplied mainly cod. India, the United States, Vietnam and the Faroe Islands each accounted for around 3% of total import value. Imports from India and Vietnam were dominated by shrimps, while the United States was an important supplier of Alaska pollock and salmon, and imports from the Faroe Islands consisted predominantly of salmon.

[112] No detail is available in terms of species.

CHART 45

TOP EXTRA-EU COUNTRIES OF ORIGIN IN 2025 (IN VALUE)

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)

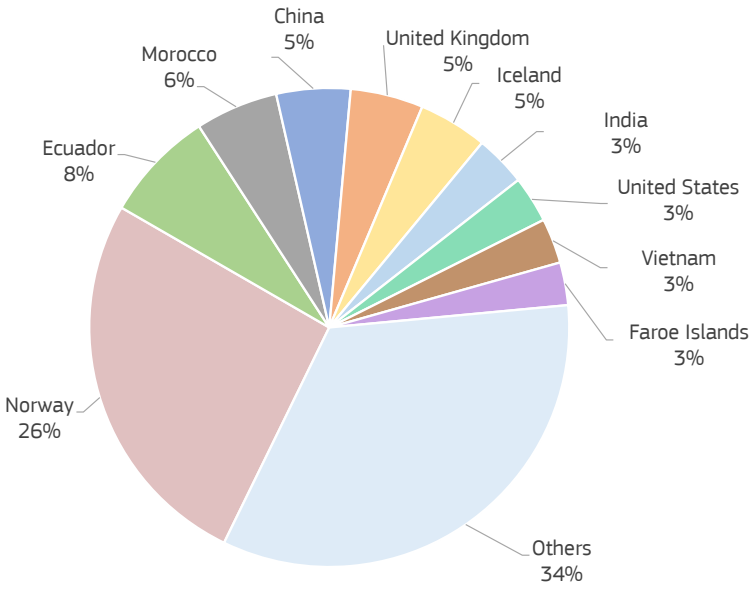


CHART 46

TOP EXTRA-EU COUNTRIES OF ORIGIN IN 2025 (IN VOLUME)

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)

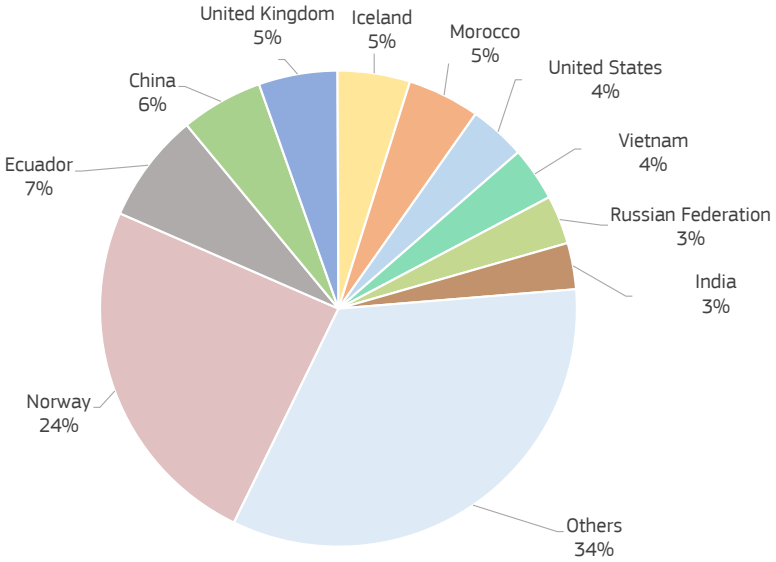


Chart 47 illustrates the trend from 2021 to 2025, showcasing the average import prices of the top-valued main commercial species imported in the EU.

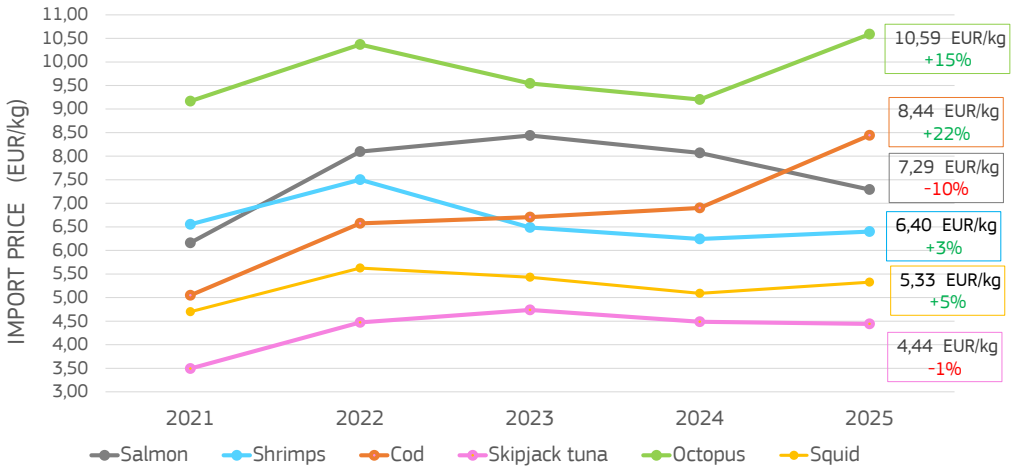
Following the widespread price increases recorded in 2022 and 2023, price developments were mixed in 2025. Salmon recorded the largest decline among the species considered, with its average unit value falling by 10%, from 8,07 EUR/kg to 7,29 EUR/kg, its lowest level since 2021. This reflected a 6% increase in volume combined with a 5% decline in nominal value. The price of skipjack tuna also decreased slightly, by 1%, to 4,44 EUR/kg.

By contrast, cod and octopus recorded a substantial nominal unit value increase of 22% and 15%, respectively, both reaching their peak unit value in the five years considered. The combined average price of shrimp imports increased more moderately, by 3%, after two consecutive years of decline.

CHART 47

NOMINAL UNIT VALUE OF SOME OF THE TOP VALUED MAIN COMMERCIAL SPECIES IMPORTED IN THE EU AND % VARIATIONS 2025/2024

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)



It is important to underline that imports are reported by Eurostat-COMEXT according to flows recorded by national customs. However, in many cases, the corresponding EU Member States are not the actual final destinations. Rather, these importing countries are points of entry for the fishery and aquaculture products imported to the EU, which are then traded in the internal market[113].

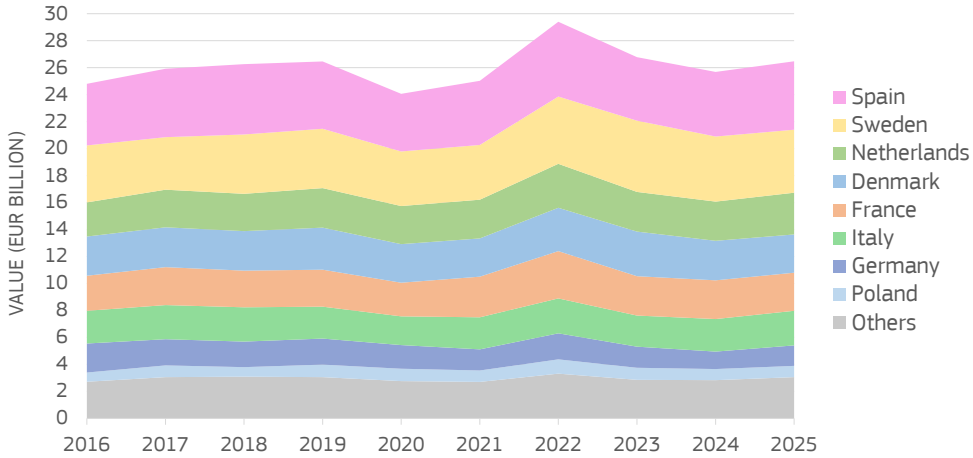
Taking this into account, the five largest EU importers in 2025 remained Spain, Sweden, the Netherlands, Denmark and France. Spain strengthened its position as the leading importer, with imports worth EUR 6,12 billion, an increase of 9% compared with 2024. It was followed by Sweden, at EUR 5,33 billion, and the Netherlands, at EUR 3,91 billion. The value of Dutch imports increased by 10%, while Sweden recorded a more moderate increase of 1%.

Denmark and France were the only countries among the five largest importers to record declines in nominal value, both of around 1%. Nevertheless, import volumes increased in all five countries. Denmark recorded the strongest volume growth, at 13%, followed by Sweden at 8%, Spain at 7%, and France and the Netherlands at around 2% each. As shown in Chart 48 and XX, among the other major importing Member States, Germany registered particularly strong growth, with import value increasing by 20% and volume by 31%. All Member States, with the exception of Lithuania, recorded increases in import volume from 2024 to 2025.

CHART 48

VALUE OF EXTRA-EU IMPORTS PER MEMBER STATE

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020).



[113] This phenomenon is known as "the Rotterdam effect".

CHART 49

NOMINAL VALUE OF EXTRA-EU IMPORTS BY MEMBER STATE IN 2025 AND % VARIATION 2025/2024

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)

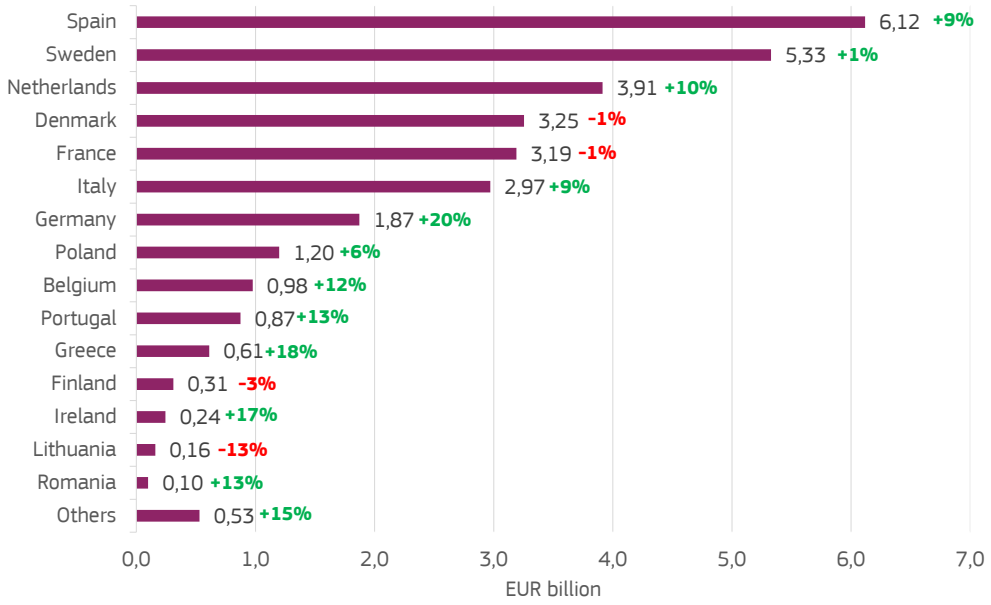
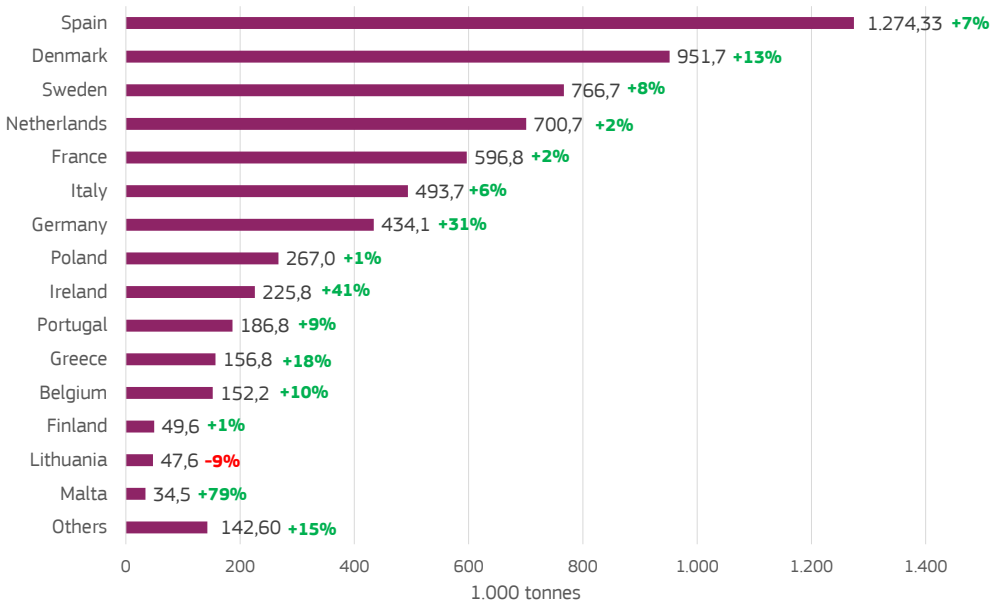


CHART 50

VOLUME OF EXTRA-EU IMPORTS BY MEMBER STATE IN 2025 AND % VARIATION 2025/2024

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)



4.3.1 ANALYSIS BY MAIN SPECIES

SALMONIDS

Salmon remained the main species imported into the EU in 2025, accounting for 25% of the total nominal value and 17% of the volume of extra-EU imports of fishery and aquaculture products. Within the broader salmonids category, which also includes trout and other salmonid species, salmon represented 97% of both volume and value.

SALMON

In 2025, salmon imports increased by 6% to 1,10 million tonnes, the highest volume recorded over the 2016-2025 period. By contrast, their nominal value declined by 5% to EUR 8,01 billion, after reaching a peak in 2024. As volumes increased and value fell, the average import price decreased by 10%, from 8,07 EUR/kg to 7,29 EUR/kg, its lowest level since 2021. Over the longer period from 2016 to 2025, salmon import volumes grew by 24%, while their value increased by 15% in real terms.

Salmon was imported primarily as fresh whole fish, which accounted for 78% of total import volume in 2025. Frozen and fresh fillets represented 9% each, and frozen whole salmon 3%. The remaining 1% consisted mainly of smoked, prepared or preserved, and salted products.

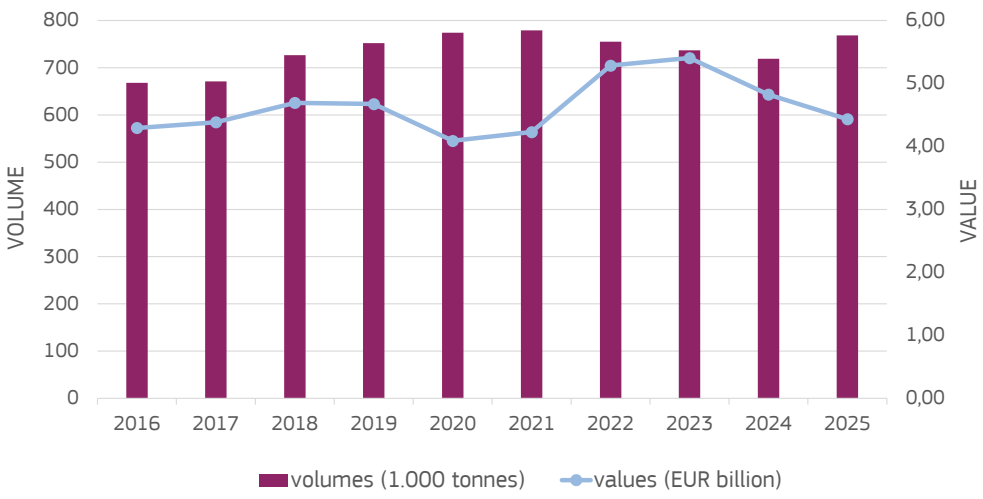
Norway remained by far the main supplier, providing 881.443 tonnes of salmon worth EUR 6,35 billion. It accounted for 80% of total import volume and 79% of value, with Sweden remaining the principal point of entry into the EU. Compared with 2024, imports from Norway increased by 7% in volume but declined by 5% in nominal value. Their average unit value consequently fell by 10%, from 8,04 EUR/kg to 7,20 EUR/kg. Between 2016 and 2025, imports from Norway grew at a compound annual rate of 2% in volume and 1% in real value, thus resulting fairly stable over time.

The Faroe Islands overtook the United Kingdom to become the second-largest supplier in 2025. In 2025, imports from the Faroe Islands rose by 33% in volume and 11% in nominal value compared with 2024, reaching 63.794 tonnes worth EUR 485 million – the highest levels recorded during the decade. Imports from the United Kingdom, by contrast, decreased by 16% in volume and 28% in value, to 56.207 tonnes and EUR 443 million. Together, the Faroe Islands and the United Kingdom accounted for 11% of total salmon import volume and 12% of value.

Chart 51 provides an overview of extra-EU imports of fresh whole salmon from Norway over the past decade, highlighting shifting trends. Between 2016 and 2021, volumes generally increased while nominal values fluctuated. In 2022 and 2023, volumes declined while values rose sharply as prices increased. Both volume and value fell in 2024, whereas a different pattern emerged in 2025: volume rebounded by 7% to 768.616 tonnes, while nominal value declined by 5% to EUR 5,17 billion. The average import price of fresh whole Norwegian salmon therefore fell by 11% from 2024 to 2025, from 7,55 EUR/kg to 6,73 EUR/kg. The declining volume trend observed in the 2022 to 2024 period must be seen in relation to biological production challenges which lowered Norway's harvest volumes. Productivity improvements in salmon production in Norway, the Faroe Islands and Iceland resulted in a 2-digit production growth rates in these countries in 2025. This was the main driver behind rise in EU import volume and fall in import value in 2025.

Average prices also declined for salmon imported from the Faroe Islands, the United Kingdom and Iceland, by 16%, 15% and 12% respectively. Conversely, prices increased for imports from the United States, Chile and China. These differences should be interpreted in light of the different product mix across suppliers, as imports from European suppliers mainly consist of farmed Atlantic salmon, while imports from the United States largely consist of wild Pacific salmon. Among the leading suppliers, the highest average price was recorded for the United States, at 8,85 EUR/kg, while the lowest was recorded for China, at 5,98 EUR/kg.

CHART 51
FRESH WHOLE SALMON IMPORTED IN THE EU FROM NORWAY
Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020).



CRUSTACEANS

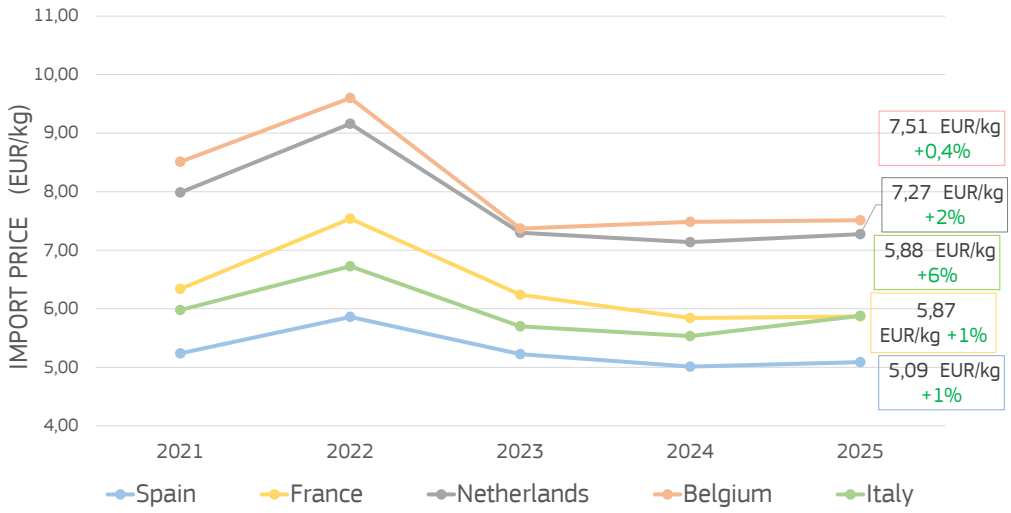
EU imports of crustaceans increased significantly in 2025, reaching 724.727 tonnes worth EUR 5,04 billion. Compared with 2024, import volume rose by 9%, while nominal value increased by 11%. Shrimps accounted for 92% of total crustacean import volume and 85% of value. They mostly include warmwater shrimps, as well as miscellaneous shrimps and prawns,[114] but not including the *Pandalidae*, *Crangon*, deep-water rose shrimps "*Parapenaeus longirostris*" or "*Pandalus*" species.

WARMWATER SHRIMPS

Warmwater shrimps imported in the EU consist of frozen shrimps of the genus Penaeus.
In 2025, they accounted for 55% of the volume and 49% of the value of all extra-EU crustacean imports. Imports reached 399.687 tonnes worth EUR 2,47 billion, increasing by 21% in volume and 24% in value compared with 2024. As value grew slightly faster than volume, the average import price increased by 2%, from 6,06 EUR/kg to 6,19 EUR/kg. Nevertheless, it remained well below the 2022 peak of 7,68 EUR/kg. The 2025 volume was the highest recorded during the 2016-2025 period, while nominal value was only slightly below the peak reached in 2022. Over the ten-year period under analysis, import volume increased by 66%, while value rose by 6% in real terms. Ecuador consolidated its position as the main supplier, accounting for 60% of total import volume and 52% of value. It was followed by India, with 16% of volume, Vietnam with 7%, Venezuela with 5% and Bangladesh with 4%. Compared with 2024, imports from Ecuador increased by 36% in volume and 39% in value, reaching 240.973 tonnes worth EUR 1,27 billion. In this timeframe, their average price rose by 3% to 5,29 EUR/kg, remaining among the lowest of the main suppliers.
Compared with 2024, the main suppliers showed different trends. Imports from India recorded even stronger growth, increasing by 45% in volume and 48% in value to 62.488 tonnes worth EUR 445 million. Their average price increased by 2% to 7,13 EUR/kg. Imports from Vietnam rose by around 10% in both volume and value, reaching 29.810 tonnes and EUR 238 million, while the average price remained broadly stable at 7,98 EUR/kg. By contrast, imports from Venezuela fell by 44% in volume and 36% in value. Their average price increased by 15% to 5,71 EUR/kg. Imports from Bangladesh grew by 15% in volume and 19% in value, with the average price rising by 3% to 8,80 EUR/kg, the highest among the five leading suppliers.
Shrimps from Vietnam and India are primarily destined for Belgium, the Netherlands and Germany[115] and have higher prices than those from Ecuador. Indeed, Ecuador only produces whiteleg shrimp (*Penaeus vannamei*), while India and Vietnam also export the higher value giant tiger shrimp (*Penaeus monodon*). In addition, most of the shrimps exported from Ecuador are head-on-shell-on (HOSO), while the majority of shrimps exported from India are peeled.
The main points of entry for warmwater shrimps into the EU in 2025 were Spain, with 101.200 tonnes and France, with 89.291 tonnes The Netherlands, Belgium and Italy followed closely, each receiving around 50.000 tonnes. It should be noted that these may not have been the final destinations. Indeed, Vigo in Spain and Rotterdam in the Netherlands are often transit points for further distribution to other EU Member States.

[114] No detail is available in terms of species.
[115] The Netherlands and Belgium might not be the final destinations. Indeed, Rotterdam (NL) and Antwerp (BE) are important ports for landings of frozen fishery and aquaculture products from Far East suppliers, and these ports act as “hubs” for shrimps arriving in the EU, so the “actual” destinations might be other countries.

CHART 52
NOMINAL IMPORT PRICES OF WARMWATER SHRIMPS IN THE TOP FIVE EU IMPORTERS AND % VARIATIONS 2025/2024
Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)



MISCELLANEOUS SHRIMPS

After returning to growth in 2024, EU imports of shrimps and prawns – not including the *Pandalidae*, Crangon, deep-water rose shrimps "*Parapenaeus longirostris*" and "*Pandalus*" species – declined slightly in volume in 2025. Imports reached 208.869 tonnes, 3% below the previous year, while their value remained broadly stable, increasing by 0,5% to EUR 1,51 billion. As a result, the average import price rose by 4%, from 6,96 EUR/kg to 7,22 EUR/kg.
Argentina remained the largest supplier, accounting for 27% of total volume and 25% of value. However, imports from Argentina, which mainly include wild-caught Argentine red shrimp, decreased by 28% in volume and 21% in value, to 55.407 tonnes worth EUR 381 million. Their average price increased by 9% to 6,88 EUR/kg.
The decline in supplies from Argentina was partly offset by growth among the other leading suppliers. Imports from India increased by 18% in volume and 22% in value, while those from Vietnam rose by 21% and 18% respectively. Greenland recorded increases of 18% in volume and 15% in value, while imports from China grew by 7% and 3%. Average prices increased for Argentina and India, but declined slightly for Vietnam, Greenland and China.

GROUNDFISH

In 2025, the EU imported 1,12 million tonnes of groundfish, worth EUR 5,01 billion. Compared with 2024, import volume increased by 4%, while value rose by 13%.
Cod and Alaska pollock remained the main species within this category, together accounting for 52% of total groundfish import volume and 65% of value. However, their trends differed. From 2024 to 2025, cod imports declined by 9% in volume but increased by 11% in value, reaching 290.344 tonnes worth EUR 2,45 billion. At the same time, Alaska pollock imports rose by 23% in volume and 25% in value, to 292.001 tonnes and EUR 791 million.
Hake remained the third most important groundfish species, accounting for around 16% of both volume and value. Its imports reached 184.332 tonnes worth EUR 825 million, increasing by 1% in volume and 8% in nominal value compared with 2024.

COD

In 2025, extra-EU imports of cod amounted to 290.344 tonnes, worth EUR 2,45 billion. Compared with 2024, import volume decreased by 9%, while nominal value increased by 11%. This divergence reflected a sharp rise in the average import price, which increased by 22%, from 6,90 EUR/kg to 8,44 EUR/kg.
The decline in volume continued the downward trend observed in recent years: between 2021 and 2025, cod import volumes fell at an average annual rate of around 6% - decreases linked to a reduction of cod quotas at global level. The jointly managed Norwegian–Russian total

allowable catch for 2025 was reduced by 25%, to 340.000 tonnes, its lowest level since 1991[116].

Despite the decline in volume, cod remained one of the EU's most valuable imported fishery products. It ranked third in value, after salmon and shrimps, and fifth in volume among the main food species, narrowly behind Alaska pollock.

Norway, Iceland, Russia and China together accounted for 80% of extra-EU cod import volume and 84% of value. Norway remained the leading supplier, representing 29% of volume and 34% of value, followed by Iceland with 25% and 28%, Russia with 14% and 12%, and China with 12% and 9%, respectively.

Compared with 2024, imports from Norway declined by 9% in volume but increased by 12% in nominal value, reaching 83.027 tonnes worth EUR 830 million. At the same time, imports from Iceland decreased by 2% in volume and rose by 13% in value, to 72.525 tonnes and EUR 698 million. The sharpest decline concerned Russia, whose supplies fell by 44% in volume and 27% in value from 2024 to 2025, to 41.969 tonnes worth EUR 300 million. By contrast, imports from China increased by 24% in volume and 47% in value, reaching 34.227 tonnes and EUR 229 million.

The composition of imports continued to differ considerably across suppliers. Imports from Norway were diversified between fresh, frozen, salted and dried products, while Iceland supplied broadly similar shares of fresh and frozen cod, alongside salted products. By contrast, frozen cod accounted for 92% of imports from Russia and 87% of those from China.

Average import prices increased across the main product presentations from 2024 to 2025. The average price of frozen cod rose by 27% to 6,65 EUR/kg. Among the four leading suppliers, China recorded the lowest frozen-cod price, at 6,75 EUR/kg, closely followed by Russia at 6,79 EUR/kg. The average price of fresh cod increased by 17% to 8,82 EUR/kg, with Iceland recording the highest price among the main suppliers, at 11,83 EUR/kg. For salted and dried cod combined, the average price rose by 19% to 11,91 EUR/kg, reaching 13,50 EUR/kg for products imported from Norway.

ALASKA POLLOCK

After falling sharply in 2024, EU imports of Alaska pollock rebounded in 2025, increasing by 23% in volume and 25% in nominal value. Imports reached 292.001 tonnes – the highest volume recorded over the 2016-2025 period – and EUR 791 million. The average import price increased slightly, by 1%, to 2,71 EUR/kg, but remained well below the peak recorded in 2022.

Alaska pollock is primarily imported as frozen fillets. Over the past decade, China had been the main supplier, consistently accounting for around 50% of total extra-EU imports. However, in 2024, a significant shift occurred, with imports from China dropping and thus reducing its share to just 22%. Fall in imports from China must be seen in relation to an increase in Chinese consumption of Alaska pollock and more products being exported to neighbouring markets, as well as African countries and Brazil[117]. China was overtaken by Russian imports, which accounted for around 42% of the volume and 37% of the value in 2024. Another interesting trend in 2024 was linked to the surge of frozen fillets imports from the United States, rising by 75% in volume and 39% in value.

In 2025, the trend continued. Russia was the largest supplier by volume in 2025, providing 136.785 tonnes, or 47% of the total, worth EUR 331 million. Compared with 2024, imports from Russia increased by 32% in volume and 38% in nominal value.

The United States followed with 114.218 tonnes, corresponding to 39% of total volume. However, it remained the leading supplier in value terms, with imports worth EUR 353 million, or 45% of the total. Imports from the United States increased by 36% in volume and 31% in

[116] Source: https://en.highnorthnews.com/home/norway-and-russia-decrease-cod-quotas-by-25-percent-next-year/157661

[117] Trade Data Monitor (TDM) data based on Chinese customs statistics show increased Chinese exports of Alaska pollock to neighbouring Asian markets and Brazil in 2024. However, Chinese export statistics do not fully align with Eurostat data: while Eurostat records a decrease of around 100.000 tonnes in EU imports from China between 2023 and 2024/2025, Chinese data show a decline in exports to the EU of only around 14.000 tonnes between 2023 and 2024, followed by a return to approximately the 2023 level in 2025. On developments in Chinese consumption, see USDA Foreign Agricultural Service at the link https://apps.fas.usda.gov/newgainapi/api/Report/DownloadReportByFileName?fileName=2025+China+Fishery+Products+Report_Beijing_China+-+People%27s+Republic+of_CH2025-0057.pdf

value compared with 2024. China ranked third, supplying 40.505 tonnes worth EUR 105 million, accounting for 14% of both volume and value. Unlike the other two main suppliers, imports from China declined by 16% in volume and 13% in value.
Among the three main suppliers, Alaska pollock imported from the United States recorded the highest average price, at 3,09 EUR/kg, although this was 4% lower than in 2024. Average prices increased by 5% for imports from Russia, to 2,42 EUR/kg, and by 4% for imports from China, to 2,60 EUR/kg.
Germany was by far the main EU point of entry, accounting for 52% of total Alaska pollock import volume, or 152.696 tonnes. It was followed by France with 15%, the Netherlands with 12% and Poland with 8%. These Member States may act as entry and distribution points rather than as the final destinations of the imported products.

TUNA AND TUNA-LIKE SPECIES

This group includes tuna and swordfish species. In 2025, EU extra-EU imports reached 724.713 tonnes, worth EUR 3,37 billion in nominal terms. Compared with 2024, volume increased by 7% and value by 6%, reaching their highest levels over the 2016-2025 period.
The increase was mainly driven by skipjack tuna, whose imports rose by 6% in volume and 5% in value, reaching 409.972 tonnes worth EUR 1,82 billion. Imports of miscellaneous tuna also grew strongly, by 22% in volume and 18% in value. Yellowfin tuna recorded a more moderate increase of 2% in volume, while its value remained broadly stable at EUR 866 million.
Skipjack tuna accounted for 57% of the total imported volume, followed by yellowfin tuna with 26%. Prepared and preserved products, mainly canned tuna, represented 76% of total volume, while frozen products accounted for 22% and fresh products for the remaining 2%.
To be noted, these imports partly consist of tuna caught and landed by the Spanish and French fleets in remote places close to the fishing areas of Ecuador, El Salvador, Guatemala, Seychelles, Mauritius, Côte d'Ivoire and Ghana. The catches were processed in those countries and then imported into the EU as prepared-preserved products.

SKIPJACK TUNA

Almost all skipjack tuna imported into the EU is in prepared and preserved form, mainly canned. In 2025, such products accounted for 97% of total skipjack import volume and 99% of value. Following the strong rebound recorded in 2024, extra-EU imports increased by a further 6% in volume and 5% in nominal value in 2025, reaching a ten-year high of 409.972 tonnes worth EUR 1,82 billion. Skipjack tuna remained the third most imported species by volume, after salmon and shrimps.
Ecuador remained by far the main supplier, accounting for 40% of total skipjack import volume and 41% of value. Imports from Ecuador increased by 9% in both volume and nominal value, reaching 165.952 tonnes worth EUR 755 million.
The Philippines overtook China to become the second-largest supplier in 2025. Imports from the Philippines rose by 19% in volume and 11% in value, to 37.161 tonnes and EUR 157 million. By contrast, imports from China declined by 13% in volume and 12% in value, reaching 32.571 tonnes worth EUR 127 million. China consequently ranked third, accounting for 8% of total volume and 7% of value.
Spain remained the main EU point of entry, receiving 121.840 tonnes, or 30% of total extra-EU skipjack imports. It was followed by the Netherlands with 77.635 tonnes, Germany with 62.851 tonnes, Italy with 46.113 tonnes and France with 37.463 tonnes. Compared with 2024, Spanish imports declined by 9% in volume, while imports entering through the Netherlands increased by 34%. It is worth noting that much of the skipjack tuna entering through Dutch ports is re-exported to its final EU destinations. Imports also rose through Germany, Italy and France, by 9%, 13% and 13% respectively.

YELLOWFIN TUNA

In 2025, extra-EU imports of yellowfin tuna increased by 2% in volume and remained broadly stable in value, rising only by 0,3%. Imports reached 188.604 tonnes worth EUR 866 million. Despite the increase, import volume remained the third-lowest recorded over the 2016-2025 period.

Yellowfin tuna was imported mainly as prepared and preserved products, which accounted for 58% of total volume in 2025. Frozen products represented 41%, while fresh products accounted for the remaining 1%. The average price of prepared and preserved products decreased by 4% to 5,91 EUR/kg, while the price of frozen products fell by 5% to 2,54 EUR/kg.

Ecuador overtook Seychelles to become the main country of origin, accounting for 21% of import volume and 22% of value. Imports from Ecuador increased by 60% in volume and 40% in nominal value, reaching 39.941 tonnes worth EUR 187 million. Seychelles followed with 30.707 tonnes worth EUR 143 million, corresponding to 16% of both volume and value. Imports from Seychelles increased by 2% in volume and 5% in value.

Papua New Guinea ranked third, although its supplies declined by 17% in volume and 23% in value, to 13.795 tonnes and EUR 71 million. Mexico became the fourth-largest supplier by volume following increases of 61% in volume and 55% in value. By contrast, imports from Mauritius and the Philippines declined, with the latter recording decreases of 52% in volume and 42% in value.

Spain remained by far the main EU point of entry, accounting for 51% of yellowfin tuna import volume, followed by Italy with 29% and France with 14%. Spain and Italy together received 91% of frozen yellowfin tuna imports, while Spain, Italy and France accounted for 94% of prepared and preserved imports.

NON-FOOD USE PRODUCTS

In 2025, extra-EU imports of non-food use products rebounded strongly, reaching 939.561 tonnes worth EUR 1,19 billion. Compared with 2024, volume increased by 35% - the highest level recorded over the 2016-2025 period – while value rose by only 4%.

Fishmeal and fish oil accounted for 32% and 22% of total import volume respectively. Fishmeal imports increased by 51% in volume and 37% in nominal value, reaching 303.162 tonnes worth EUR 441 million. Their average price declined by 10% to 1.454 EUR/tonne.

Fish oil imports rose by 45% in volume, to 208.303 tonnes, but their value fell by 17% to EUR 495 million. This reflected a sharp 43% decline in the average price, from 4.158 EUR/tonne in 2024 to 2.377 EUR/tonne in 2025, reversing the strong price increases recorded in the previous two years.

The remaining 46% of import volume consisted of other products not intended for human consumption, such as fish waste and seaweed. According to available level of detail of data, however, it is not possible to identify the products included in this latter category more precisely.

FISHMEAL

In 2025, extra-EU fishmeal imports rebounded strongly, reaching 303.162 tonnes worth EUR 441 million – the highest levels recorded over the 2016-2025 period. Compared with 2024, volume increased by 51% and nominal value by 37%.

Peru became the largest supplier, accounting for 22% of total import volume and 20% of value. Imports from Peru increased almost sevenfold, reaching 65.351 tonnes worth EUR 90 million. Morocco ranked second, although its supplies declined by 10% in volume and 21% in value, to 53.269 tonnes and EUR 68 million.

Imports from South Africa increased by 68% in volume and 48% in value, reaching 48.829 tonnes worth EUR 63 million. Chile also recorded particularly strong growth, with imports rising by 151% in volume and 117% in value, to 43.967 tonnes and EUR 67 million. By contrast, imports from Norway fell by 22% in volume and 12% in value, while those from the Faroe Islands declined by 32% and 20% respectively.

Average prices varied considerably among the main suppliers. Norway recorded the highest average price, at 2.465 EUR/tonne, followed by Chile at 1.532 EUR/tonne. Morocco recorded the lowest price among the five leading suppliers, at 1.277 EUR/tonne.
Denmark became the main EU point of entry for fishmeal in 2025, receiving 35% of the total. It was followed by Spain with 24%, Germany with 20% and Greece with 11%. Spain, together with Germany and Denmark, are major entry points to the EU market, primarily due to the logistics of its harbours that have overseas routes and trading partnerships. Germany is also a hub for the further distribution of fishmeal, primarily for the aquafeed segment.

FISH OIL

In 2025, EU imports of fish oil rebounded strongly in volume, increasing by 44% to 208.303 tonnes – the highest level recorded since 2020. By contrast, their nominal value declined by 17% to EUR 495 million. The average import price consequently fell by 43%, from 4.158 EUR/tonne in 2024 to 2.377 EUR/tonne in 2025, reversing the upward trend observed since 2022.
Norway and Peru remained the two main suppliers, together accounting for 43% of total import volume and 38% of value. Norway was the largest supplier by volume, providing 57.314 tonnes worth EUR 91 million. Compared with 2024, imports from Norway increased by 51% in volume and 4% in value, while their average price fell by 31% to 1.585 EUR/tonne. Peru ranked second by volume but first by value, supplying 32.250 tonnes worth EUR 95 million. Its import volume increased by 39%, while value declined by 29%, resulting in a 49% decrease in the average price to 2.951 EUR/tonne.
Imports from Chile also increased substantially in volume, rising by 84% to 26.831 tonnes, although their value declined by 5%. Mexico recorded particularly strong growth and became the fourth-largest supplier, with imports reaching 24.305 tonnes worth EUR 58 million. By contrast, imports from the United States and Panama fell in both volume and value.
Denmark remained the main EU point of entry for fish oil, receiving 47% of total import volume. It was followed by Spain with 16%, Greece with 12%, the Netherlands with 10% and France with 8%.

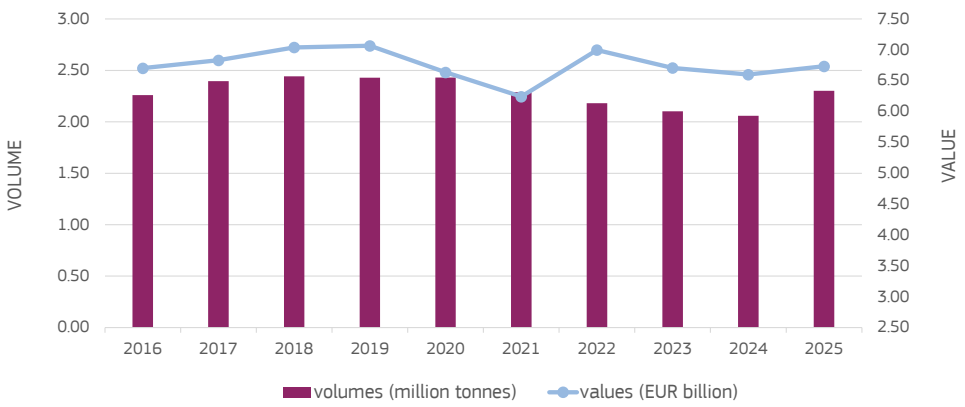
4.4 EXTRA-EU EXPORTS

In 2025, EU exports of fishery and aquaculture products to third countries increased significantly in volume, rising by 12% from 2024 to 2,30 million tonnes. This marked a clear reversal of the downward trend recorded between 2021 and 2024 and brought export volumes to their highest level since 2020. Value also increased, although at a slower rate, rising by 5% from 2024 to EUR 8,22 billion.
This represents a change from the pattern observed between 2022 and 2024, when export volumes declined while nominal values continued to increase, reflecting a substantial rise in average unit values. In 2025, this divergence partly reversed, as the strong recovery in exported volumes outpaced the growth in value. Over the longer 2016-2025 period, export volumes increased by around 2%, while export value remained broadly stable in real terms, as illustrated in Chart 53.

CHART 53

EXTRA-EU EXPORTS OF FISHERY AND AQUACULTURE PRODUCTS

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020).



In volume terms, the EU's main extra-EU exports in 2025 were blue whiting, fishmeal, fish oil and other non-food-use products, herring, skipjack tuna, mackerel and salmon. Extra-EU tuna exports partly comprise catches by Spanish and French vessels landed in third countries close to the fishing grounds. A significant share is processed locally and subsequently at least partly imported into the EU as prepared and preserved products or frozen loins. The initial landings are recorded as exports.

Salmon remained by far the EU's leading fishery and aquaculture export in value terms. After declining sharply in 2021, export volumes partially recovered in 2022, fell again in 2023 and subsequently increased in both 2024 and 2025. In 2025, salmon exports rose by 7% in volume to 94.485 tonnes, while their nominal value remained broadly stable at EUR 1,29 billion.

The United States remained the main destination for salmon exports, receiving 36.514 tonnes worth EUR 572 million in 2025. Salmon accounted for 45% of the total value and 23% of the volume of all EU fishery and aquaculture products exported to the United States.

Norway and Nigeria were the two leading destinations for EU exports in volume terms. Exports to Norway were dominated by non-food-use products, which accounted for 79% of the total volume. Fishmeal and fish oil alone represented 61%. Exports to Nigeria consisted mainly of blue whiting and herring, which together accounted for 94% of the volume exported to the country.

CHART 54

TOP EXTRA-EU COUNTRIES OF DESTINATION IN 2025 (IN VOLUME)

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)

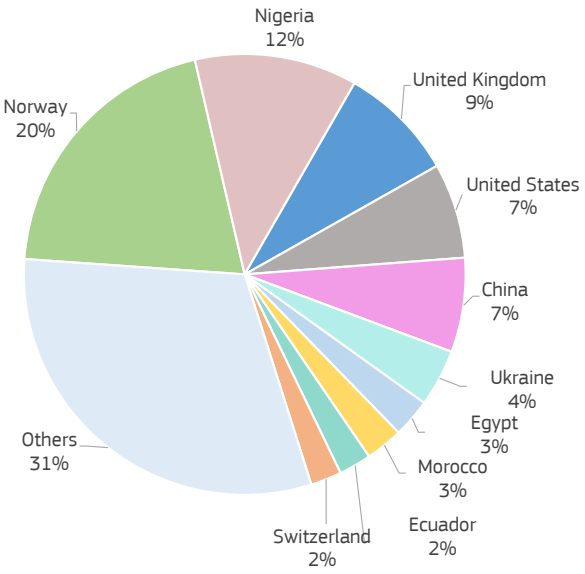


CHART 55

TOP EXTRA-EU COUNTRIES OF DESTINATION IN 2025 (IN VALUE)

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)

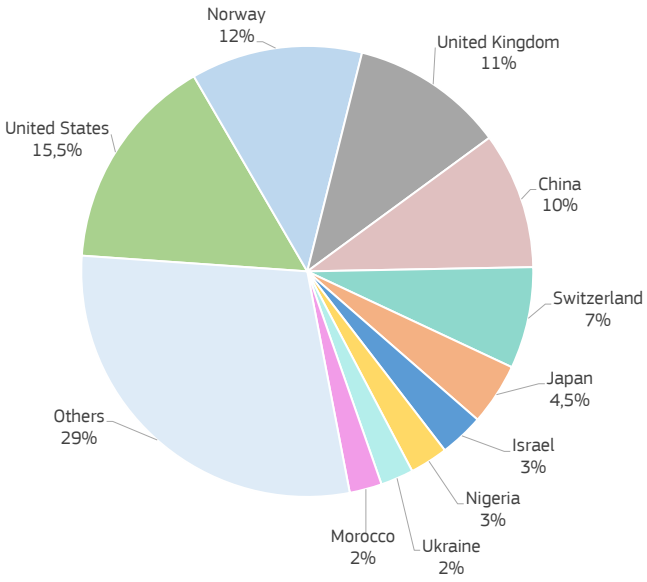


CHART 56

VALUE OF EXTRA-EU EXPORTS BY MEMBER STATE (EUR BILLION)

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020).

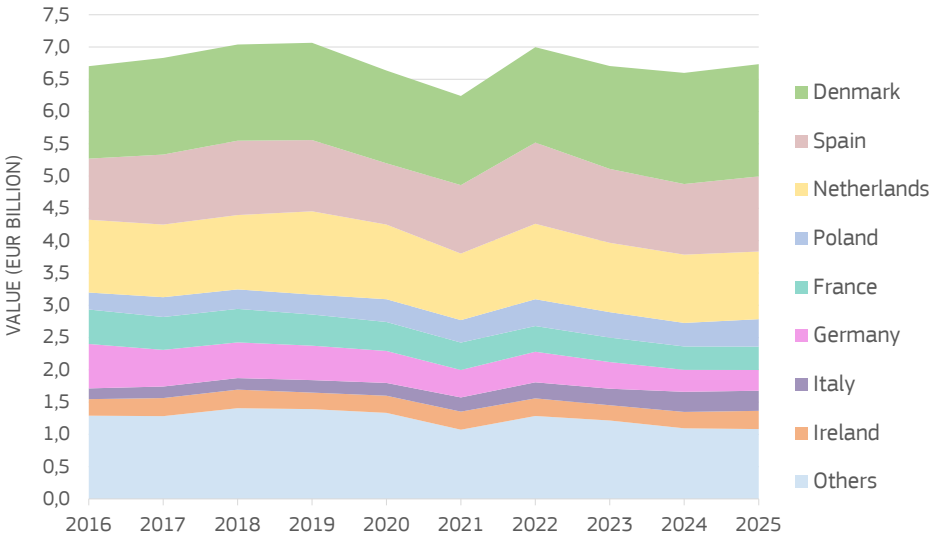


CHART 57

NOMINAL VALUE OF EXTRA-EU EXPORTS BY MEMBER STATE IN 2025 AND % VARIATION 2025/2024

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)

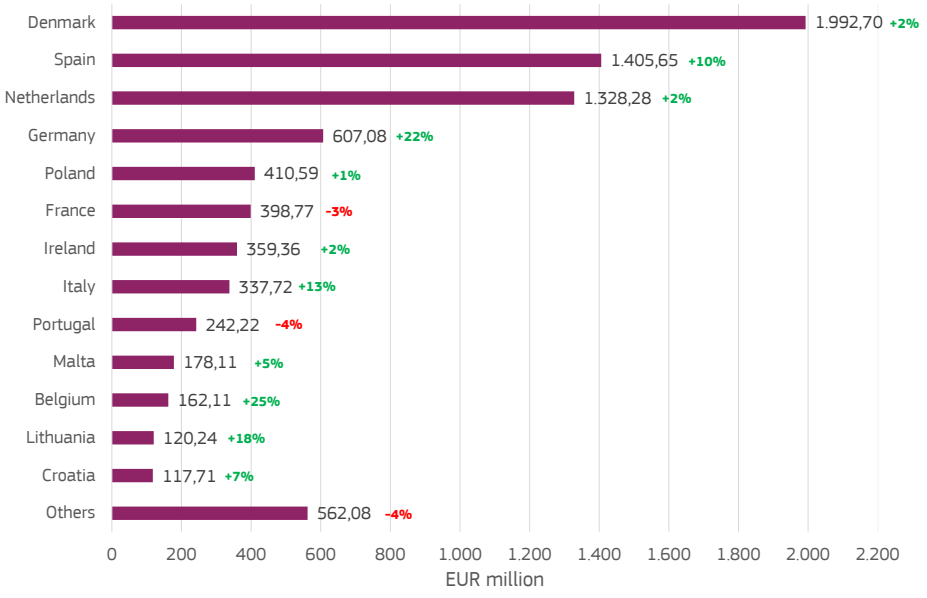
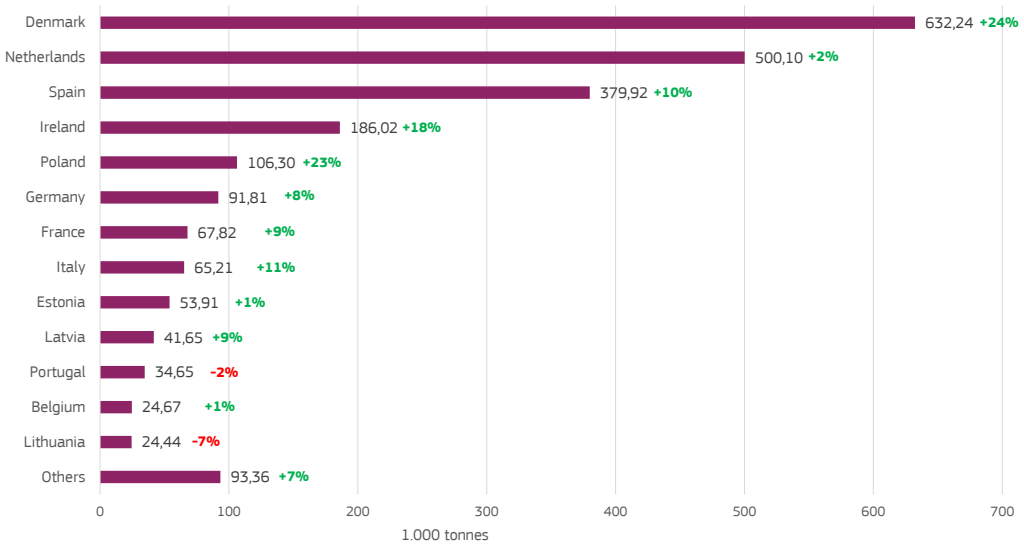


CHART 58
VOLUME OF EXTRA-EU EXPORTS BY MEMBER STATE IN 2025 AND % VARIATION 2025/2024
Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)



4.4.1 ANALYSIS BY MAIN SPECIES

SALMONIDS

Salmon remained by far the highest-value species exported by the EU in 2025. Extra-EU exports of salmonids reached 106.045 tonnes worth EUR 1,40 billion in nominal terms, representing increases of 9% in volume and 1% in value compared with 2024. Salmon accounted for 89% of the group's total volume and 93% of its value. Overall, salmonids represented 5% of the volume and 17% of the value of total extra-EU exports of fishery and aquaculture products, while salmon alone accounted for 4% and 16%, respectively.

SALMON

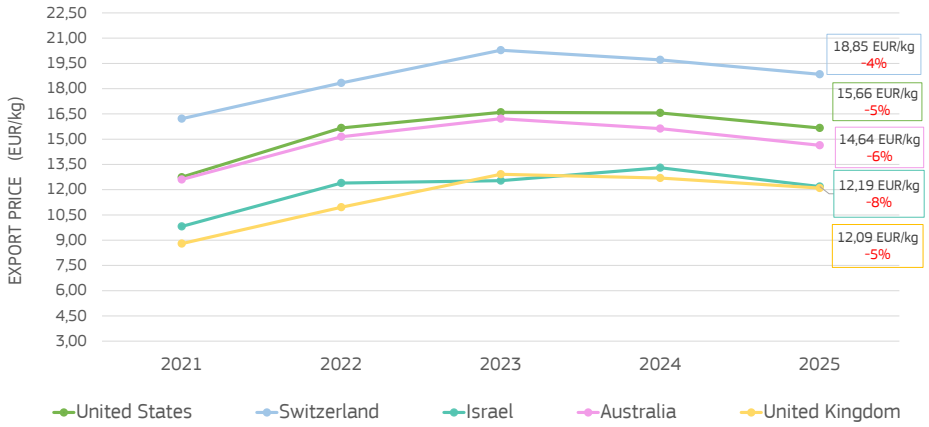
In 2025, extra-EU exports of salmon increased by 7% in volume, reaching 94.485 tonnes, while their value remained broadly stable at EUR 1,29 billion, only decreasing 0,1%.

In 2020, nearly half of extra-EU salmon exports consisted of fresh whole or gutted products, but only 6% in 2025. Conversely, fresh, frozen and smoked fillets increased their combined share from 30% to 80% of volume and from 34% to 86% of value. This shift towards higher-value processed products contributed significantly to the increase in the overall value.

The Netherlands remained the leading EU exporter of salmon in 2025, supplying 29.063 tonnes worth EUR 433 million, mainly as fresh, smoked and frozen fillets. Poland followed with 25.091 tonnes worth EUR 330 million, consisting primarily of frozen and smoked fillets. Denmark ranked third, exporting 17.120 tonnes worth EUR 240 million, with a more balanced mix of fresh, frozen and smoked fillets.

Chart 59 shows the evolution of average export prices to the main extra-EU destinations. Prices generally increased between 2021 and 2023, stabilised or declined slightly in 2024, and fell across all five leading destinations in 2025. Switzerland continued to record the highest average price, at 18,85 EUR/kg, as its demand is concentrated on high-quality fresh and smoked fillets, including Label Rouge and organic salmon. It was followed by the United States at 15,66 EUR/kg and Australia at 14,64 EUR/kg. Average prices stood at 12,19 EUR/kg for Israel and 12,09 EUR/kg for the United Kingdom. Compared with 2024, prices declined by between 4% and 8% across these destinations.

CHART 59
NOMINAL EXPORT UNIT VALUES OF SALMON TO THE TOP-5 EXTRA-EU DESTINATIONS AND % VARIATIONS 2025/2024
Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)



SMALL PELAGICS

In 2025, EU exports of small pelagics to third countries remained broadly stable in volume, declining by 0,2% to 456.117 tonnes – the lowest level recorded over the 2016-2025 period, following the downward trend started in 2021. By contrast, their nominal value increased by 11% to EUR 947 million. Small pelagics accounted for 20% of the total volume and 12% of the value of extra-EU exports of fishery and aquaculture products.

Herring and mackerel remained the two main species in this category, together accounting for 314.487 tonnes, or 69% of small pelagic exports. Herring represented 9% of total extra-EU export volume, while mackerel accounted for 4%.

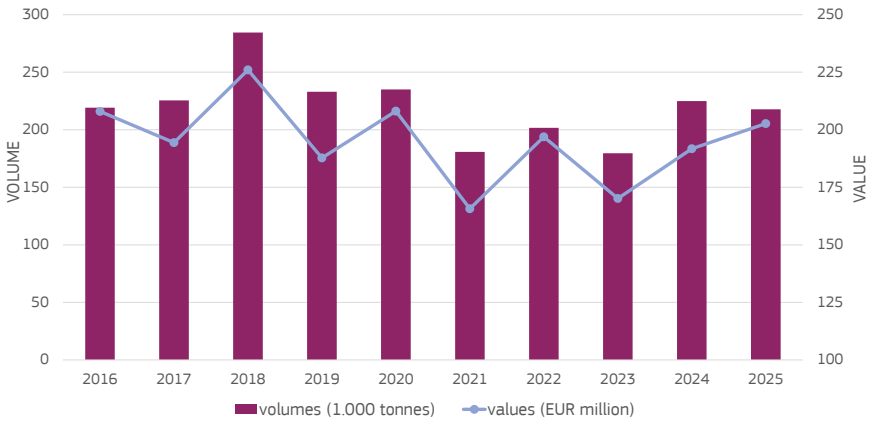
Similarly to the Netherlands for small pelagics, Denmark acts as an "export hub" for non-food-use products, accounting for around two-thirds of the overall volume of EU exports in this category in 2025.

HERRING

In 2025, EU exports of herring totalled 217.779 tonnes, worth EUR 258 million. Compared with 2024, export volume declined by 3%, partially reversing the previous year's rebound, while nominal value increased by 9%. As shown in Chart 60, herring exports have followed a volatile trend in recent years: volume fell sharply in 2021, recovered in 2022, declined again in 2023 and rebounded in 2024, before decreasing moderately in 2025. The overall trend continued to be largely driven by the Netherlands, which accounted for 58% of total export volume in 2025. From 2024 to 2025, Dutch exports fell by 13% in volume but increased by 2% in value.

Nigeria remained the main destination, receiving 70.943 tonnes, or 33% of total herring exports. Although exports to Nigeria declined by 15% in volume, their value increased by 10%. Egypt followed with 35.090 tonnes, while Ukraine and Norway received 29.980 tonnes and 28.645 tonnes respectively. Exports increased in both volume and value to Ukraine and Norway, partly offsetting the declines recorded for Nigeria and Egypt.

CHART 60
HERRING EXPORTED FROM THE EU TO THIRD COUNTRIES
Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020).



MACKEREL

EU exports of mackerel continued to decline in 2025, falling by 19% to 96.708 tonnes, the lowest volume recorded over the decade under analysis. By contrast, their nominal value increased by 4% to EUR 298 million.

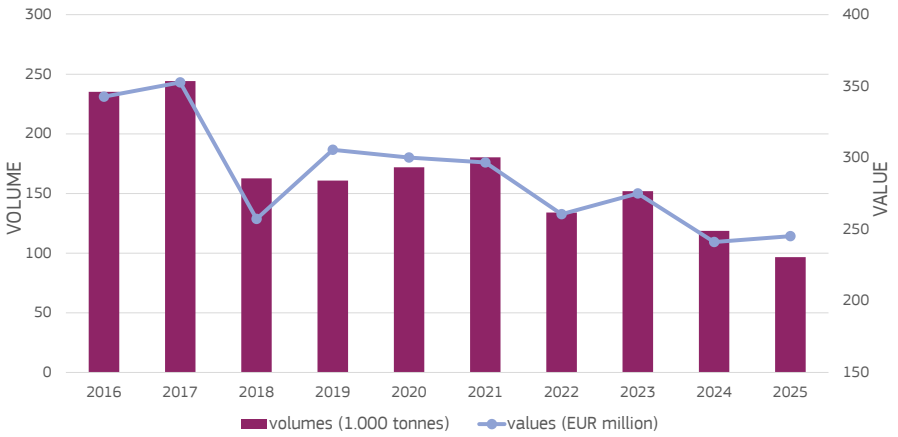
Between 2021 and 2025, mackerel export volumes declined by 46%, while their nominal value decreased by only 2%, as the average export price increased by 82%. Over the longer 2016-2025 period, export volume fell by 59%, while value declined by 28% in real terms.

The United Kingdom became the main destination in 2025, receiving 12.859 tonnes, or 13% of total volume. It was followed by Nigeria with 11.435 tonnes, Norway with 9.947 tonnes and the Faroe Islands with 8.811 tonnes. Compared with 2024, exports to Nigeria and the Faroe Islands declined sharply, by 33% and 68% in volume respectively. By contrast, exports to Norway increased by 160%, while those to the United Kingdom remained broadly stable in volume but rose by 18% in nominal value.

CHART 61

MACKEREL EXPORTED FROM THE EU TO THIRD COUNTRIES

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020)



GROUNDFISH

In 2025, EU exports of groundfish species to third countries increased by 10% in volume and 13% in nominal value, reaching 390.590 tonnes worth EUR 779 million. Groundfish accounted for 17% of the total volume and 9% of the value of extra-EU exports of fishery and aquaculture products. Blue whiting remained by far the main groundfish species exported in volume terms, accounting for 69% of the category's total volume, while representing 22% of the category export value. Cod, by contrast, accounted for only 11% of groundfish export volume but remained the leading species in value terms, representing 49% of the category's total value.

COD

In 2025, EU exports of cod declined by 17% in volume, to 43.850 tonnes, while their nominal value increased by 10%, reaching EUR 382 million. Between 2021 and 2025, cod export volumes decreased by 24%, while nominal value increased by 37%.

Denmark remained the main EU exporter, accounting for 32% of total cod export volume and 25% of value. Danish exports reached 14.000 tonnes worth EUR 95 million, representing a 14% decline in volume but a 34% increase in value compared with 2024. The average export price therefore rose by 55%, to 6,78 EUR/kg, although it remained the lowest among the five leading EU exporters. Danish exports consisted mainly of frozen whole or gutted cod, with China receiving 66% of the total volume.

Portugal ranked second, exporting 6.369 tonnes worth EUR 81 million. Its exports decreased by 22% in volume and 13% in value, while the average price increased by 11% to 12,77 EUR/kg – the highest among the five leading exporters. This reflected Portugal's higher-value product mix, including frozen, dried and salted cod. Exports of cod fillets from Portugal moved against the overall trend, increasing by 35% in volume and 49% in value.

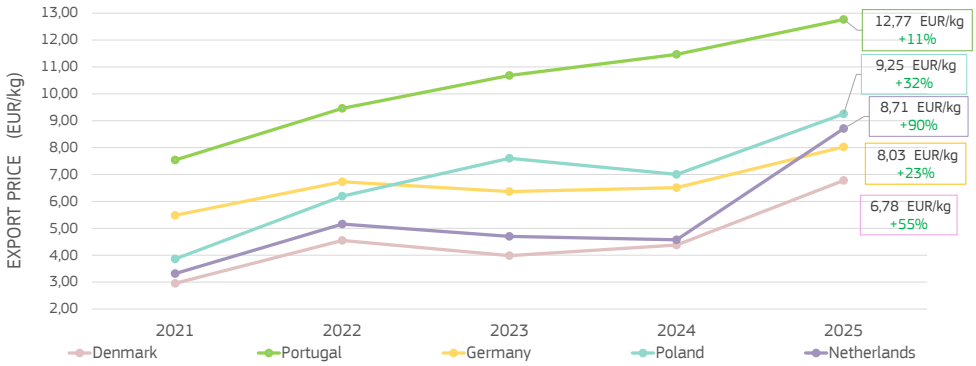
Germany and Poland followed, exporting 5.413 tonnes and 5.239 tonnes respectively. German export volume decreased by 13%, while value increased by 7%, bringing the average price to 8,03 EUR/kg. Polish volumes remained broadly stable, while nominal value rose by 32%,

resulting in an average price of 9,25 EUR/kg. The Netherlands recorded the sharpest contraction among the leading exporters, with volume falling by 47%, although value remained broadly stable as the average price nearly doubled to 8,71 EUR/kg.

CHART 62

NOMINAL EXPORT UNIT VALUES OF COD FROM MAIN EU EXPORTERS AND % VARIATIONS 2025/2024

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)



BLUE WHITING

In 2025, extra-EU exports of blue whiting increased by 19% in volume and 36% in value, reaching 267.859 tonnes worth EUR 169 million. This was the highest volume recorded over the 2016-2025 period. The average export price rose by 14% over 2024, from 0,55 EUR/kg in 2024 to 0,63 EUR/kg. Blue whiting was exported almost exclusively frozen, either whole or gutted.

Nigeria remained by far the main destination, receiving 186.934 tonnes, equivalent to 70% of total export volume. Compared with 2024, exports to Nigeria increased by 8% in volume and 21% in nominal value. China ranked second, with 27.621 tonnes, followed by Côte d'Ivoire and Cameroon.

The Netherlands remained the leading EU exporter, accounting for 78% of the total. Dutch exports increased by 14% in volume and 29% in nominal value, reaching 207.769 tonnes worth EUR 129 million. Ireland followed with 46.499 tonnes, corresponding to 17% of total extra-EU blue whiting exports.

NON-FOOD USE PRODUCTS

In 2025, exports of fishery and aquaculture products not intended for human consumption reached 668.520 tonnes and EUR 1,24 billion. They represented 29% of the total volume and 15% of the nominal value of extra-EU exports. Compared with 2024, volume increased sharply by 36%, reaching the highest level recorded over the 2016-2025 period, while nominal value rose by only 1%. Consequently, the average export price fell by 26%, from 2.511 EUR/tonne to 1.862 EUR/tonne. Of note, as for the Netherlands for small pelagics, Denmark works as an "export hub" for non-food use products covering, in 2025, for around two thirds of the overall volume of EU exports for this group.

FISHMEAL

Extra-EU exports of fishmeal continued to grow in 2025, increasing by 31% in volume and 15% in nominal value to 225.599 tonnes worth EUR 415 million. These were the highest levels recorded over the decade under analysis in both volume, nominal and real value. As volume increased more rapidly than value, the average export price declined by 12%, from 2.094 EUR/tonne in 2024 to 1.840 EUR/tonne in 2025.

Norway remained by far the main destination, receiving 145.464 tonnes, or 64% of total fishmeal export volume. Denmark consolidated its position as the leading EU exporter, accounting for 80% of both volume and value. Danish exports increased by 35% in volume and 19% in value, reaching 180.448 tonnes worth EUR 334 million in 2025.

FISH OIL

In 2025, extra-EU exports of fish oil increased by 33% in volume to 178.264 tonnes, the highest level recorded over the 2016-2025 period. By contrast, their nominal value declined by 14% to EUR 559 million. The average export price therefore fell by 35%, from 4.834 EUR/tonne in 2024 to 3.135 EUR/tonne.

Between 2021 and 2025, fish oil export volumes increased by 10%, while nominal value rose by 91%. The average export price was consequently 73% higher than in 2021, despite its significant decrease recorded in 2025.

Denmark remained the leading EU exporter, accounting for 75% of total fish oil export volume. Danish exports rose by 30% in volume but declined by 17% in nominal value, reaching 133.312 tonnes worth EUR 384 million. Norway remained the main destination, receiving 78% of total volume, followed by the United Kingdom with 11%.

4.5 INTRA-EU TRADE

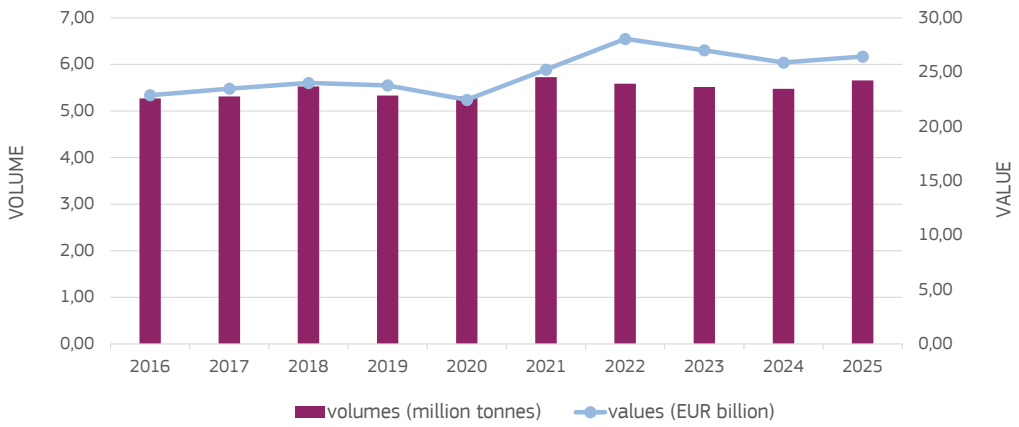
In 2025, intra-EU trade[118] in fishery and aquaculture products reached 5,66 million tonnes worth EUR 32,34 billion. Compared with 2024, volume increased by 3%, while value rose by 5%.

To be noted, exchanges within the EU largely consist of re-exports of products originally imported from third countries[119]. After entering the EU market, these products may also be traded and processed several times in different Member States. The creation of added value along the often complex supply chains and the multiplication of cross-border flows contribute to inflating the value of intra-EU exports.

The 15 highest-value flows by exporting Member State, destination and main commercial species are shown in Chart 64. These flows continued to be dominated by salmon, with the largest being exports from Poland to Germany, worth EUR 1,11 billion, followed by salmon exports from Sweden to Poland, worth EUR 0,90 billion. Overall, salmon and cod together accounted for almost 40% of the total value of intra-EU trade in 2025.

The Netherlands retained its position as the Member State with the highest value of intra-EU exports, reaching EUR 5,64 billion, an increase of 8% compared with 2024. It was followed by Sweden, at EUR 5,09 billion, and Spain, at EUR 4,58 billion.

CHART 63
INTRA-EU TRADE OF FISHERY AND AQUACULTURE PRODUCTS
Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020).



[118] Intra-EU trade analysis is based on intra-EU exports only, due to the fact that intra-EU imports and intra-EU exports should coincide. For more details, please refer to the Methodological background.

[119] It has to be underlined that despite "exports" are reported as such by Eurostat-COMEXT according to flows recorded by national customs, in most cases the northern EU Member States are not the actual exporters but rather countries through which products are transported.

CHART 64

TOP 15 FLOWS OF FISHERY AND AQUACULTURE PRODUCTS WITHIN THE EU IN 2025 (IN NOMINAL VALUE)

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)

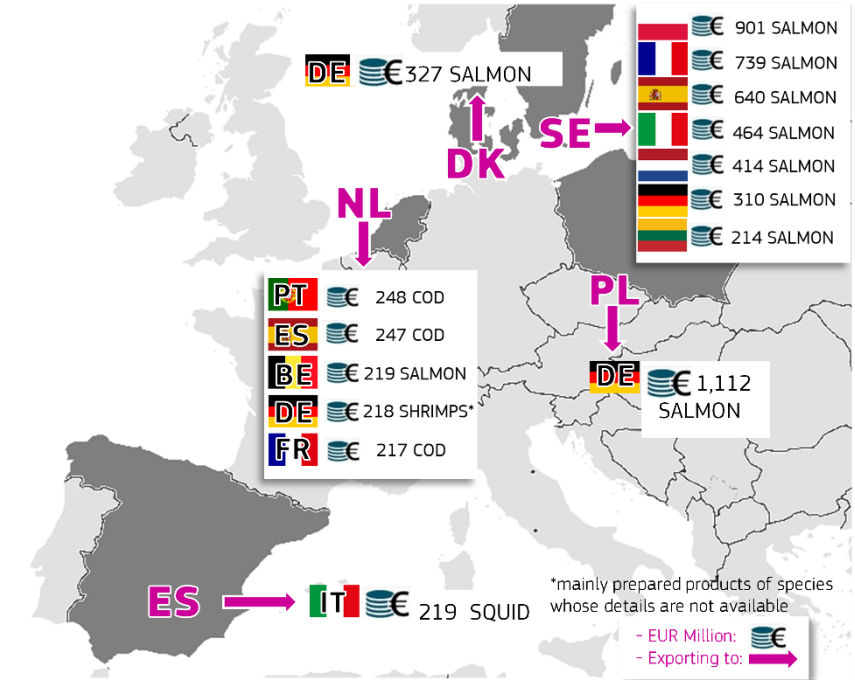


CHART 65

VALUE OF INTRA-EU EXPORTS PER MEMBER STATE

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409). Values are deflated by using the GDP deflator (base=2020).

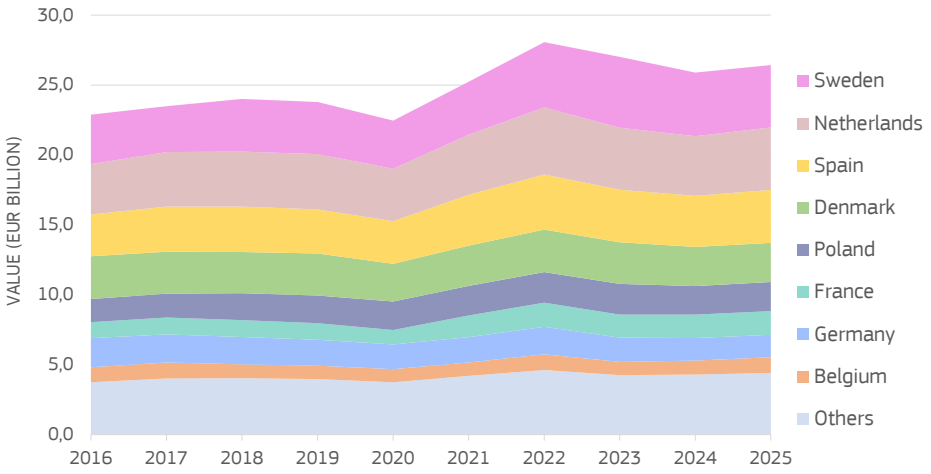


CHART 66

NOMINAL VALUE OF INTRA-EU EXPORTS BY MEMBER STATE IN 2025 AND % VARIATION 2025/2024

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)

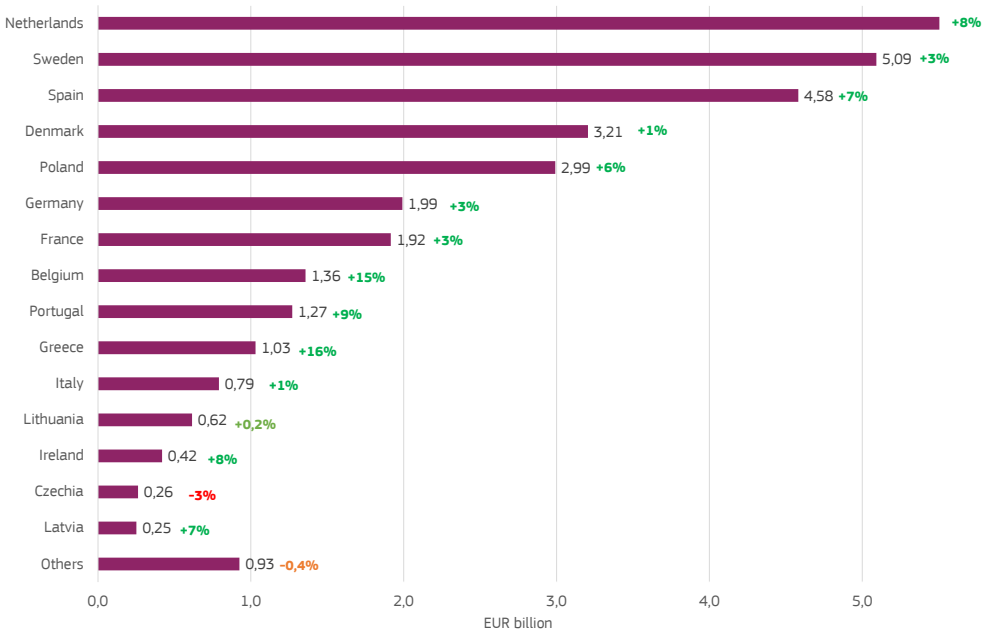
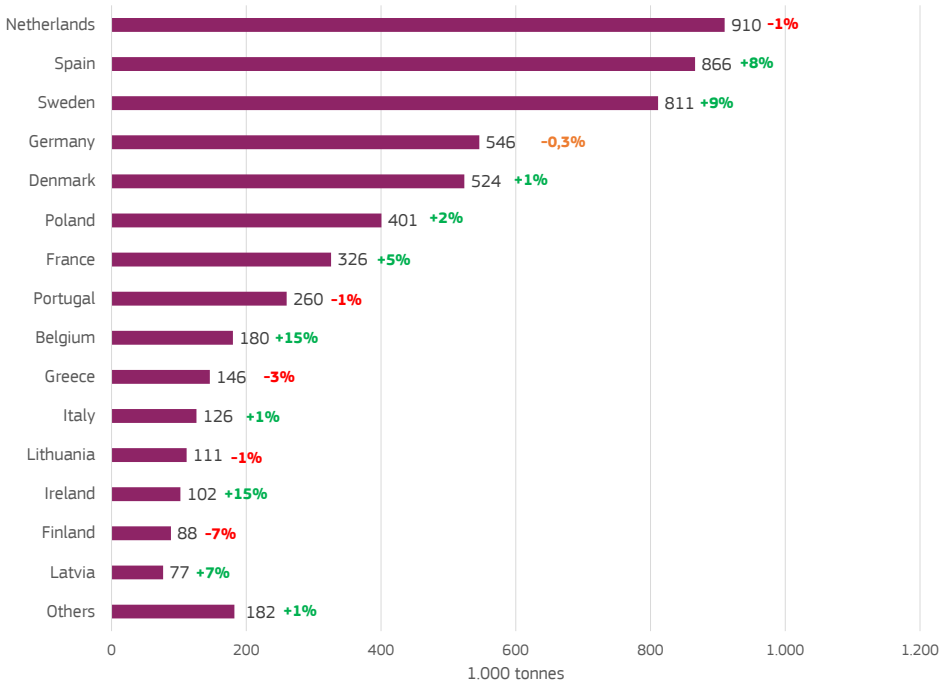


CHART 67

VOLUME OF INTRA-EU EXPORTS BY MEMBER STATE IN 2025 AND % VARIATION 2025/2024

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)



4.5.1 ANALYSIS BY MAIN SPECIES

SALMONIDS

Salmon continued to dominate intra-EU trade in salmonids, a group that also includes trout and other salmonid species. In 2025, intra-EU exchanges of salmonids reached 1,23 million tonnes worth EUR 11,11 billion, increasing by 10% in volume and 2% in nominal value compared with 2024. Salmon alone accounted for 92% of the group's volume and 93% of its value, amounting to 1,13 million tonnes worth EUR 10,38 billion. Overall, salmonids represented 22% of total intra-EU trade volume and 34% of value, while salmon alone accounted for 20% and 32%, respectively.

SALMON

According to Eurostat-COMEXT, Sweden, being the main EU entry point of salmon imports from Norway, remained by far the leading intra-EU exporter of salmon in 2025, accounting for 49% of total volume and 40% of value[120]. Denmark followed with shares of 15% and 13%, while Poland represented 11% of volume and 19% of value.

Since Poland has a thriving smoking industry – mainly for salmon from Norway – its exports mainly include smoked products and, to a lesser extent, fresh products. On the other hand, exports from Denmark and Sweden consist almost entirely of fresh products.

Consequently, Poland recorded the highest average unit value among the three main exporters, at 15,45 EUR/kg, compared with 7,94 EUR/kg for Denmark and 7,49 EUR/kg for Sweden, as shown in Chart 68.

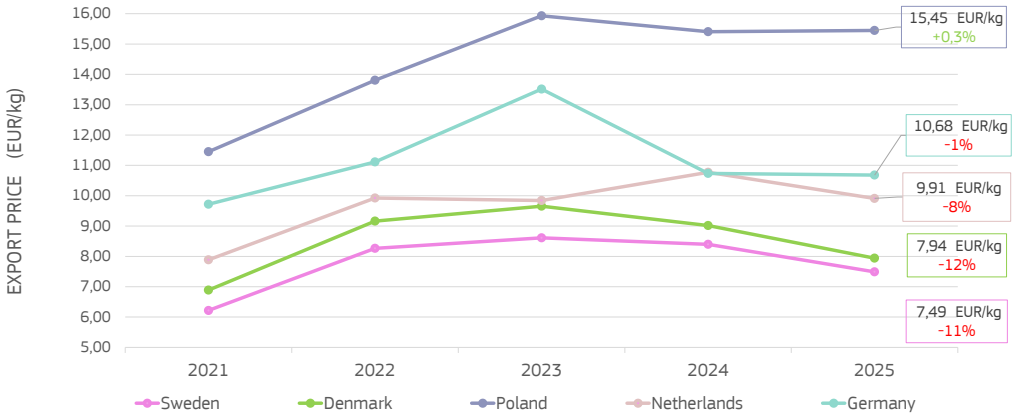
After declining gradually between 2021 and 2024, intra-EU salmon trade rebounded strongly in 2025. Volume increased by 11%, reaching the highest level of the 2016-2025 period, while its value rose by a more moderate 2%. The increase in volume was mainly driven by Sweden, whose exports rose by 11% to 559.087 tonnes, and Denmark, where they increased by 14% to 171.087 tonnes. Exports from Poland grew by 8% to 127.273 tonnes, while those from the Netherlands increased by 21% to 96.506 tonnes.

As volume grew more rapidly than value, the average unit value of intra-EU salmon trade declined by 8%, from 9,92 EUR/kg in 2024 to 9,15 EUR/kg in 2025. Average unit values fell by 11% for Sweden, 12% for Denmark and 8% for the Netherlands. Poland was the main exception, with its average unit value remaining broadly stable at 15,45 EUR/kg.

CHART 68

NOMINAL UNIT VALUE OF SALMON IN THE INTRA-EU TRADE BY THE TOP EXPORTERS IN 2025 AND % VARIATIONS 2025/2024

Source: EUMOFA elaboration of Eurostat-COMEXT data (online data code: ds-045409)



GROUNDFISH

In 2025, intra-EU trade in groundfish remained stable in volume, at 756.439 tonnes, while its nominal value increased by 11% to EUR 4,21 billion. Groundfish accounted for 13% of both the volume and value of total intra-EU trade in fishery and aquaculture products. Cod remained the main contributor to the category, particularly in value terms.

COD

Cod is the second most valued species among all fishery and aquaculture products traded in the EU[121].

In 2025, intra-EU cod trade declined by 6% in volume to 267.616 tonnes – the lowest level recorded over the 2016–2025 period. By contrast, its nominal value increased by 16% to EUR 2,43 billion. The average unit value therefore rose by 23%, from 7,40 EUR/kg in 2024 to 9,09 EUR/kg in 2025. Cod accounted for 35% of groundfish trade volume and 58% of its value.

The Netherlands remained the main intra-EU exporter of cod, accounting for 39% of total volume and 41% of value. Dutch exports remained broadly stable in volume, at 104.852 tonnes, but increased by 26% in nominal value to EUR 1,01 billion. Spain was the main

[120] *Ibidem.*
[121] *Ibidem.*

destination, receiving 29.618 tonnes, primarily as frozen fillets. Portugal followed with 21.328 tonnes, an increase of 41% from 2024, mainly comprising salted whole or gutted cod and dried cuts. The value of Dutch exports to Portugal rose by 74%, while their average unit value increased to 11,61 EUR/kg.

Denmark and Sweden together accounted for 33% of total cod trade volume and 32% of value. Danish exports declined by 18% in volume and 4% in value, reaching 47.231 tonnes worth EUR 390 million. They consisted mainly of fresh whole or gutted cod exported to the Netherlands and fresh fillets supplied to France. Average unit values reached 6,99 EUR/kg for fresh whole or gutted cod exported to the Netherlands and 16,02 EUR/kg for fresh fillets sent to France.

By contrast, Swedish exports increased by 11% in volume and 42% in nominal value, reaching 40.150 tonnes worth EUR 383 million. Portugal was their main destination, receiving 16.281 tonnes, mainly as salted whole or gutted cod and dried cuts. These products recorded average unit values of 11,43 EUR/kg and 15,28 EUR/kg respectively.

OTHER SPECIES

The other major species that dominate intra-EU trade flows are, as for salmon and cod, primarily imported species that will be re-exported within the EU market. These include warmwater and miscellaneous shrimps, as well as skipjack tuna.

In 2025, combined intra-EU exchanges of warmwater and miscellaneous shrimps reached a ten-year high of 239.594 tonnes worth EUR 2,18 billion. Compared with 2024, volume increased by 3% while its value by 7%. Miscellaneous shrimps accounted for the larger share, reaching 132.922 tonnes and EUR 1,31 billion, while warmwater shrimps totalled 106.672 tonnes worth EUR 868 million.

Skipjack tuna also reached its highest level of the 2016-2025 period, with intra-EU exchanges increasing by 5% in volume and 3% in nominal value to 209.489 tonnes and EUR 1,11 billion. As volume grew faster than value, its average unit value declined slightly, by 2%, to 5,29 EUR/kg.

Unlike these predominantly imported species, trout is largely produced within the EU, which has historically maintained a high level of self-sufficiency. Intra-EU trout trade increased by 6% in volume and 3% in nominal value in 2025, reaching 91.921 tonnes worth EUR 681 million – the highest levels recorded over the decade. Together with mussels, trout remains one of the most widely farmed species in the EU aquaculture sector.

5/ LANDINGS

5.1 OVERVIEW

TOTAL EU

From 2020 to 2024, the volume of landings decreased by 25%.

The data on landings[122] analysed in this report cover the initial unloading of fishery products, including algae and seaweed, from fishing vessels in each EU Member State[123]. In addition to landings of species destined for human consumption, the data include products intended for industrial uses[124].

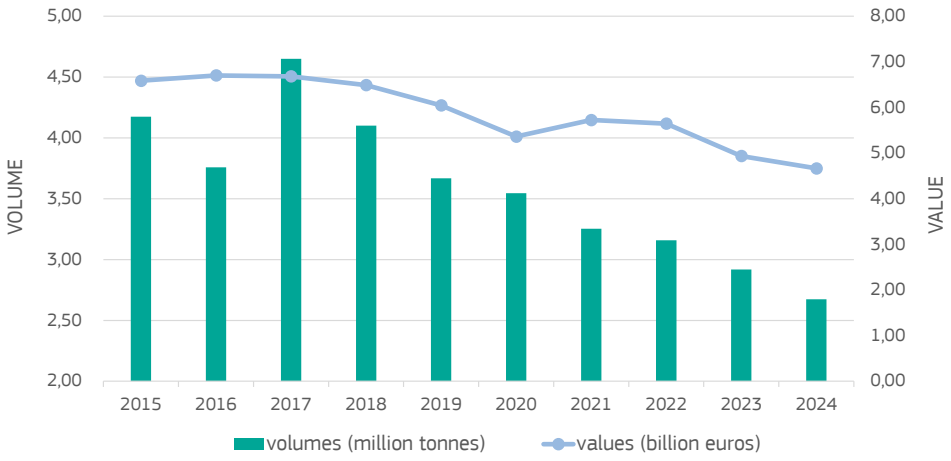
In 2024, total EU landings reached 2,67 million tonnes, with a value of EUR 5,44 billion, representing the lowest volume recorded over the 2015–2024 decade. This marked a continuation of the uninterrupted downward trend in landing volumes observed since 2018.

Between 2020 and 2024, EU landings decreased by 25% in volume, while their nominal value increased slightly, by 1%. Over the longer 2015-2024 period, landing volumes fell by 36%, corresponding to a decrease of 1,50 million tonnes, while their value declined by 29% in real terms, or EUR 1,92 billion. Compared with 2023, landings decreased by 8% in volume and 3% in nominal value in 2024, corresponding to reductions of around 244.000 tonnes and EUR 148 million, respectively.

In 2024, 78% of EU landings of aquatic animals were destined for human consumption, close to 20% were intended for industrial purposes, and the remaining share was intended for animal feed or had an unknown purpose[125]. Seaweeds and algae accounted for 2% of total EU landings.

CHART 69
TOTAL LANDINGS IN THE EU

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data.
More details on the sources used can be found in the Methodological background.
Values are deflated by using the GDP deflator (base=2020).



[122] In line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, since the most recent reference period is year 2024, UK is excluded from the EU aggregations of each year. In addition, EU data include Croatia since 2013, date of the EU's enlargement to this country.
[123] Data regarding landings do not refer to landlocked countries (Czechia, Luxembourg, Hungary, Austria and Slovakia). The data analysed in this report cover products landed in EU by vessels of: EU Member States, Canada, Faroe Islands, Greenland, Kosovo, Iceland, Norway and the UK.
[124] It should be noted that the data on fishery production included in the supply balance regard catches for human consumption, which is thus different from the data on landings analysed in this chapter. For the definitions, please refer to the Methodological background.
[125] Industrial uses include fishery products landed for reduction to fish meal and oil, as well as products intended for animal consumption. The separate category animal feed, however, refers only to fresh fish fed directly to animals and explicitly excludes quantities destined for processing into fish meal and oil. Thus, fish used for fish meal/oil production is classified under industrial uses, not under the specific animal-feed category.

As shown in Chart 70, landings decreased for most of the main commercial species in the EU in 2024. Herring remained the most landed species, despite an 11% decline from 2023. This decrease was mainly driven by Denmark, where volumes fell by almost 28.000 tonnes, down 20% compared with 2023.

Blue whiting followed, down by 10%, while sprat landings decreased by 5%. The sharpest decline among the main species concerned mackerel, whose landings fell by 27%. The decrease in mackerel landings was broad-based across several of the main landing countries. The largest reductions were recorded in the Netherlands, where landings fell by 19.470 tonnes, and Portugal, with a decline of 12.359 tonnes. Overall, reductions in Total Allowable Catches (TACs) for mackerel and horse mackerel were implemented in the EU and are continuing in 2025.

Sardine landings also declined, by 3%, while hake landings fell by 12% to 94.339 tonnes. Spain remained by far the main country for EU hake landings and accounted for most of the decrease, with volumes falling by 6.234 tonnes, from 68.572 tonnes in 2023 to 62.338 tonnes in 2024.

By contrast, anchovy landings increased by 4% to 102.640 tonnes, mainly driven by Spain. Clams recorded the strongest increase among the main species shown in Chart 70, rising by 8% to 61.852 tonnes, driven primarily by higher landings in the Netherlands and Italy. Landings of seaweed and other algae increased by 3% to 54.431 tonnes, almost entirely due to France. Scallop landings also increased slightly, by 1% to 49.499 tonnes, mainly reflecting an increase of 887 tonnes in France.

CHART 70

MOST IMPORTANT MAIN COMMERCIAL SPECIES LANDED IN THE EU
VOLUME IN 2024, % OF TOTAL AND % VARIATIONS 2024 / 2023

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data.
More details on the sources used can be found in the Methodological background.



	1.000 tonnes	% of total	% variation 2024/2023
Herring	417	16%	-11%
Blue whiting	391	15%	-10%
Sprat (=Brisling)	293	11%	-5%
Mackerel	151	6%	-27%
Sardine	144	5%	-3%
Anchovy	103	4%	+4%
Hake	94	3%	-12%
Clam	62	2%	+8%
Seaweed and other algae	54	2%	+3%
Scallop	49	2%	+1%
Others*	915	34%	-7%

Total: 2,67 million tonnes

*Others largely include the EUMOFA aggregation "other groundfish" – mainly comprising sandeel, which alone accounted for 3% of total volumes landed.

A particularly notable development concerned sandeel[126], despite it not being included among the EU's main commercial species. Its trend is worth analysing because of its significant contribution to total EU landing volumes, accounting for 3% of the total. Almost all sandeel landed in the EU is landed in Denmark, which holds by far the largest EU quota for this species. In Denmark, sandeel is primarily used for industrial purposes, particularly for the production of fishmeal.

[126] Sandeel is not included among EUMOFA's "main commercial species" because of its limited market for human consumption. It is therefore included in the aggregation "other groundfish".

After rebounding strongly in 2023, EU sandeel landings decreased by 35% in 2024, from 140.001 tonnes to 90.833 tonnes, and Denmark accounted for more than 99% of the total. The decrease occurred in the context of more restrictive fishing conditions. The EU sandeel quota for 2024 was set at 164.142 tonnes, of which 158.096 tonnes were allocated to Denmark[127], with fishing opportunities differentiated across the different sandeel management areas. Moreover, the closure of British waters to sandeel fishing restricted access to fishing grounds traditionally used by Danish vessels[128]. This likely contributed to the lower landings recorded during the 2024 fishing season[129].

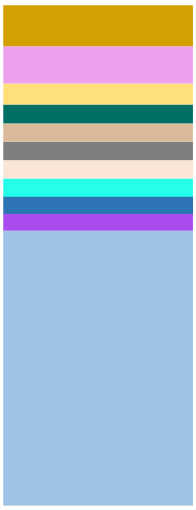
Sandeel landings have been highly variable over the 2015–2024 period. EU volumes ranged from a low of 45.944 tonnes in 2016 to a peak of 402.030 tonnes in 2017, before fluctuating substantially in subsequent years. These fluctuations reflect changes in stock biomass and the resulting adjustments in fishing opportunities in the North Sea. The 2024 level remained well below the peaks observed earlier in the period, illustrating the strong influence of annual fishing opportunities and stock conditions on this highly regulated fishery. Fishing opportunities were reduced further in 2025, when the overall TAC was set at 110.078 tonnes, with an EU quota of 106.556 tonnes and a Danish quota of 102.630 tonnes.

In value terms, as shown in Chart 71, almost all of the main commercial species with the highest EU landing values recorded decreases in 2024. The exceptions were shrimps, squid and Norway lobster, which also recorded slight increases in landed volumes.

CHART 71

MOST IMPORTANT MAIN COMMERCIAL SPECIES LANDED IN THE EU
NOMINAL VALUE IN 2024, % OF TOTAL AND % VARIATIONS 2024 / 2023

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data.
More details on the sources used can be found in the Methodological background.



	million euros	% of total	% variation 2024/2023
Shrimps*	462	8%	+4%
Hake	404	7%	-2%
Herring	229	4%	-5%
Squid	203	4%	+7%
Common sole	200	4%	-4%
Monk	200	4%	-2%
Norway lobster	199	4%	+3%
Anchovy	197	4%	-4%
Mackerel	188	3%	-15%
Swordfish	179	3%	-3%
Others**	2.983	55%	-3%

Total: EUR 5,44 billion

* "Shrimps" includes *Crangon* spp., coldwater shrimps, deep-water rose shrimps, warmwater shrimps and miscellaneous shrimps.
**Among other main commercial species, the ones with the highest landing value in 2024 were octopus, clam and blue whiting, each covering 3% of the total.

Consequently, declines in landing value for several species were driven primarily by lower volumes rather than by falling nominal unit values. As shown in Table 18, average unit values increased for most of the main commercial species in 2024. Compared with 2023, the strongest increase was recorded for skipjack tuna, whose average unit value rose by 32%, followed by mackerel (+16%), sardine (+13%) and hake (+11%). Herring also recorded a 7% increase, while more moderate increases were observed for monk and *Crangon* shrimp (+5% each), Atlantic horse mackerel (+4%) and cod (+3%).

[127] Source: https://eur-lex.europa.eu/eli/reg/2024/1015/oj/eng
[128] Source: https://ec.europa.eu/commission/presscorner/detail/en/ip_24_2050
[129] Source: https://effop.org/news-events/sandeel-fishing-for-2024-concludes-with-lower-landings-amid-british-waters-closure/

These unit value developments partly cushioned the effect of lower landing volumes on the overall value of several species. This was particularly evident for hake, whose landing volume decreased by 12% while its average unit value increased by 11%, limiting the decline in nominal landing value to 2%. Similarly, mackerel volumes fell by 27%, whereas its average unit value increased by 16%, resulting in a smaller, though still substantial, 15% decrease in landing value.

By contrast, average unit values declined for a smaller number of species. Compared with 2023, the sharpest decreases were recorded for European plaice (-12%), anchovy (-8%), crab and scallop (-7% each), followed by mussel (-5%), haddock and clam (-4% each) and Norway lobster (-2%). Despite the decreases recorded for some species in 2024, average unit values remained above their 2020 levels for most of the main commercial species.

TABLE 18

AVERAGE NOMINAL PRICES AT LANDING STAGE OF TOP MAIN COMMERCIAL SPECIES IN THE EU (EUR/KG)

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data.
More details on the sources used can be found in the Methodological background.
Possible discrepancies in % changes are due to rounding.

Main commercial species	2020	2021	2022	2023	2024	2024/2023	2024/2020
Anchovy	1,46	1,93	2,11	2,09	1,92	-8%	+32%
Atlantic horse mackerel	1,04	1,31	1,02	1,22	1,28	+4%	+23%
Blue whiting	0,41	0,57	0,35	0,38	0,39	+4%	-5%
Clam	2,46	2,38	2,42	2,60	2,49	-4%	+1%
Cod	3,95	4,14	4,97	4,74	4,88	+3%	+24%
Crab	2,22	2,41	3,21	2,83	2,63	-7%	+18%
European plaice	2,62	2,37	3,48	3,03	2,68	-12%	+2%
Haddock	1,79	1,84	1,79	1,76	1,68	-4%	-6%
Hake	3,01	3,07	3,20	3,85	4,28	+11%	+42%
Herring	0,41	0,51	0,21	0,51	0,55	+7%	+35%
Mackerel	1,08	1,23	0,97	1,07	1,25	+16%	+16%
Monk	4,93	5,41	5,82	5,41	5,67	+5%	+5%
Mussel *Mytilus* spp.	0,29	0,31	0,28	0,39	0,37	-5%	+25%
Norway lobster	9,37	9,98	11,69	10,48	10,28	-2%	+10%
Sardine	0,86	0,99	0,98	0,91	1,03	+13%	+20%
Scallop	2,81	2,61	2,77	2,75	2,55	-7%	-9%
Seaweed and other algae	0,07	0,06	0,07	0,07	0,07	+0,5%	+7%
Shrimp *Crangon* spp.	3,60	4,11	5,63	6,57	6,87	+5%	+91%
Skipjack tuna	1,22	1,44	1,75	1,69	2,23	+32%	+83%
Sprat (=Brisling)	0,23	0,25	0,28	0,39	0,40	+3%	+74%
Yellowfin tuna	1,82	2,48	3,09	3,08	3,12	+1%	+71%

BY MEMBER STATE

At Member State level, the overall decline in EU landings in 2024 was broad-based. Most of the main landing countries recorded lower volumes, with the largest reduction occurring in Denmark, followed by the Netherlands, Spain and France. Nevertheless, some important exceptions were observed. Italy was the only major landing country to record a clear increase in volume, with landings rising by 4% to 125.338 tonnes, although their value declined by 2% to EUR 684 million. Portugal recorded broadly stable volumes, at 136.038 tonnes, while its landing value increased by 7% to EUR 366 million, the strongest value growth among the main landing countries. Spain also showed some resilience: despite a 3% decline in volume, its landing value remained broadly stable. Overall, the 2024 decrease was therefore driven primarily by lower landing volumes in the largest northern European landing countries, while developments were more mixed in southern Member States.

Denmark remained the Member State with the highest landing volume in the EU, with 560.801 tonnes worth EUR 436 million. Compared with 2023, this represented decreases of 19% in volume and 14% in value. The reduction was mainly driven by

lower landings of sandeel, which fell by more than 49.000 tonnes, as well as herring, blue whiting and sprat, which decreased by 27.724 tonnes, 21.097 tonnes and 19.443 tonnes, respectively. Mackerel landings also fell by 9.252 tonnes.

Spain ranked second in volume but remained by far the leading Member State in landing value, with 479.234 tonnes worth EUR 1,66 billion. Compared with 2023, Spanish landing volumes declined by 3%, while value remained broadly stable, increasing by less than 1%. Lower volumes of mackerel, hake and blue whiting were accompanied by declines in several tuna species, notably skipjack, albacore and bigeye tuna. These reductions were partly offset by higher landings of anchovy, sardine, squid and yellowfin tuna. The broadly stable total value despite lower volumes reflected, among other factors, higher values for squid, sardine and deep-water rose shrimp.

CHART 72
VOLUMES OF LANDED PRODUCTS IN MAIN EU COUNTRIES IN 2024 AND % VARIATIONS 2024 / 2023

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data.
More details on the sources used can be found in the Methodological background.

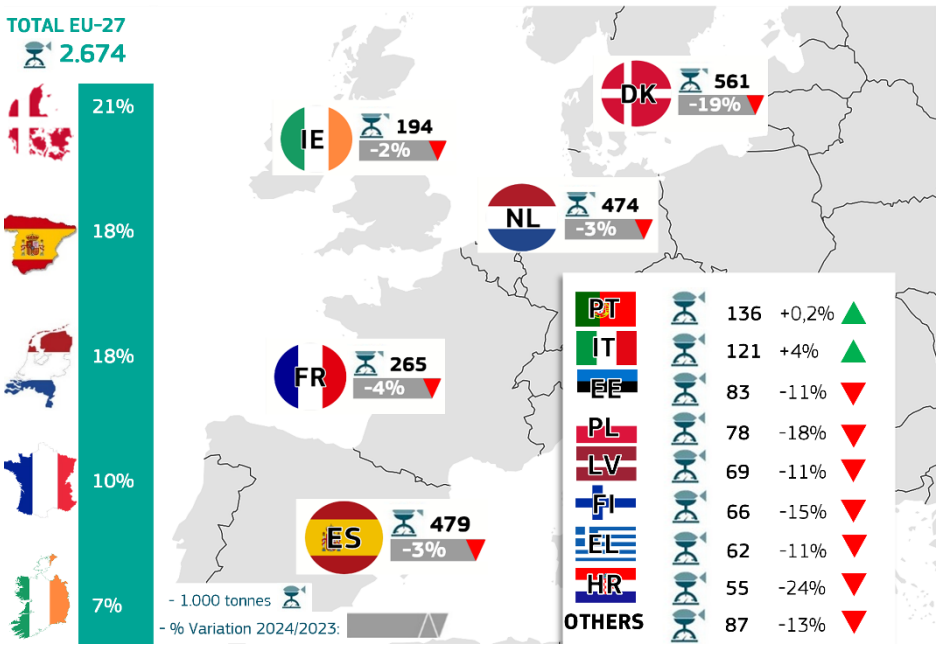
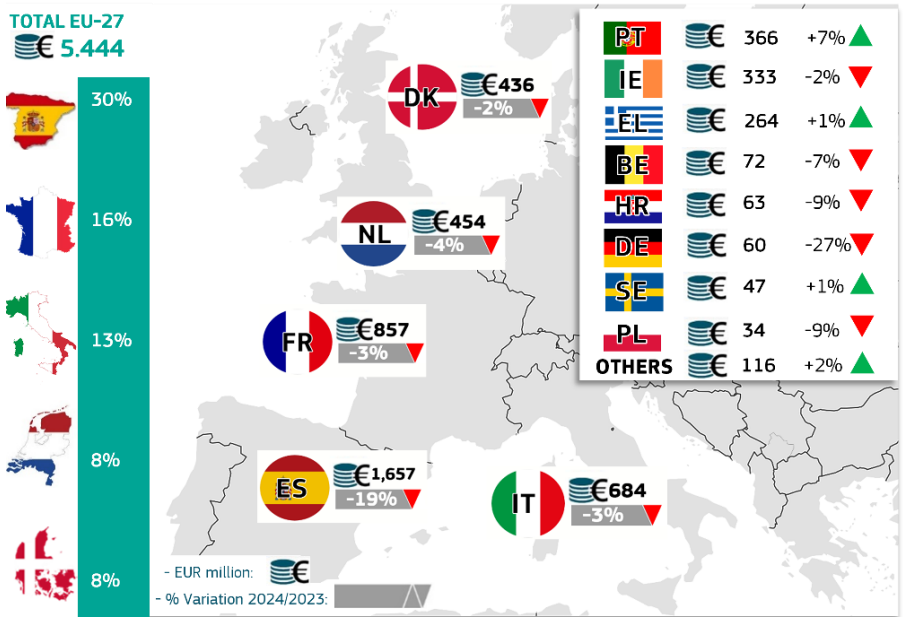


CHART 73
NOMINAL VALUES OF LANDED PRODUCTS IN MAIN EU COUNTRIES IN 2024 AND % VARIATIONS 2024 / 2023

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data.
More details on the sources used can be found in the Methodological background.



5.2 ANALYSIS BY MAIN SPECIES

SMALL PELAGICS

In 2024, EU landings of small pelagics totalled 1,17 million tonnes, with a nominal value of EUR 953 million. Compared with 2023, volumes decreased by 10%, while nominal value fell by 5%, continuing the downward trend observed since 2018. Both volume and value reached their lowest levels over the 2015–2024 period. Small pelagics nevertheless remained a major component of EU landings, as the five main small pelagic species – herring, sprat, mackerel, sardine and anchovy – together accounted for around 41% of total EU landed volume in 2024, but only 16% of total landing value, reflecting the relatively low unit values of these species.

HERRING

In 2024, landings of herring, the most landed main commercial species in the EU, totalled 416.896 tonnes, accounting for 16% of the total volume of fish landed in the EU. This represented a decrease of 50.236 tonnes, or 11%, compared with 2023, reversing the moderate rebound recorded in the previous year and bringing herring landings to their lowest level over the 2015-2024 period. In value terms, herring landings amounted to EUR 229 million, down by 5% from 2023. As the decline in value was smaller than that in volume, the average unit value increased by 7%, from 0,51 EUR/kg to 0,55 EUR/kg. The decline occurred against a backdrop of reduced fishing opportunities for several herring stocks in 2024, including a 24% reduction in the TAC for Atlantic spring-spawning herring[130] and reductions in TACs for several Baltic herring stocks[131].

The Netherlands remained the main Member State for herring landings in volume terms. The Dutch herring sector is strongly export-oriented. In 2024, Dutch landings reached 150.322 tonnes, accounting for 36% of the EU total and remaining broadly stable compared with 2023, only up 1%. Their nominal value also increased slightly, by 2%, to EUR 70 million, while the average unit value remained almost unchanged. Denmark ranked second in volume, with 110.634 tonnes, accounting for more than one quarter of total EU herring landings, following a 20% decrease from 2023. Danish landing value fell less markedly, by 14%, to EUR 91 million, and remained the highest among all Member States. This reflected an 8% increase in the average unit value, from 0,76 EUR/kg in 2023 to 0,82 EUR/kg in 2024. Landings also decreased substantially in several Baltic and Nordic Member States. Finland remained the third-largest landing country, with 44.977 tonnes, down by 17% from 2023, while its landing value decreased by only 3% to EUR 16 million. Estonia recorded a similar trend, with volumes falling by 18% to 36.109 tonnes and value decreasing by 2% to EUR 14 million. In Latvia, landings declined by 13% to 30.118 tonnes, but their value increased by 9% to EUR 12 million. By contrast, Sweden was the only major herring landing country to record increases in both volume and value, with landings rising by 9% to 24.070 tonnes and value by 27% to EUR 14 million.

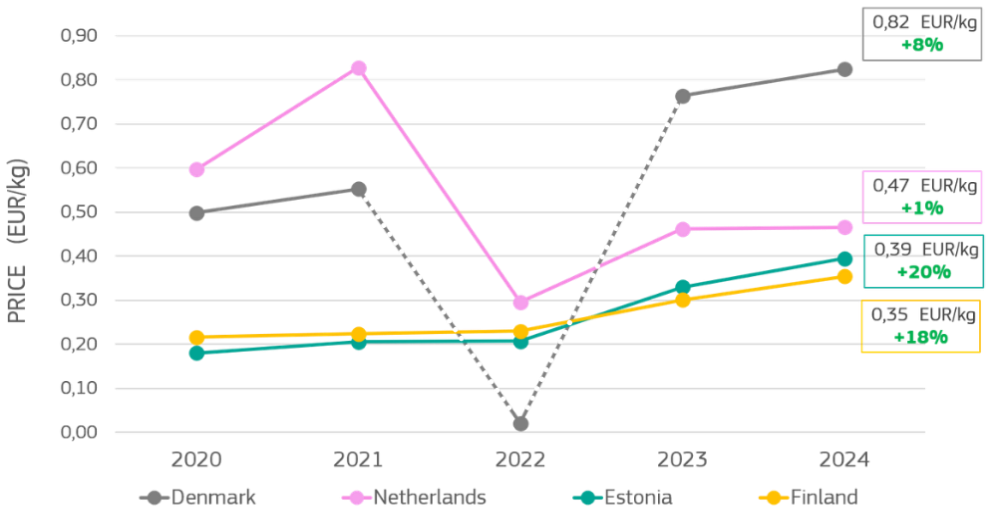
Overall, average unit values increased in most of the main herring landing countries in 2024, partly offsetting the effect of lower volumes. The strongest increases among the main countries were recorded in Latvia (+24%), Estonia (+20%), Finland (+18%) and Sweden (+17%). Herring landings originate from different stocks, including the North Sea stock, the Atlantic spring-spawning stock and the Baltic stock. These stocks have different characteristics and market destinations and therefore command different prices. In addition, the shares of landings destined for industrial uses and human consumption vary from year to year, resulting in significant differences in unit values. This is especially relevant for Denmark and Sweden.

[130] Source: https://oceans-and-fisheries.ec.europa.eu/news/north-east-atlantic-coastal-states-reach-agreement-mackerel-blue-whiting-and-atlanto-scandian-2023-10-23_en
[131] Source: https://oceans-and-fisheries.ec.europa.eu/news/baltic-sea-agreement-reached-2024-fishing-opportunities-2023-10-24_en

CHART 74

AVERAGE NOMINAL PRICES OF HERRING LANDED IN MAIN EU MEMBER STATES (EUR/KG)

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data. More details on the sources used can be found in the Methodological background.
2022 data for value of Danish landings of herring are confidential.

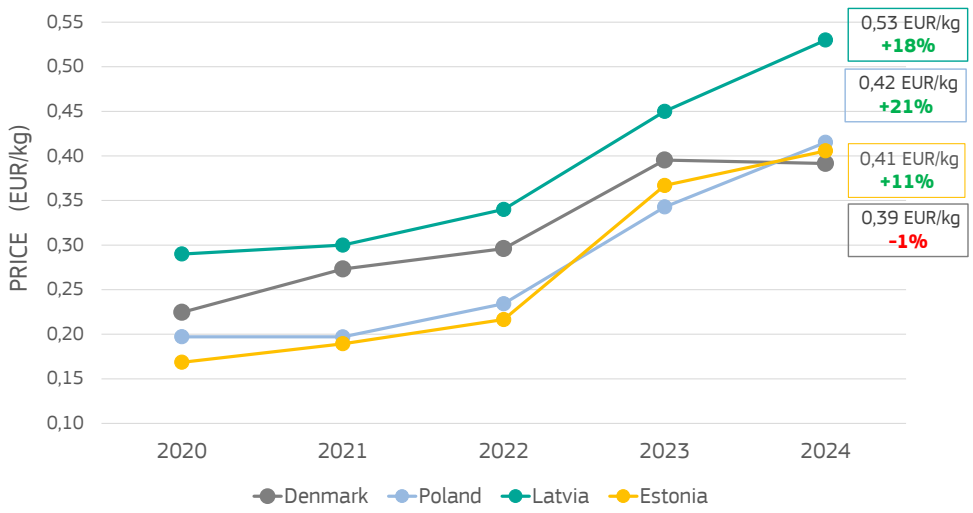


SPRAT

In 2024, EU landings of sprat totalled 293.198 tonnes, worth EUR 118 million. Compared with 2023, volumes decreased by 5%, while nominal value fell more moderately, by 2%. Over the longer 2015-2024 period, sprat landing volumes declined by 45%, while their value decreased by 30% in real terms. The large decrease over the period partly reflects the exceptionally high level recorded in 2015, when favourable stock conditions and record-high recruitment led to substantially increased fishing opportunities for North Sea sprat[132]. More generally, EU sprat catches have fluctuated considerably over the period, largely reflecting changes in TACs and quotas, particularly those affecting the Danish fishery[133].
Denmark remained by far the main Member State for sprat landings, accounting for 52% of EU volume and 51% of value. Danish landings decreased by 11% from 2023 to 153.559 tonnes, while their value fell by 12% to EUR 60 million. The average unit value remained broadly stable at 0,39 EUR/kg. Danish sprat landings are mainly intended for industrial uses, particularly for fishmeal production, while Poland and Latvia have well-established canning industries for sprat and are the largest producers of canned sprat in the EU. Poland ranked second, with 44.278 tonnes, down by 4%, but its landing value increased by 16% to EUR 18 million, as the average unit value rose by 21%, from 0,34 EUR/kg to 0,42 EUR/kg. Estonia followed with 34.075 tonnes, 5% below 2023, while value increased by 5% to EUR 14 million, supported by an 11% rise in average unit value to 0,41 EUR/kg. Latvia recorded 28.604 tonnes, down by 10%, while its value increased by 6% to EUR 15 million, as the average unit value rose by 18% to 0,53 EUR/kg, the highest among the four main landing countries. Together, Denmark, Poland, Estonia and Latvia accounted for 89% of EU sprat landing volume and 91% of value in 2024.

[132] Source: https://eur-lex.europa.eu/legal-content/EN/ALL/?uri=COM%3A2015%3A0487%3AFIN
[133] Source: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/price-structure-analyses/sprat-in-the-eu.

CHART 75
AVERAGE NOMINAL PRICES OF SPRAT LANDED IN MAIN EU MEMBER STATES (EUR/KG)
Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data. More details on the sources used can be found in the Methodological background.



MACKEREL

In 2024, EU landings of mackerel totalled 151.048 tonnes, worth EUR 188 million. Compared with 2023, volumes fell by 27%, while nominal value decreased by 15%. Both volume and value reached their lowest levels of the decade. Compared with 2015, mackerel landing volumes declined by 58%, while their value declined by 44% in real terms.

Mackerel landings in the EU have shown marked volatility over the past decade, reflecting fluctuations in stock availability, changes in TACs and the redistribution of fishing opportunities following Brexit. Periods of recovery, such as in 2020 and 2022, have alternated with sharp contractions, notably in 2021, 2023 and 2024.

The coastal states agreed a TAC of 739.386 tonnes for North-East Atlantic[134] mackerel in 2024, 5% below the 2023 TAC[135]. However, the 27% decline in EU landings was considerably larger than the reduction in the overall TAC, indicating that the TAC reduction alone cannot explain the full decrease in landed volumes. For Ireland in particular, fishing opportunities have also been affected by the transfer of mackerel quota to the United Kingdom under the EU–UK Trade and Cooperation Agreement. Moreover, the TAC for North-East Atlantic mackerel was reduced further in 2025, to 576 958 tonnes, 22% below the 2024 TAC[136].

The decrease in 2024 was broad-based across the main landing countries. The Netherlands remained the largest in volume terms, with 41.022 tonnes, accounting for 27% of EU mackerel landings. Dutch volumes fell by 32% compared with 2023, while value declined by 27% to EUR 38 million. The average unit value nevertheless increased by 7%, from 0,86 EUR/kg to 0,92 EUR/kg. Due to the vertical integration of the Dutch pelagic supply chain, these values should be interpreted with caution, as internal prices used within integrated fishing and processing companies may underestimate the actual market value of the fish[137].

Ireland ranked second, with 36.450 tonnes worth EUR 60 million, representing decreases of 12% in volume and 2% in value. Its average unit value increased by 11% to 1,65 EUR/kg, the highest among the four main landing countries. Spain followed with 32.902 tonnes worth EUR 42 million. Spanish volumes declined by 18%, while value remained broadly stable, falling by only 1%, as the average unit value rose by 20% to 1,28 EUR/kg. Portugal recorded the sharpest decline among the four main countries, with landings falling by 39% to 19.131 tonnes and value by 32% to EUR 11 million. Its average unit value nevertheless increased by 12% to 0,57 EUR/kg. Together, the Netherlands, Ireland, Spain and Portugal accounted for 86% of EU mackerel landing volume and 80% of value in 2024.

[134] This agreement includes the European Union, the Faroe Islands, Greenland, Iceland, Norway and the United Kingdom.
[135] Source: https://oceans-and-fisheries.ec.europa.eu/news/north-east-atlantic-coastal-states-reach-agreement-mackerel-blue-whiting-and-atlanto-scandian-2023-10-23_en?prefLang
[136] Source: https://oceans-and-fisheries.ec.europa.eu/news/north-east-atlantic-coastal-states-reach-agreement-mackerel-blue-whiting-and-atlanto-scandian-2024-10-25_en
[137] Source: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/price-structure-analyses/mackerel-in-the-eu

SARDINE

In 2024, EU landings of sardine totalled 144.182 tonnes, worth EUR 149 million. Compared with 2023, volume decreased by 3%, reaching the lowest level recorded over the decade under analysis, while nominal value increased by 10%. Compared with 2015, sardine landing volumes declined by 20%, while their value fell by 31% in real terms.

Spain and Portugal were the two main Member States for sardine landings in 2024, together accounting for half of the EU total volume. Spain ranked first, with 39.881 tonnes, or 28% of EU landings, representing a 14% increase from 2023. Its landing value rose more strongly, by 34% to EUR 44 million, as the average unit value increased by 18%, from 0,94 EUR/kg to 1,10 EUR/kg. Portugal followed with 32.181 tonnes, or 22% of the EU total. Portuguese landings increased by 24% in volume and 26% in value, reaching EUR 34 million, while their average unit value remained broadly stable at 1,05 EUR/kg.

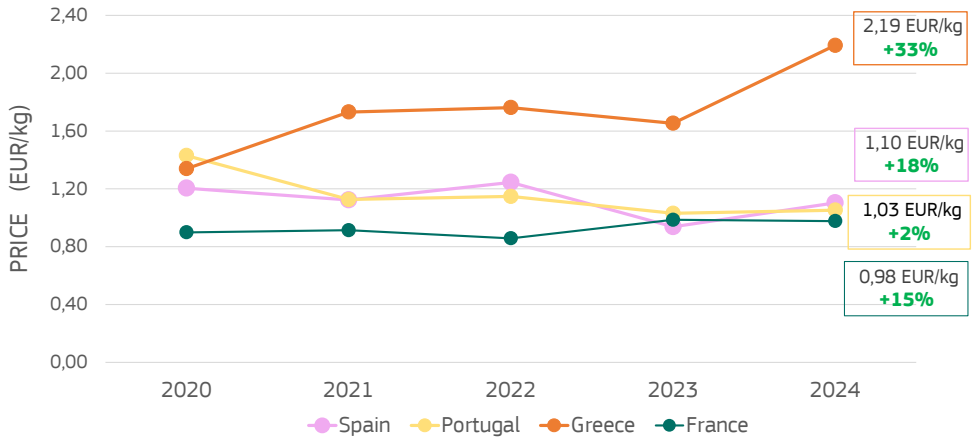
By contrast, Croatia recorded a substantial decline. Landings fell by 32%, from 32.093 tonnes in 2023 to 21.853 tonnes in 2024, while their value decreased by 24% to EUR 14 million. This decline occurred in the context of management measures for small pelagic fisheries in the Adriatic Sea. Under the GFCM multiannual management plan, the transitional regime for 2024 provided for a 9% reduction in the sardine catch limit compared with 2023[138]. The latest stock assessment available during 2024 also indicated that Adriatic sardine biomass was continuing to decline and that fishing mortality remained above the level associated with maximum sustainable yield[139].

France ranked fourth, with 18.238 tonnes, down by 19% from 2023, while landing value also decreased by 20% to EUR 18 million. The average unit value remained broadly stable at 0,98 EUR/kg. Among the other relevant landing countries, Italy recorded a 14% increase in volume to 9.493 tonnes, whereas Greece saw volumes fall by 17% to 8.240 tonnes. Despite the lower volume, Greek landing value increased by 10%, reflecting a strong rise in its average unit value to 2,19 EUR/kg, the highest among the main landing countries.

CHART 76

AVERAGE NOMINAL PRICES OF SARDINE LANDED IN MAIN EU MEMBER STATES (EUR/KG)

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data. More details on the sources used can be found in the Methodological background.



ANCHOVY

In 2024, EU anchovy landings totalled 102.640 tonnes, worth EUR 197 million. Compared with 2023, volumes increased by 4%, bringing landings back above 100.000 tonnes after the previous year's decade-low, while nominal value decreased by 4%

Spain remained by far the main Member State for anchovy landings, accounting for almost half of the EU total. Spanish landings increased by 13%, from 45.208 tonnes in 2023 to 50.873 tonnes in 2024, while their value rose by only 2% to EUR 93 million. As a result, the average unit value decreased by 9%, from 2,00 EUR/kg to 1,82 EUR/kg. Spain's anchovy fishery includes the important Bay of Biscay stock, for which the EU TAC was set at 33.000 tonnes in 2024, of which 29.700 tonnes were allocated to Spain and the remainder to France[140]. Italy ranked second, with 19.432 tonnes, broadly stable compared with 2023 (-1%). However, its landing value decreased by 12% to EUR 56 million, as the average unit

[138] Source: https://faolex.fao.org/docs/pdf/eur223602.pdf
[139] Working Group on Stock Assessment of Small Pelagic Species (WGSASP) session on small pelagic species in the Adriatic Sea (GSAs 17–18) | General Fisheries Commission for the Mediterranean (GFCM) | Food and Agriculture Organization of the United Nations.
[140] Source: https://eur-lex.europa.eu/eli/reg/2024/257/2024-01-11/eng/pdf

value dropped from 3,24 EUR/kg to 2,89 EUR/kg. Croatia followed with 12.145 tonnes and EUR 11 million, down by 12% in volume and 16% in value. This decline occurred in the context of the management regime for small pelagic fisheries in the Adriatic Sea, under which the 2024 anchovy catch limit was reduced by 5% compared with 2023[141].

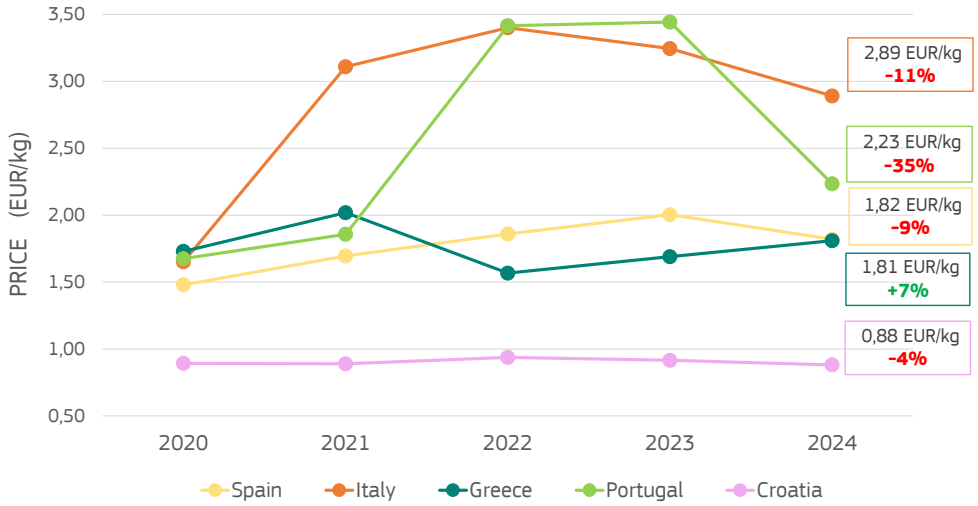
By contrast, Greece recorded increases in both volume and value. Greek landings rose by 3% to 11.921 tonnes, while their value increased by 11% to EUR 22 million, supported by a 7% rise in the average unit value to 1,81 EUR/kg. Portugal recorded the strongest increase in volume among the main landing countries, with landings rising by 29% to 5.884 tonnes. Their value nevertheless declined by 16% to EUR 13 million, and the average unit value fell sharply from 3,44 EUR/kg in 2023 to 2,23 EUR/kg in 2024.

As shown in Chart 77, the unit value of anchovy landings varies considerably among EU Member States, even when similar volumes are landed.

CHART 77

AVERAGE NOMINAL PRICES OF ANCHOVY LANDED IN MAIN EU MEMBER STATES (EUR/KG)

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data. More details on the sources used can be found in the Methodological background.



GROUNDFISH

In 2024, EU groundfish landings totalled 669.363 tonnes, worth EUR 843 million. Compared with 2023, volumes decreased by 14%, reversing the increase recorded in the previous year, while nominal value fell by 4%. The 2024 volume was the second-lowest recorded over the 2015-2024 period, after 2022, while both nominal and real landing value reached their lowest levels of the time series.

The main commercial species in this grouping are blue whiting, hake, cod, haddock, redfish, saithe, whiting, pouting, ling, pollack, grenadier and toothfish, while the remaining species, including sandeel, are aggregated under "other groundfish".

Groundfish landings have remained highly variable over the past decade, particularly because of fluctuations in sandeel and blue whiting. Sandeel landings alone ranged from around 40.000 tonnes to just under 400.000 tonnes from year to year. This variability is closely linked to annual fishing opportunities, stock conditions and access to fishing grounds. Sandeel is targeted by a relatively specialised fleet in a highly seasonal fishery, with landings primarily supplying the fishmeal and fish-oil industry. In 2024, the reduction in sandeel landings occurred in the context of restricted access to traditional fishing grounds in British waters, while fishing opportunities also varied substantially across the different sandeel management areas.

Not all groundfish species declined in 2024. Redfish landings increased by 47% to 13.341 tonnes, while cod landings rose slightly, by 1%, to 16.795 tonnes. These increases were nevertheless too small to offset the reductions in sandeel, blue whiting and hake, which together accounted for most of the decrease in EU groundfish landings.

[141] Source: https://oceans-and-fisheries.ec.europa.eu/news/fisheries-ministers-decide-fishing-opportunities-2024-mediterranean-and-black-sea-2023-12-12_en

BLUE WHITING

Among groundfish, blue whiting is the most landed main commercial species in the EU. In 2024, it accounted for 390.860 tonnes worth EUR 153 million. Compared with 2023, volumes decreased by 10% and value by 7%.

Most blue whiting landed in the EU is destined for non-food uses, particularly fishmeal and fish oil production. Blue whiting, together with sandeel, sprat and herring, is among the main species used as raw material for the EU fishmeal and fish-oil industry. Smaller quantities are destined for human consumption, including for use in products such as surimi[142].

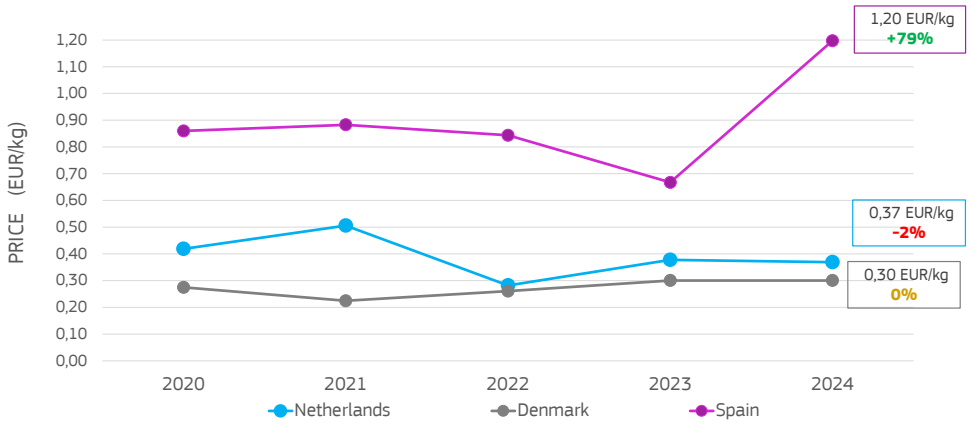
The Netherlands remained the main landing country and was the only one among the four leading Member States to record an increase in volume. Dutch landings rose by 3% to 183.420 tonnes; the highest level recorded over the 2015-2024 period and represented around half of EU blue whiting landings. Their value remained broadly stable at EUR 68 million, while the average unit value decreased slightly, from 0,38 EUR/kg to 0,37 EUR/kg.

Denmark ranked second, with 117.087 tonnes worth EUR 35 million. Both volume and value decreased by around 15% compared with 2023, while the average unit value remained stable at 0,30 EUR/kg. Ireland followed with 58.253 tonnes, down by 17%, and a value of EUR 17 million, down by 16%. Spain landed 23.151 tonnes, 19% less than in 2023. However, Spanish landing value increased markedly, by 45% to EUR 28 million, as the average unit value rose from 0,67 EUR/kg to 1,20 EUR/kg. As in previous years, the considerably higher unit value recorded in Spain may reflect differences in the market destination of its landings compared with the large industrial fisheries in northern Europe.

CHART 78

AVERAGE NOMINAL PRICES OF BLUE WHITING LANDED IN MAIN EU MEMBER STATES (EUR/KG)

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data. More details on the sources used can be found in the Methodological background.



HAKE

In 2024, EU hake landings totalled 94.339 tonnes, worth EUR 404 million. Compared with 2023, volume decreased by 12%, while nominal value fell by only 2%. Both volume and value reached their lowest levels over the decade under analysis.

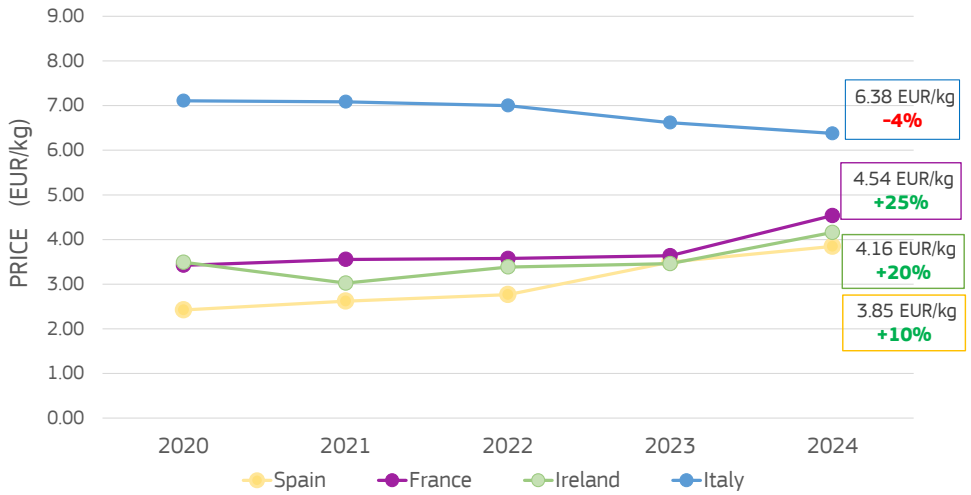
Spain remained by far the leading Member State, accounting for around two-thirds of total EU hake landings. Spanish landings decreased by 9%, from 68.572 tonnes in 2023 to 62.338 tonnes in 2024, while their value remained broadly stable at EUR 240 million. As a result, the average unit value increased by 10%, from 3,50 EUR/kg to 3,85 EUR/kg.

European hake (*Merluccius merluccius*) remained by far the main hake species, with landings decreasing by 18%, from 72.024 tonnes in 2023 to 58.846 tonnes in 2024. It was landed across a broad range of Member States, although Spain accounted for the largest volume, with 34.025 tonnes, followed by France (8.673 tonnes), Italy (5.845 tonnes), Ireland (3.435 tonnes), Greece (2.826 tonnes) and Denmark (1.949 tonnes). Argentine hake (*Merluccius hubbsi*) followed with 18.807 tonnes, 3% more than in 2023, of which around 96% was landed in Spain, mostly as whole frozen products, and the remainder in Portugal. Silver hake (*Merluccius bilinearis*) increased more markedly, by 53%, from 4.005 tonnes to 6.119 tonnes, with landings also concentrated in Spain and Portugal, while Benguela hake

[142] More information can be found in the EUMOFA study on EU fishmeal and fish oil available at the link https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/other-publications/fishmeal-and-fish-oil-2025-edition

(*Merluccius polli*) declined by 20% to 4.053 tonnes and was recorded exclusively in Spain in 2024. These species also showed substantial differences in unit values: European hake averaged 5,40 EUR/kg in 2024, compared with 1,96 EUR/kg for Argentine hake, 1,53 EUR/kg for silver hake and 3,31 EUR/kg for Benguela hake. In most other Member States, hake landings consisted almost entirely of European hake. Differences in species composition therefore help explain the variation in average unit values between Member States shown in Chart 79.

CHART 79
AVERAGE NOMINAL PRICES OF HAKE LANDED IN MAIN EU MEMBER STATES (EUR/KG)
Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data. More details on the sources used can be found in the Methodological background.



COD

In 2024, EU cod landings totalled 16.795 tonnes, worth EUR 82 million. Compared with 2023, volume increased slightly, by 1%, while nominal value rose by 4%. Despite this modest recovery, cod landings remained close to the historically low levels recorded in recent years. Over the 2015-2024 period, volumes declined by 81%, while landing value decreased by 67% in real terms.

Denmark remained the leading Member State for cod landings, with 5.970 tonnes, accounting for 36% of the EU total. Danish landings decreased by 12% compared with 2023, while their value remained broadly stable at EUR 32 million. Consequently, the average unit value increased by 13%, from 4,71 EUR/kg to 5,31 EUR/kg.

Spain ranked second and recorded the strongest increase among the main landing countries. Spanish cod landings rose by 45%, from 2.794 tonnes in 2023 to 4.041 tonnes in 2024. However, their value decreased by 12% to EUR 14 million, and the average unit value fell sharply from 5,90 EUR/kg to 3,57 EUR/kg. This divergence partly reflected the composition of Spanish landings: almost all cod was landed frozen, with the increase in volume in 2024 concentrated in lower-priced frozen presentations, while the average unit value of frozen fillets also decreased.

Portugal ranked third, with 2.590 tonnes, down by 6% from 2023, while its landing value increased by 2% to EUR 8,6 million. Its average unit value consequently rose by 9%, from 3,04 EUR/kg to 3,30 EUR/kg. Germany followed with 1.500 tonnes, representing a 32% decrease in volume, while value fell by 29% to EUR 9,6 million. The average unit value nevertheless increased by 5% to 6,40 EUR/kg. Together, Denmark, Spain, Portugal and Germany accounted for around 84% of EU cod landing volume in 2024.

A notable development was also recorded in France, although from a relatively low base. French cod landings increased from 202 tonnes in 2023 to 1.005 tonnes in 2024, with value rising from EUR 1,2 million to EUR 9,8 million. Most of the increase consisted of frozen fillets, which also helps explain the comparatively high average unit value recorded in France. Overall, the slight increase in EU cod landings in 2024 therefore masked substantial shifts between Member States and product presentations.

CRUSTACEANS

In 2024, EU landings of crustaceans totalled 98.688 tonnes, worth EUR 827 million. Compared with 2023, volume remained broadly stable, while nominal value increased by 3%. Volumes nevertheless remained close to the lowest level recorded over the 2015-2024 period, while, in real terms, the value of crustacean landings reached its lowest level of the decade. Compared with 2015, crustacean landing volumes declined by 13%, while their value decreased by 10% in real terms.

SHRIMPS

Shrimps, presented here as all shrimp species combined, are the highest-value product landed in the EU[143], with a total landing value of EUR 462 million in 2024.

EU shrimp landings totalled 47.370 tonnes in 2024, virtually unchanged from 2023, while their nominal value increased by 4%. Despite this stabilisation, volumes remained close to the lowest level recorded over the 2015-2024 period.

Crangon shrimp, which is only landed in the northern Member States, regained its position as the most landed shrimp species in 2024, accounting for 35% of total EU shrimp landings, with 16.342 tonnes worth EUR 112 million. Compared with 2023, volume increased by 10% and value by 15%, while the average unit value rose by 5%, from 6,57 EUR/kg in 2023 to 6,87 EUR/kg. The increase was mainly driven by the Netherlands, where landings rose by 69%, from 6.437 tonnes to 10.873 tonnes, and value increased by 58% to EUR 69 million. The Netherlands consequently accounted for around two-thirds of EU *Crangon* shrimp landings. By contrast, German landings fell by 41% to 3.704 tonnes, while Denmark recorded a 31% decrease to 1.164 tonnes.

Deep-water rose shrimp (*Parapenaeus longirostris*) ranked second, with 15.425 tonnes worth EUR 108 million, representing decreases of 7% in volume and 3% in value compared with 2023. Spain became the leading landing country, with 6.599 tonnes, up by 15%, while value increased by 24% to EUR 61 million. Italy followed with 5.319 tonnes, down by 11%, and Greece with 2.254 tonnes, down by 30%. Together, Spain, Italy and Greece accounted for more than 90% of EU deep-water rose shrimp landings. The average EU unit value increased by 5%, from 6,68 EUR/kg in 2023 to 7,01 EUR/kg in 2024.

Landings of miscellaneous shrimps increased slightly, by 2%, from 6.985 tonnes in 2023 to 7.132 tonnes in 2024, while their nominal value remained broadly stable at EUR 157 million. Spain and Italy continued to dominate this category, together accounting for almost 90% of total volume. Spanish landings increased by 8% to 3.847 tonnes, with value rising by 12% to EUR 86 million, whereas Italian landings fell by 9% to 2.479 tonnes and value declined by 18% to EUR 55 million.

This category is mainly composed of three high-value species. Striped red shrimp (*Aristeus varidens*) was the most landed in 2024, at 1.799 tonnes, all recorded in Spain. Giant red shrimp (*Aristaeomorpha foliacea*) followed with 1.768 tonnes, of which more than 90% was landed in Italy, with smaller quantities in Malta and Spain. Blue and red shrimp (*Aristeus antennatus*) accounted for a further 1.681 tonnes, mainly landed in Spain, followed by Italy and Portugal. These species command particularly high unit values. In 2024, the average unit value was around 19,52 EUR/kg for striped red shrimp, 24,15 EUR/kg for giant red shrimp and 31,65 EUR/kg for blue and red shrimp, helping explain why miscellaneous shrimps represented a comparatively high share of shrimp landing value despite their limited volume.

Warmwater shrimp landings increased by 11% to 6.143 tonnes, while value rose by 16% to EUR 68 million. Spain remained the main landing country, with 3.679 tonnes, followed by Italy with 1.847 tonnes. Italian landings recorded particularly strong growth, increasing by 26% in volume and 34% in value. The average EU unit value of warmwater shrimp increased by 4% to 11,02 EUR/kg.

[143] The aggregation "Shrimps" includes the species: Shrimp *Crangon* spp.,coldwater shrimps (mainly Nothern prawn "*Pandalus borealis*"), deepwater-rose shrimps ("*Parapenaeus longirostris*"), warmwater shrimps (mainly Camarote prawns "*Penaeus kerathurus*") and miscellaneous shrimps (mainly giant red shrimps "*Aristaeomorpha foliacea*", blue and red shrimps "*Aristeus antennatus*" and striped red shrimps "*Aristeus varidens*").

By contrast, landings of coldwater shrimp other than *Crangon* declined by 29% to 2.329 tonnes, while value decreased by 19% to EUR 17 million. Sweden and Denmark remained the main landing countries, with 1.066 tonnes and 1.005 tonnes, respectively. The decline was mainly attributable to Denmark, where volumes fell by 43%. The average unit value nevertheless increased by 15% to 7,13 EUR/kg.

The broadly stable volume of EU shrimp landings in 2024 masked significant shifts between species and Member States. The strong recovery of *Crangon* shrimp, particularly in the Netherlands, and higher warmwater shrimp landings offset reductions in deep-water rose and coldwater shrimp, while higher average unit values contributed to the 4% increase in total shrimp landing value.

TABLE 19

AVERAGE NOMINAL PRICES OF SHRIMPS IN THE EU COUNTRIES WHERE MOST LANDINGS WERE RECORDED IN 2024 (EUR/KG)

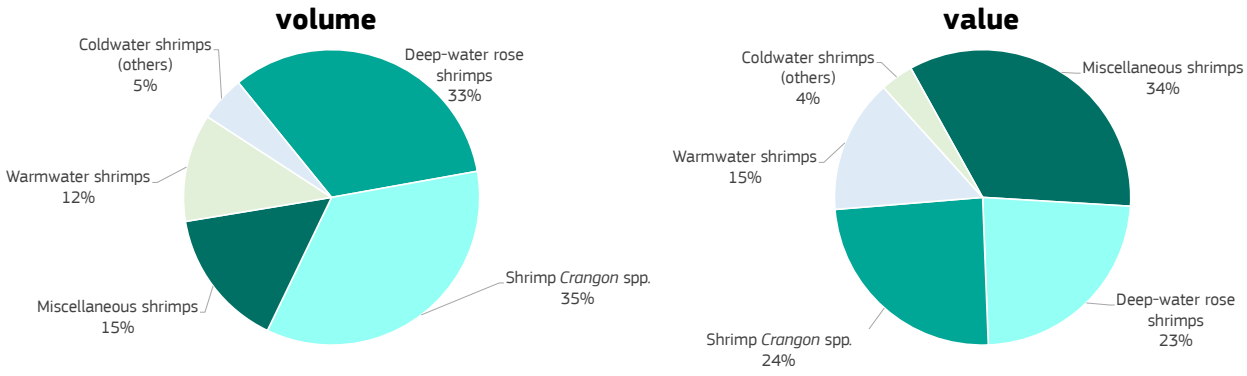
Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data.
More details on the sources used can be found in the Methodological background.

Main commercial species	Member State	2020	2021	2022	2023	2024	2024/2023	2024/2020
Shrimp *Crangon* spp.	Netherlands	3,25	3,79	5,96	6,79	6,37	-6%	+96%
	Germany	3,70	4,06	5,53	6,01	7,17	+19%	+94%
Other coldwater shrimps mainly Northern prawn (*Pandalus borealis*)	Sweden	10,97	11,90	9,41	8,23	8,72	+6%	-21%
	Denmark	4,27	4,51	3,89	4,57	6,00	+31%	+40%
Deep-water rose shrimps (*Parapenaeus longirostris*)	Spain	9,64	10,11	8,59	8,63	9,31	+8%	-3%
	Italy	6,56	5,12	5,90	5,41	4,96	-8%	-24%
	Greece	4,11	4,70	4,73	5,20	3,91	-25%	-5%
Miscellaneous shrimps mainly giant red shrimp (*Aristaeomorpha foliacea*), blue and red shrimp (*Aristeus antennatus*), and striped red shrimp (*Aristeus varidens*)	Spain	20,97	23,61	24,66	21,59	22,43	+4%	+7%
	Italy	27,15	22,32	27,24	24,54	22,28	-9%	-18%
Warmwater shrimps mainly caramote prawn (*Penaeus kerathurus*)	Spain	11,23	15,91	10,09	9,91	9,58	-3%	-15%
	Italy	15,92	17,87	18,50	13,00	13,83	+6%	-13%

CHART 80

LANDINGS OF SHRIMPS IN THE EU IN 2024

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data.
More details on the sources used can be found in the Methodological background.



TUNA AND TUNA-LIKE SPECIES

In 2024, EU landings of tuna and tuna-like species totalled 152.465 tonnes, worth EUR 606 million. Compared with 2023, volume remained virtually stable, while nominal value decreased by 2%. Landings therefore remained at historically low levels: 2024 recorded the second-lowest volume of the 2015-2024 decade, after 2023, and the lowest value of the decade, both in nominal and real terms.

Spain remained by far the main Member State for tuna and tuna-like species landings, accounting for 72% of EU volume and 65% of value. Spanish landings decreased by 6%, from 116.660 tonnes in 2023 to 109.552 tonnes in 2024, while their value fell by 8% to EUR 393 million. This decline was largely offset by increases in Italy and France. Italian landings rose by 34% to 18.823 tonnes, with value increasing by 20% to EUR 113 million, while French landings increased by 29% to 9.725 tonnes, worth EUR 51 million.

Although skipjack tuna was not among the most landed species in the EU in 2024, its development remains noteworthy following the exceptional contraction recorded in the previous year. EU skipjack landings decreased by a further 12%, from 27.286 tonnes in 2023 to 24.107 tonnes in 2024. Spain continued to account for most EU skipjack landings, although its volume fell by 25%, from 21.200 tonnes to 15.908 tonnes, while value decreased by 26% to EUR 26 million. In 2023, the exceptional reduction in Spanish skipjack landings mainly reflected a shift in where catches were landed rather than an equivalent decline in catches, as Spanish tropical tuna vessels operate in distant waters and frequently land frozen catches in third-country ports.

YELLOWFIN TUNA

In 2024, EU landings of yellowfin tuna totalled 37.351 tonnes, worth EUR 117 million. Compared with 2023, volume increased by 17% and nominal value by 18%, marking a partial recovery from the decade-low recorded in the previous year. Nevertheless, both volume and value remained at their second-lowest levels of the decade.

Spain remained by far the main landing country, accounting for 87% of EU yellowfin tuna landings in 2024. Spanish volumes increased by 12%, from 28.975 tonnes in 2023 to 32.404 tonnes, while their value rose more moderately, by 6% to EUR 86 million. As a result, the average unit value decreased by 5%, from 2,79 EUR/kg to 2,65 EUR/kg. Almost all Spanish yellowfin tuna landings were recorded as whole frozen products, which accounted for around 98% of the country's volume.

The increase at EU level was also supported by Italy and Portugal. Italian landings rose by 76% to 2.530 tonnes, while their value more than doubled to EUR 20 million. This corresponded to a particularly high average unit value of 7,93 EUR/kg, compared with 5,64 EUR/kg in 2023. Portuguese landings increased more than threefold, from 424 tonnes to 1.391 tonnes, with value rising to EUR 3,5 million. By contrast, France recorded a 7% decrease in volume to 1.021 tonnes and a 17% decrease in value to EUR 6,9 million. Nevertheless, EU yellowfin tuna landings remained well below the levels recorded before the sharp contraction of 2023.

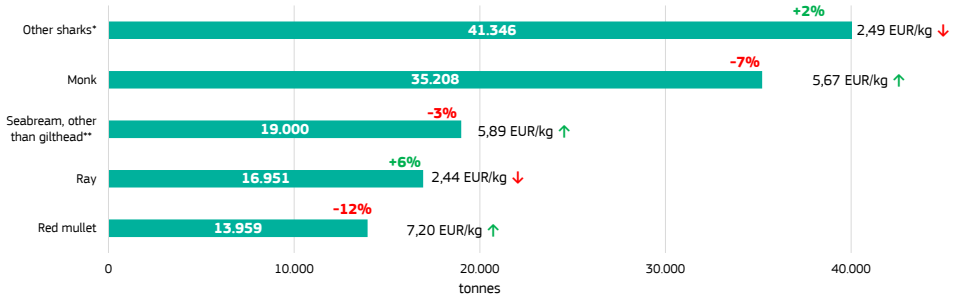
OTHER MARINE FISH

In 2024, EU landings of “other marine fish” totalled 222.732 tonnes, worth EUR 913 million. Compared with 2023, volume increased by 4%, interrupting the downward trend observed since 2021, while nominal value rose slightly, by 1%. Despite the recovery in volume, landings remained at the second-lowest level of the 2015-2024 period, after the decade-low recorded in 2023. In real terms, however, the value of landings fell to its lowest level of the decade. Compared with 2015, landing volumes decreased by 25%, while their value declined by 24% in real terms. Chart 81 provides an overview of the landings of the main commercial species included in this group.

CHART 81

MAIN SPECIES OF "OTHER MARINE FISH": VOLUME LANDED IN 2024, % VARIATIONS 2024/2023 AND NOMINAL PRICES AT LANDING STAGE

Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main). More details on the sources used can be found in the Methodological background.



*The grouping "Other sharks" mainly includes blue shark (68% of the total), small-spotted catshark (12%), smooth-hounds (10%), shortfin mako (4%), nursehound (3%) and tope shark, catsharks nei and smooth-hound (1% each).

**The grouping "Seabream, other than gilthead" mainly includes bogue (30% of the total), black seabream (14%), common pandora (13%), red porgy and white seabream (7% each), axillary seabream (6%), blackspot (5%), saddled seabream and common dentex (3% each), sand steenbras, common two-banded seabream and sargo breams nei (2% each), large-eye dentex, pink dentex and annular seabream (1% each).

MONK

After increasing in 2023 for the first time since 2018, EU landings of monk totalled 35.208 tonnes in 2024, worth EUR 200 million. Compared with 2023, volume decreased by 7%, partially reversing the recovery recorded in the previous year, while nominal value fell by only 2%.

At a more detailed species level, around 32% of the total volume was reported as "monkfishes nei[144]" (*Lophius spp.*), while 24% was reported as European angler (*Lophius piscatorius*) and a further 24% under the broader category "anglerfishes nei[145]" (*Lophiidae*). Blackbellied angler (*Lophius budegassa*) accounted for around 20%, while shortspine African angler (*Lophius vaillanti*) and American angler (*Lophius americanus*) represented less than 1% combined. The species composition also differed markedly between Member States. Almost all French landings were reported as monkfishes nei, while Spanish landings mainly comprised blackbellied angler and European angler. In Ireland, all landings were reported under anglerfishes nei in 2024, whereas Denmark and Italy predominantly reported European angler.

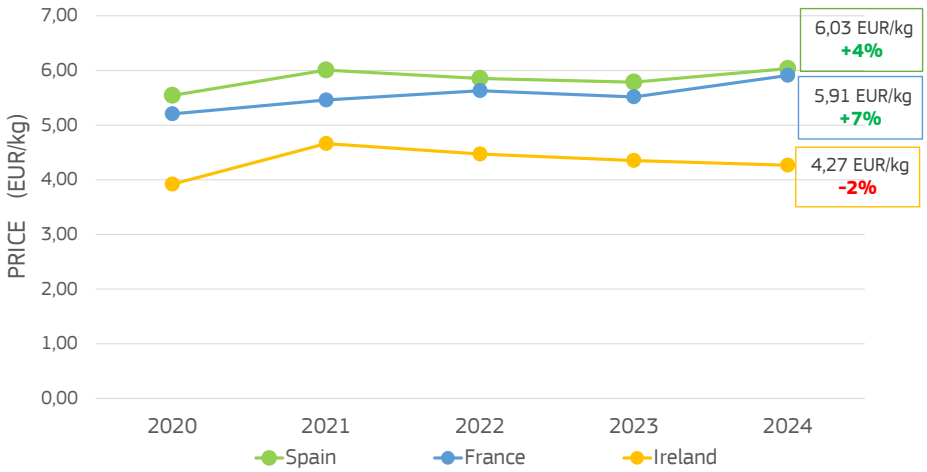
Spain remained the leading Member State, with 11.221 tonnes, accounting for 32% of total EU monk landings. Spanish volumes declined by 6% compared with 2023, while value decreased by only 2% to EUR 68 million. As a result, the average unit value increased by 4%, from 5,78 EUR/kg to 6,03 EUR/kg.

France followed closely, accounting for 30% of EU monk landing volume. French landings decreased by 4% to 10.579 tonnes, but their value increased by 3% to EUR 63 million, supported by a 7% rise in the average unit value to 5,91 EUR/kg. Ireland ranked third, with 7.750 tonnes, representing a 19% decrease compared with 2023. Its landing value fell by 20% to EUR 33 million, while the average unit value remained broadly stable at 4,27 EUR/kg. Together, Spain, France and Ireland accounted for around 84% of total EU monk landings in 2024.

Among the other relevant landing countries, Denmark recorded an 8% increase in volume to 2.482 tonnes and a 13% increase in value to EUR 14 million. Italy also recorded an 8% increase in volume, reaching 941 tonnes, while Portugal showed the strongest relative growth, with landings rising by 52% to 934 tonnes, although it continued to account for only a small share of the EU total.

[144] Not elsewhere included.
[145] *Ibidem*.

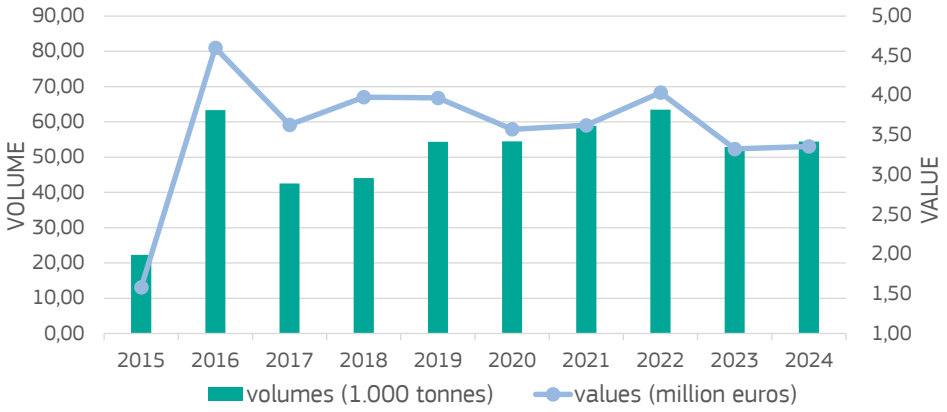
CHART 82
AVERAGE NOMINAL PRICES OF MONK LANDED IN MAIN EU MEMBER STATES (EUR/KG)
Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data. More details on the sources used can be found in the Methodological background.



SEAWEED AND OTHER ALGAE

Seaweeds and other algae accounted for 2% of total EU landings of fishery products in 2024. Their landings totalled 54.431 tonnes, worth EUR 3,83 million, representing increases of 3% in both volume and nominal value compared with 2023. This partly reversed the decline recorded in the previous year.

CHART 83
TOTAL LANDINGS OF SEAWEED AND OTHER ALGAE IN THE EU
Source: EUMOFA, based on EUROSTAT (online data code: fish_ld_main) and national sources' data. More details on the sources used can be found in the Methodological background



France continued to dominate EU landings, accounting for 94% of total volume in 2024. French landings increased by 3%, from 49.808 tonnes in 2023 to 51.290 tonnes, while their value also rose by 3% to EUR 2,12 million. The average unit value remained very low and broadly stable at around 0,04 EUR/kg. At species level, French landings continued to consist almost entirely of tangle (*Laminaria digitata*) and North European kelp (*Laminaria hyperborea*). Tangle remained the main species, with 35.332 tonnes landed in 2024, 3% less than in 2023. By contrast, North European kelp landings increased by 19%, from 13.373 tonnes to 15.958 tonnes. Together, the two species accounted for virtually all French seaweed landings.

Spain ranked second, with 2.960 tonnes landed in 2024, 1% less than in 2023, while value increased by 4% to EUR 1,71 million. Spain therefore accounted for only around 5% of EU volume but 45% of total value, with an average unit value of 0,58 EUR/kg, more than ten times the French average. Spain also landed several higher-value edible species, including wakame (*Undaria pinnatifida*), whose landings remained broadly stable at 155 tonnes, worth EUR 130.000, corresponding to an average unit value of around 0,84 EUR/kg. The substantial difference in average unit values between France and Spain therefore reflects their different species composition and market orientation. French landings are overwhelmingly concentrated in large-volume, low-unit-value kelp species, whereas Spanish landings include a broader range of comparatively higher-value seaweeds.

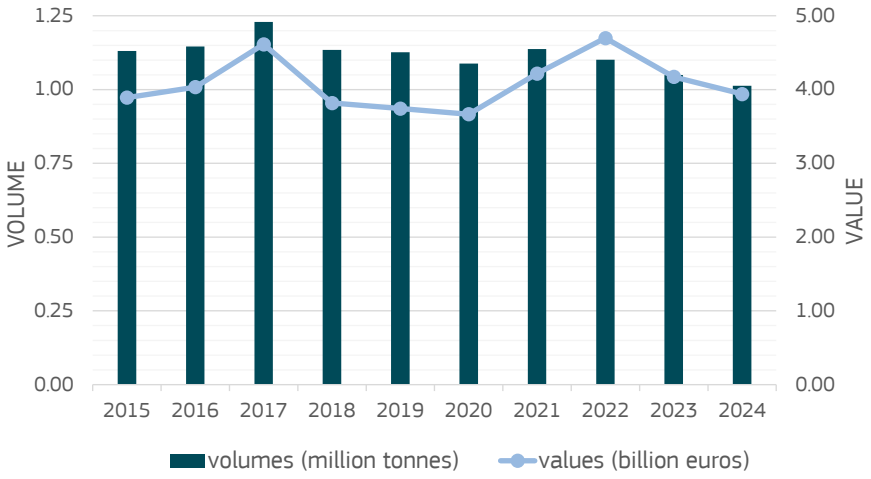
6/ AQUACULTURE

6.1 OVERVIEW

TOTAL EU

In 2024, EU[146, 147] aquaculture production dropped to 1,01 million tonnes, which was 100.000 tonnes below its 10-year average of 1,12 million tonnes (-9%) and almost 30.000 lower than in 2023, when it totalled 1,05 million tonnes (-3%). Production reached a nominal value of EUR 4,66 billion, with a decrease by 2% from 2023 whereas in real terms[148], its value was 3% lower of its 10-year average.

CHART 84
AQUACULTURE PRODUCTION IN THE EU
Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background.
Values are deflated by using the GDP deflator (base=2020).



After the growth registered in 2021, EU aquaculture production has been decreasing and reached a decade low in 2024.

The decreasing trend of the volumes of EU aquaculture production has been continuing since 2022, which came after the significant growth registered from 2020 to 2021 that was tied to recovery from the COVID-19 market downturn. On the other hand, it is worth noting that in value terms, 2022 still showed an increase, although this largely reflected higher production costs and subsequent rises in unit prices, which took place as producers adjusted to inflation in input costs rather than purely volume-driven growth.

Mussel *Mytilus* spp., which accounts for one third of the total volumes produced in the EU, was the main species behind the overall decline observed during the last three years. In value terms, clam and other marine fish species[149] were the main contributors to the decreasing trend registered since 2022.

[146] The main source of data for EU aquaculture production is EUROSTAT. The data cover the aquaculture sector from the point of view of farm-gate production available for human consumption. It is important to note that the production is accounted for at first sale. Thus, production for own consumption is not reported, nor eggs and hatchlings produced for on-growing on the same farm without selling. An exception from the "for human consumption" criteria is being made since the reference year 2016 for aquatic plants, which are included regardless of their final use. Data were integrated using FAO and national sources for several Member States: more details on the integrations made and on data collected for each country can be found in the Methodological background.
[147] In line with Eurostat's guidelines on the production and dissemination of statistical data by Commission services after the UK withdrawal from the EU, since the most recent reference period is year 2024, UK is excluded from the EU aggregations of each year. In addition, EU data include Croatia since 2013, date of the EU's enlargement to this country.
[148] In this report, value and price variations for periods longer than 5 years are analysed by deflating values using the GDP deflator (base=2020); for shorter periods, nominal value and price variations are analysed.
[149] No detail on species is available, as they are registered under "Osteichthyes = Marine fishes nei".

The five-year trends for most important groups of species farmed in the EU are shown in Charts 85 and 86. In 2024, bivalves and other molluscs and aquatic invertebrates made up 44% of the EU's aquaculture production volume, primarily driven by mussel farming in Spain and oyster farming in France. More in detail, Spanish production of mussels covered around 16% of the total EU farming production in 2024, while French oyster production accounted for 8% of the total. As mentioned above, the most significant developments seen in 2024 have been the drop in mussel and clam production. Salmonids and the category "other marine fish", which comprehends gilthead seabream and European seabass, accounted for shares of 20% each of the total farmed volumes. Most of the production of these two groups concerns trout in France, Italy and Denmark (each representing 4% of the total volumes of aquaculture products farmed in the EU), as well as production of seabass and seabream in Greece (10% and 5% each). Freshwater species ranks fourth, making up 10% of the EU's aquaculture production volume in 2024. Carp prevails within this group, thanks to production in Poland, Czechia and Hungary, which accounted for 5% of the total EU farming production.

CHART 85

VOLUMES OF MOST PRODUCED COMMODITY GROUPS FARMED IN THE EU AND % VARIATIONS 2024/2023

Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background.

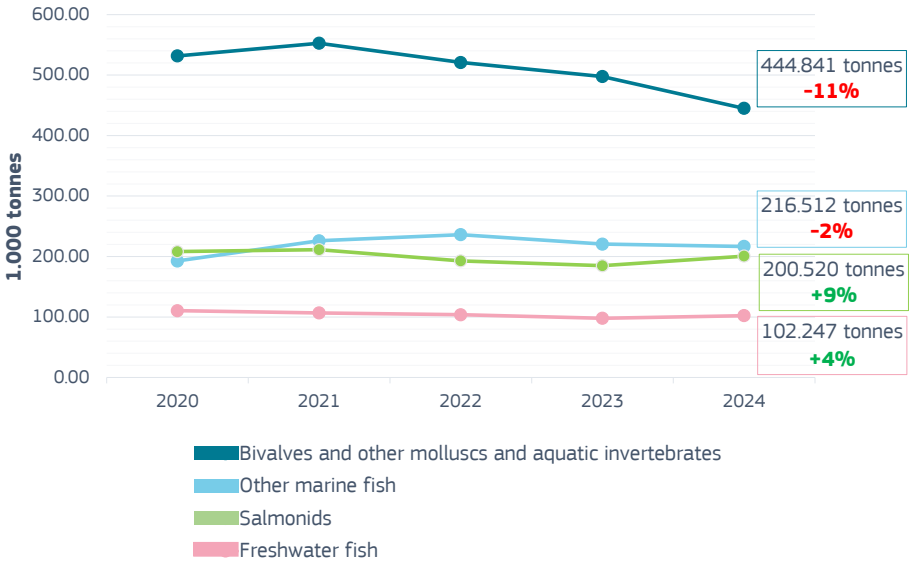
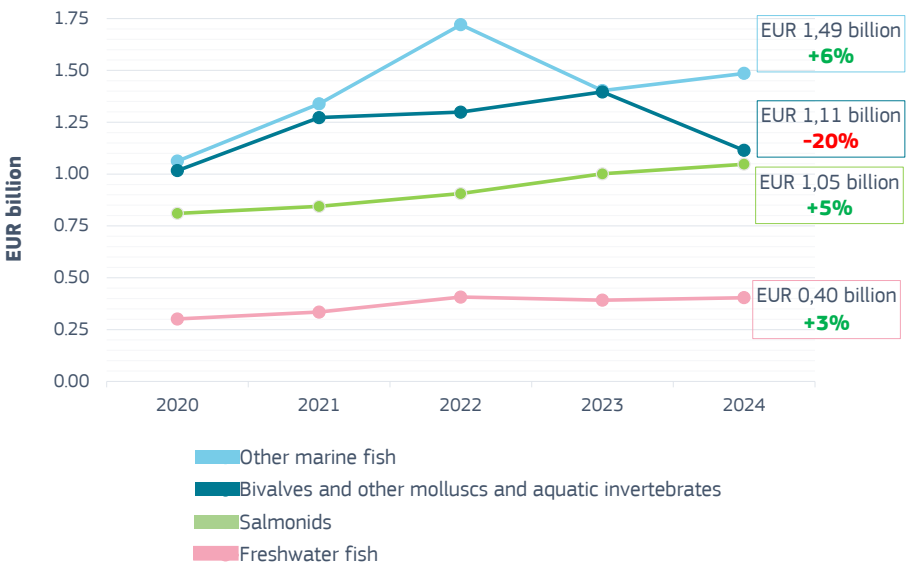


CHART 86

NOMINAL VALUES OF MOST VALUED COMMODITY GROUPS FARMED IN THE EU AND % VARIATIONS 2024/2023

Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background.



The species[150] composition of EU aquaculture production in 2024 remained similar to that in the previous ten years in terms of volumes, although there was a decline in the share represented by mussel production (from close to 40% to one third of the total), to the advantage of trout and gilthead seabream. In value terms, the most notable changes regard trout, whose share on total more than doubled compared to 2015 (from 15% to one third of the total) and European seabass, whose share grew from 11% to 18%. Conversely, the production value of oyster accounted for only 10% of the total in 2024, which was much less than ten years before, when it represented one quarter of the total. The decrease can be observed in volume as well, albeit of minor magnitude (13% vs. 10% share of 2015 and 2024 totals, respectively).

To note, bluefin tuna stands out as the only tuna species among the ten most farmed in the EU. Although still a niche species, it showed sustained growth over the ten-year period under analysis, with its shares in both value and volume rising by 2% thanks to a remarkable growth in Maltese production[151].

CHART 87

EU AQUACULTURE PRODUCTION BY MAIN COMMERCIAL SPECIES (IN VOLUME) 2015 VS. 2024

Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background.

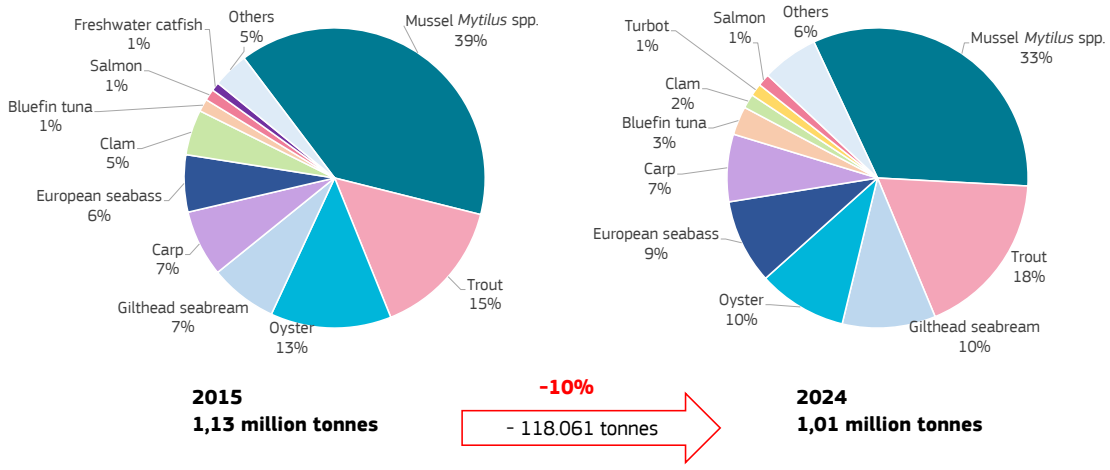
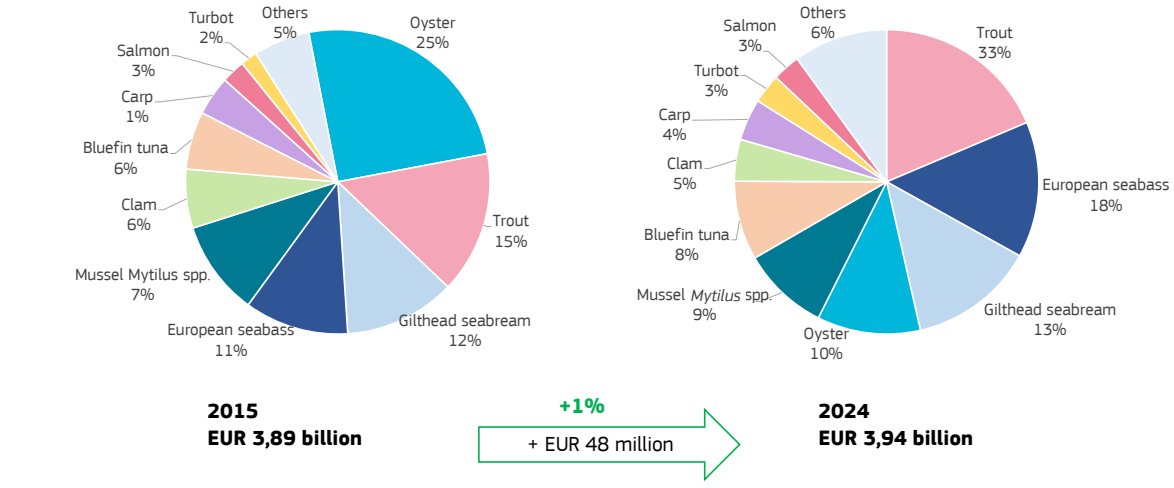


CHART 88

EU AQUACULTURE PRODUCTION BY MAIN COMMERCIAL SPECIES IN REAL VALUE (BASE=2020) 2015 VS. 2024

Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background. Values deflated by using the GDP deflator (base=2020).



[150] The data on EU aquaculture production by individual species can be consulted here: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/dashboards/aquaculture.

[151] The increase in Maltese bluefin tuna production could also be related to illegal and unreported farming of the species in Malta. In 2020, both the EU and the Maltese Fisheries Department has filed a criminal case against tuna farmers previously accused of having bought bluefin tuna quotas in excess of what was granted to them. Source: https://www.europol.europa.eu/media-press/newsroom/news/how-illegal-bluefin-tuna-market-made-over-eur-12-million-year-selling-fish-in-spain

BY MEMBER STATE

Aquaculture in the EU is characterised by production specialisations of a few Member States: Greece for gilthead seabream and European seabass, Spain for mussel and European seabass, France for oyster, mussel and trout, Italy for clam and trout, Netherlands for mussel, Poland for carp, Denmark for trout, Ireland for salmon and Malta for bluefin tuna.

The largest producers, ranked by volume, were Spain, France, Greece, Italy, Poland and Ireland. In value terms, Ireland moves up to the fifth place, thanks to its production of salmon., whereas Poland comes last due to the fact that its aquaculture production is mainly carp, which is less valuable than salmon, especially considering that the whole Irish salmon production is certified organic[152]. Together, these six countries account for more than 70% of the total EU aquaculture production, both in volume and value.

As shown in Tables 20 and 21, the major trends concern Italy and Ireland. In Italy, there were significant drops in volume and value, which is largely attributable to the decline in the production of major species such as trout and clams, as well as of mussels. In Ireland, the increases were linked to the significant growth in the production of salmon.

TABLE 20
VOLUMES OF AQUACULTURE PRODUCTION IN THE EU MAIN PRODUCING COUNTRIES (1.000 TONNES)
Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background. Possible discrepancies in % changes are due to rounding.

Member State	2020	2021	2022	2023	2024	2024/2023
Spain	277	277	273	243	246	+1%
France	191	193	184	187	186	-0,3%
Greece	131	144	141	141	128	-9%
Italy	123	146	130	130	98	-24%
Poland	46	45	42	41	44	+7%
Ireland	35	39	40	33	36	+9%

TABLE 21
NOMINAL VALUES OF AQUACULTURE PRODUCTION IN THE EU MAIN PRODUCING COUNTRIES (MILLION EUROS)
Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background. Possible discrepancies in % changes are due to rounding.

Member State	2020	2021	2022	2023	2024	2024/2023
France	723	781	792	906	902	-0,4%
Spain	582	649	809	802	856	+7%
Greece	552	641	852	684	693	+1%
Italy	392	547	553	618	385	-38%
Ireland	163	164	159	151	203	+34%
Poland	123	160	186	186	182	-2%

As shown in Charts 89 and 90, the most notable developments between 2023 and 2024 in other EU countries concern Denmark and the Netherlands. In Denmark, production grew by 16% in volume corresponding to a boost by 32% in value, marking a recovery which came after drops of 26% in both volume and value from 2022 to 2023. This trend was driven by production of trout, the main species farmed in the

[152] Source: https://www.bordbia.ie/organic/organic-irish-seafood/

country. Dutch production decreased by 20% in volume terms, mainly due to mussels. It is not possible to determine the evolution of the total value of the Dutch production because production figures for eel[153], which is a key high-value species in the Netherlands, were not publicly disclosed for 2023 for confidentiality reasons (small number of producers). The production value for other major species actually dropped, including mussels (-32%) and "other marine fish[154]" (-44%).

CHART 89

VOLUMES OF AQUACULTURE PRODUCTION IN THE MAIN EU PRODUCING COUNTRIES IN 2024 AND % VARIATION 2024/2023

Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background.

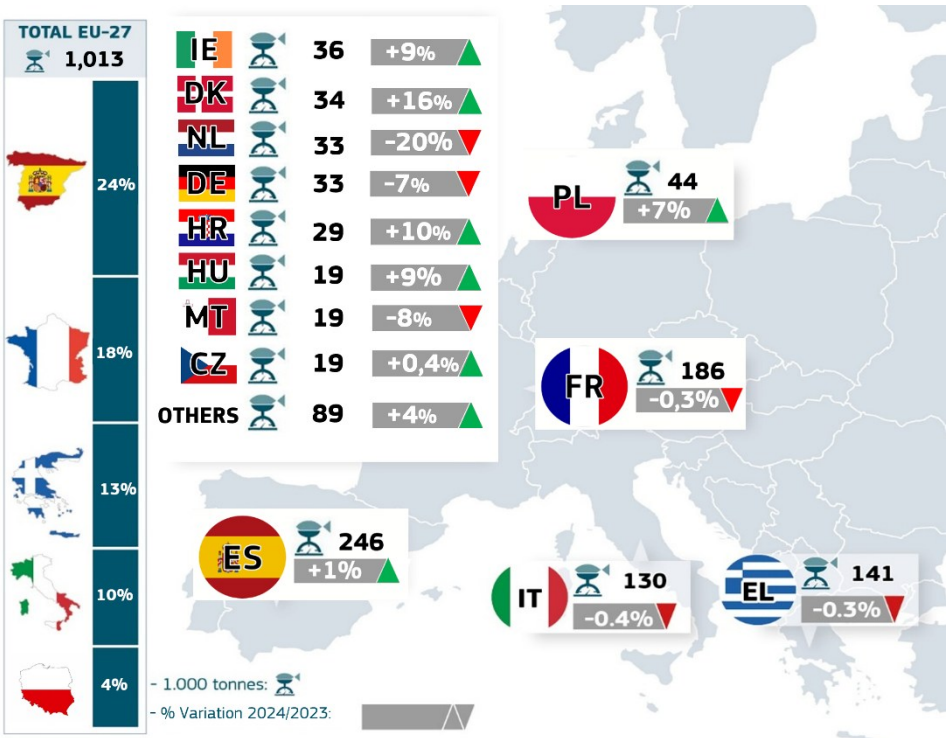
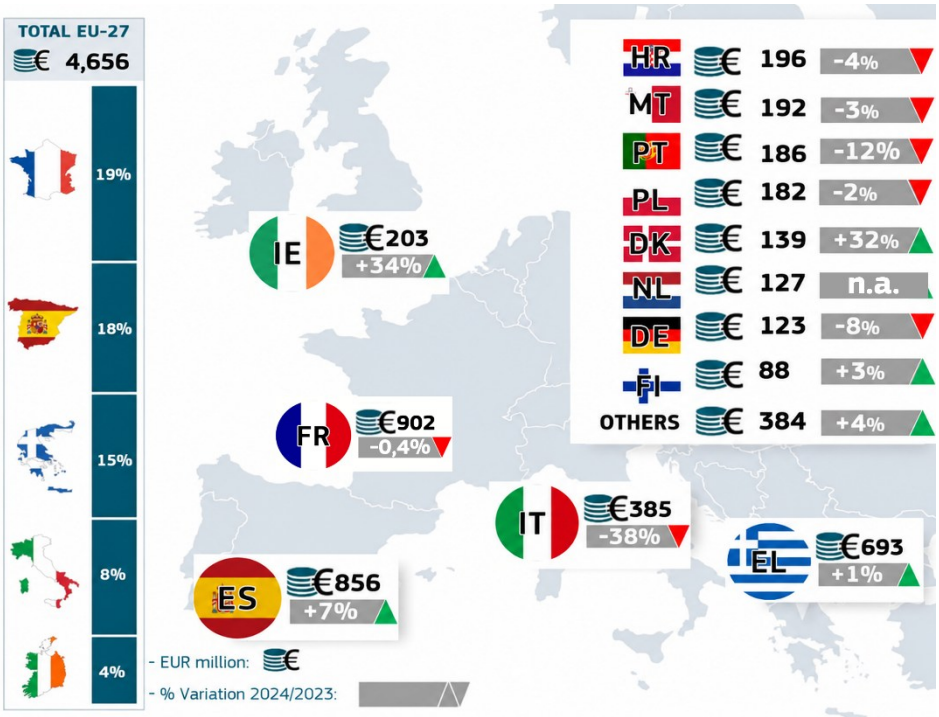


CHART 90

NOMINAL VALUES OF AQUACULTURE PRODUCTION IN THE MAIN EU PRODUCING COUNTRIES IN 2024 AND % VARIATION 2024/2023

Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background.

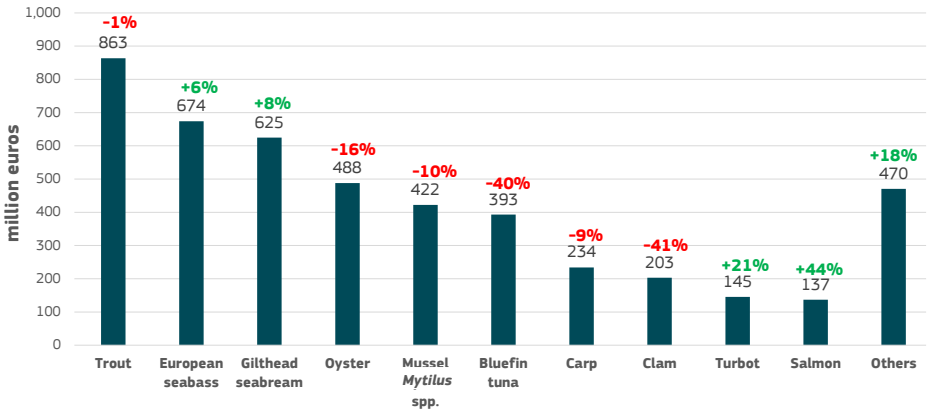


[153] In 2024, with production close to 33.000 tonnes worth EUR 27 million, eel accounted for 6% of total aquaculture production in the Netherlands, corresponding to a share of 21% in value terms.
[154] Available data refer to the category Diadromous fishes nei, i.e. a general aggregation of species that migrate between the sea and fresh water.

6.2 ANALYSIS BY MAIN SPECIES

This section provides a detailed analysis of the main species farmed in the EU, broken down by commodity group.

CHART 91
NOMINAL VALUES OF MAIN SPECIES FARMED IN THE EU IN 2024 AND % VARIATION 2024/2023
Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background



BIVALVES AND OTHER MOLLUSCS AND AQUATIC INVERTEBRATES

In 2024, EU Member States farmed 444.841 tonnes of bivalves and other molluscs and aquatic invertebrates, 11% less than in 2023 and marking a third consecutive year of decline. This was the lowest level of the decade. The drop in terms of value was even higher, as it decreased by 20% to reach EUR 1,11 billion.
Oysters, mussels and clams accounted for more than 99% of the total aquaculture production of this category, in volume and in value.

MUSSEL

In 2024, with 332.318 tonnes, mussel represented one third of the total volume of EU aquaculture production, for a total value of EUR 365 million. As mentioned in the preamble of this chapter, this species was behind the overall decline of EU aquaculture production during the last three years.
Except for a slight 5%-increase from 2020 to 2021, EU mussel production has been on a downward trend since 2018. During the same period, the unit price at EU level has steadily increased, growing by 39% from 0,93 EUR/kg in 2019 to 1,29 EUR/kg in 2023, after which it reached 1,27 EUR/kg in 2024.
Spain is by far the major EU producer, representing half of total 2024 production of mussel, followed by France (15%) and Italy (13%). In these three countries, mussel production mainly takes place through off-bottom raft technique. In Spain, most of the production is destined for fresh consumption (around 70%), and the remaining 30% goes to the processing industry. Of this, the canning sector is the most significant[155], followed by freezing and primary cooking and chilled and prepared meals.
In Italy and France, mussels are mainly consumed fresh. France mostly produces the more valuable blue mussel (*Mytilus edulis*), which is mainly destined for fresh markets. Spanish production registered a recovery in 2024, amounting to 164.559 tonnes, which was a 6%-increase from 2023. Despite this visible recovery, output remains significantly low compared to historical levels, as production averaged 207.000 tonnes over the ten-year period under analysis. In value, production reached EUR 123 million, with a 12%-increase from the previous year. The decline in EU mussel production from 2023 to 2024 was indeed mainly caused by the drops recorded by all other major producers. Several factors could cause this decline, including diseases, lack of mussel seed (spat), rising operational costs and extreme weather conditions experienced in the last years[156].

[155] The volumes of live farmed mussels used are approximately 20.000 tonnes per year.
[156] https://aac-europe.org/wp-content/uploads/2025/10/16-AAC-Recommendation-on-the-Concerning-Impact-of-Climate-Change-on-EU-Mussel-Production.pdf

CLAM

In 2024, EU production of farmed clams dropped dramatically to just above 15.500 tonnes. This was 56% below the average production recorded during the decade under analysis, and represented a 49% decrease from 2023. In value, production totalled EUR 203 million, down by 41% from the previous year. In real terms, this was 33% lower than the average value over the ten-year period.

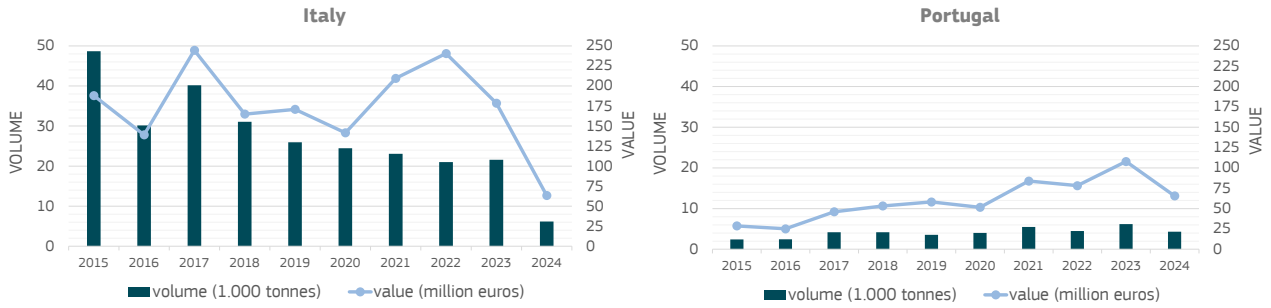
The downward trend had started in 2018, mainly driven by Italy, by far the largest producer of clam in the EU, in particular of Japanese carpet shell. From 2018 to 2022, production suffered a structural decline, after which the invasive Atlantic blue crab (*Callinectes sapidus*) dramatically worsened the situation, as it preys on both juvenile and adult clams[157]. During 2023, it caused extensive mortality in the Po Delta and northern Adriatic lagoons, destroying much of the seed that would have sustained/fed the 2024 harvest. As a result, production in 2024 collapsed to 6.175 tonnes, compared with an output of over 20.000 tonnes only a few years earlier.

Production in Portugal dropped as well. The country is second in the EU for farmed production of clams, but unlike Italy, is specialised in the production of the more valuable grooved carpet shell. This production is concentrated in coastal lagoons and estuaries such as the Ria Formosa and the Sado estuary. The decrease that took place between 2023 and 2024 was likely attributable to deteriorations in water quality and pollution events, as a recent research highlights that Portuguese clam farming areas are among the ecosystems most exposed to climate change[158].

CHARTS 92 AND 93

FARMED PRODUCTION OF CLAM IN MAIN EU PRODUCING COUNTRIES

Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background. Values are deflated by using the GDP deflator (base=2020).



OYSTER

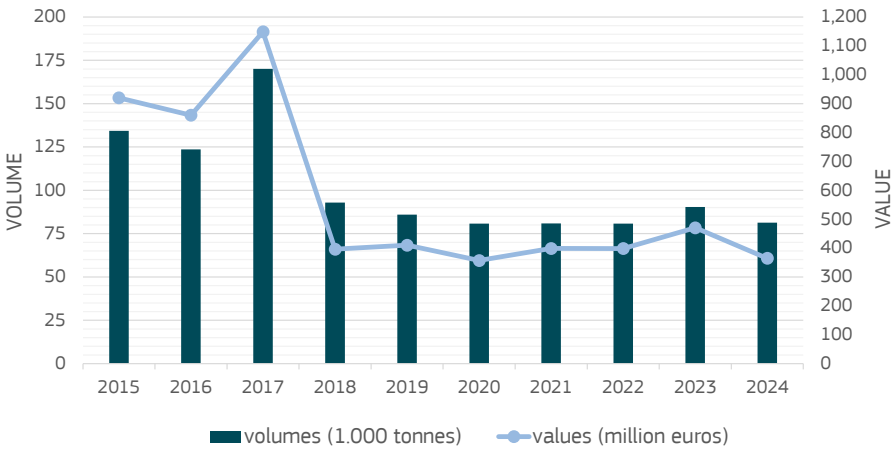
As mentioned above, the value of EU production of oyster shrank from 2015 to 2024, with a 56% drop in real terms against a 34% decrease in volume. France, which accounts for more than 80% of the overall output at EU level, was the main contributor to this decline. This downward trend was the result of several simultaneous shocks rather than one structural collapse of the industry. Repeated diseases causing mortality events have been the single biggest long-term factor. Since around 2008, France has experienced recurring mass mortalities of juvenile Pacific cupped oysters (Crassostrea gigas), i.e. the main oyster species farmed in the country. Also, the collapse was linked with the outbreak of norovirus (gastroenteritis virus), which led to temporary closures and several sales bans. As shown in Chart 94, there was a sharp fall from 2017 to 2018, due to several biological factors: continued high mortality of juvenile oysters due to herpesvirus and associated Vibrio infections; the exceptionally

[157] A case study on invasive blue crab is included in Monthly Highlights N. 5 – 2026 available at https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/monthly-highlights/eumofa-monthly-highlights-no-5-2026

[158] https://researchportal.ulisboa.pt/en/publications/from-past-to-future-assessing-ria-formosas-suitability-for-groove.

warm summer of 2018, which increased thermal stress; local mortality events in important production areas[159]. In more recent years, several important production areas (including Arcachon) were temporarily closed, harvesting was suspended, media coverage damaged consumer confidence and consequently, many consumers avoided raw oysters during the holiday season[160].

CHART 94
FARMED PRODUCTION OF OYSTER IN FRANCE
Source: EUMOFA elaboration of EUROSTAT data (online data code: fish_aq2a). Values are deflated by using the GDP deflator (base=2020).



Smaller export-oriented oyster industries have emerged in Ireland and, to a lesser extent, in Portugal and the Netherlands. In 2024, Irish production totalled 7.792 tonnes worth EUR 50 million, which represented a decrease by 6% in volume, but a 17%-growth in value terms compared with 2023. Production in Portugal achieved a decade-peak at 3.345 tonnes (+41% from 2023) and EUR 13 million (+33%). In the Netherlands, production totalled 2.698 tonnes (+65%) and EUR 7 million (+52%).

SALMONIDS

Salmonids accounted for more than one fifth of the total EU farmed production in 2024, both in terms of volume and value. More in detail, trout is the highest-valued species farmed in the EU, accounting for one third of the overall value, against a 18% share of the total volumes.

TROUT

In 2024, the EU produced 181.321 tonnes of trout – mostly rainbow trout (*Oncorhynchus mykiss*) – with a total value of EUR 863 million. Compared with the previous year, there was a 6%-increase in volume, whereas the value was just 1% below the decade-peak that was achieved in 2023.

From 2021 to 2023, the contrasting trend of shrinking volumes against rising values has been driven by the steep increase in production costs, which led producers to adjust prices upward, but also by market conditions. In particular, the 2023 decline in European Atlantic salmon supply and the resulting record prices exerted upward pressure on large rainbow trout, which is used as a substitute for salmon in the processing and smoking industry.

In 2024, the increase in the volumes of EU trout production was driven by France and Denmark, which offset the decrease registered in Italy. Indeed, France remains one of Europe's leading producers of rainbow trout, with an established network of freshwater raceways and hatcheries. To note, for the second year in a row, in 2024, the value of total French aquaculture production was the highest in the EU, thanks to the growing production of trout and clams, which compensates the drop in value on the oyster market. In Denmark the sector has a well-developed mix of land-based

[159] For example, in the Étang de Thau (Mediterranean coast), the 2018 heatwave caused oxygen depletion ("malaïgue"), leading to average oyster losses exceeding 50% in some farming zones.
[160] https://www.telegraph.co.uk/world-news/2023/12/28/france-bans-arcachon-oysters-after-food-poisoning-outbreak/

recirculating aquaculture systems (RAS) and sea-cage production, making it relatively resilient to environmental and economic challenges.

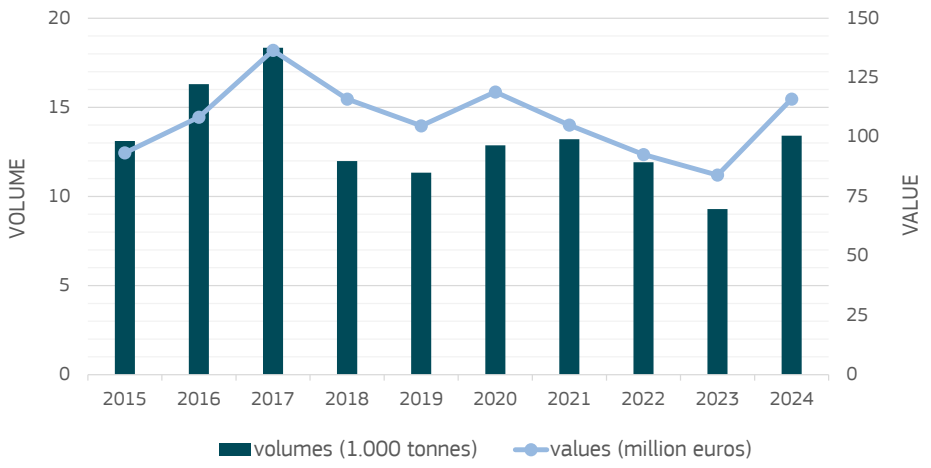
TABLE 22
FARMED PRODUCTION OF TROUT IN MAIN EU PRODUCING COUNTRIES
Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the Methodological background.

	2024			% variations 2024/2023		
Member State	Volume (tonnes)	Price (EUR/kg)	Value (million euros)	Volume	Price	Value
France	35.801	5,20	186	+29%	+2%	+32%
Italy	31.308	3,85	121	-11%	-34%	-42%
Denmark	27.337	4,65	127	+18%	+7%	+26%

SALMON

Salmon production in the EU takes place almost entirely in Ireland, where the whole production is certified organic[161]. As shown in Chart 95, there was a sharp spike in production during 2024. The primary factors driving this surge include the challenging environmental and biological pressures suffered in 2023, which resulted in a significantly depressed harvest, followed by a return to normal operational conditions in 2024, crossing the 13.000 tonnes-mark. This represented Ireland's highest overall salmon production since 2017, proving that the underlying farm infrastructure and biomass had strongly recovered. This volume spike, paired with premium pricing and strong international demand, pushed the overall value of Irish salmon production up by 44% from 2023, hitting a decade peak at EUR 137 million.

CHART 95
FARMED PRODUCTION OF SALMON IN IRELAND
Source: EUMOFA elaboration of EUROSTAT data (online data code: fish_aq2a). Values are deflated by using the GDP deflator (base=2020).



FRESWATER FISH

Freshwater species farmed in the EU largely comprise carps and eels.

CARP

EU production of carp totalled 73.595 tonnes in 2024, registering an increase by 2% in volume compared with 2023. In value terms, a 9%-decrease was recorded, bringing it to EUR 234 million.

70% of the production of carp in the EU takes place in three Central European countries, namely Poland (21.902 tonnes worth EUR 76 million farmed in 2024), Czechia (16.922 tonnes worth EUR 43 million) and Hungary (13.508 tonnes worth EUR 43 million). All of them registered increases in the volumes produced in comparison with 2023, especially Poland and Hungary, that saw increases by 10% and 7%,

[161] It should be considered that a minor portion of total salmon production in Ireland is not certified organic, even if the fish are reared under conditions that meet or exceed organic standards.

respectively. The increase in Czechia was by 1% in both volume and value, whereas Poland registered a value-drop by 13%, and the value of Hungarian production decreased by 2%.

Romania, Germany, Bulgaria, Croatia and Lithuania account for another 27% of the total volumes of EU production of carp. In these countries, the most notable changes from 2023 to 2024 were recorded in Romania (-12% in volume and -14% in value) and Bulgaria (+15% in volume and -1% in value).

The situation in France is also worth being mentioned. The country has covered 3% of the total volumes of EU carp production in the nine years before 2024, when this share dropped to 0,1%. More in detail, production from 2023 to 2024 decreased by more than 90% in both volume and value, reaching just above 50 tonnes worth 671.000 EUR. This was linked to structural, economic, and environmental pressures hitting France's extensive pond fish farming (*pisciculture d'étang*)[162].

EEL

EU production of eel in 2024 amounted to 4.651 tonnes and EUR 58 million. The Netherlands, which is by far the major producing country, covered 44% of the total volumes and a 46%-share in value, with production amounting to 2.050 tonnes and EUR 27 million. It was followed by Germany that had shares by 26% and 29%, respectively. German production of eel achieved a five-year peak at 1.191 tonnes thanks to a 2%-increase from the previous year. In value, it totalled EUR 17 million, which was also a 2%-increase from 2023. In Denmark, production totalled 89 tonnes for a value of EUR 716 million.

As mentioned above, the 2023 data on EU eel production are partial, because figures for the Netherlands may not be disclosed due to confidentiality. This means that the mere comparison of 2024 and 2023 data at EU and Dutch levels would give a distorted picture of the sector's real performance.

OTHER MARINE FISH

Two species of this commodity group, namely gilthead seabream and European seabass, account for significant portions of EU aquaculture production[163]. In 2024, the latter covered 18% of the total EU value, corresponding to a 6%-share in volume, whereas gilthead seabream covered shares of 13% in value and 10% in volume. They are usually farmed in the same sites in the Mediterranean, prevalently in Greece, Italy and Spain.

GILTHEAD SEABREAM

In 2024, the EU production of gilthead seabream continued the downward trend initiated during the previous year, when it decreased by 2% from the decade-high of 107.742 tonnes that was recorded in 2022. The decrease from 2023 to 2024 was of the same magnitude, bringing to a total production of 101.553 tonnes (-2%) – an output still above the 100.000 tonnes-threshold for the third year in a row. The overall production value totalled EUR 625 million, which represented a 8%-increase from the previous year.

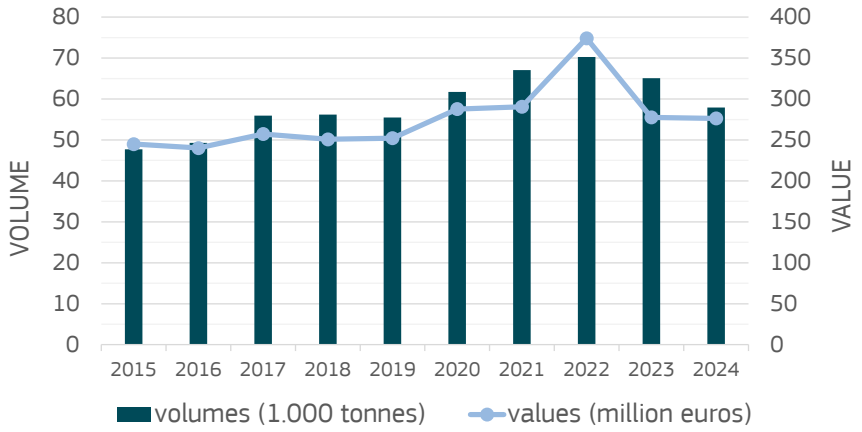
The main producer is Greece, covering 57% of the total volumes of EU production of this species in 2024, and a 52%-share in value terms. Production in Greece totalled 57.910 tonnes and EUR 327 million, dropping by 11% in volume against a 3%-increase in value terms. The primary reason behind the volume contraction was most likely a peak in operational costs, as raw materials for fish feed rose due to global supply chain pressures. Because it takes roughly 14 to 18 months for a gilthead seabream to reach commercial market size, the tightening financial environment in late 2022 and 2023 forced many major Greek aquaculture companies to scale back their initial juvenile stocking efforts to save on upfront feed costs. That reduction in biomass directly materialized in a lower production in 2024. On the global stage, Türkiye is the

[162] Source: https://www.info.gouv.fr/upload/media/content/0001/09/19885ad84978486e59b2daed03ae2f113e29954c.pdf

[163] Seabass production consists almost exclusively of the species *Dicentrarchus labrax*, the rest including other marine fish of the Moronidae family. As regards seabream, the species *Sparus aurata* prevails, the rest mostly including the species *Pagrus pagrus*.

main competitor for Greek producers of gilthead seabream. Throughout 2023 and 2024, Turkish aquaculture rapidly expanded its production volume. Paired with the massive devaluation of the Turkish Lira, Turkish exporters were able to flood non-EU and some EU markets with highly competitive, lower-priced seabream. This pricing squeeze may have forced Greek farms to prioritize higher-value, larger-sized fish rather than sheer volume[164].

CHART 96
FARMED PRODUCTION OF GILTHEAD SEABREAM IN GREECE
Source: EUMOFA elaboration of EUROSTAT (online data code: fish_aq2a) and FAO data. Values are deflated by using the GDP deflator (base=2020).



Spain, Croatia and Italy accounted respectively for 11%, 10% and 8% of the total production volume , corresponding to 11%, 12% and 11% of the total value. Of these countries, only Spain recorded decreased production from 2023 to 2024, dropping by 18% to reach 10.819 tonnes. Conversely, Croatia and Italy achieved decade peaks of 10.356 tonnes (+16%) and 8.207 tonnes (+10%), respectively.
In value terms, all registered increases: production in 2024 was worth EUR 70 million in Spain (+2% from 2023), EUR 75 million in Croatia (+18%) and EUR 66 million in Italy (+13%). To note, the significant value growths led to decade-peaks in real terms in Croatia and Italy, where local producers were favoured by the drop in Greek supplies. Further, it is worth mentioning that Croatia's aquaculture sector has steadily modernized its marine cages along the Adriatic, earning a strong reputation for high-quality, sustainably farmed fish[165].

EUROPEAN SEABASS

After the decreases recorded in 2022 and 2023, the EU production of European seabass recovered in 2024, totalling 92.256 tonnes and EUR 674 million, both up by 5% from the previous year. Greece and Spain dominate EU production with respective shares on total volumes of 52% and 28%, corresponding to value-shares of 45% and 33%.
As shown in Charts 97 and 98, Greek production peaked in 2021 due to several events: when the COVID-19 pandemic broke out in 2020, the sudden, sweeping closure of Europe's HORECA sector triggered a sharp drop in demand, and Greek farmers were forced to keep millions of market-ready seabass in the water, continuing to feed them through 2020, leading to a massive increase in the sold production in 2021. Moreover, in early 2020, the storm Gloria struck Spain's Mediterranean coast, causing severe damage to aquaculture infrastructure and leading to significant fish escapes. Consequently, Spanish distributors increasingly relied on Greek suppliers to meet domestic demand throughout 2020 and 2021,[166]. Immediately following this peak, the market inverted. Imports from Türkiye depressed prices and at the same time, skyrocketing production costs forced the Hellenic Aquaculture Producers Organisation

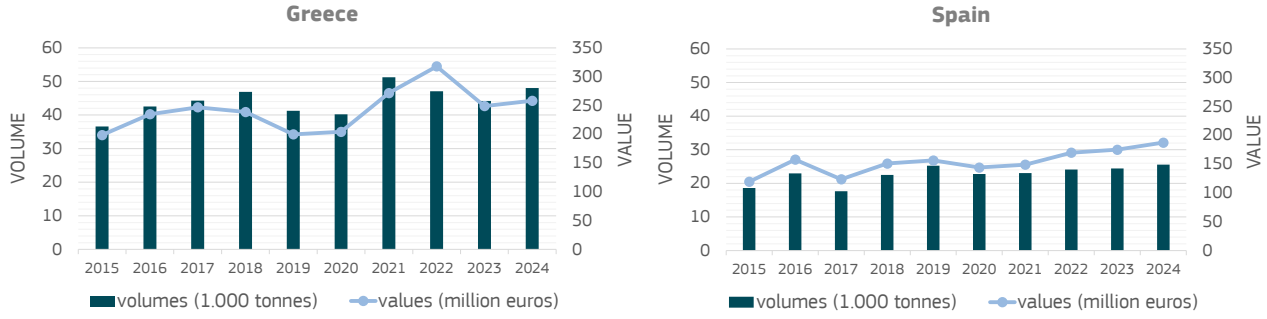
[164] Source: https://openknowledge.fao.org/server/api/core/bitstreams/dcb82e83-7ed9-471f-b511-31a8493905c7/content
[165] https://www.mispeces.com/en/news/The-cultivation-of-gilthead-seabream-in-Croatia-relies-on-innovation-to-overcome-the-winter-slowdown/
[166] https://fishfromgreece.com/wp-content/uploads/2022/01/HAPO_AR21_ENG-PRESS.pdf#:~:text=In%20March%2C%20a%20gradual%20decline%20in%20turnover,or%20new%20orders%20in%20the%20coming%20months.

(HAPO) and Greek farmers to pivot toward a "value over volume" strategy, intentionally reducing juvenile stocking densities to survive the economic squeeze.

CHARTS 97 AND 98

FARMED PRODUCTION OF EUROPEAN SEABASS IN MAIN EU PRODUCING COUNTRIES

Source: EUMOFA elaboration of Eurostat (online data code: fish_aq2a) and FAO data. Details on the sources used can be found in the methodological background. Values are deflated by using the GDP deflator (base=2020).



TUNA AND TUNA-LIKE SPECIES

Bluefin tuna is the only tuna species farmed in the EU. In 2024, production amounted to 31.171 tonnes worth EUR 392 million, both down by 5% from 2023.

BLUEFIN TUNA

Nonetheless, production showed sustained growth over the ten-year period under analysis, with production mainly taking place in Malta, Spain and Croatia, as well as in Portugal, although marginally. The vast majority of this production is capture-based aquaculture (tuna fattening): wild, live tuna are caught using purse seine nets, transferred to massive offshore cages, and fed extensively for months to boost their fat content[167].

On the long term, production has been growing during the decade under analysis in all these countries. However, the two major producers, Malta and Spain, saw decreases by 11% and 9%, respectively, from 2023 to 2024, when production was 16.603 tonnes in Malta and 9.741 tonnes in Spain. In value terms, the first saw a 5%-decrease and reached EUR 179 million, whereas in Spain, the 2024 production totalled EUR 173 million (+1%). The 33% volume spike in Croatia offset the declines observed in the two major farming nations. However, the Croatian production of bluefin tuna, totalling 4.365 tonnes and EUR 35 million, was worth 30% less than in 2023. In Portugal, production boosted from less than 110 tonnes in 2023 to more than 460 tonnes in 2024, accompanied by a value-growth from EUR 1 million to EUR 5 million.

PRODUCTION OF FISH EGGS FOR HUMAN CONSUMPTION

During the 2015-2024 decade, the volumes of EU production of fish eggs for human consumption has increased by 22%, registering a value-boost by 82% in real terms. Total volumes farmed in 2024 reached 1.367 tonnes, which represented a 5%-increase from 2023. The total value of EU production in 2024 reached EUR 117 million, which was 4% above the 2023-value[168].

Almost half of the total production in 2024 took place in Denmark, and another 25% in Finland. Italy and France followed, with relative shares of total EU production volumes of 9% and 8%, respectively. Spain and Poland represented 5% and 4% of the total, respectively, while Bulgaria, Greece and Germany account for the remaining volumes. The species farmed heavily influence the value of production. Indeed, the composition in value terms gives a different picture. In value terms, Italy led the EU

[167] Because of the unique nature of the Adriatic Sea, according to the ICCAT recommendation 25-04, Croatia is permitted to catch tuna having a minimum weight of 6,4 kg or, in the alternative, having a minimum fork length of 66 cm. Since they start with such small fish, Croatian operations do not just "fat" fish for a few months, but they raise these juveniles in cages until they reach commercial size.
[168] Source: Eurostat (online data code: fish_aq2b).

with a 35% share, followed by France (27%), Denmark (16%), Poland (14%), and Finland (6%), while the remaining four Member States combined represented just 2%. Production in Denmark and Spain only includes eggs of rainbow trout, that represent almost the entire production in Finland as well. In Italy and France, production is equally split between rainbow trout and sturgeon. In Poland, production of sturgeon prevails. In Bulgaria, carp represent more than two thirds of the production, the rest being constituted of sturgeon. Greek production only includes fathead grey mullet, and German production mainly includes brook trout, as well as beluga and other salmonids[169].

As shown in Table 23, the growth at EU level registered from 2023 to 2024 was driven by Danish and, to a lesser extent, Spanish production (+35%), which offset the drop seen in Finland (-15%).

TABLE 23
EU PRODUCTION OF FISH EGGS FOR HUMAN CONSUMPTION
Source: EUROSTAT (online data code: fish_aq2b).

	2024		% variations 2024/2023	
Member State	Volume (tonnes)	Value (1.000 EUR)	Volume	Value
Denmark	665	18.716	+16%	+45%
Finland	341	6,668	-15%	-10%
Italy	120	40.396	+2%	+1%
France	107	30.935	-3%	-2%
Spain	73	1.623	+35%	-32%
Poland	50	16.006	+5%	+4%
Bulgaria	8	2.057	+502%	+90%
Germany	2	198	-67%	-88%
Greece	2	101	n.a.[170]	

[169] No detail on species is available, as they are registered under "Salmonids nei".
[170] In Eurostat statistics, Greek production in 2023 was zero. However, according to ELSTAT, it totalled 3,2 tonnes worth a value of EUR 149.000. Source: https://www.statistics.gr/documents/20181/da10e368-8a70-d56f-4405-3e9d47ca176e.

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