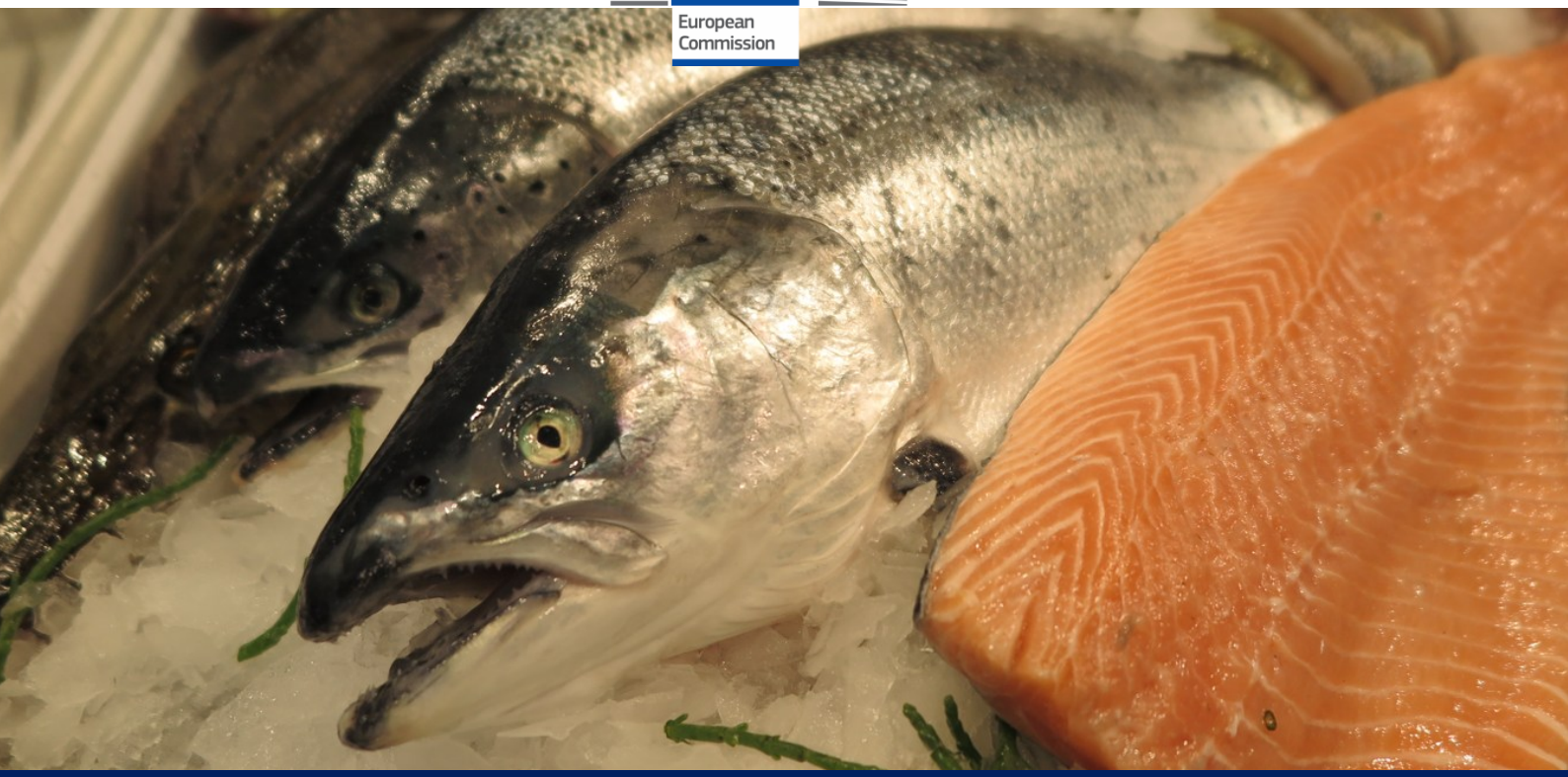
European Commission



Monthly Highlights

No. 8/2026

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

fishery-aquaculture-market-observatory.ec.europa.eu/

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1. GLOBAL HIGHLIGHTS

EU/Aquaculture Policy: On 30 June 2026, Commissioner Costas Kadis hosted an Implementation Dialogue on EU aquaculture policy with representatives from the sector, retailers, NGOs, civil society and Member States. The discussion focused on how to unlock the potential of sustainable EU aquaculture, which currently accounts for 0,72% of global production by volume and 1,29% by value. The dialogue also addressed policy implementation, sector bottlenecks, best practices, and input to the CFP evaluation and the Vision 2040 for Fisheries and Aquaculture.[1]

Source: Eurofish International Organisation

EU/Outermost Regions: On 6 July 2026, the European Commission highlighted how EU funding had supported the revival of canned fish production on Terceira Island in the Azores. Through support from the Fisheries Local Action Group Grater, TZT Flying Fish Azores has secured funding for canning equipment and marketing, enabling the Casa do Portinho brand to add value to locally landed species such as horse mackerel, Atlantic bonito, limpets, parrotfish and barracuda. The shift from fresh fish exports to artisanal canned products has helped overcome logistics challenges linked to island remoteness, doubled company revenues and opened markets in France, Spain, Switzerland and the United States.[2]

FAO/IUU Fishing: On 21 July 2026, Argentina approved its accession to FAO's Port State Measures Agreement (PSMA), strengthening port controls against illegal, unreported and unregulated fishing in the South Atlantic. The agreement aims to prevent vessels involved in IUU fishing from accessing ports and landing catches, supported by inspections, data sharing and cooperation among parties. Argentina's accession aligns it with neighbouring countries such as Chile and Uruguay and is expected to reinforce regional coordination in a highly active fishing area targeting species such as squid, hake and shrimp.[3]

Global/Aquaculture Leadership: On 24 July 2026, Dr Foluke Omotayo Areola officially assumed office as President of the World Aquaculture Society, becoming the first African and first African woman to lead the organisation. Her mandate focuses on strengthening global collaboration, advancing sustainable aquaculture, and increasing Africa's role in international aquaculture development and decision-making.[4]

EU/Aquaculture & Gender: In July 2026, a policy brief of the European Commission highlighted the role of women in aquaculture and the persistent gender gap in the EU marine living resources sector, covering the production, processing and distribution of fish products. While gender gaps in the wider EU labour market are gradually narrowing, women remain underrepresented in this part of the blue economy, pointing to the need for greater visibility, inclusion and support for women's participation across the aquaculture value chain.[5]

EU/Bivalve Aquaculture: In July 2026, a background paper (Huntington, 2026)[6] on EU bivalve mollusc farming examined the main challenges affecting mussel, oyster, clam and scallop production. The paper highlights bivalve aquaculture as a low-carbon and environmentally beneficial food production sector but notes that EU production has stagnated or declined in recent years due to combined environmental, biological, socio-economic and regulatory pressures. It also identifies possible ways to address these challenges under the EU strategic guidelines for aquaculture and the EMFAF framework.[7]

[1] https://oceans-and-fisheries.ec.europa.eu/news/commissioner-kadis-hosts-implementation-dialogue-eu-aquaculture-policy-2026-06-30_en
[2] https://oceans-and-fisheries.ec.europa.eu/news/remote-island-shelves-around-world-story-azorean-canned-fish-2026-07-06_en
[3] https://en.mercopress.com/2026/07/21/argentina-joins-fao-treaty-against-illegal-fishing-tightening-control-in-the-south-atlantic
[4] https://www.aquafeed.com/newsroom/farming-news/world-aquaculture-society-elects-first-african-president/
[5] https://euagenda.eu/publications/turning-the-tide-women-s-role-in-aquaculture
[6] Huntington, T. (2026), Implementing the Strategic Guidelines for EU aquaculture "Challenges in the bivalve mollusc farming sector and ways to address them". Publications Office of the European Union, 2026, doi: 10.2926/2365678
[7] https://euagenda.eu/publications/implementing-the-strategic-guidelines-for-eu-aquaculture-challenges-in-the-bivalve-mollusc-farming-sector-and-ways-to-address-them-background-paper-european-maritime-aquaculture-and-fisheries-fund-emfaf

2. MACROECONOMIC CONTEXT

2.1. Marine fuel

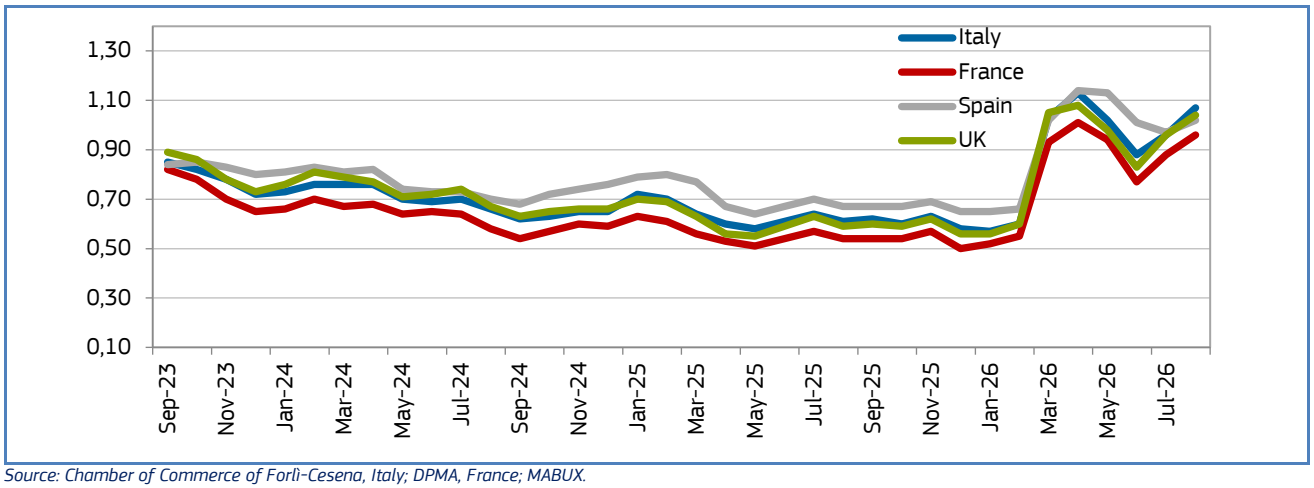
Average prices for marine fuel on **28th August 2026** ranged between 0,96 and 1,07 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 8,5% compared with the previous month and by an average of 69,7% compared with the same month in 2025.

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

Country	Aug 2026	Change from Jul 2026	Change from Aug 2025
France *(ports of Lorient and Boulogne)*	0,96	9%	78%
Italy *(ports of Ravenna and Livorno)*	1,07	11%	75%
Spain *(ports of A Coruña and Vigo)*	1,02	5%	52%
The UK *(ports of Grimsby and Aberdeen)*	1,04	8%	76%

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

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



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

2.2. Consumer prices and inflation

In July 2026 the EU annual inflation rate was 3,0%, up from 2,8% compared to June 2026. A year earlier, the rate was 2,4%.

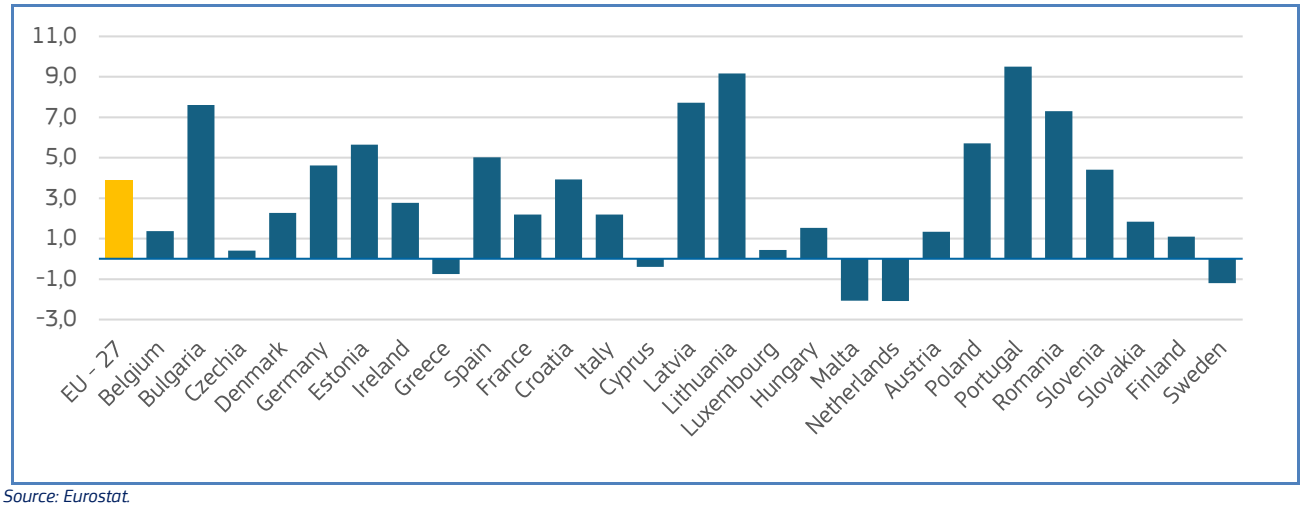
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR JUL 2026, COMPARED WITH JUL 2025**

Lowest inflation rates		Highest inflation rates	
Sweden	+0,3%	Romania	+8,2%
Czechia	+1,3%	Lithuania	+5,4%
Denmark, Hungary	+1,6%	Cyprus, Bulgaria	+4,4%

Source: Eurostat.

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

Figure 2. **ANNUAL RATE OF CHANGE FOR FISH AND SEAFOOD PRODUCTS IN JULY 2026 (value expressed in percentage)**



Source: Eurostat.

Table 3. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2025 = 100)**

	Jul 2024	Jul 2025	Jun 2026	Jul 2026	Change from Jun 2026	Change from Jul 2025
Food and non-alcoholic beverages	96,67	100,43	101,28	101,01	-0,3%	0,6%
Fish and other seafood	97,23	99,94	103,59	103,85	0,3%	3,9%
Fish, live, fresh, chilled or frozen	96,12	99,58	104,72	104,84	0,1%	5,3%
Fish, dried, salted, in brine or smoked	97,00	100,58	105,30	106,37	1,0%	5,8%
Fish preparations	99,20	99,85	101,93	102,42	0,5%	2,6%
Other seafood, live, fresh, chilled or frozen	98,09	100,54	101,19	100,93	-0,3%	0,4%
Other seafood, dried, salted, in brine or smoked	101,24	105,18	97,56	99,04	1,5%	-5,8%
Other seafood preparations	97,10	100,53	103,68	103,49	-0,2%	2,9%

Source: Eurostat.

2.4. Exchange rates

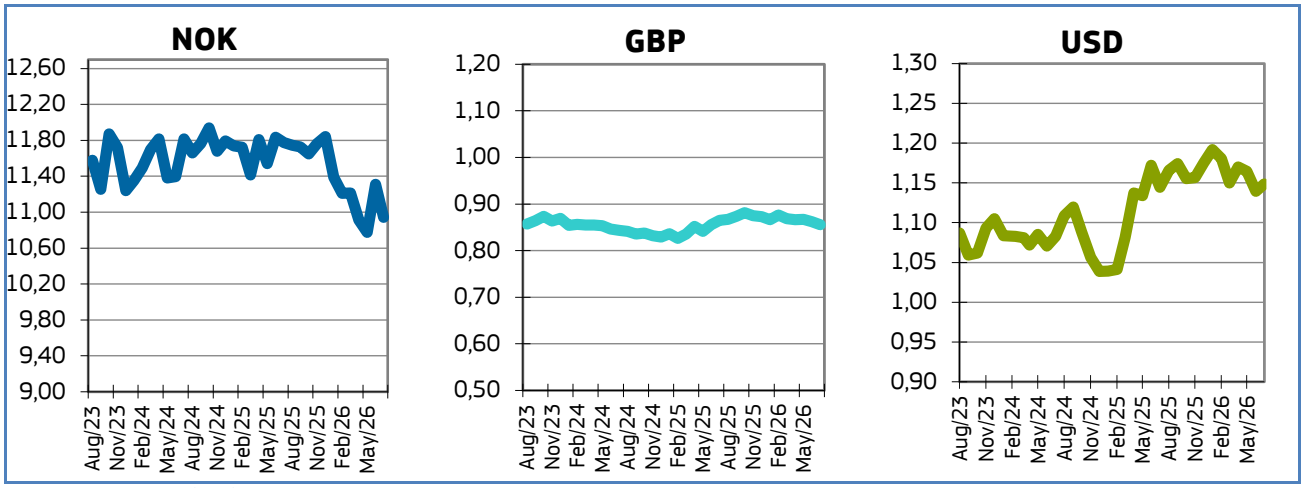
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Jul 2024	Jul 2025	Jun 2026	Jul 2026
NOK	11,8175	11,7740	11,3105	10,9420
GBP	0,8438	0,8649	0,8618	0,8557
USD	1,0828	1,1446	1,1394	1,1485

Source: European Central Bank.

In July 2026, the euro appreciated against the US dollar (0,8%) and depreciated against the British pound sterling (0,7%), and the Norwegian krone (3,3%), relative to the previous month. For the past six months, the euro has fluctuated around 1,1588 against the US dollar, 11,0599 against the Norwegian krone and 0,8659 against the British pound sterling. Compared with July 2025, the euro appreciated 0,3% against the US dollar and depreciated 1,1% against the British pound sterling and 7,1% against the Norwegian krone.

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



Source: European Central Bank.

3. FIRST SALES IN EUROPE[8]

3.1. Year-to-date comparison of First sales

Increases in value and volume (Jan - May 2026 vs Jan - May 2025): Croatia, France, Germany, Italy, Lithuania and Poland, recorded increases in both first-sales value and volume. The highest increase in volume was observed in France due mainly to sardine and scallop, while the highest growth in value was in Poland due to sprat and herring.

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

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

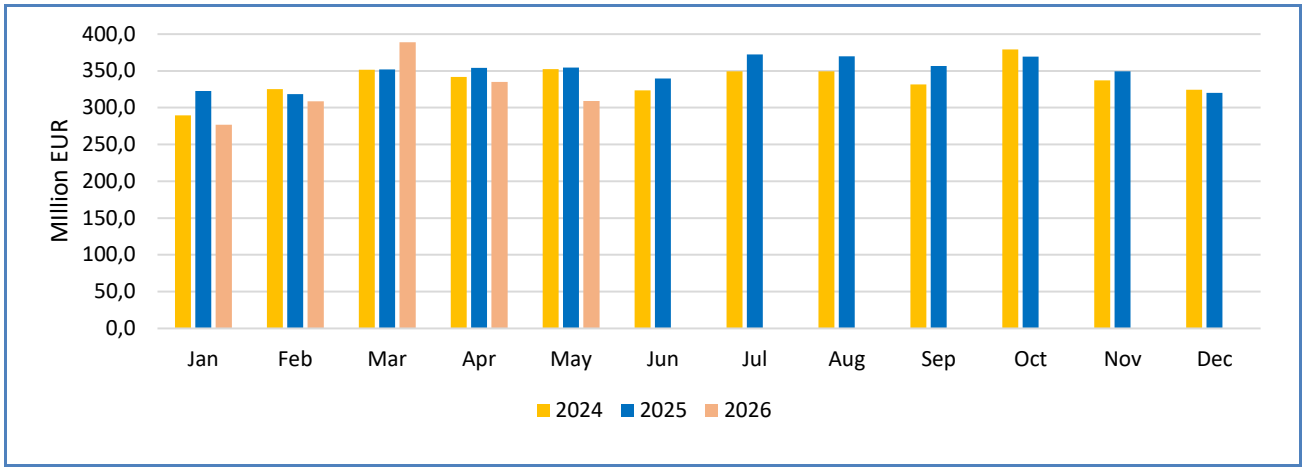
	January – May 2024		January – May 2025		January – May 2026		Change from January – May 2025	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	5.403	30,68	5.418	32,10	4.834	30,24	-11%	-6%
Bulgaria	1.378	0,73	1.359	0,90	695	0,58	-49%	-36%
Croatia	8.946	16,05	5.489	13,60	6.297	15,02	15%	10%
Cyprus	134	1,01	129	0,91	107	0,77	-17%	-15%
Denmark	369.358	208,08	362.022	217,53	209.154	186,63	-42%	-14%
Faroe Islands	384.387	192,28	391.546	294,23	268.521	270,84	-31%	-8%
Finland	33.301	12,29	41.235	12,41	34.908	12,47	-15%	0%
France	88.280	278,01	92.555	306,15	156.456	360,91	69%	18%
Germany	17.941	29,49	3.312	10,40	3.464	11,76	5%	13%
Greece	10.990	36,25	9.300	32,58	10.264	31,66	10%	-3%
Ireland	137.733	134,49	151.309	172,38	121.987	141,51	-19%	-18%
Italy	23.527	108,98	20.734	106,40	21.254	104,70	3%	-2%
Latvia	21.061	7,66	20.291	8,22	18.407	8,63	-9%	5%
Lithuania	244	0,34	144	0,19	192	0,24	34%	26%
Netherlands	6.878	49,94	7.347	47,15	6.561	39,63	-11%	-16%
Poland	36.712	18,61	35.761	17,34	46.385	22,43	30%	29%
Portugal	29.590	101,81	29.209	107,48	25.163	96,92	-14%	-10%
Spain	173.481	587,42	156.235	586,13	130.829	524,20	-16%	-11%
Sweden	55.903	38,57	42.800	29,99	35.813	30,49	-16%	2%
Norway	1.434.845	1.412,26	1.287.027	1.626,05	1.023.734	1.522,93	-20%	-6%
United Kingdom	146.957	273,79	147.186	301,81	111.382	323,00	-24%	7%

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

[8] During January–May 2026, 18 EU Member States (MS), the Faroe Islands, Norway and the United Kingdom reported first-sales data for 10 commodity groups. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section "First sales in Europe" are extracted from EUMOFA.

The overall value of first sales in the period January - May in 2026 was EUR 1,62 billion, a 5% decrease compared to 2025, and a 3% decrease compared to 2024. Overall volume was 832.770 tonnes, a 15% decrease compared to 2025, and an 18% decrease compared to 2024.

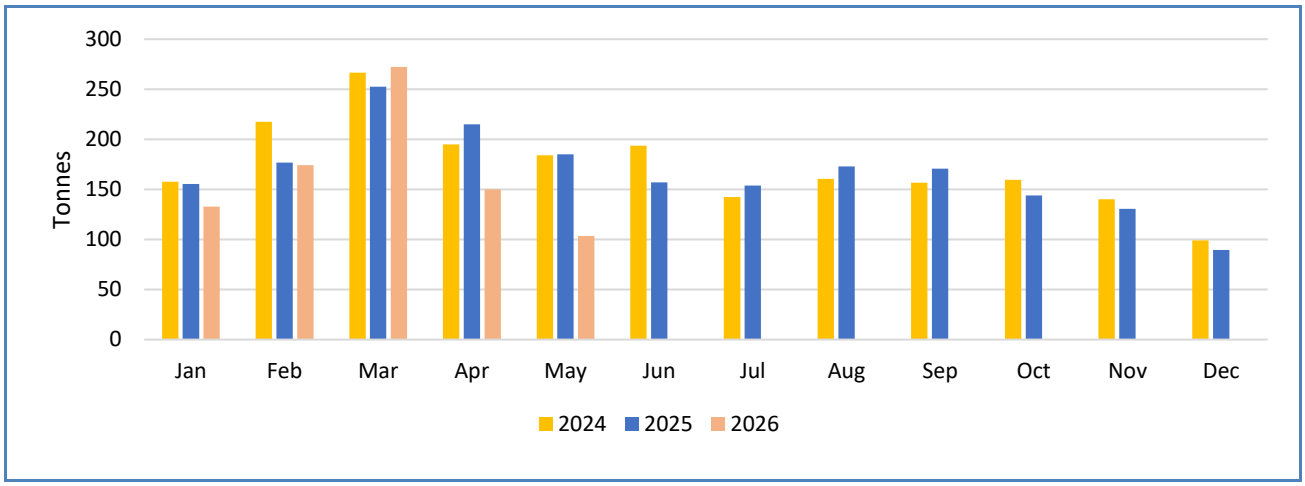
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST-SALES VALUE FROM THE REPORTING COUNTRIES[8] (value in million EUR)**



In the first four months of 2026, monthly first-sales value and volume in January, February, April and May were lower than in the corresponding months of both 2025 and 2024 but increased in March compared with both years.

The decrease in first-sales value compared to 2025 was mainly driven by groundfish and crustaceans (-13% and -12%, respectively). Compared with 2024 the decrease in first-sales value was driven by tuna and tuna-like species and crustaceans (-29% and -14%, respectively). Similarly, in the same period in 2026, the decrease in first-sales volume was mainly due to groundfish which fell by 47% in comparison with both 2025 and 2024.

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



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

Bivalves and other molluscs and aquatic invertebrates

In January-May 2026, first-sales value of "Bivalves and other molluscs and aquatic invertebrates" amounted to EUR 119,9 million, a 2% increase compared to the same period in 2025. First-sales volume reached 45.780 tonnes, a decrease of 7% compared to 2025. Scallop was the main commercial species of the commodity group driving the increase in value (+22%), while the decrease in volume was mainly due to mussel *Mytilus* spp. and clam (-48% and -20% respectively).

Figure 6. **FIRST-SALES VALUE AND VOLUME OF BIVALVES, JAN 2024 – MAY 2026**

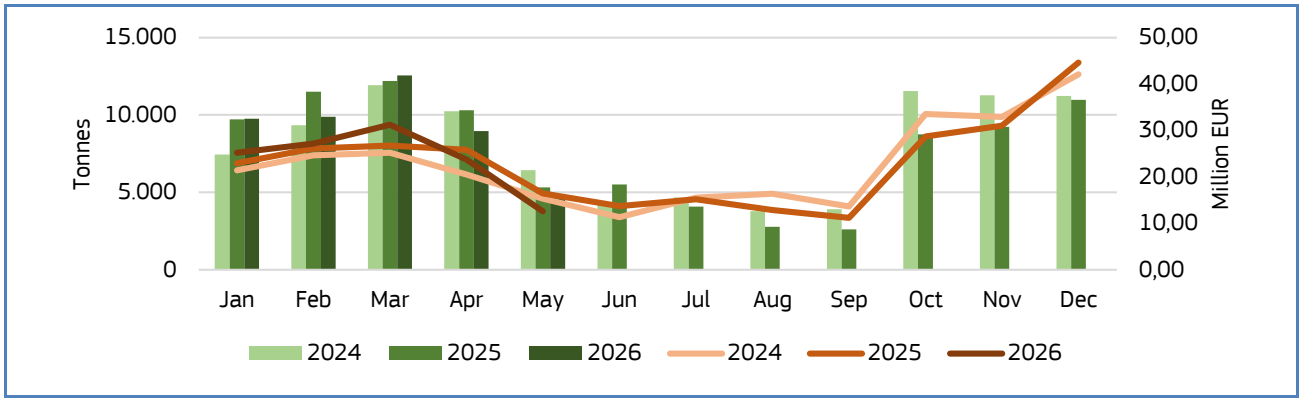


Table 6. **FIRST-SALES PRICE OF BIVALVES MAIN COMMERCIAL SPECIES (MCS) JAN - MAY 2025 & JAN - MAY 2026**

Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
France	Scallop	2,07 EUR/kg	2,31 EUR/kg	+12%
Ireland	Scallop	2,28 EUR/kg	2,10 EUR/kg	-8%
France	Sea urchin	6,79 EUR/kg	9,53 EUR/kg	+41%

Cephalopods

In 2026, first-sales value of "Cephalopods" totalled EUR 116,2 million, a 13% decrease compared to 2025. First-sales volume totalled 16.738 tonnes, a decrease of 14% compared to 2025. Squid (-24% and -27%) and octopus (-11% and -11%) were the main commercial species driving the decrease in first-sales value and volume.

[9] This section explores the evolutionary trends at commodity group level, covering volume, value and price dynamics alongside the composition of the primary species since the start of the year. It emphasizes those species that exert the greatest influence in terms of value contribution and explores the trajectory of their price fluctuations over time. https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/metadata

[10] The data analysis in this section (figures and tables) is downloaded from the EUMOFA database and is provided by national sources or collected through their related website. https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/dashboards

Figure 7. **FIRST-SALES VALUE AND VOLUME OF CEPHALOPODS, JAN 2024 – MAY 2026**

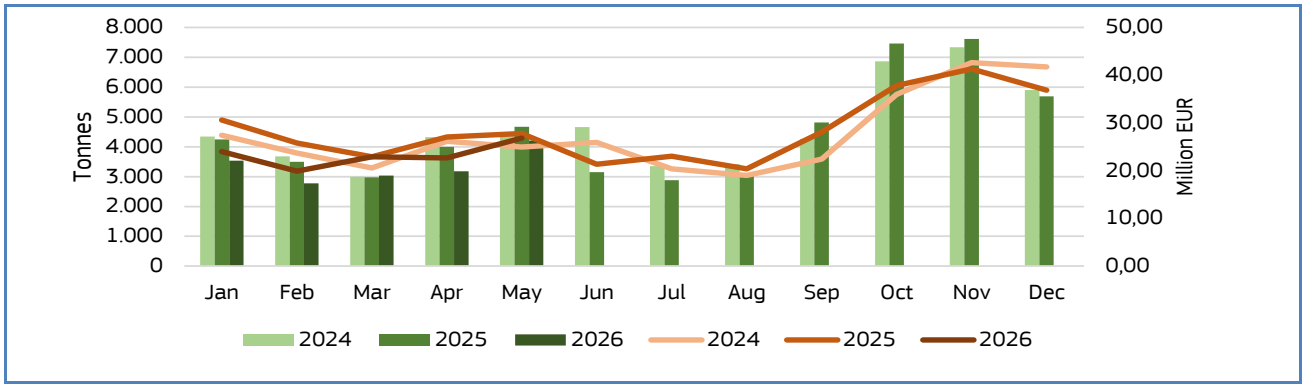


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN - MAY 2025 AND JAN - MAY 2026)**

Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
Spain	Squid	5,46 EUR/kg	5,24 EUR/kg	-4%
Portugal	Octopus	8,85 EUR/kg	8,44 EUR/kg	-5%
Spain	Octopus	7,54 EUR/kg	8,40 EUR/kg	+11%

Crustaceans

Between January and May 2026, first-sales value of "Crustaceans" totalled EUR 204,1 million, a 12% decrease in value compared to 2025. First-sales volume amounted to 22.398 tonnes, a decrease of 5% compared to 2025. Norway lobster and miscellaneous shrimp (-17% and –14% respectively) were the two main products responsible for the decrease in first-sales value, while Norway lobster and crab (-20% and -18% respectively) were mainly responsible for the decrease in first-sales volume.

Figure 8. **FIRST-SALES VALUE AND VOLUME OF CRUSTACEANS, JAN 2024 – MAY 2026**

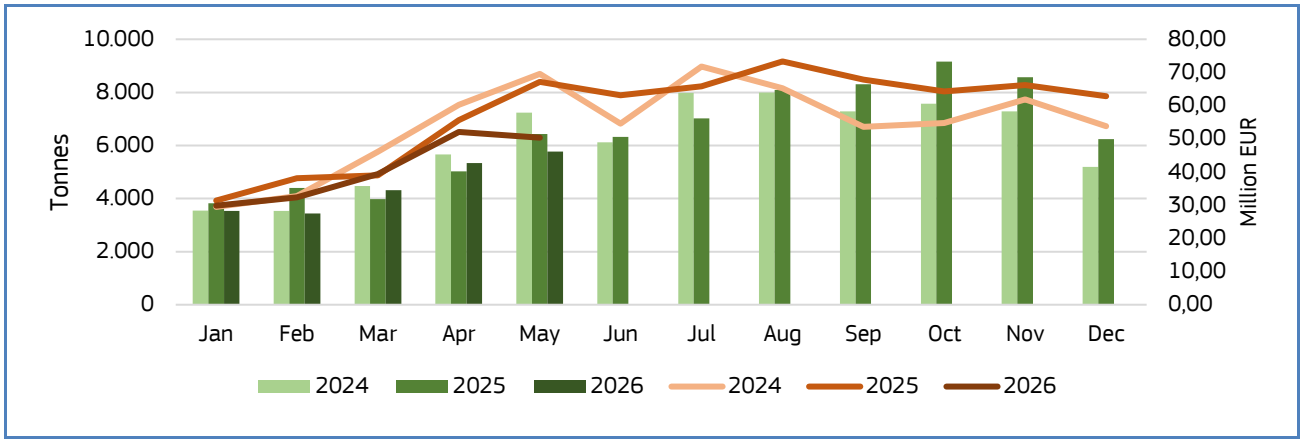


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN - MAY 2025 AND JAN - MAY 2026)**

Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
Spain	Miscellaneous shrimp	26,65 EUR/kg	22,89 EUR/kg	-14%
Ireland	Norway lobster	12,94 EUR/kg	12,91 EUR/kg	0
Spain	Warmwater shrimp	18,30 EUR/kg	15,79 EUR/kg	-14%

Flatfish

In 2026, first-sales value of "Flatfish" totalled EUR 140,7 million, a 2% decrease compared to 2025. First-sales volume amounted to 16.854 tonnes, a decrease of 16% compared to 2025. Common sole (-2% and -15%) and European plaice (-11% and -22%) were the main species driving the reduction in first-sales value and volume.

Figure 9. **FIRST-SALES VALUE AND VOLUME OF FLATFISH, JAN 2024 – MAY 2026**

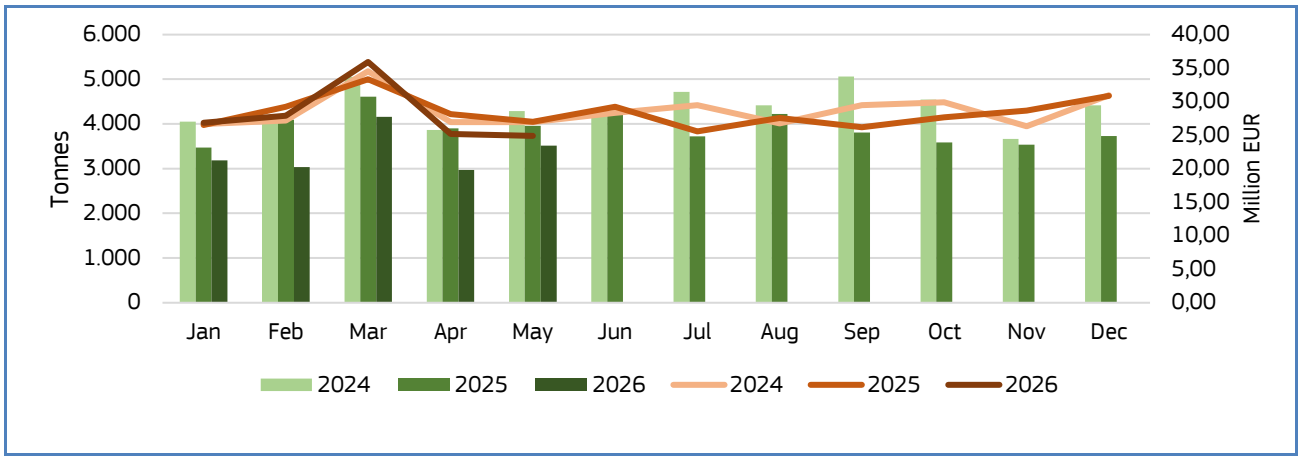


Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN - MAY 2025 AND JAN - MAY 2026)**

Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
Netherlands	Common sole	16,64 EUR/kg	19,74 EUR/kg	+19%
France	Common sole	16,98 EUR/kg	19,11 EUR/kg	+13%
Denmark	Turbot	16,54 EUR/kg	21,16 EUR/kg	+28%

Freshwater fish

In 2026, first-sales value of "Freshwater fish" reached EUR 14,2 million, marking a 3% decrease compared to 2025. First-sales volume amounted to 1.358 tonnes, a decrease of 31% compared to 2024. Pike perch (-72%) was mainly responsible for the decrease in first-sales value, while the category "other freshwater fish"[11] was the main contributor to the decrease in first-sales value and volume (-32%).

[11] „Other freshwater fish" comprises 25 products, and together round goby, freshwater bream and roach represent 93% of first-sales volume.

Figure 10. **FIRST-SALES VALUE AND VOLUME OF FRESHWATER FISH, JAN 2024 – MAY 2026**

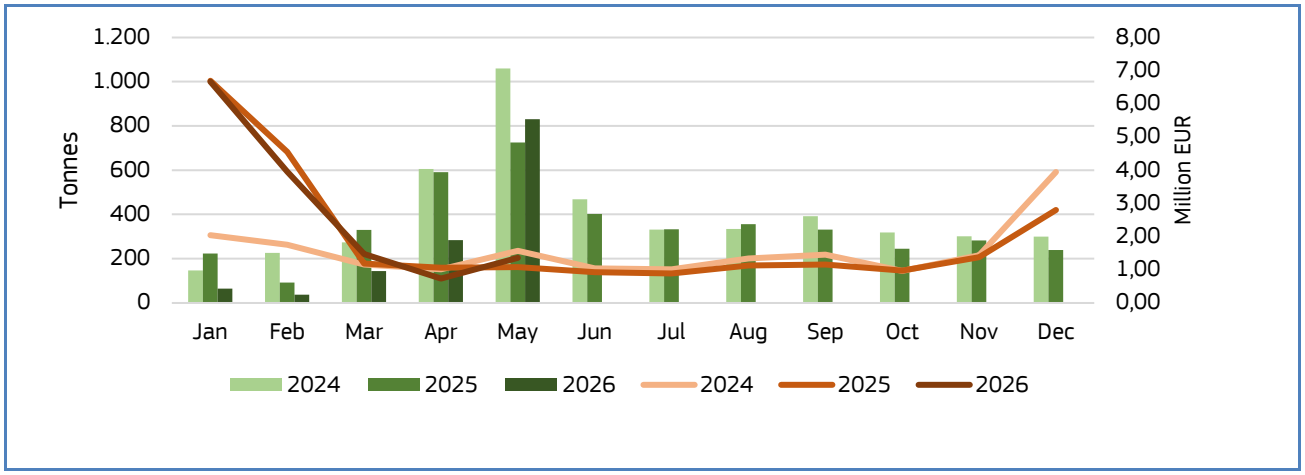


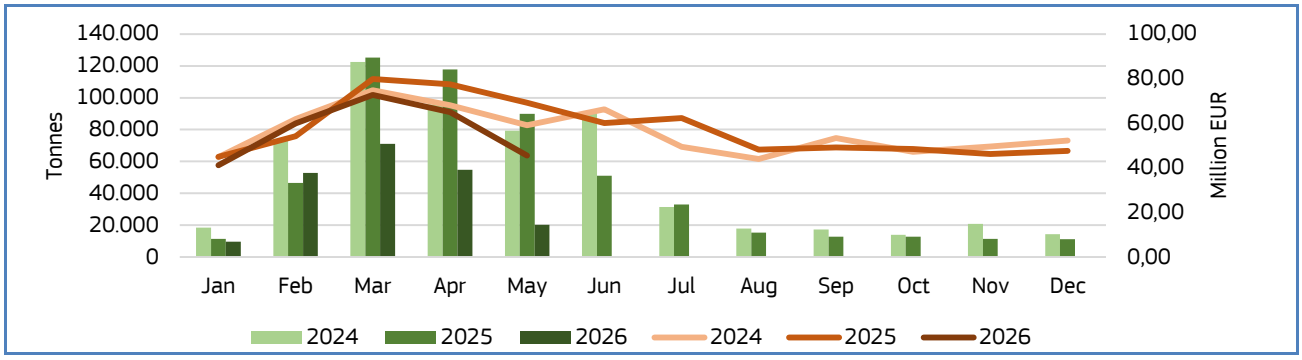
Table 10. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN - MAY 2025 AND JAN - MAY 2026)**

Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
Germany	Other freshwater fish[12]	0,78 EUR/kg	0,71 EUR/kg	-8%
Poland	Pike-perch	5,71 EUR/kg	5,43 EUR/kg	-5%
Germany	Pike-perch	7,61 EUR/kg	8,74 EUR/kg	+15%

Groundfish

In 2026, first-sales value of "Groundfish" totalled EUR 284,4 million, a decrease of 13% compared to 2025. First-sales volume amounted to 208.588 tonnes, a decrease of 47% compared to 2025. Blue whiting (-28% and -47%) was the main species responsible for the decrease in first-sales value and volume.

Figure 11. **FIRST-SALES VALUE AND VOLUME OF GROUNDFISH, JAN 2024 – MAY 2026**



[12] „Other freshwater fish" in Germany comprised 6 species of which freshwater breams nei and roach account together for 96% of total first-sales volume.

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

Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
Denmark	Blue whiting	0,34 EUR/kg	0,44 EUR/kg	+29%
Denmark	Other groundfish[13]	0,36 EUR/kg	0,46 EUR/kg	+25%
Denmark	Cod	6,11 EUR/kg	7,37 EUR/kg	+20%

Other marine fish[14]

In 2026, first-sales value of the category "other marine fish" totalled EUR 238,5 million, a decrease of 4% compared to 2025. First-sales volume amounted to 64.605 tonnes, a decrease of 13% compared to 2025. Other sharks[15] (-26%) was the main commercial species contributing to the decrease in first-sales value, while the category "other marine fish"[16] was behind the decrease in first-sales volume (-17%).

Figure 12. **FIRST-SALES VALUE AND VOLUME OF OTHER MARINE FISH, JAN 2024 – MAY 2026**

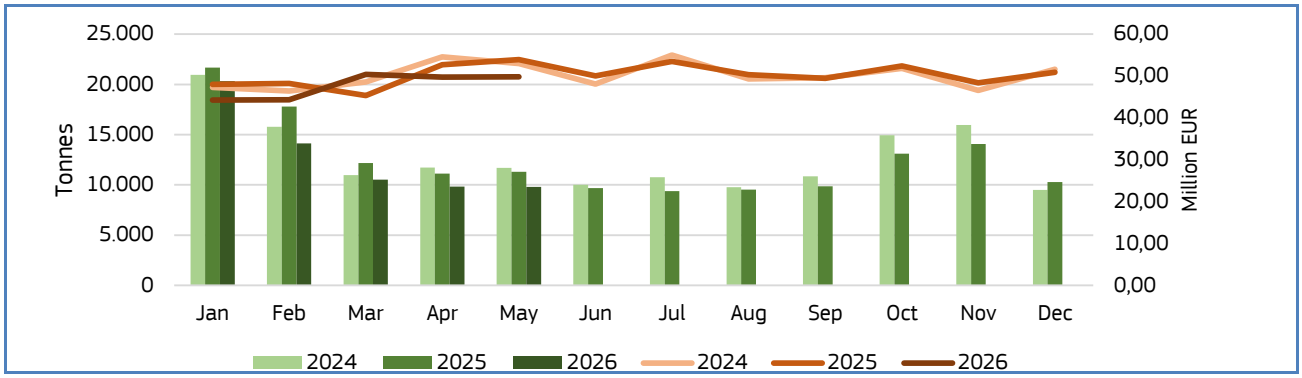


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN - MAY 2025 AND JAN - MAY 2026)**

Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
Spain	Other sharks[17]	3,26 EUR/kg	3,21 EUR/kg	-2%
Portugal	Scabbardfish	4,63 EUR/kg	4,38 EUR/kg	-6%
Denmark	Other marine fish[18]	0,41 EUR/kg	0,50 EUR/kg	+21%

Salmonids

In 2026, first-sales value of "Salmonids" totalled EUR 219.393, a decrease of 32% compared to 2025, while first-sales volume amounted to 21.734 kg, a decrease of 27% compared to 2025. Trout (-32%) was the main species responsible for the decrease in first-sales value and together with the category "other salmonids"[19] (-19% and -43%) was responsible for the decrease in first-sales volume of salmonids.

[13] „Other groundfish" in Denmark comprised 6 species of which sandeels nei and wolffishes nei account together for 92% of total first-sales value and 99% of total first-sales volume in the period January – May 2026.
[14] Seventeen Main Commercial Species are included in the Commmodity Group „Other Marine Fish".
[15] „Other sharks" MCS comprises 30 species of which blue shark and smooth-hounds nei accounting together for 74% of first-sale value.
[16] Of the „Other marine fish" Main Commercial Species (MCS), boarfish and boarfishes nei represent 76% of total first-sales volume.
[17] "Other sharks" MCS in Spain comprises 19 species of which blue shark and shortfin mako represent together 94% of first-sales value and 89% of first-sales volume.
[18] „Other marine fish" MCS in Denmark comprises 12 species in the period analysed of which boarfishes nei represented 95% of the total value and 98% of volume.
[19] „Other marine fish" MCS comprises 3 species in the period analysed of which European whitefish represented 92% of the total volume.

Figure 13. **FIRST-SALES VALUE AND VOLUME OF SALMONIDS, JAN 2024 – MAY 2026**

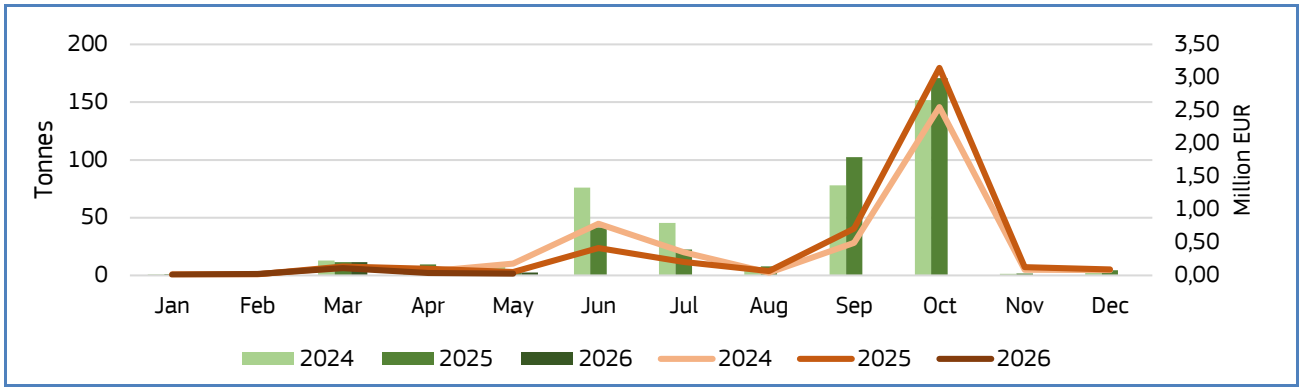


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN - MAY 2025 AND JAN - MAY 2026)**

Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
Poland	Trout	13,44 EUR/kg	10,98 EUR/kg	-18%
Germany	Trout	9,58 EUR/kg	7,78 EUR/kg	-19%
Denmark	Other salmonids[20]	8,67 EUR/kg	7,94 EUR/kg	-8%

Small pelagics

In 2026, first-sales value of "Small pelagics" amounted to EUR 410,8 million, an increase of 8% compared to 2025. First-sales volume amounted to 431.026 tonnes, an increase of 17% compared to 2025. Sardine (+146% and +258%) was the commercial species contributing most to the increase in first-sales value and volume.

Figure 14. **FIRST-SALES VALUE AND VOLUME OF SMALL PELAGICS, JAN 2024 – MAY 2026**

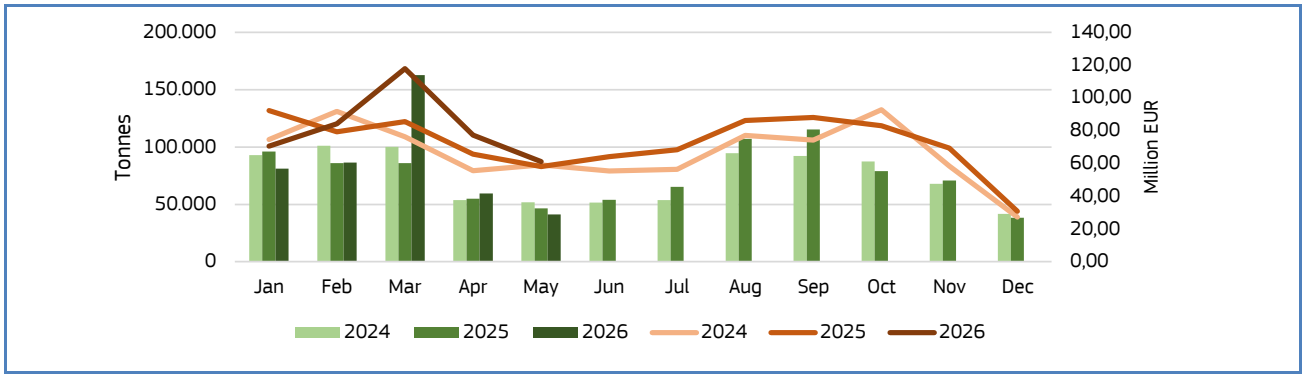


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN - MAY 2025 AND JAN - MAY 2026)**

Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
France	Sardine	0,81 EUR/kg	0,62 EUR/kg	-23%
Denmark	Herring	0,62 EUR/kg	0,76 EUR/kg	+22%
Denmark	Sprat	0,46 EUR/kg	0,57 EUR/kg	+25%

[20] „Other salmonids" MCS in Denmark comprises 1 species in the period analysed, European whitefish reprsenting 100% of first sales value and volume.

Tuna and tuna-like species

In 2026, first-sales value of "Tuna and tuna-like species" totalled EUR 89,4 million, a decrease of 14% compared to 2025. First-sales volume totalled 19.185 tonnes, a decrease of 22% compared to 2025. Swordfish (-18% and -27%) and yellowfin tuna (-29% and -22%), and were the main commercial species driving the decrease in first-sales value and volume.

Figure 15. **FIRST-SALES VALUE AND VOLUME OF TUNA AND TUNA-LIKE SPECIES, JAN 2024 – MAY 2026**

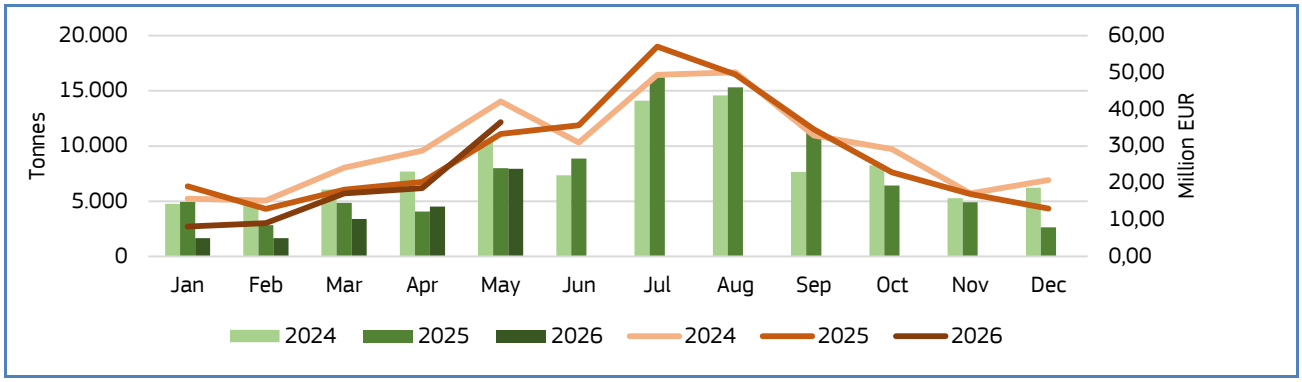


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN - MAY 2025 AND JAN - MAY 2026)**

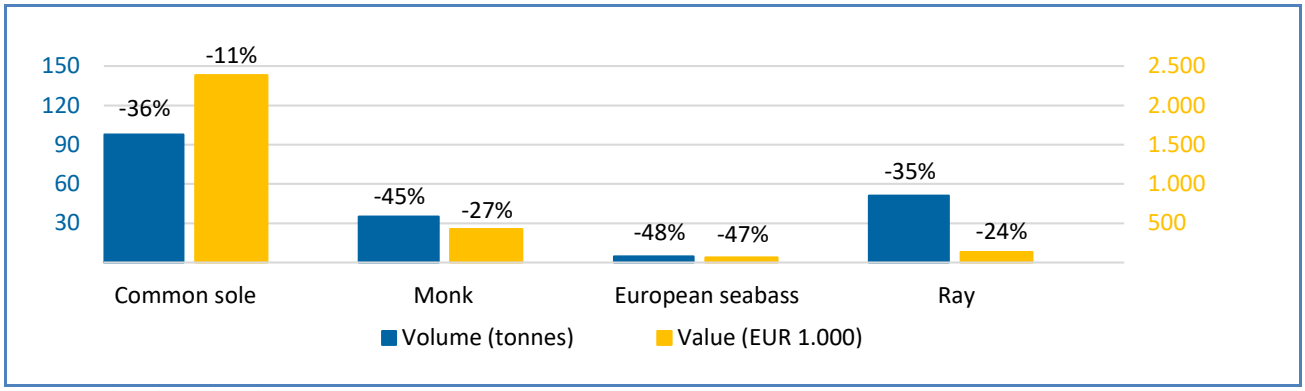
Country	Main Commercial Species	First-sales average price Jan-May 2025	First-sales average Price Jan-May 2026	Trend (Jan-May 2026 vs Jan-May 2025 %)
Spain	Swordfish	5,11 EUR/kg	5,79 EUR/kg	+13%
Spain	Yellowfin tuna	2,55 EUR/kg	2,18 EUR/kg	-15%
Spain	Skipjack tuna	1,60 EUR/kg	1,38 EUR/kg	-13%

3.3. First sales in reporting countries[21]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-May 2026 vs Jan-May 2025	EUR 30,2 million, -6%	4.834 tonnes, -11%	Squid, cuttlefish, monk, European plaice.	In May 2026, first-sales value and volume of **saithe** declined by 96% and 93% respectively year-on-year. The sharp decrease reflects the absence of Belgian fishing activity in the Norwegian zone, where a significant share of last year's landings originated and had to be landed in Belgium. Remaining catches are mostly sold in Denmark rather than Belgium. The decline also coincides with a 24% reduction in the North Sea saithe TAC[22], while saithe remains a minor target species for the Belgian fleet.
May 2026 vs May 2025	EUR 4,9, million, -1%	639 tonnes, -14%	Common sole, monk, European seabass, Ray	

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



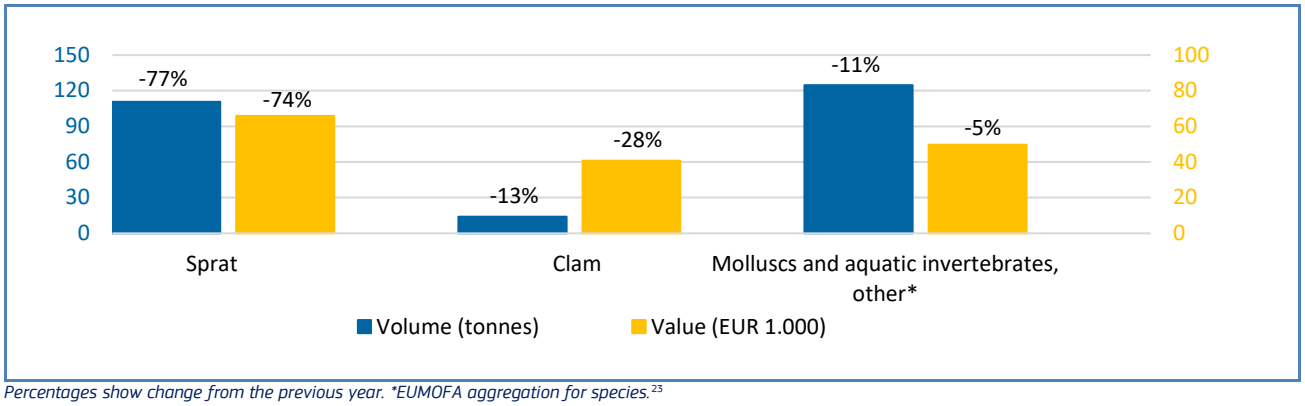
Percentages show change from the previous year.

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 0,6 million, -36%	695 tonnes, -49%	Sprat, red mullet, other molluscs and aquatic invertebrates*.
May 2026 vs May 2025	EUR 0,2 million, -57%	249 tonnes, -61%	Sprat, calm, other molluscs and aquatic invertebrates*.

[21] First-sales data updated on 28. 07 2026. This section covers all countries for which data are available on the date of extraction from the EUMOFA database and analysis.
[22] https://statbel.fgov.be/fr/nouvelles/baisse-du-chiffre-daffaires-de-la-peche-maritime-belge

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

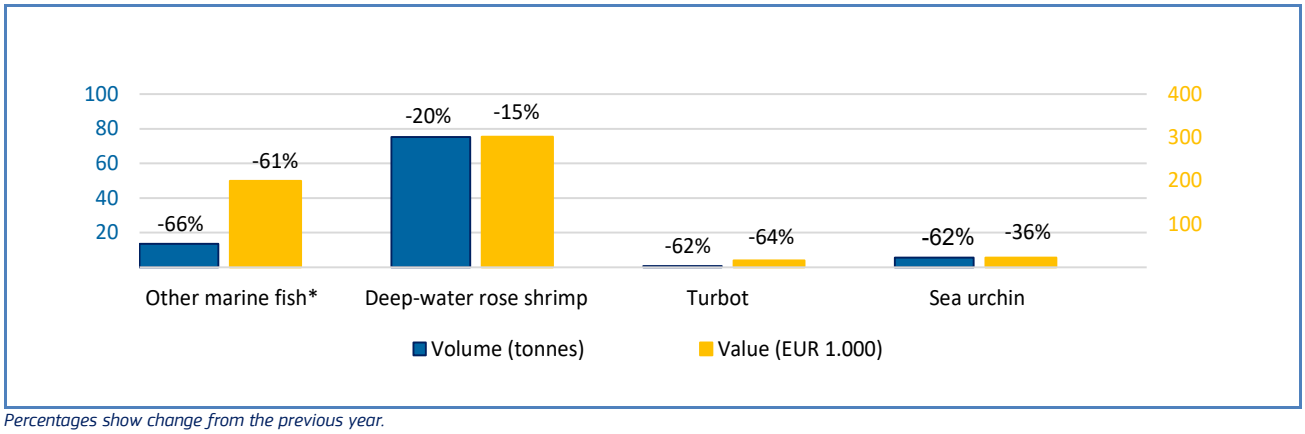


*Percentages show change from the previous year. *EUMOFA aggregation for species.*[23]

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

Croatia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 15,0 million, +10%	6.297 tonnes, +15%	Sardine, John dory, hake, octopus, mackerel.
May 2026 vs May 2025	EUR 2,7 million, -8%	339 tonnes, -15%	Other marine fish*, deep-water rose shrimp, turbot, sea urchin.

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



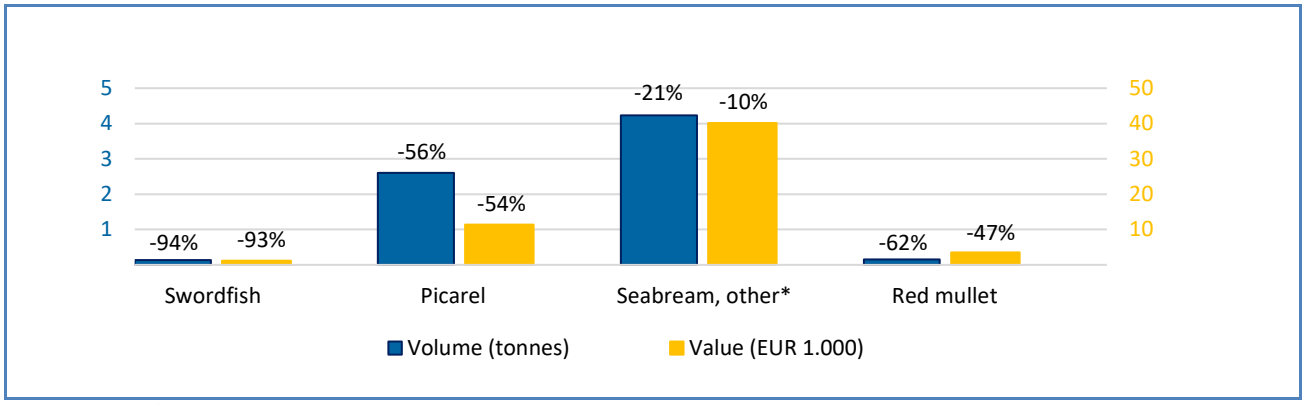
Percentages show change from the previous year.

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 0,8 million, -15%	107 tonnes, -17%	Red mullet, squid, other seabream*, swordfish.
May 2026 vs May 2025	EUR 0,2 million, -17%	20 tonnes, -29%	Swordfish, picarel, other seabream*, red mullet.

[23] Metadata 2, Annex 3: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/metadata#data-management---metadata-2

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



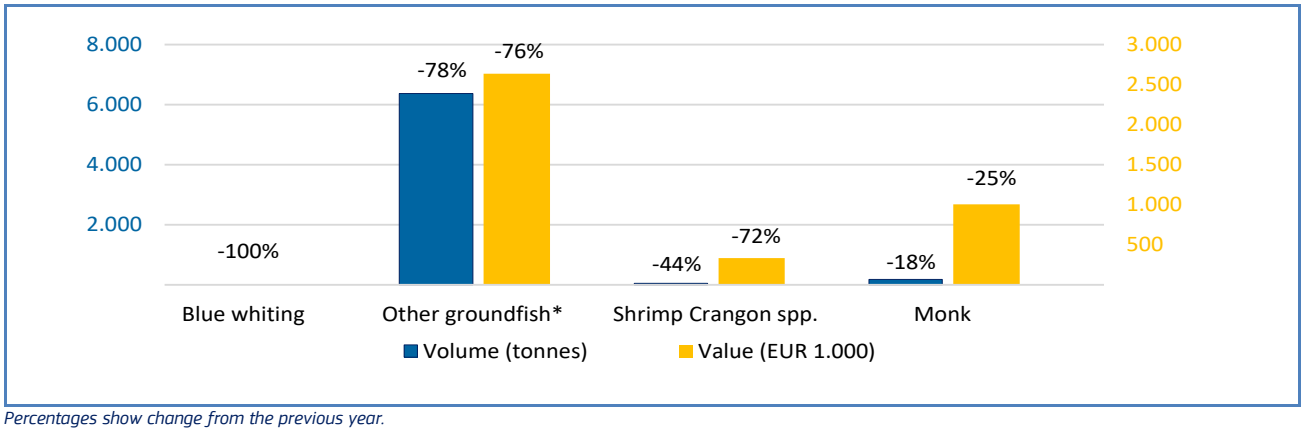
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-May 2026 vs Jan-May 2025	EUR 186,6 million, -14%	209,2 tonnes, -42%	Blue whiting, other groundfish*, mackerel, cod.	In May 2026, no first-sales of **blue whiting** were recorded. The absence of landings reflects the seasonal nature of the fishery, with most catches occurring between February and April. The decline also coincides with a substantial reduction in the 2026 North Sea blue whiting TAC following increased fishing pressure resulting from the lack of agreement among Coastal States.[24]
May 2026 vs May 2025	EUR 20,1 million, -51%	12.044 tonnes, -84%	Blue whiting, other groundfish*, shrimp *Crangon* spp., monk	

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

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



Percentages show change from the previous year.

[24] ICES Advice 2025 – whb.27.1-91214 – https://ices-library.figshare.com/articles/report/Blue_whiting_i_Micromesistius_poutassou_i_in_subareas_1_9_12_and_14_Northeast_Atlantic_and_adjacent_waters_/27202938

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

The Faroe Islands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 270,9 million, -8%	268.521 tonnes, -31%	Cod, blue whiting, mackerel, coldwater shrimps*.
May 2026 vs May 2025	EUR 52,6 million, -15%	76.905 tonnes, -27%	Blue whiting, cod, mackerel, coldwater shrimps*

Figure 21. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE FAEROE ISLANDS, MAY 2026**

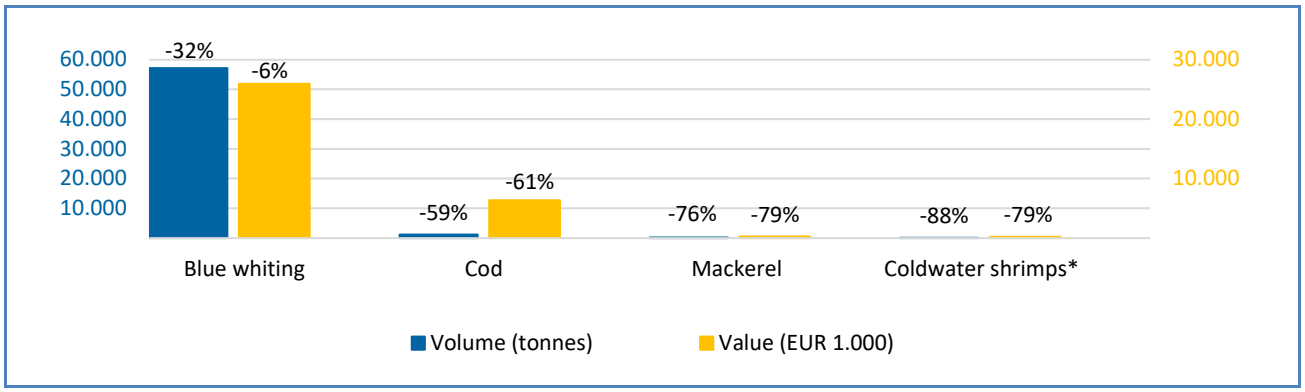
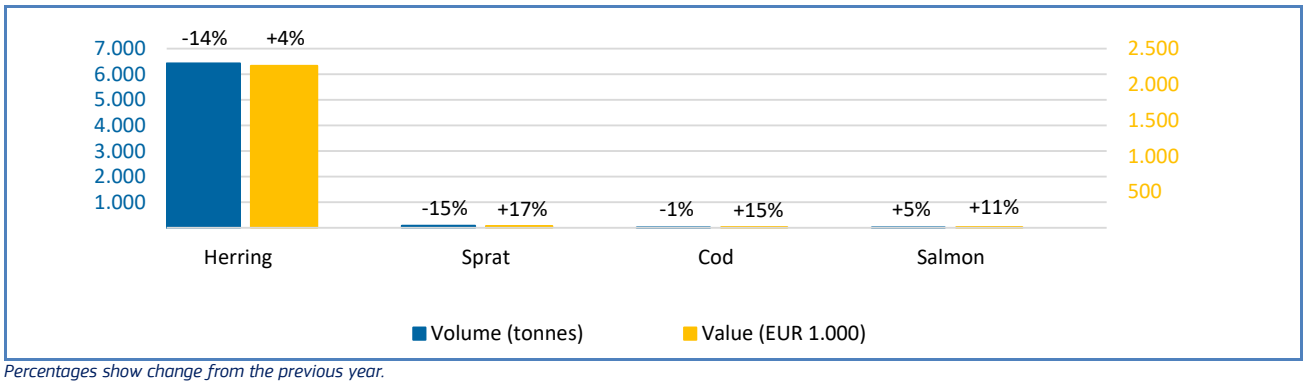


Table 22. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND**

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 12,4 million, 0%	35 tonnes, -15%	**Value**: herring, sprat, cod. **Volume**: herring
May 2026 vs May 2025	EUR 2,3 million, +4%	7 tonnes, -14%	**Value**: herring, sprat, cod. **Volume**: herring.

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

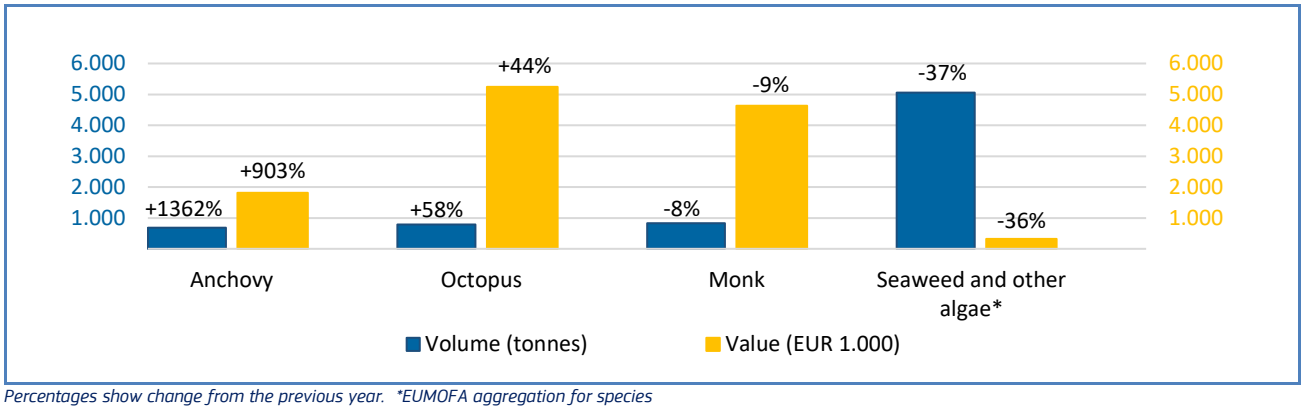


Percentages show change from the previous year.

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-May 2026 vs Jan-May 2025	EUR 360,9 million, +18%	156.456 tonnes, +69%	Sardine, scallop, octopus, anchovy.	In May 2026, first-sales value and volume of **anchovy** increased by 903% and 1.362% respectively year-on-year. The sharp rise was driven by the start of the fishing season and higher catches following substantial TAC increases for 2026, particularly in Iberian waters (+60%)[25] and, to a lesser extent, in the Bay of Biscay (+6%). Most landings were recorded at La Turballe[26], while the increase in value was moderated by lower average ex-vessel prices. Regulatory changes introduced by the French government to increase flexibility for incidental anchovy catches, in response to higher fishing opportunities, also facilitated the rise in landings and trade.
May 2026 vs May 2025	EUR 55,9 million, 0%	18.285 tonnes, -13%	**Value**: octopus, monk, Norway lobster. **Volume**: Seaweed and other algae*.	

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



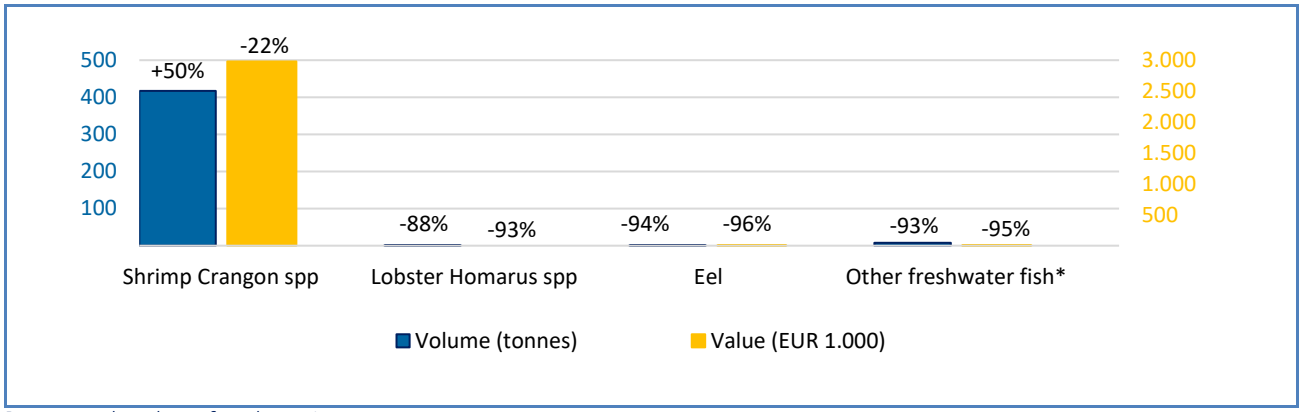
*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 11,8 million, +13%	3.464 tonnes, +5%	Shrimp *Crangon* spp., blue whiting, Miscellaneous small pelagics.
May 2026 vs May 2025	EUR 3,0 million, -28%	563 tonnes, 0%	**Value**: shrimp *Crangon* spp.*, Lobster Homarus spp., eel. Other freshwater fish*. **Volume**: shrimp *Crangon* spp.*

[25] https://oceans-and-fisheries.ec.europa.eu/news/fisheries-ministers-agree-fishing-opportunities-2026-atlantic-and-north-sea-and-mediterranean-and-2025-12-13_en
[26] https://www.franceagrimer.fr/chiffre-et-analyses-economiques/ventes-declarees-en-halles-maree

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



Percentages show change from the previous year.

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

Greece	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 31,7 million, -3%	10.264 tonnes, +10%	**Value**: other seabream*, niscellaneous tuna, sardine **Volume**: anchovy, sardine, deep-water rose shrimp.
May 2026 vs May 2025	EUR 8,4 million, +5%	3.033 tonnes, +12%	Anchovy, octopus, deep-water rose shrimp, sardine.

Figure 25. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GREECE, MAY 2026**

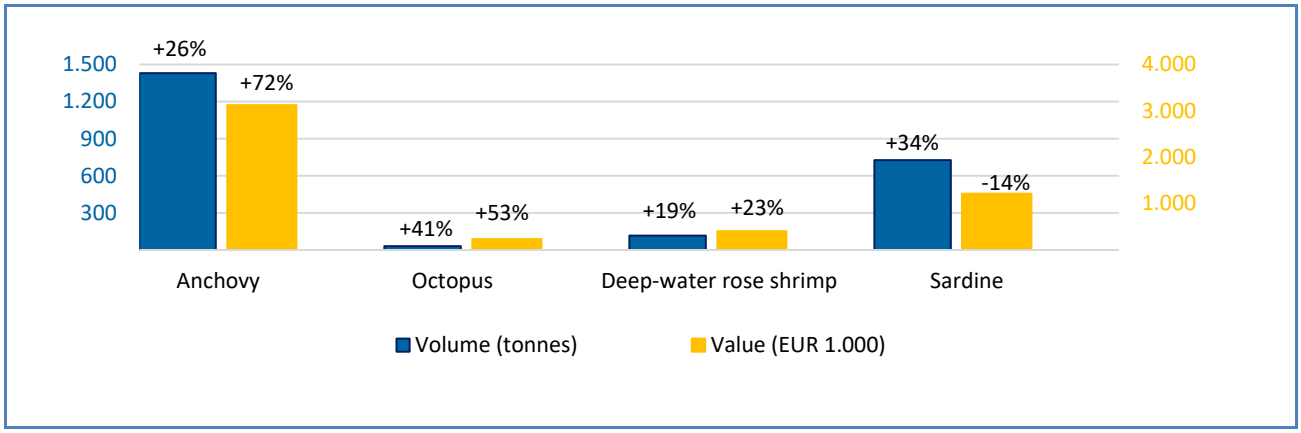
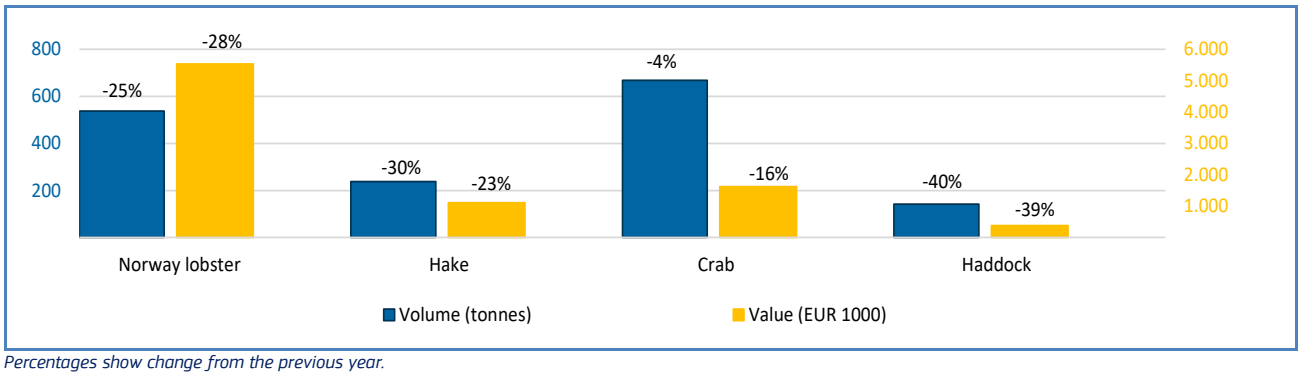


Table 26. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND**

Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 141,5 million, -18%	121.987 tonnes, -19%	Mackerel, Atlantic horse mackerel, Norway lobster, haddock, sprat.
May 2026 vs May 2025	EUR 16,5 million, -11%	3.505 tonnes, -5%	Norway lobster, hake, crab, haddock.

Figure 26. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN IRELAND, MAY 2026**

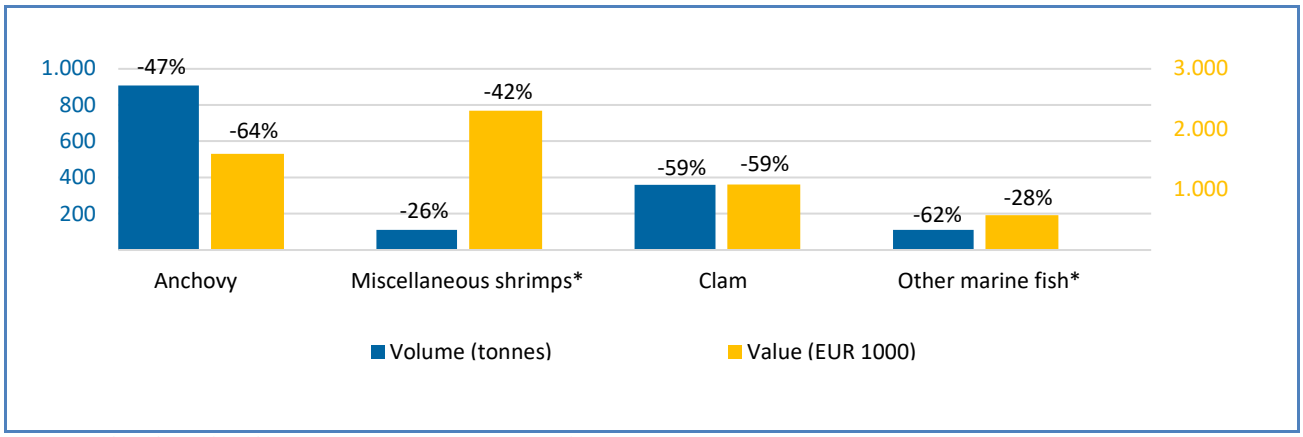


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 104,7 million, -2%	21.254 tonnes, +3%	**Value**: anchovy, miscellaneous shrimps*, Norway lobster. **Volume**: sardine, other marine fish, cuttlefish.
May 2026 vs May 2025	EUR 19,3 million, -25%	3.873 tonnes, -28%	Anchovy, miscellaneous shrimps*, clam, other marine fish*.

Figure 27. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, MAY 2026**

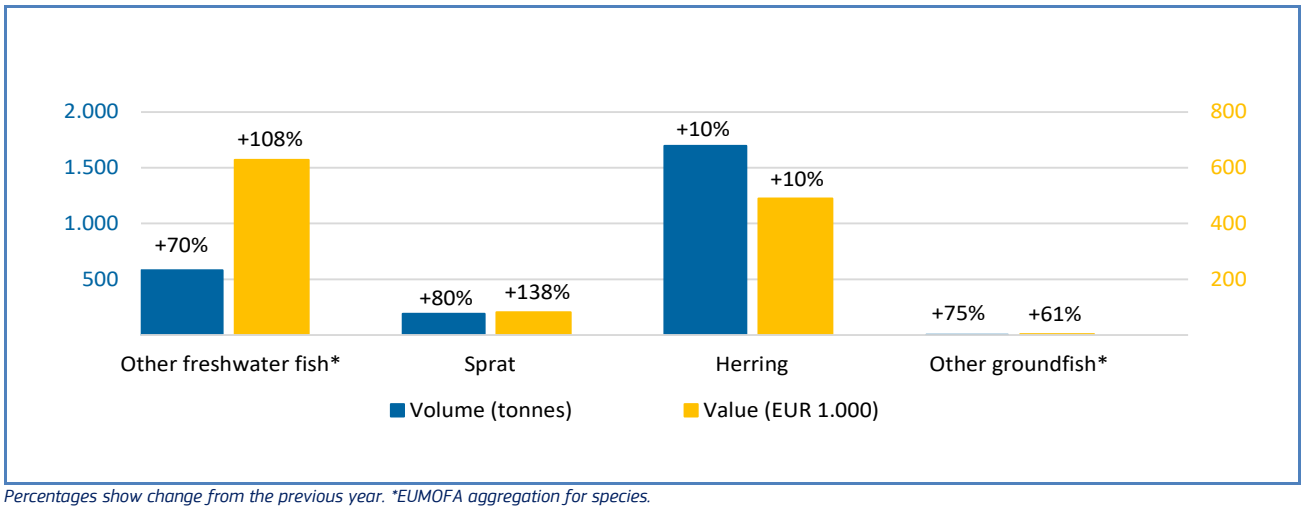


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-May 2026 vs Jan-May 2025	EUR 8,6 million, +5%	18.408 tonnes, -9%	**Value**: sprat, other freshwater fish*. **Volume**: herring.	In May 2026, first-sales value and volume of the MCS grouping of the species **other freshwater fish** increased by 108% and 70% compared to May 2025. The growth was driven mainly by higher supplies of round goby and vimba bream. Round goby, now a dominant coastal species in Latvia, also benefited from strong export demand (particularly from Ukraine) along with higher fish prices, increased fuel and logistics costs, and favourable seasonal market conditions. These combined factors resulted in the significant rise in both market value and volume.
May 2026 vs May 2025	EUR 1,2 million, +47%	2.501 tonnes, +23%	Other freshwater fish*, sprat, herring, other groundfish*.	

Figure 28. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, MAY 2026**

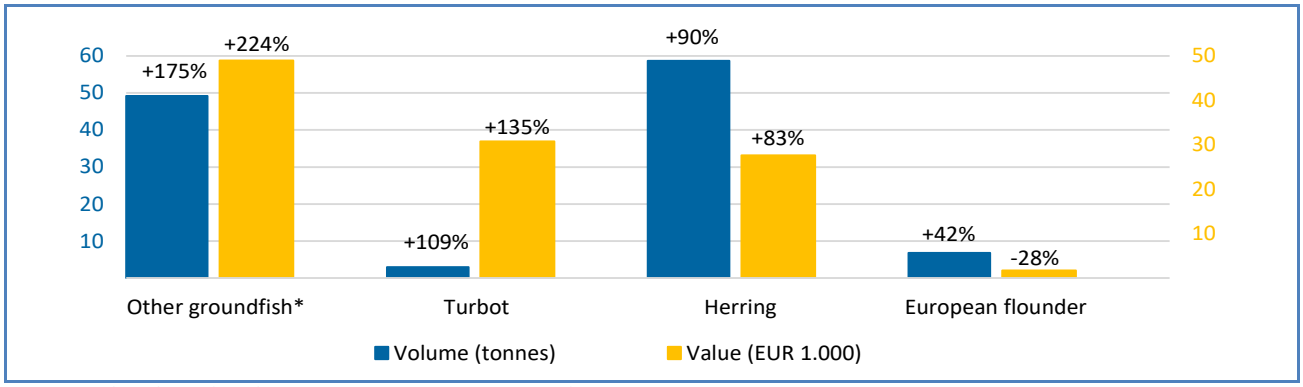


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 0,2 million, +26%	191 tonnes, +34%	Other groundfish*, herring, turbot.
May 2026 vs May 2025	EUR 0,02 million, +48%	128 tonnes, +56%	Other groundfish*, turbot, herring, European flounder.

Figure 29. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LITHUANIA, MAY 2026**

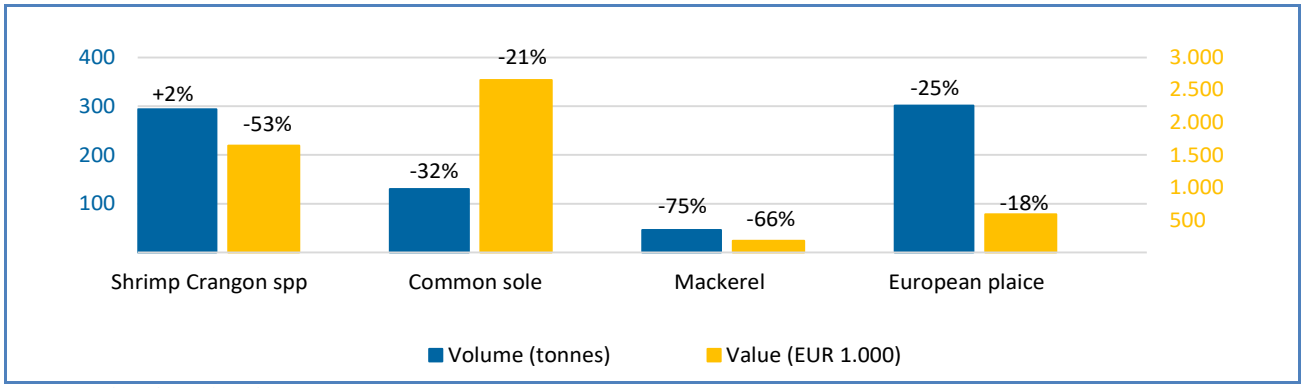


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 39,6 million, -16%	6.561 tonnes, -11%	Shrimp *Crangon* spp., common sole, squid, European plaice.
May 2026 vs May 2025	EUR 8,3 million, -27%	1.601 tonnes, -11%	Shrimp *Crangon* spp., common sole, mackerel, European plaice.

Figure 30. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, MAY 2026**

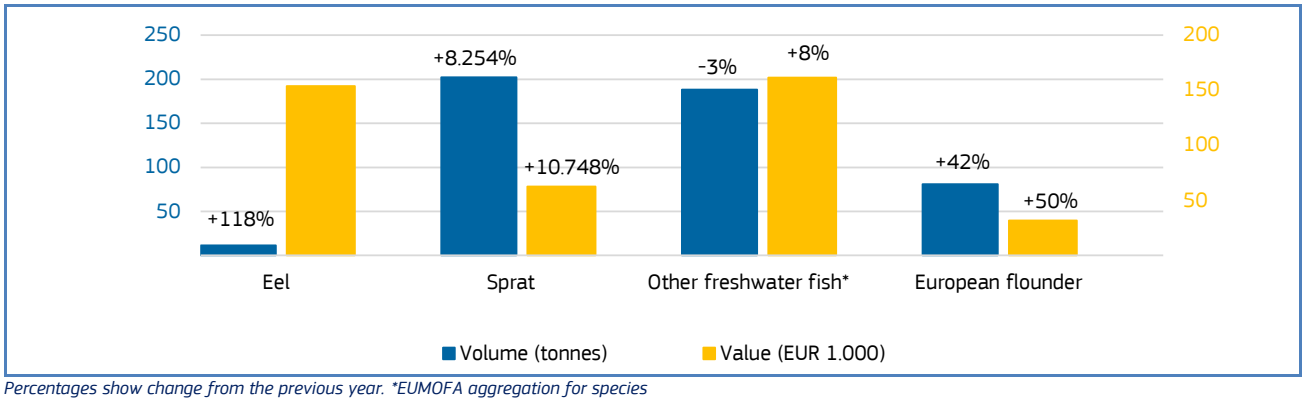


Percentages show change from the previous year.

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

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 22,4 million, +29%	46.385 tonnes, +30%	Sprat, herring.
May 2026 vs May 2025	EUR 0,8 million, +28%	932 tonnes, +50%	Eel, sprat, other freshwater fish*; European flounder.

Figure 31. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, MAY 2026**

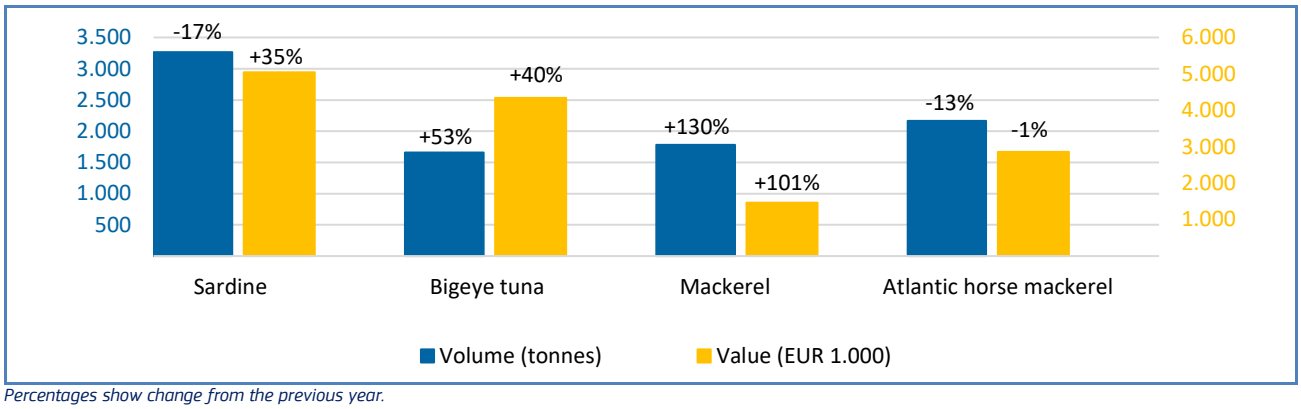


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 96,9 million, -10%	25.163 tonnes, -14%	Octopus, anchovy, scabbardfish, sardine, clam.
May 2026 vs May 2025	EUR 29,2 million, +3%	11.308 tonnes, 0%	**Value**: sardine, bigeye tuna, mackerel. **Volume**: sardine, Atlantic horse mackerel.

Figure 32. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, MAY 2026**

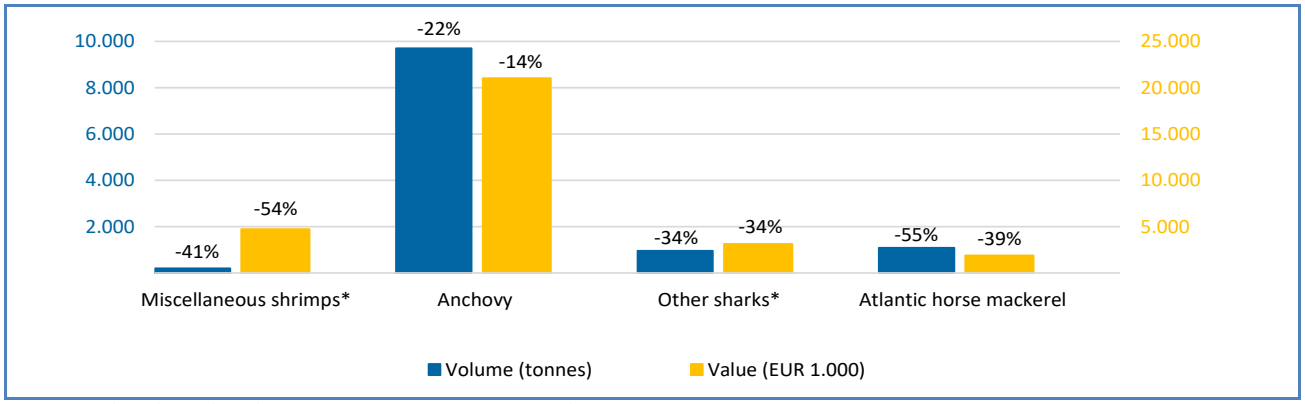


Percentages show change from the previous year.

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 524,2 million, -11%	130.829 tonnes, -16%	Mackerel, swordfish, other sharks*, hake.
May 2026 vs May 2025	EUR 132,5 million -8%	35.445 tonnes, -18%	Miscellaneous shrimps*, anchovy, other sharks*, Atlantic horse mackerel.

Figure 33. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, MAY 2026**

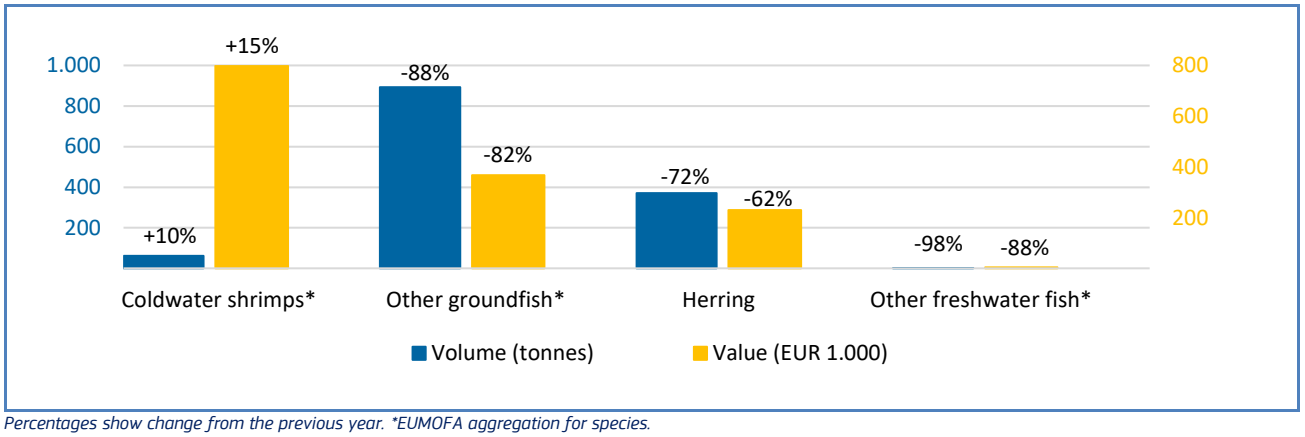


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 30,5 million, +2%	35.813 tonnes, -16%	**Value**: sprat, herring, saithe **Volume**: other groundfish*, blue whiting.
May 2026 vs May 2025	EUR 3,9 million, -26%	2.548 tonnes, -74%	Coldwater shrimps*, other groundfish*, herring, other freshwater fish*.

Figure 34. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, MAY 2026**

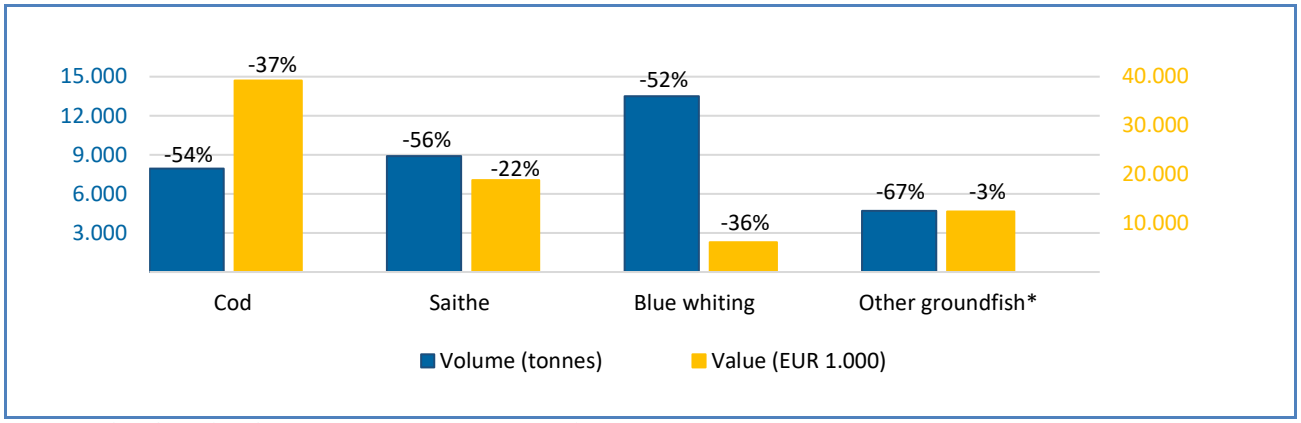


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 1,5 billion, -6%	1.024.734 tonnes, -20%	Crab, mackerel, cod, saithe, mackerel.
May 2026 vs May 2025	EUR 178 million -7%	144.060 tonnes, -20%	Cod, saithe, blue whiting, other groundfish*.

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

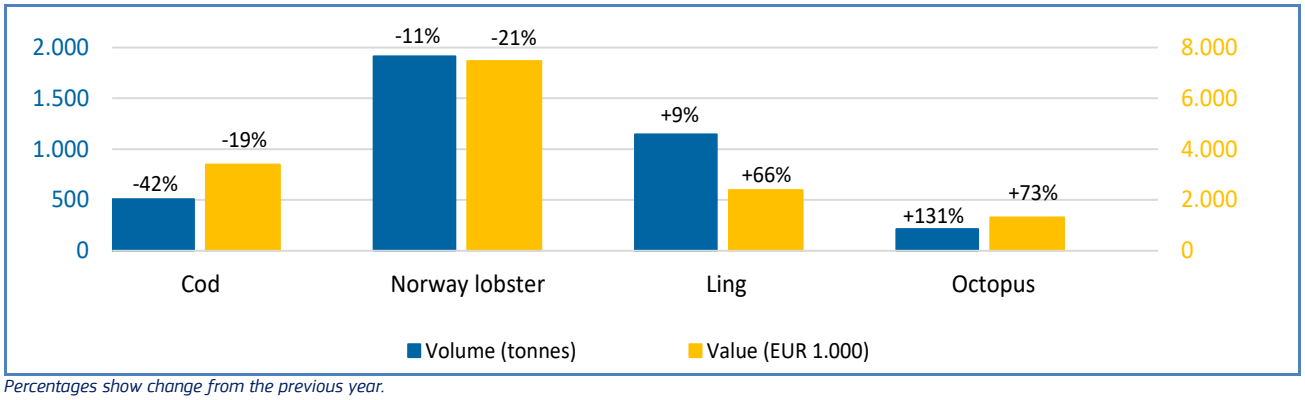


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-May 2026 vs Jan-May 2025	EUR 323 million, +7%	111.382 tonnes, -24%	**Value**: mackerel, haddock, monk. **Volume**: mackerel, blue whiting, Norway lobster.
May 2026 vs May 2025	EUR 41 million +1%	12.928 tonnes, -1%	**Value**: ling, octopus, saithe. **Volume**: cod, Norway lobster.

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



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

From January to May 2026, the value of extra-EU imports decreased by 1% compared to the same period in 2025, while volume decreased by 6%. The MCSs contributing most to the decrease in import values were skipjack tuna (-26%), and warmwater shrimps (-15%), while blue whiting (-52%), other non-food uses[27] (-26%) and skipjack tuna (-19%), contributed most to the decrease in volume.

Increases in value and volume: Austria, Bulgaria, Czechia, Greece, Hungary, Lithuania, Poland, Slovakia and Sweden recorded an increase in extra-EU imports in both value and volume. The most significant increases in value in absolute terms were recorded in Lithuania driven by an increase in salmon (+128%) and mackerel (+69%), while Malta recorded the highest increase in volume in absolute terms due to other non-food uses[28] (+3.163%) and skipjack tuna (+14%).

Decreases in value and volume: Belgium, Croatia, France, Latvia, Luxemburg, Portugal, Romania, Slovenia, and Spain recorded decreases in extra-EU imports in value and volume. Croatia recorded the largest decline in absolute terms value and volume driven mainly by a fall in salmon imports by value (-84%), while the highest decrease in volume was due to the category "other marine fish"[29] (-90%).

[27] This includes products not reported as Fish oil nor Fishmeal
[28] Of „Other non-food use" MCS in Malta fish waste represented 98% of total import volume.
[29] Of „Other marine fish" MCS in Croatia frozen fish, n.e.s. represented 64% of total import volume, while fillets of fish, dried, salted or in brine, but not smoked (excl. tilapia, catfish, carp, eels, Nile perch, snakeheads, fish of the families Bregmacerotidae, Euclichthyidae, Gadidae, Macrouridae, Melanonidae, Merlucciidae, Moridae and Muraenolepididae, and fish fillets, salted or in brine of Pacific salmon, Atlantic salmon, Danube salmon and lesser or Greenland halibut) represented 26%.

Table 37. **JANUARY - MAY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)[30]**

	January - May 2025			January - May 2026			Change from January - May 2025		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	3.716	25,3	6,80	4.190	28,9	6,91	13%	15%	2%
Belgium	63.077	408,1	6,47	45.806	287,1	6,27	-27%	-30%	-3%
Bulgaria	5.439	16,0	2,95	5.675	16,9	2,98	4%	5%	1%
Croatia	4.675	16,8	3,60	3.394	10,9	3,21	-27%	-35%	-11%
Cyprus	3.512	21,9	6,24	3.647	21,7	5,95	4%	-1%	-5%
Czechia	6.558	31,0	4,73	6.805	33,2	4,88	4%	7%	3%
Denmark	437.859	1262,2	2,88	352.286	1336,0	3,79	-20%	6%	32%
Estonia	4.562	24,0	5,26	4.145	23,7	5,72	-9%	-1%	9%
Finland	15.800	107,4	6,80	15.500	108,9	7,03	-2%	1%	3%
France	236.946	1265,0	5,34	224.872	1188,5	5,29	-5%	-6%	-1%
Germany	169.599	753,6	4,44	169.084	755,5	4,47	0%	0%	1%
Greece	57.546	247,9	4,31	61.509	264,8	4,30	7%	7%	0%
Hungary	953	4,4	4,57	986	4,4	4,46	3%	1%	-2%
Ireland	150.682	112,3	0,75	135.741	134,1	0,99	-10%	19%	33%
Italy	205.919	1250,9	6,07	205.156	1237,0	6,03	0%	-1%	-1%
Latvia	9.332	26,7	2,86	8.583	26,2	3,06	-8%	-2%	7%
Lithuania	19.428	58,6	3,01	20.373	73,8	3,62	5%	26%	20%
Luxembourg[31]	1	0,2	199,10	0	0,0	250,11	-83%	-79%	26%
Malta	965	3,9	4,05	1.119	3,6	3,21	16%	-8%	-21%
Netherlands	290.354	1622,2	5,59	268.729	1665,2	6,20	-7%	3%	11%
Poland	105.048	456,0	4,34	110.917	492,4	4,44	6%	8%	2%
Portugal	78.889	372,7	4,72	74.088	325,9	4,40	-6%	-13%	-7%
Romania	10.359	46,0	4,44	9.058	41,0	4,52	-13%	-11%	2%
Slovakia	2.269	7,5	3,32	2.405	7,7	3,20	6%	2%	-4%
Slovenia	2.723	11,9	4,35	2.001	8,9	4,43	-27%	-25%	2%
Spain	517.600	2630,2	5,08	481.841	2402,6	4,99	-7%	-9%	-2%
Sweden	278.697	2088,8	7,49	290.808	2205,3	7,58	4%	6%	1%
EU-27	**2.682.509**	**12.871,3**	**4,80**	**2.508.716**	**12.704,1**	**5,06**	**-6%**	**-1%**	**6%**

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: salmonids and small pelagics recorded an increase in value and volume of extra-EU imports. Small pelagics recorded the highest increase in both value and volume in absolute terms with mackerel (+39% and +9%) and herring (+17% and +36%) driving the increase.

[30] During January -May 2026, the 27 EU Member States (MS), reported import data for 12 commodity groups. Extra-EU imports are goods recorded by Member States when they enter the territory of the EU where transit is not included.
[31] Luxembourg import values and volumes are shown separately, as the large unit of measurement used for the rest of the countries analysed does not reflect the real values: Jan-May 2025: First-sales volume = 1.196 kg; First-sales value = 238.126 EUR - Jan -May 2026: First-sales volume = 199 kg; First-sales value 49.772.

Decreases in value and volume: crustaceans, freshwater fish and tuna and tuna-like species were the commodity group recording a decline in both value and volume of extra-EU imports. Tuna and tuna-like species recorded the largest decline in absolute terms attributed to skipjack tuna (-26% and -19%).

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

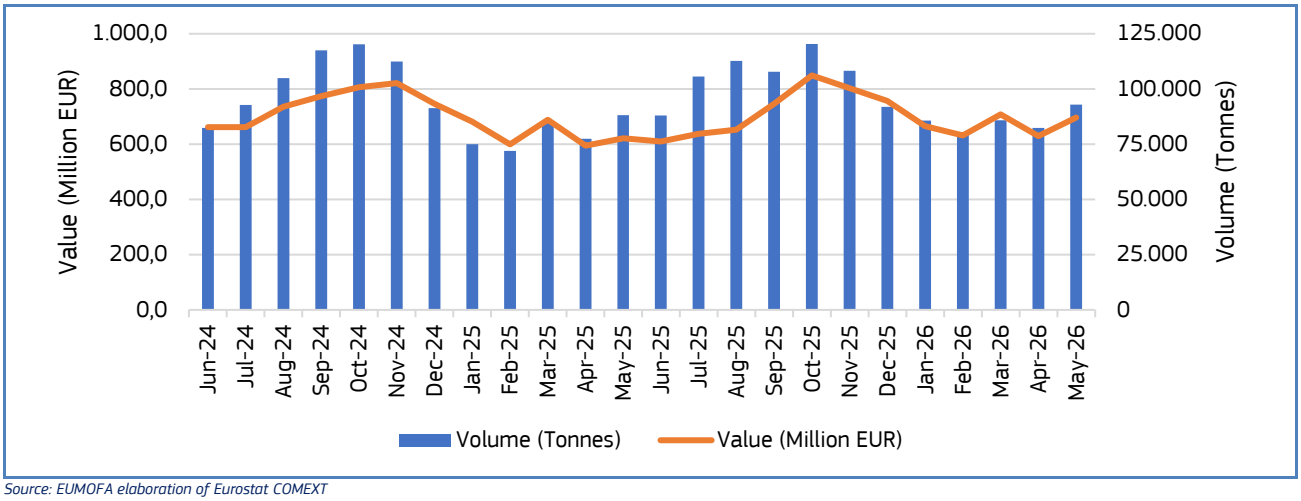
	January - May 2025			January - May 2026			Change from January – May 2025			
Commodity group	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**MCS**
Bivalves	291,1	64.542	4,51	304,3	58.193	5,23	5%	-10%	16%	Clam, scallop.
Cephalopods	1.475,7	228.027	6,47	1.459,7	231.075	6,32	-1%	1%	-2%	Other cephalopods, octopus.
Crustaceans	1.884,6	268.327	7,02	1.751,9	255.012	6,87	-7%	-5%	-2%	Warmwater shrimp, lobster *Homarus* spp.
Flatfish	177,7	34.732	5,12	197,5	33.202	5,95	11%	-4%	16%	Greenland halibut, Atlantic halibut.
Freshwater fish	261,3	64.027	4,08	218,2	57.952	3,76	-17%	-9%	-8%	Freshwater catfish. tilapia.
Groundfish	2.124,0	549.789	3,86	2.159,2	432.968	4,99	2%	-21%	29%	Other groundfish, cod.
Other marine fish	772,8	125.682	6,15	796,6	119.716	6,65	3%	-5%	8%	European seabass, gilthead seabream.
Salmonids	3.186,1	397.950	8,01	3.331,2	426.269	7,81	5%	7%	-2%	Salmon.
Small pelagics	441,4	163.685	2,70	532,9	189.390	2,81	21%	16%	4%	Mackerel, herring.
Tuna and tuna-like species	1.566,6	328.730	4,77	1.246,1	283.204	4,40	-20%	-14%	-8%	Skipjack tuna, miscellaneous tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of salmonids in EU Member States

In January – May 2026, extra-EU imports of salmonids accounted for a total value of EUR 3.331 million and a total volume of 426.269 tonnes, marking a 5% increase in value and 7% increase in volume compared to the same period in 2025.

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



Source: EUMOFA elaboration of Eurostat COMEXT

In the period analysed, extra-EU imports of salmonids peaked in October, both in terms of value and volume, while the lowest falls were in February.

Between January and May 2026, Sweden, Denmark and the Netherlands were the EU's main importers of salmonids. Together they accounted for 77% of total extra-EU import volumes of salmonids, with Sweden representing 54%, Denmark 15% and the Netherlands 9% of the total import volume.

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

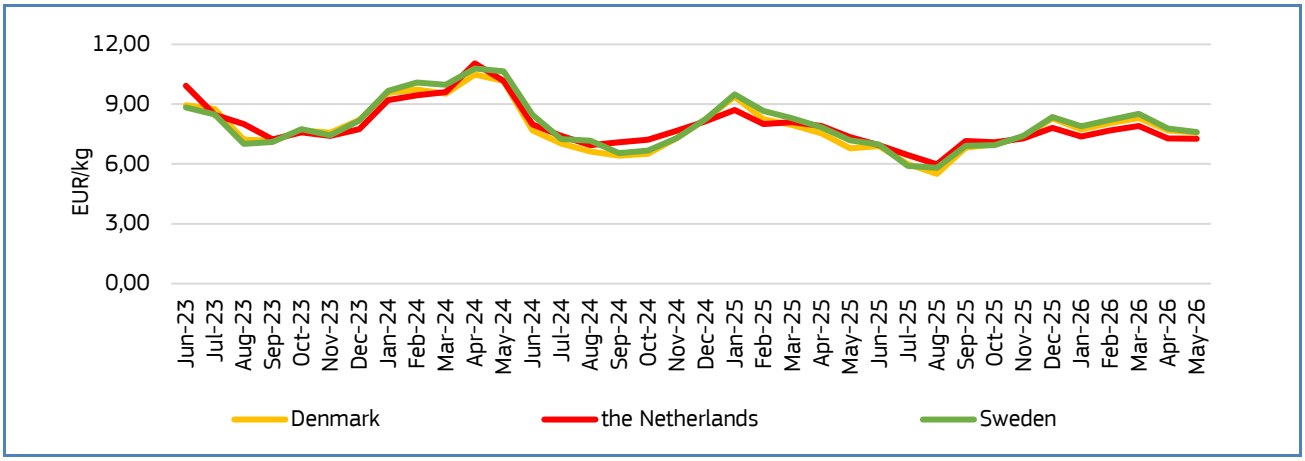
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan–May 2025	Jan-May 2026	Trend (%)	Jan–May 2025	Jan-May 2026	Trend (%)	
Sweden	1688,6	1.817,4	5%	205.693	228.145	11%	Salmon
Denmark	517,1	495,5	8%	65.306	63.020	-4%	Salmon
Netherlands	246,9	287,3	-4%	30.784	38.243	24%	Salmon

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

In terms of value, salmon was the main imported species within the "Salmonids" commodity group, accounting for 97% of the total value, followed by trout at 3%.

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

Figure 38. **EXTRA-EU IMPORT PRICE OF SALMON IN THE NETHERLANDS, GERMANY AND SPAIN (APR 2023 – MAR 2026)**



Between June 2023 and May 2026, the price of salmon fluctuated and decreased in the three countries analysed: Denmark (-5%), the Netherlands (-10%) and Sweden (-5%). Between January and May 2026, the volume of salmon imported to Denmark was 62.648 tonnes, 3% less compared with the same period in 2025, while the price decreased by 1%. Imports by volume came from Norway (63%), followed by the Faroe Islands (27%) and Iceland (8%).

During the same period, 37.139 tonnes of salmon were imported to the Netherlands, 25% more compared to 2025, with a price decrease of 6% compared to 2025. Iceland accounted for 32% of the total imported volume of salmon in 2026, followed by Norway with 32% and Faroe Islands 24%.

In Sweden, 223.429 tonnes of salmon were imported in 2026, coming almost entirely from Norway (99,9%). Import volumes increased by 12% while prices decreased by 3%.

In the three countries, imports showed similar behaviour: in Denmark, import volumes peaked in August/September; in the Netherlands between September/October and in Sweden import volumes peaked in October.

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

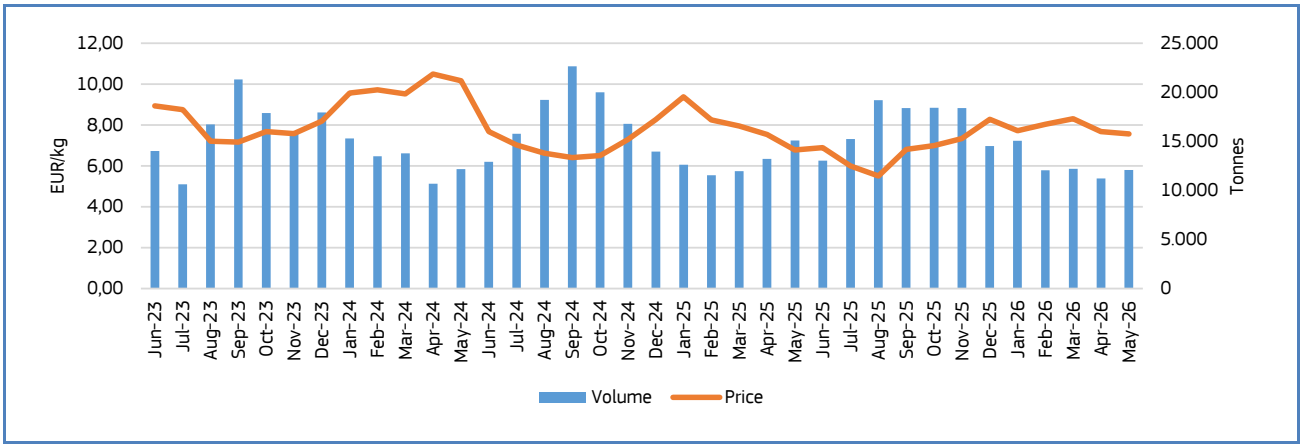


Figure 40. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SALMON IN THE NETHERLANDS, JUN 2023 – MAY 2026 (volume in tonnes and price in EUR/kg)**

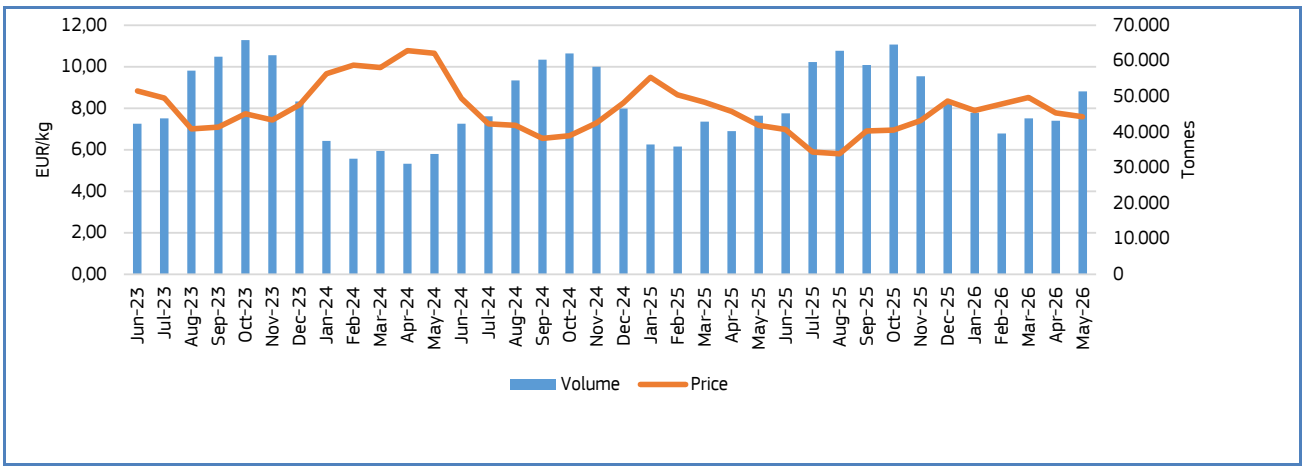
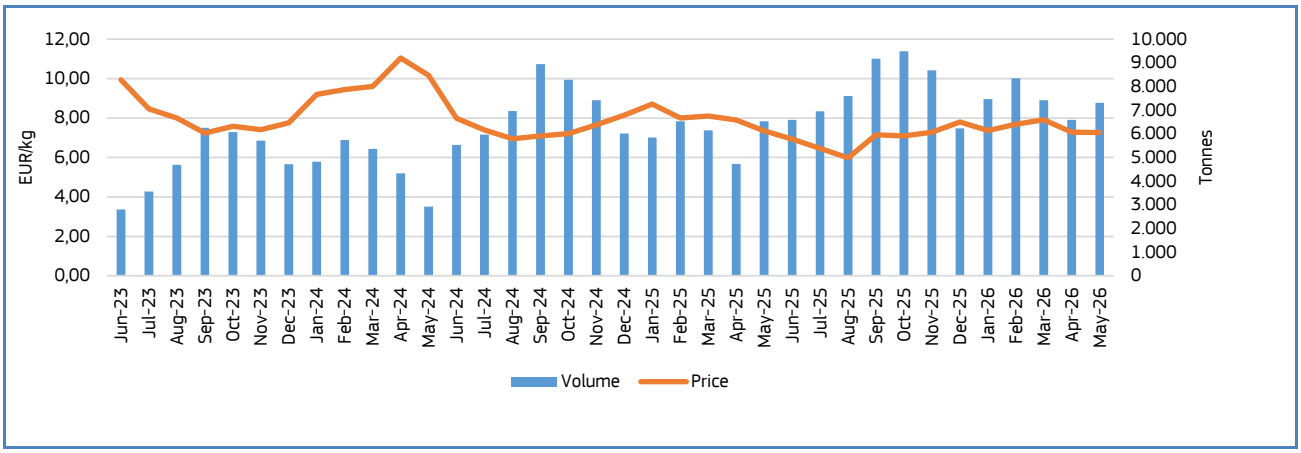


Figure 41. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF SALMON IN SWEDEN, JUN 2023 – MAY 2026 (volume in tonnes and price in EUR/kg)**



4.3. Extra-EU imports of salmon by origin

Between January and May 2026, EU imports of salmon[32] recorded an increasing trend in volume (+8%) and in value (+5%) compared with the same period in 2025. Between January and May 2026, the EU imported 412.501 tonnes of salmon for a value of EUR 3,2 billion. The main extra-EU countries supplying freshwater salmon to the EU in 2026 were Norway (76%), followed by the Faroe Islands (6%), the United Kingdom and Iceland (5% respectively). Compared to the same period in 2025, import volume increased from the main country Norway (+5%) as well as from the Faroe Islands (+10%), Iceland (+74%), Chile (+91%) and China (+12%). Over the same period, imports decreased from the United Kingdom (-20%), and the United States (-4%).

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

Country	Jan – May 2024		Jan – May 2025		Jan – May 2026		Jan – May 2026/2025	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Norway	2.560,6	256.100	2.390,1	296.751	2.476,6	312.584	4%	5%
Faroe Islands	190,2	16.723	202,3	23.996	208,7	26.304	3%	10%
United Kingdom	278,2	26.568	213,0	26.374	173,2	21.009	-19%	-20%
Iceland	94,5	10.435	95,6	12.101	144,5	21.046	51%	74%
Others	192,4	29.247	183,8	23.773	233,8	31.559	27%	33%
Total	**3.315,8**	**339.074**	**3.084,8**	**382.995**	**3.236,8**	**412.501**	**5%**	**8%**

[32] 03019911 - Live Pacific salmon "*Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou and Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"
03021300 - Fresh or chilled Pacific salmon "*Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou* and *Oncorhynchus rhodurus*"
03021400 - Fresh or chilled Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"
03031100 - Frozen sockeye salmon [red salmon] "*Oncorhynchus nerka*"
03031200 - Frozen Pacific salmon (excl. sockeye salmon "red salmon")
03031300 - Frozen, Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"
03031900 - Frozen salmonidae (excl. trout and Pacific, Atlantic and Danube salmon)
03044100 - Fresh or chilled fillets of Pacific salmon "*Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"
03048100 - Frozen fillets of Pacific salmon "*Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*"
03053910 - Fillets of Pacific salmon "*Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*", salted or in brine, but not smoked
03054100 - Smoked Pacific salmon "*Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tschawytscha, Oncorhynchus kisutch, Oncorhynchus masou* and *Oncorhynchus rhodurus*", Atlantic salmon "*Salmo salar*" and Danube salmon "*Hucho hucho*", incl. fillets (excl. offal)
16041100 - Prepared or preserved salmon, whole or in pieces (excl. minced)
16042010 - Prepared or preserved salmon (excl. whole or in pieces)

5. CONSUMPTION

5.1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[33]. They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

Compared to May 2025, household consumption of fresh fishery and aquaculture products in May 2026 increased in both volume and value in Hungary, Ireland, the Netherlands, Portugal and Sweden. In contrast, France, Germany and Spain recorded decreases in both value and volume. Denmark and Poland registered a decrease in volume and an increase in value, while Italy recorded an increase in volume.

The most notable increases were in Hungary and Sweden where consumption increased in volume by 8% and 15% respectively and in value by 25% and 10% respectively compared to 2025. France recorded the most notable decrease: 11% in volume and 6% in value, respectively.

Table 41. **MONTHLY OVERVIEW OF THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita consumption 2023* (live weight equivalent, LWE) kg/capita/year	May 2024		May 2025		May 2026		Change from May 2025 to May 2026	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	974	18,99	1.058	21,05	1.014	22,09	-4%	5%
France	32,14	13.424	191,39	13.167	197,20	11.764	184,39	-11%	-6%
Germany	12,08	3.964	73,03	4.347	81,07	4.299	79,11	-1%	-2%
Hungary	5,83	261	2,35	245	2,14	263	2,68	8%	25%
Ireland*	20,00	847	15,33	887	16,36	920	17,75	4%	8%
Italy	30,38	16.417	215,36	16.354	224,44	16.845	225,30	3%	0%
Netherlands*	19,90	1.989	43,22	1.843	41,99	2.059	44,06	12%	5%
Poland	13,67	2.692	31,22	3.154	38,32	3.138	41,91	-1%	9%
Portugal	53,61	4.677	37,23	4.497	39,12	4.569	42,25	2%	8%
Spain	40,68	38.368	397,53	38.041	412,83	35.287	394,43	-7%	-4%
Sweden	10,00	491	7,22	640	10,30	736	11,33	15%	10%

** The methodologies for estimating apparent consumption at EU and Member State levels are different, the first based on data and estimates, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes. Where EUMOFA estimations on per capita apparent consumption continued to show high annual volatility even with these adjustments, national contact points were contacted to confirm these estimates or to provide their own figures. These are marked with a * in the Table above: Hungary: Institute of Agricultural Economics; Netherlands: Dutch Fish Marketing; Poland: Institute of Agricultural and Food Economics - National Research Institute; Denmark: the Danish Fisheries Agency could not provide any estimates but, according to estimates made by the University of Copenhagen for the latest years, per capita apparent consumption has been between 20,00-25,00 kg LWE; Ireland: the Sea Fisheries Protection Authority could not provide estimates, but EUMOFA has estimated that the average per capita apparent consumption over the last three years has been around 20,00 kg LWE; Sweden: the Swedish Board of Agriculture could not provide estimates but as reported by the Swedish research institute RISE, the consumption in 2023 was 10 kg LWE/per person per year or 1,6 portions person per week.*

[33] Last update: 20.7.2026.

5.2. Overview of household consumption[34] of salmonids consumed in the EU

In the household consumption data used by EUMOFA, consumption of fresh salmonids is monitored in ten[35] Member States: Denmark, France, Germany, Ireland, Italy, the Netherlands, Poland, Portugal, Spain and Sweden. At species level, Denmark, France, Germany, the Netherlands and Poland monitor salmon and trout, Ireland, Italy, Portugal and Spain monitor salmon, and Sweden monitors other salmonids and salmon.

Figure 42. **HOUSEHOLD PURCHASES (in value) OF SALMONIDS IN GERMANY, THE NETHERLANDS, POLAND AND SWEDEN MAY 2023 – APR 2026**

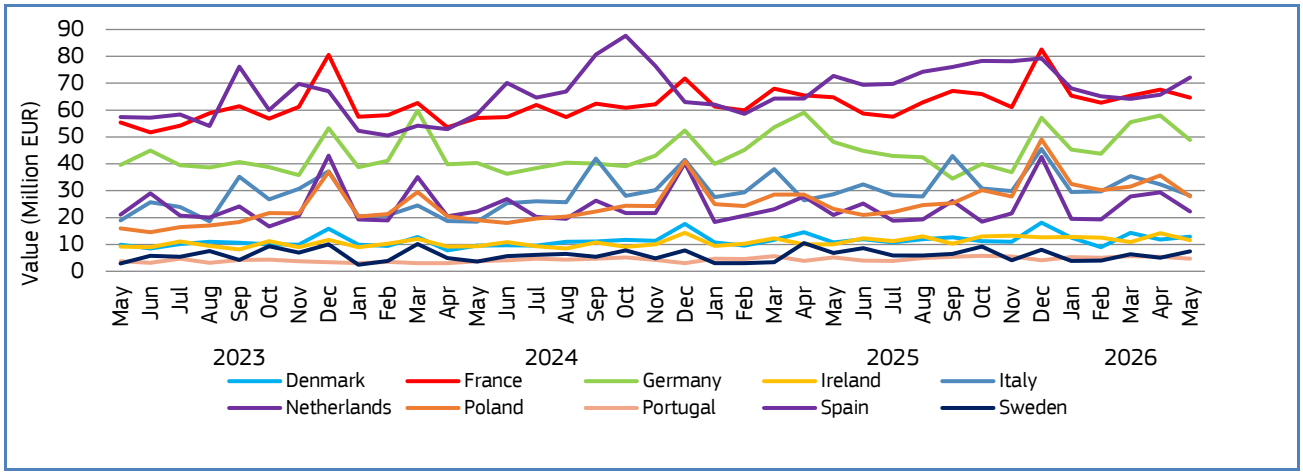
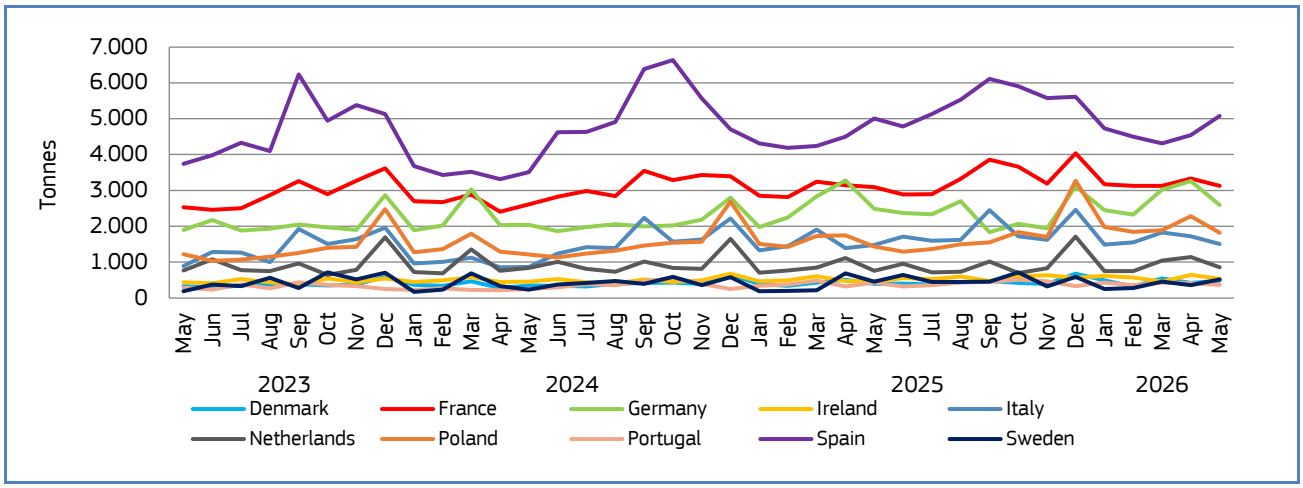


Figure 43. **HOUSEHOLD PURCHASES (in volume) OF SALMONIDS IN GERMANY, THE NETHERLANDS, PORTUGAL AND SWEDEN MAY 2023 – APR 2026**

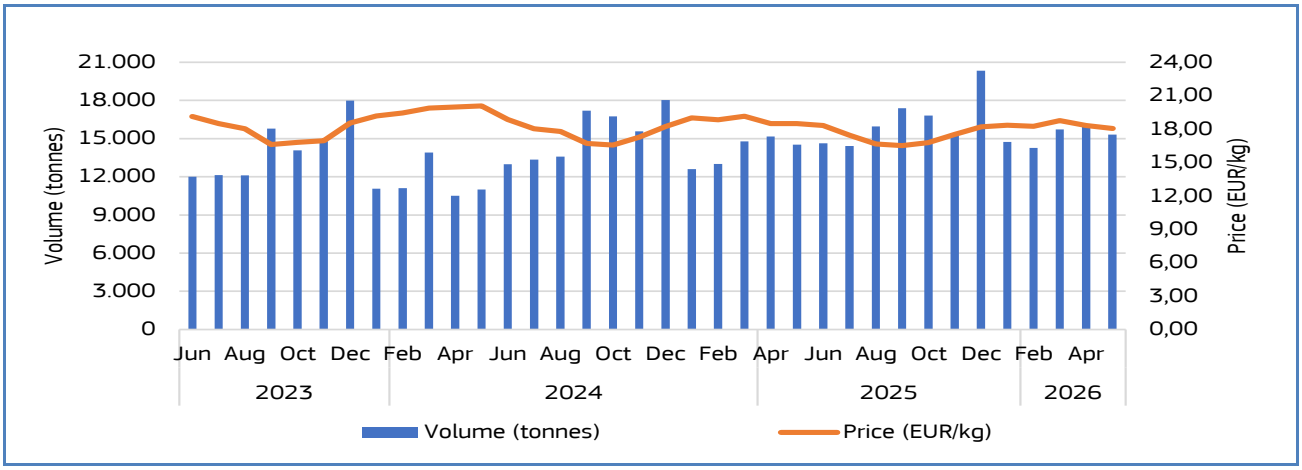


[34] The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the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

5.3. Household consumption trends of salmon - the main species of salmonids in reporting countries

Long-term trend (Jun 2023 to May 2026): Annual variations with a strong peak in December in volume and fluctuating prices.
Yearly average retail price (Jan – May): 19,71 EUR/kg (2024), 18,79 EUR/kg (2025), 18,35 EUR/kg (2026)
Yearly consumption (Jan – May): 55.583 tonnes (2024), 70.105 tonnes (2025), 76.219 tonnes (2026)
Short-term trend (Jun 2025 to May 2026): Fluctuating prices and seasonal variations with a strong peak in December in volume.
Average retail price (Jun 2025 to May 2026): 17,76 EUR/kg.
Consumption (Jun 2025 to May 2026): 191.196 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME OF FRESH SALMON PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, JUN 2023 – MAY 2026**



Consumption of salmon in the reporting countries fluctuates seasonally, peaking strongly in December, due to higher consumption of the species typically during the Christmas period. Prices show a fluctuation related to demand and availability.

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

Global highlights: European Commission, MercoPress, AquaFeed, EU Agenda.

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

First sales: ICES, Statistics Belgium, France AgriMer, European Commission.

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

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

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

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

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

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