



Monthly Highlights

No. 5/2026

EUMOFA

European Market Observatory for
Fisheries and Aquaculture Products



eumofa.eu @EU_MARE #EUMOFA

Contents



Global highlights

Global news from fisheries
and aquaculture sector



First sales in Europe

Analysis of first sales in reporting
countries



Consumption

Groundfish



Macroeconomic context

Marine fuel, consumer prices
and exchange rates



Extra-EU imports

Analysis of extra-EU imports of
groundfish in EU Member States



Case studies

1. Fishmeal and fish oil in the EU
2. Invasive blue crab in the EU

2. MACROECONOMIC CONTEXT

2.1. Marine fuel

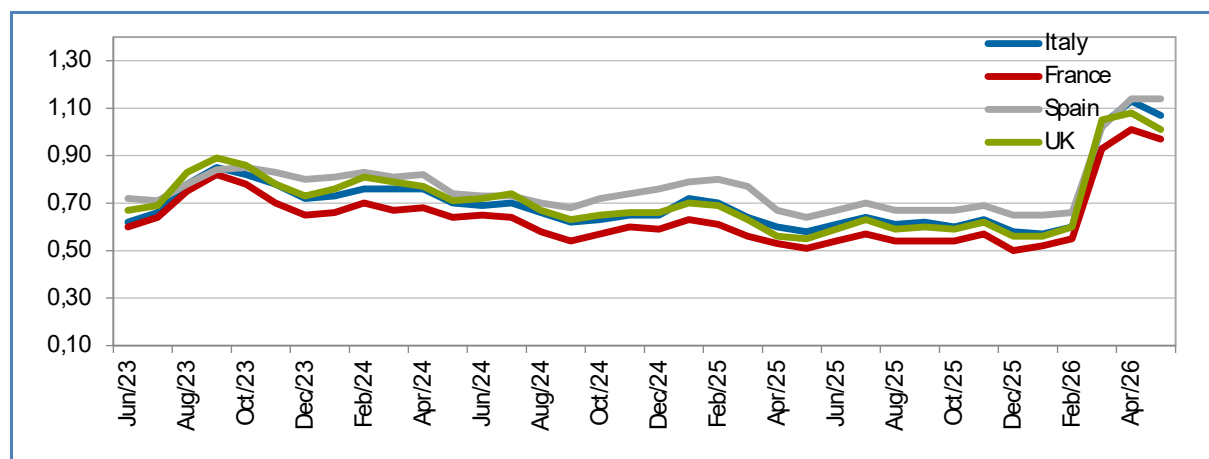
Average prices for marine fuel until 15th May 2026 ranged between 0,97 and 1,14 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices decreased by an average of about 3,9% compared with the previous month and increased by an average of 83,8% compared with the same month in 2025.

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

Country	Dec 2025	Change from Nov 2025	Change from Dec 2024
France <i>(ports of Lorient and Boulogne)</i>	0,97	-4%	90%
Italy <i>(ports of Ravenna and Livorno)</i>	1,07	-5%	84%
Spain <i>(ports of A Coruña and Vigo)</i>	1,14	0%	78%
The UK <i>(ports of Grimsby and Aberdeen)</i>	1,01	-6%	84%

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 April 2026 the EU annual rate of inflation was 3,2%, up from 2,8% compared to March 2026. A year earlier, the rate was 2,4%.

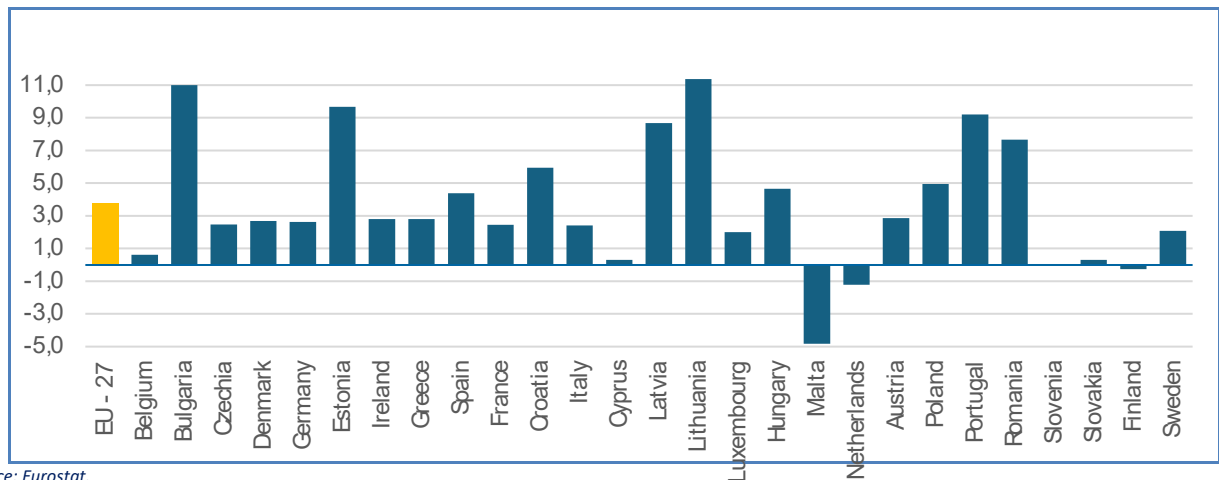
Table 2. HIGHEST AND LOWEST INFLATION RATES FOR APRIL 2026, COMPARED WITH APRIL 2025

Lowest inflation rates		Highest inflation rates	
Sweden	+0,5%	Romania	+9,5%
Denmark	+1,2%	Bulgaria	+6,0%
Czechia	+2,1%	Croatia	+5,4%

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 MARCH 2026 (value expressed in percentage)



Source: Eurostat.

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

	Mar 2024	Mar 2025	Feb 2026	Mar 2026	Change from Feb 2026	Change from Mar 2025
Food and non-alcoholic beverages	96,15	99,36	101,64	101,71	0,1%	2,4%
Fish and other seafood	97,27	99,09	102,64	102,81	0,2%	3,8%
Fish, live, fresh, chilled or frozen	97,03	98,87	103,87	103,68	-0,2%	4,9%
Fish, dried, salted, in brine or smoked	95,83	99,12	103,87	104,43	0,5%	5,4%
Fish preparations	98,60	99,45	100,72	101,21	0,5%	1,8%
Other seafood, live, fresh, chilled or frozen	97,21	99,31	100,46	100,90	0,4%	1,6%
Other seafood, dried, salted, in brine or smoked	96,89	97,46	99,48	98,53	-1,0%	1,1%
Other seafood preparations	96,78	99,32	102,43	103,24	0,8%	3,9%

Source: Eurostat.

2.4. Exchange rates

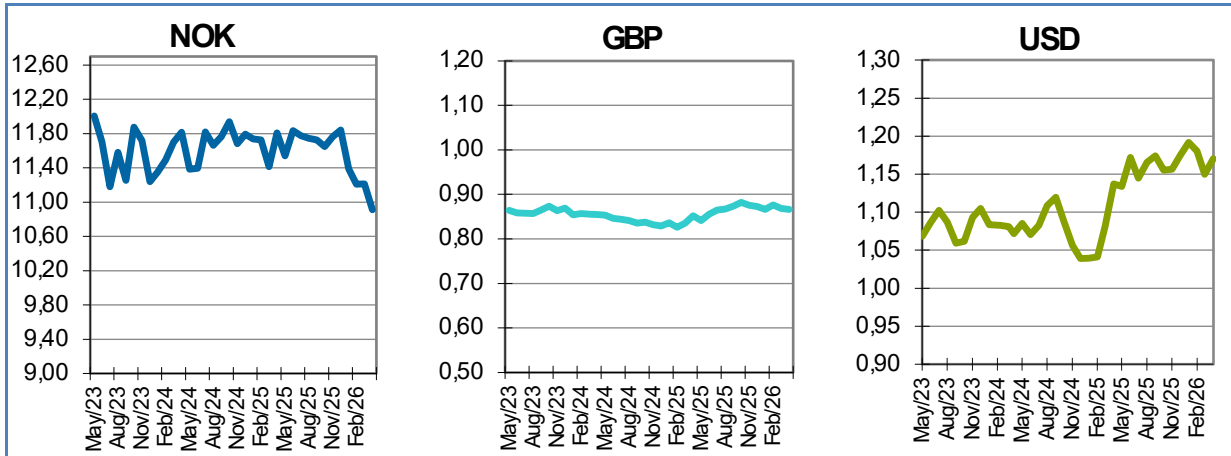
Table 4. EURO EXCHANGE RATES FOR SELECTED CURRENCIES

Currency	Apr 2024	Apr 2025	Mar 2026	Apr 2026
NOK	11,8150	11,8090	11,2125	10,9123
GBP	0,8548	0,8518	0,8683	0,8663
USD	1,0718	1,1373	1,1498	1,1702

Source: European Central Bank.

In April 2026, the euro appreciated against the US dollar (1,8%) and depreciated against the Norwegian krone (2,7%) and the British pound sterling (0,2%), relative to the previous month. For the past six months, the euro has fluctuated around 1,1707 against the US dollar, 11,3882 against the Norwegian krone and 0,8708 against the British pound sterling. Compared with April 2025, the euro appreciated 2,9% against the US dollar and 1,7% against the British pound sterling and depreciated 7,6% against the Norwegian krone.

Figure 3. TREND OF EURO EXCHANGE RATES



Source: European Central Bank.

3. FIRST SALES IN EUROPE⁷

3.1. Year-to-date comparison of first sales

Increases in value and volume (Jan - Feb 2026 vs Jan - Feb 2025): Croatia, Denmark, Estonia, Finland, Latvia, Portugal and Norway recorded increases in both first-sales value and volume. The highest increase in volume was observed in Sweden due mainly to herring and sprat, while the highest growth in value in Finland was due to herring.

Decreases in value and volume (Jan - Feb 2026 vs Jan - Feb 2025): Belgium, Bulgaria, Cyprus, France, Greece, Ireland, Italy, Lithuania, Poland, Spain and Sweden recorded decreases in first-sales value and volume. Germany stood out with the most significant drop both in volume and value in relative terms, due mainly to mackerel and European plaice.

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

Country	January – February 2024		January – February 2025		January – February 2026		Change from January – February 2025	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	2.71	12,42	2.663	13,74	2.430	12,03	-9%	-12%
Bulgaria	238	0,18	34	0,10	18	0,07	-47%	-32%
Croatia	1.254	4,11	1.715	3,96	1.952	4,27	14%	8%
Cyprus	40	0,32	46	0,33	32	0,21	-29%	-36%
Denmark	143.171	90,08	104.701	84,65	110.327	90,15	5%	7%
Estonia	14.319	6,86	15.120	5,98	16.262	6,67	8%	12%
Finland	129.166	71,81	98.967	105,75	107.055	140,99	8%	33%
France	30.457	100,86	33.174	124,13	32.136	125,84	-3%	1%
Germany	11.372	12,11	2.116	2,64	264	1,31	-88%	-51%
Greece	3.238	13,33	2.932	12,22	2.516	10,56	-14%	-14%
Ireland	54.585	76,23	67.718	93,44	57.853	77,31	-15%	-17%
Italy	9.105	40,40	7.507	37,93	8.378	41,41	12%	9%
Latvia	9.227	3,18	9.555	3,92	5.734	3,03	-40%	-23%
Lithuania	28	0,13	16	0,07	13	0,08	-19%	11%
Netherlands	2.612	18,21	3.104	19,68	2.711	17,46	-13%	-11%
Poland	16.388	8,11	13.979	6,99	15.023	7,17	7%	2%
Portugal	8.189	35,73	8.992	40,00	4.600	24,37	-49%	-39%
Spain	42.560	175,64	39.070	178,39	30.090	147,93	-23%	-17%
Sweden	31.142	20,04	16.846	13,39	19.695	14,19	17%	6%
Norway	608.943	619,35	513.349	677,91	511.211	660,74	0%	-3%
United Kingdom	78.421	154,15	76.385	165,59	57.816	194,74	-24%	18%

Possible discrepancies in % changes are due to rounding.

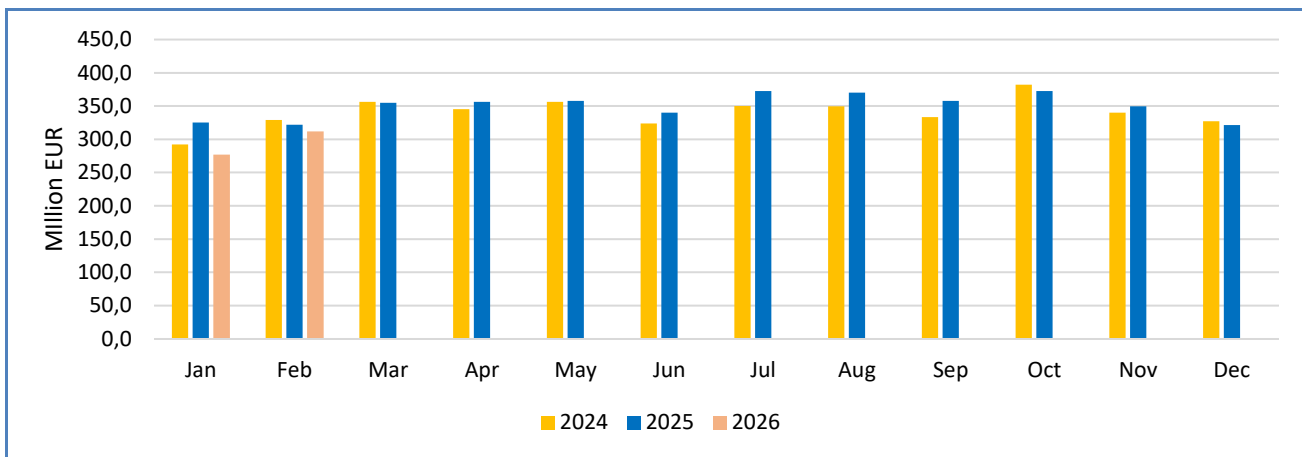
** Volumes are reported in net weight for EU Member States, and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (nominal values without VAT). For Norway, prices are reported in EUR/kg of live weight.*

⁷ During January–February 2026, 19 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section “First sales in Europe” are extracted from EUMOFA.



The overall value of first sales in the two first months of 2026 was EUR 588,7 million, a 9% decrease compared to 2025, and a 5% decrease compared to 2024. Overall volume was 323.114 tonnes, a 7% decrease compared to 2025, and an 17% decrease compared to 2024.

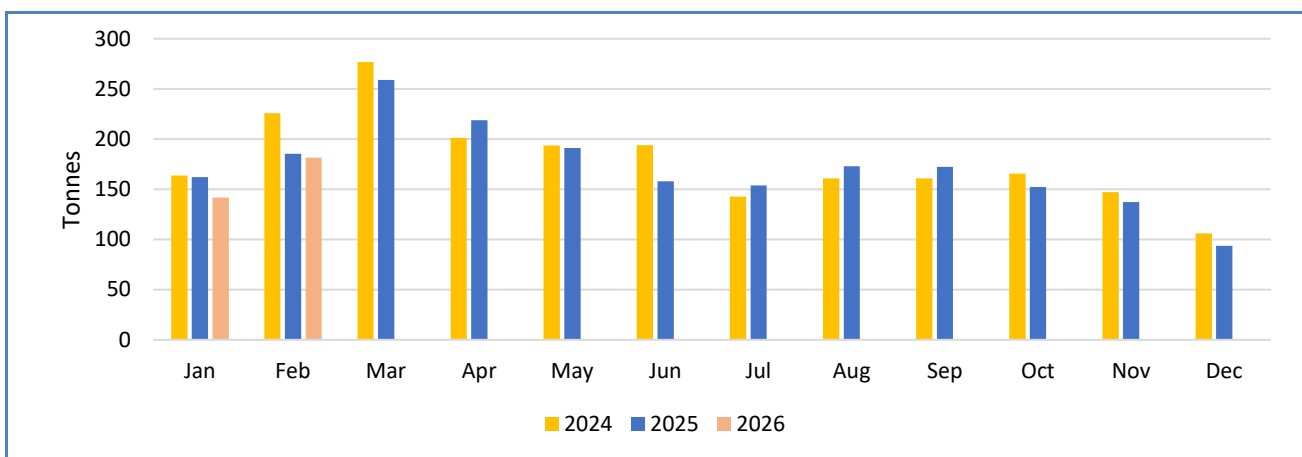
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST SALES VALUE FROM THE REPORTING COUNTRIES⁷**
(value in million EUR)



In the first two months of 2026, monthly first-sales value in both January and February was lower compared to 2024 and 2025. Over the same period in 2026, first-sales volume decreased compared to the same period in both 2024 and 2023.

The decrease in first-sales value compared to 2025 and 2024 was mainly driven by small pelagics (-11% and -9%, respectively) and tuna and tuna-like species (-46% and -44%, respectively). Similarly, in the same period in 2026, the decrease in first-sales volume was mainly due to small pelagics which fell by 7% in comparison to 2025. Compared with 2024 both groundfish and small pelagics contributed to the reduction, declining by 33% and 12%, respectively.

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^{8,9}

Bivalves and other molluscs and aquatic invertebrates

In January-February 2026, first-sales value of “Bivalves and other molluscs and aquatic invertebrates” amounted to EUR 52,0 million, a 6% increase compared to the same period in 2024. First-sales volume reached 19.489 tonnes, a decrease of 8% compared to 2024. Scallop was the main commercial species driving the increase in value of the commodity group (+27), while the decrease in volume was mainly due to mussel *Mytilus* spp (-92%).

Figure 6. FIRST SALES VALUE AND VOLUME OF BIVALVES, JAN 2024 – FEB 2026

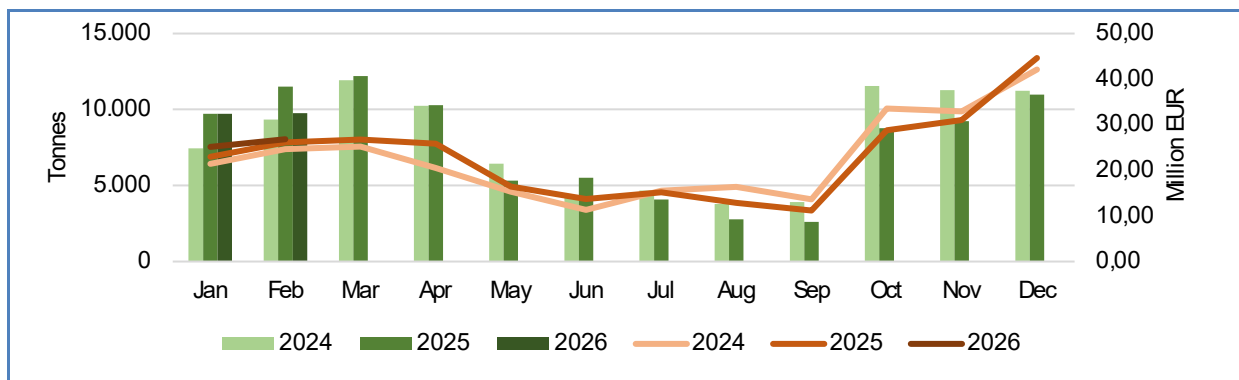


Table 6. FIRST SALES PRICES OF BIVALVES MAIN COMMERCIAL SPECIES (MCS) (JAN - FEB 2025 AND JAN - FEB 2026)

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
France	Scallop	2,07 EUR/kg	2,33 EUR/kg	+12%
Italy	Clam	2,68 EUR/kg	2,74 EUR/kg	+2%
France	Sea urchin	4,96 EUR/kg	9,18 EUR/kg	+85%

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

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

Cephalopods

In 2026, first-sales value of “Cephalopods” totalled EUR 44,1 million, a 22% decrease compared to 2025. First-sales volume totalled 6.338 tonnes, a decrease of 18% compared to 2025. Octopus (-34% and -37%) was the main commercial species driving the decrease in first-sales value and volume.

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

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



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

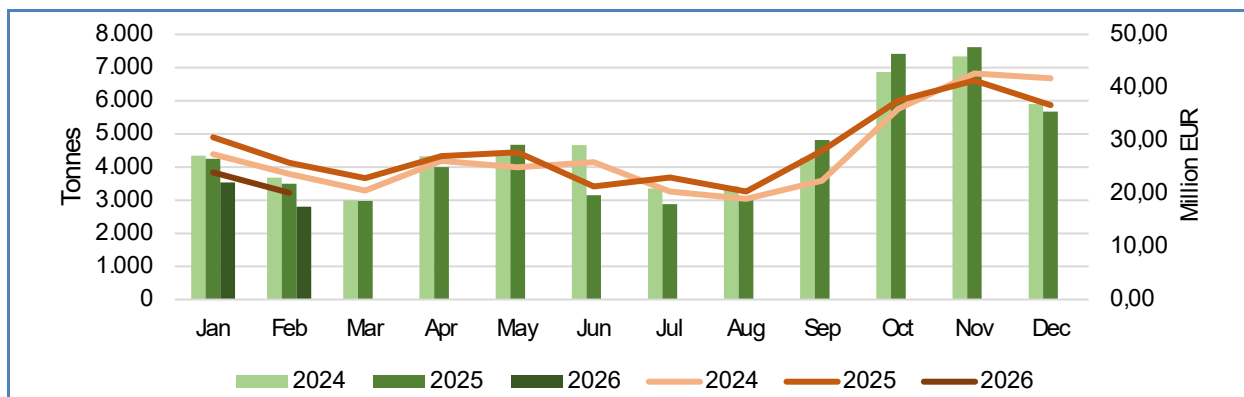


Table 7. FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN - FEB 2025 AND JAN - FEB 2026)

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
Portugal	Octopus	8,59 EUR/kg	8,51 EUR/kg	-1%
Spain	Octopus	7,69 EUR/kg	8,48 EUR/kg	+10%
France	Squid	9,31 EUR/kg	8,55 EUR/kg	-8%

Crustaceans

In 2026, first-sales value of “Crustaceans” totalled EUR 62,0 million, an 11% decrease in value compared to 2025. First-sales volume amounted to 6.926 tonnes, a decrease of 16% compared to 2025. Deep water rose shrimp (-27% and -16%) and Norway lobster (-12% and -19%) were the two main products responsible for the decrease in first-sales value and volume.

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

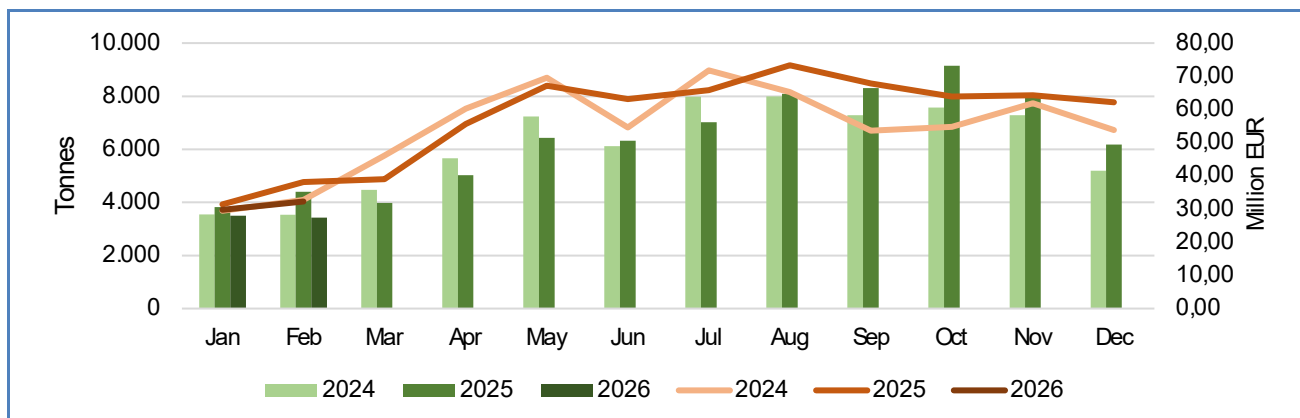


Table 8. FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN - FEB 2025 AND JAN - FEB 2026)

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
Spain	Deep-water rose shrimp	7,49 EUR/kg	6,31 EUR/kg	-16%
The Netherlands	Shrimp <i>Crangon</i> spp.	8,37 EUR/kg	5,05 EUR/kg	-40%
Spain	Warmwater shrimp	10,79 EUR/kg	11,94 EUR/kg	+11%

Flatfish

In 2026, first-sales value of “Flatfish” totalled EUR 54,7 million, a 2% decrease compared to 2025. First-sales volume amounted to 6.213 tonnes, a decrease of 30% compared to 2025. European plaice (-18% and -29%, respectively) was the main species driving the decline in first-sales value and, together with European flounder (-32%), also accounted for most of the reduction in first-sales volume.

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

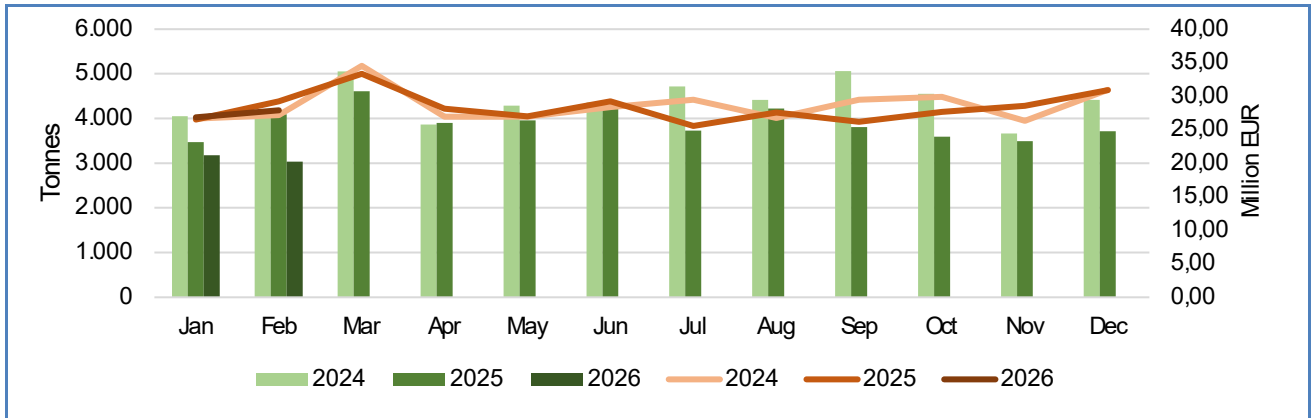


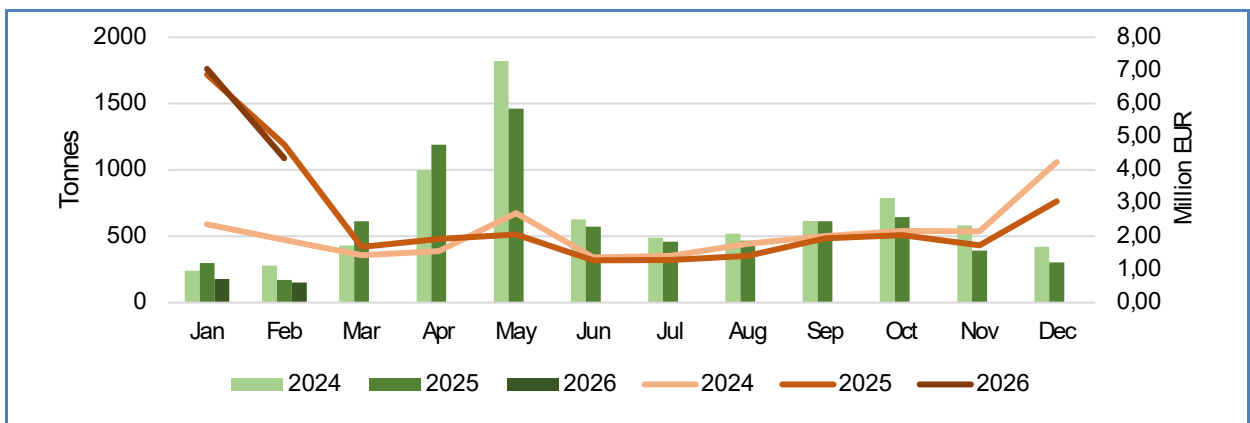
Table 9. FIRST-SALES PRICE OF FLATFISH MCS (JAN - FEB 2025 AND JAN - FEB 2026)

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
France	Common sole	17,34 EUR/kg	18,67 EUR/kg	+8%
Denmark	Turbot	19,53 EUR/kg	27,26 EUR/kg	+40%
Denmark	European plaice	2,94 EUR/kg	3,40 EUR/kg	+16%

Freshwater fish

In 2026, first-sales value of “Freshwater fish” reached EUR 11,4 million, marking a 2% decrease compared to 2025. First-sales volume amounted to 328 tonnes, a decrease of 30% compared to 2025. The category “other freshwater fish”¹⁰ was the main contributor to the decrease in first-sales value and volume (-67% and -71%, respectively).

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



¹⁰ „Other freshwater fish“ comprises 30 species, and European perch was driving the decline in first-sales value (-74%) and volume (-75%) representing 55% of total first-sales value and 20% of total first-sales volume.

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

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
Poland	Pike-perch	6,02 EUR/kg	5,03 EUR/kg	-16%
France	Eel*	199,64 EUR/kg	186,89 EUR/kg	-6%
Poland	Other freshwater fish ¹¹	0,87 EUR/kg	0,99 EUR/kg	+14%

*The average price of eel reflects different products: glass eel (up to 419 EUR/kg), yellow eel (up to 21 EUR/kg) and silver eel (up to 17 EUR/kg).

Groundfish

In 2026, first-sales value of “Groundfish” totalled EUR 101,4 million, an increase of 2% compared to 2025. First-sales volume amounted to 62.511 tonnes, an increase of 8% compared to 2025. Blue whiting (+43% and +22% respectively) was mainly responsible for the increase in first-sales value and volume.

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

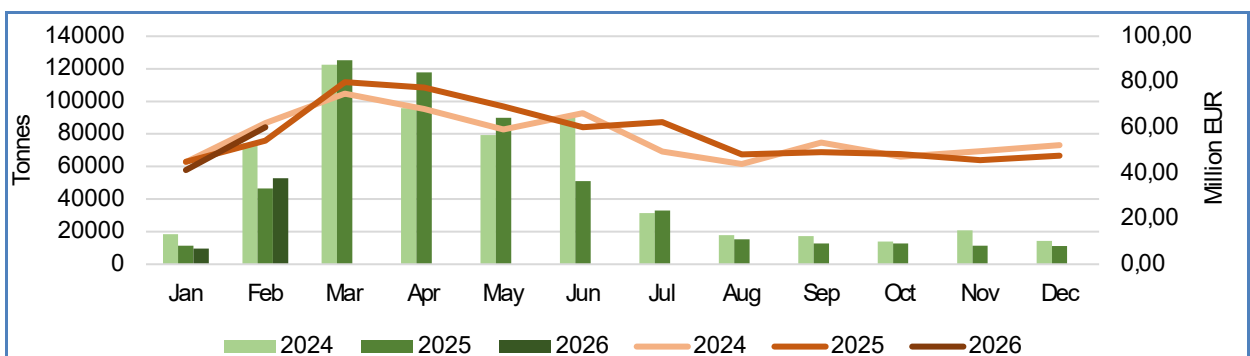


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN - FEB 2025 AND JAN - FEB 2026)**

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
Ireland	Blue whiting	0,30 EUR/kg	0,46 EUR/kg	+56%
Denmark	Saithe	2,53 EUR/kg	3,34 EUR/kg	+32%
Spain	Redfish	1,71 EUR/kg	1,65 EUR/kg	-4%

Other marine fish¹²

In 2026, first-sales value of the category “other marine fish” totalled EUR 88,6 million, a decrease of 8% compared to 2025. First-sales volume amounted to 34.437 tonnes, a decrease of 13% compared to 2024. Other sharks¹³ (-29% and -28%, respectively) and monk (-8% and -15% respectively) were the main commercial species contributing to the decrease in first-sales value and volume.

¹¹ „Other freshwater fish” in Poland comprised 5 species of which freshwater brim accounts for 44% of total first-sales value and 76% of total first-sales volume.

¹² Seventeen Main Commercial Species are included in the Commodity Group „Other Marine Fish” with monk representing more than 25% of the total value and almost 20% of total volume.

¹³ „Other sharks” comprises 27 species, and blue shark was driving the decline in first-sales value (-34%) and volume (-40%) representing 65% of total first-sales value and 48% of total first-sales volume.



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

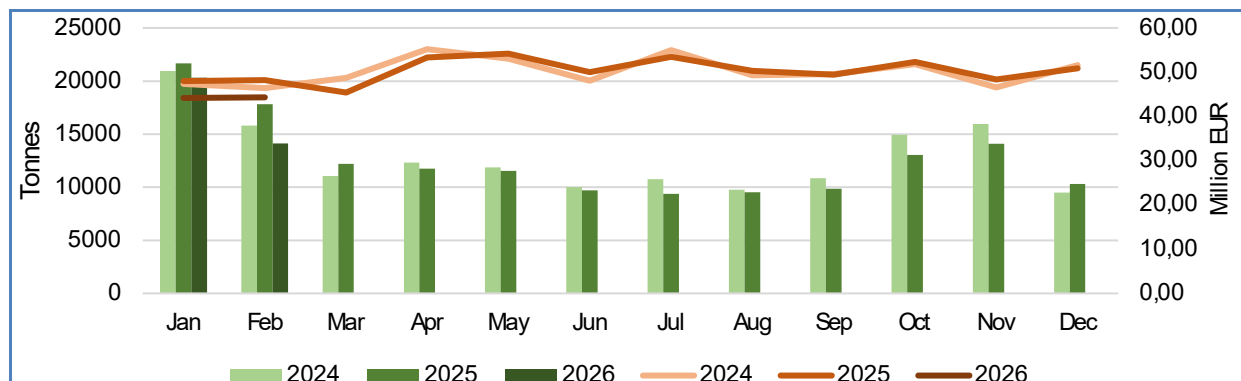


Table 12. FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN - FEB 2025 AND JAN - FEB 2026)

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
Spain	Other sharks ¹⁴	3,03 EUR/kg	3,22 EUR/kg	+6%
Denmark	Other marine fish ¹⁵	0,41 EUR/kg	0,48 EUR/kg	+18%
Portugal	Scabbardfish	4,59 EUR/kg	4,40 EUR/kg	-4%

Salmonids

In 2025, first-sales value of “Salmonids” totalled EUR 27.786, a decrease of 17% compared to 2025, while first-sales volume amounted to 1.728 kg, a decrease of 50% compared to 2024. Trout (-29% and -48% respectively) was the main species responsible for the decrease in first-sales value and volume of salmonids.

Figure 13. FIRST SALES VALUE AND VOLUME OF SALMONIDS, JAN 2024 – FEB 2026

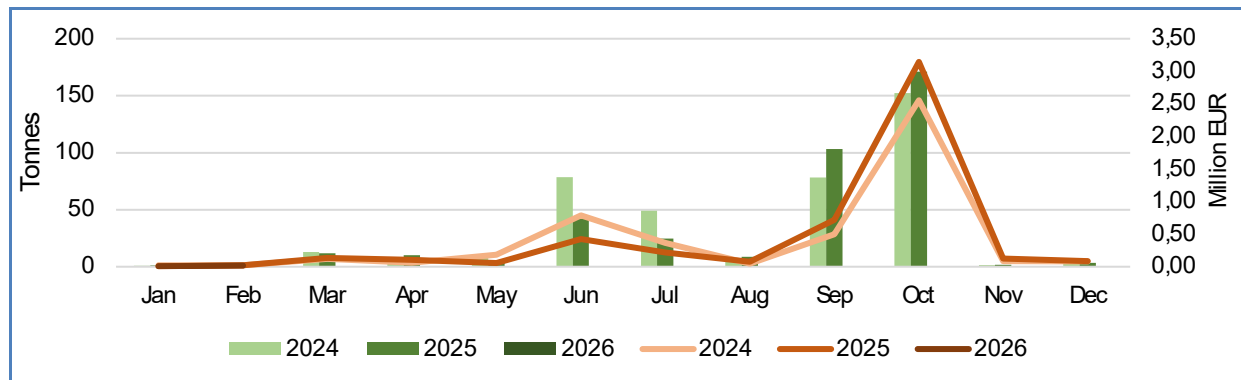


Table 13. FIRST-SALES PRICE OF SALMONIDS MCS (JAN - FEB 2025 AND JAN - FEB 2026)

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
Germany	Trout	9,40 EUR/kg	8,00 EUR/kg	-15%

Small pelagics

In 2026, first-sales value of “Small pelagics” amounted to EUR 157,4 million, a decrease of 11% compared to 2025. First-sales volume amounted to 183.548 tonnes, a 7% decrease compared to 2025. Mackerel (-50% and -73%) was the commercial species contributing most to the decrease in first-sales value and volume.

¹⁴ „Other marine fish“ MCS in Spain comprises 15 species species in the period analysed of which blue shark represented 88% of the total value and 86% of volume.

¹⁵ „Other marine fish“ MCS in Denmark comprises 8 species in the period analysed of boarfishes nei represented almost 100% of the total value and volume.



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

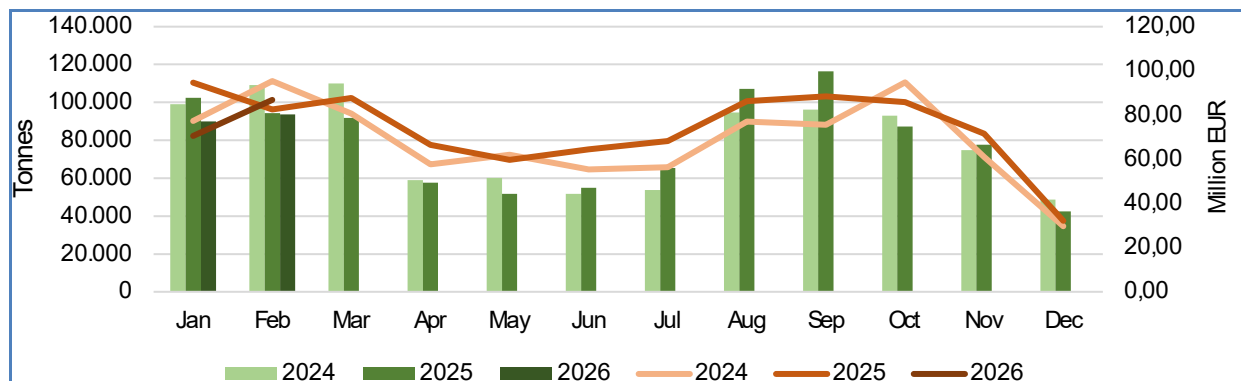


Table 14. FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN - FEB 2025 AND JAN - FEB 2026)

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
Ireland	Mackerel	2,16 EUR/kg	4,03 EUR/kg	+87%
Denmark	Mackerel	2,15 EUR/kg	0,53 EUR/kg	-75%
Portugal	Anchovy	2,76 EUR/kg	3,09 EUR/kg	+12%

Tuna and tuna-like species

In 2026, first-sales value of “Tuna and tuna-like species” totalled EUR 17,3 million, a decrease of 46% compared to 2025. First-sales volume totalled 3.316 tonnes, a decrease of 57% compared to 2025. Yellowfin tuna (-63% and -64%), and swordfish (-38% and -46%) 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 – FEB 2026

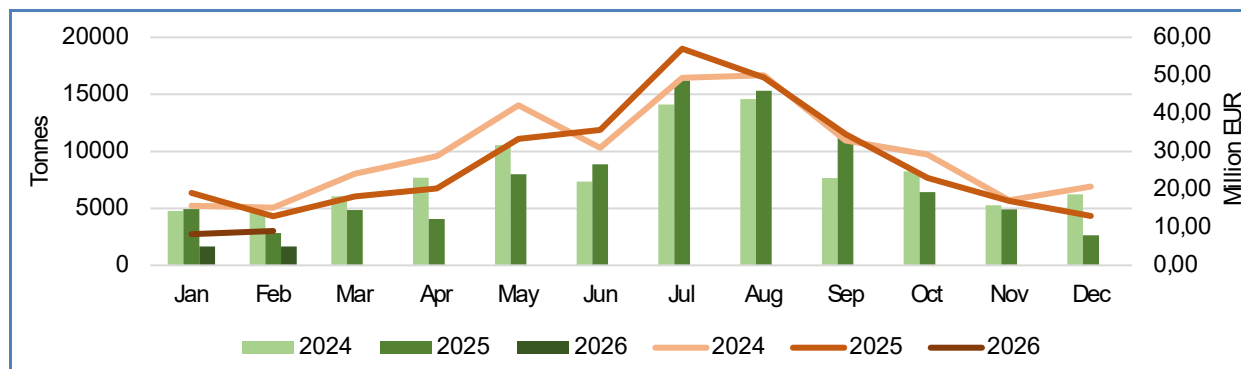


Table 15. FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN - FEB 2025 AND JAN - FEB 2026)

Country	Main Commercial Species	First-sales average price Jan-Feb 2025	First-sales average Price Jan-Feb 2026	Trend (Jan-Feb 2026 vs Jan-Feb 2025 %)
Spain	Swordfish	5,04 EUR/kg	5,75 EUR/kg	+14%
Spain	Yellowfin tuna	2,64 EUR/kg	2,39 EUR/kg	-10%
Spain	Bigeye tuna	2,32 EUR/kg	2,55 EUR/kg	+10%



3.3. First sales in reporting countries¹⁶

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


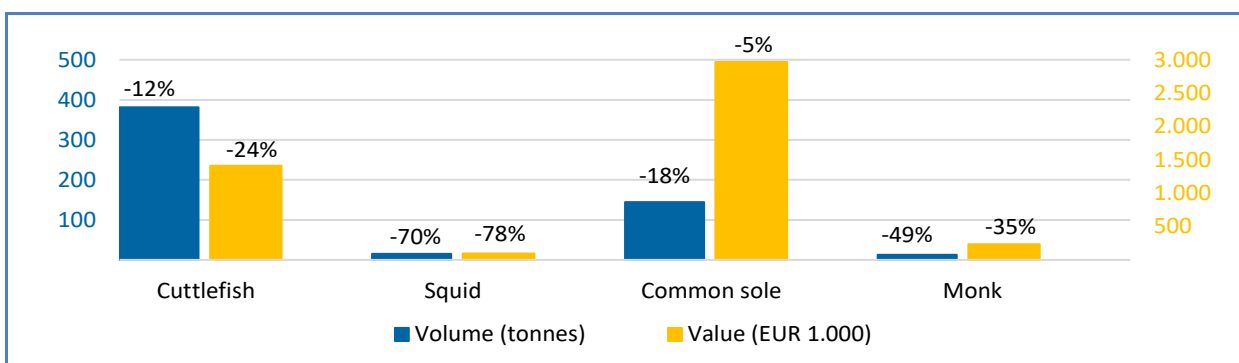
 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 12,0 million, -12%	2.430 tonnes, -9%	Squid, cuttlefish, monk, octopus.
Feb 2026 vs Feb 2025	EUR 6,8 million, -13%	1.138 tonnes, -5%	Cuttlefish, squid, common sole, monk.

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



Percentages show change from the previous year.

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


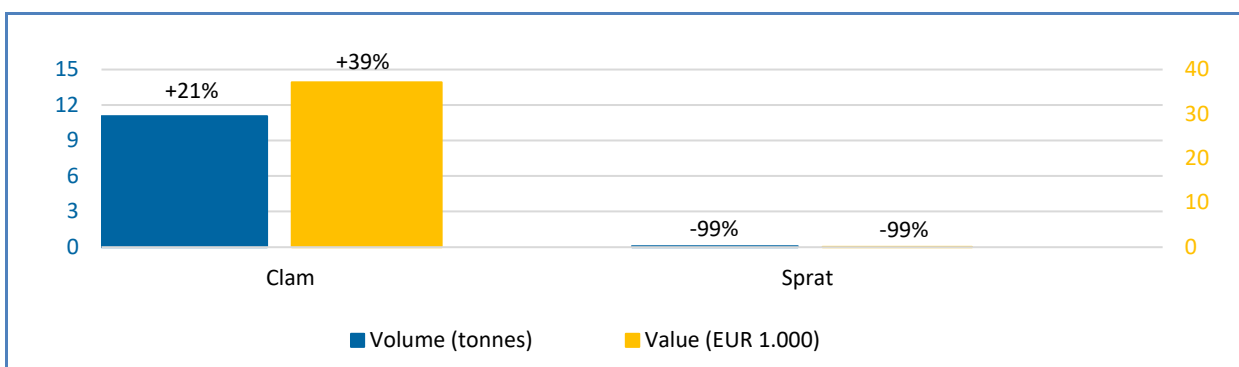
 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 0,07 million, -32%	18 tonnes, -47%	Clam, sprat.
Feb 2026 vs Feb 2025	EUR 0,04 million, +25%	11 tonnes, -23%	Value: clam Volume: sprat

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



Percentages show change from the previous year. *EUMOFA aggregation for species.¹⁷

¹⁶ First-sales data updated on 20. 04. 2026. This section covers all countries for which data are available on the date of extraction from the EUMOFA database and analysis.

¹⁷ Metadata 2, Annex 3: <https://eumofa.eu/supply-balance-and-other-methodologies>



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


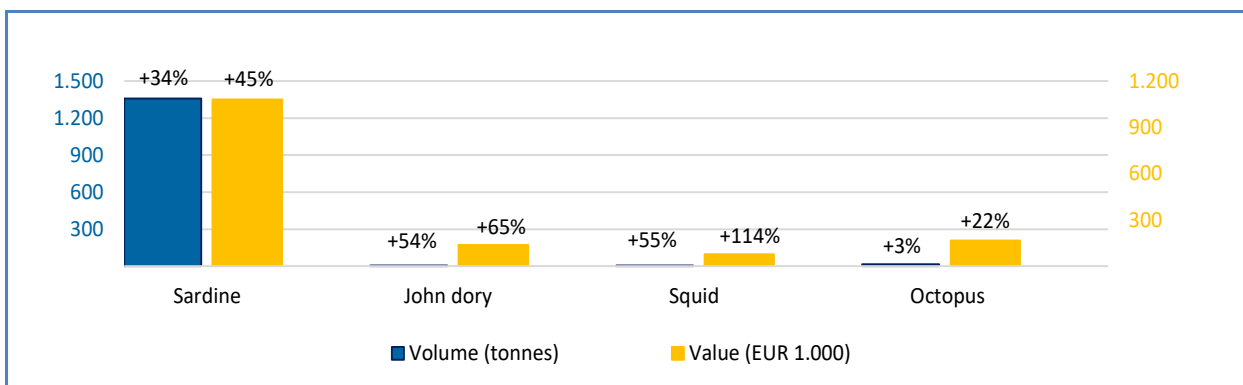
 Croatia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 4,3 million, +8%	1.952 tonnes, +14%	Sardine, squid, John Dory, octopus.
Feb 2026 vs Feb 2025	EUR 3,0 million, +10%	1.757 tonnes, +17%	Sardine, John Dory, squid, octopus.

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



Percentages show change from the previous year.

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


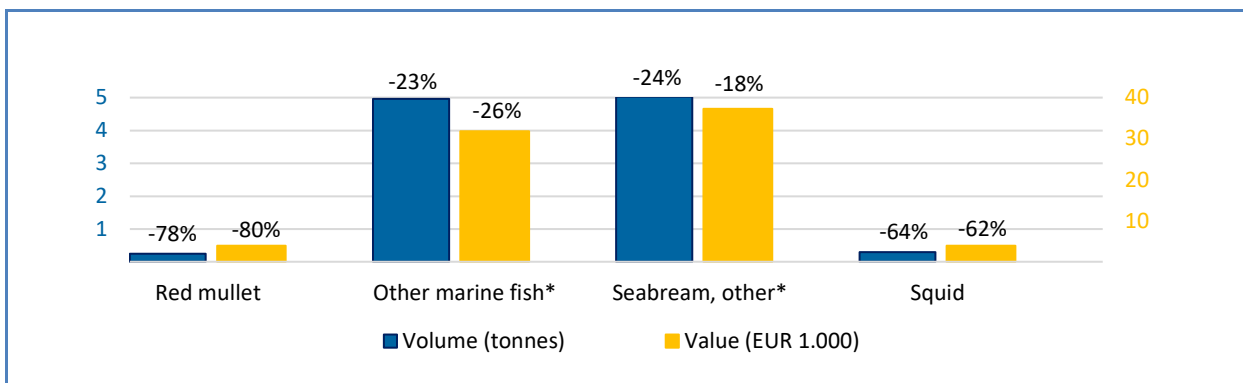

 Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 0,2 million, -36%	32 tonnes, -29%	Other marine fish*, Other seabream*, red mullet, squid.
Feb 2026 vs Feb 2025	EUR 0,1 million, -25%	17 tonnes, -15%	Red mullet, Other marine fish*, Other seabream *, squid.

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



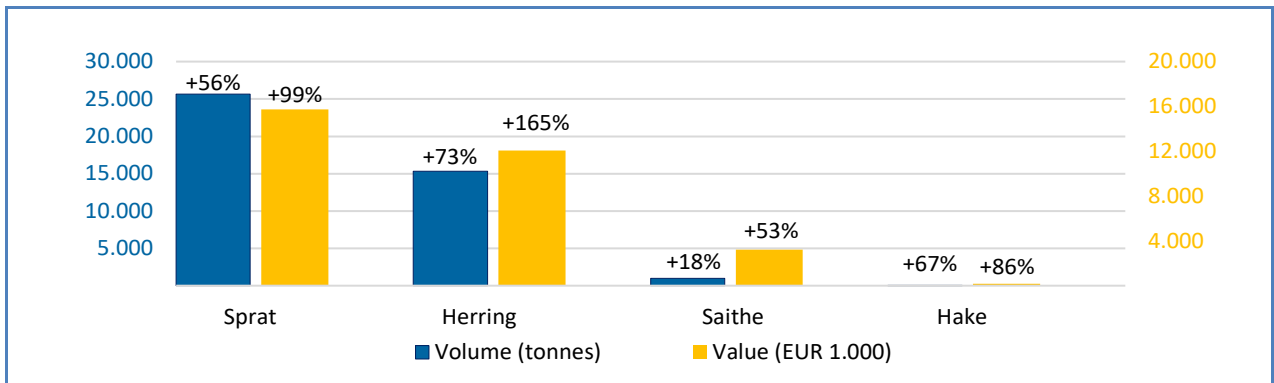
Percentages show change from the previous year. *EUMOFA aggregation for species.

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

 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 90,2 million, +7%	110.327 tonnes, +5%	Herring, sprat, saithe, hake.
Feb 2026 vs Feb 2025	EUR 47,6 million, +25%	60.255 tonnes, +8%	Sprat, herring, saithe, hake.


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

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



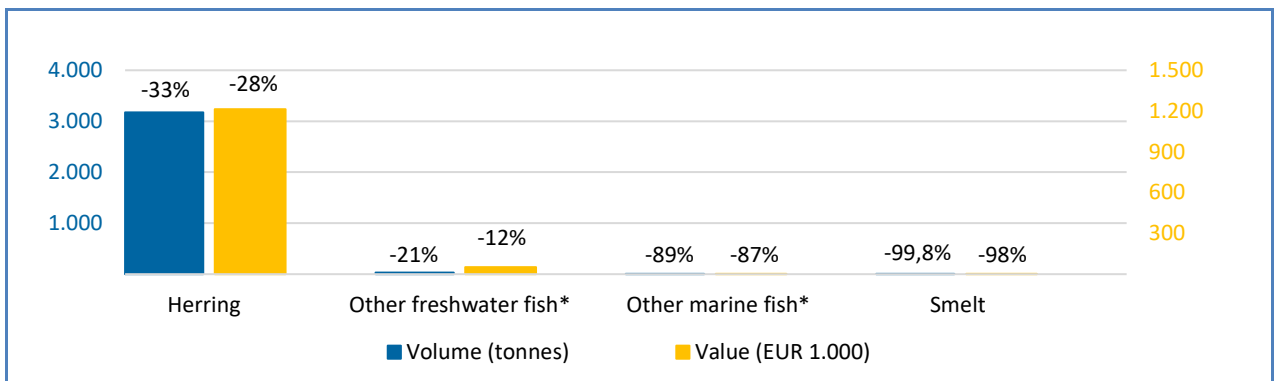
Percentages show change from the previous year.

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

 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 6,7 million, +12%	16.262 tonnes, +8%	Sprat, pike-perch, pike.
Feb 2026 vs Feb 2025	EUR 3,1 million, -7%	7.229 tonnes, -15%	Herring, Other freshwater fish*, Other marine fish*, smelt.

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

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



Percentages show change from the previous year.

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


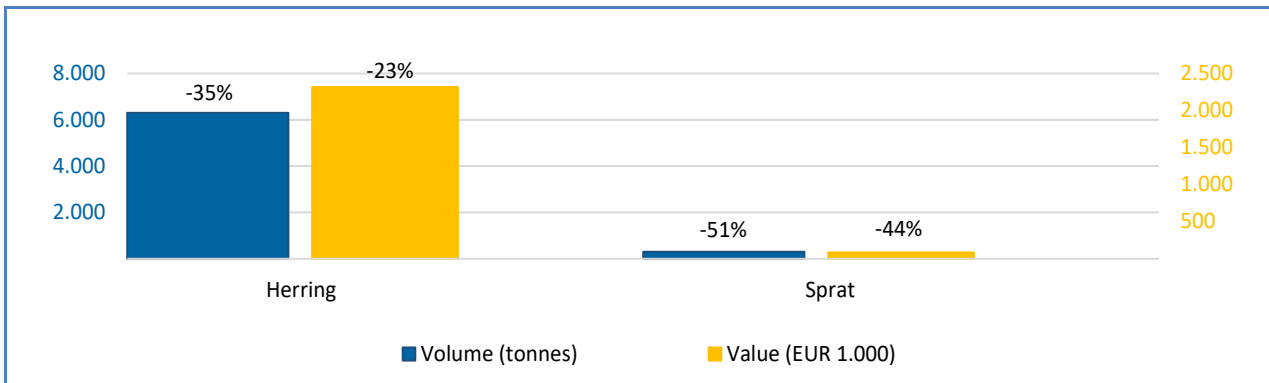
 Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 4.7 million, -15%	6.598 tonnes, -36%	Herring.
Feb 2026 vs Feb 2025	EUR 2,4 million, -24%	6.598 tonnes, -36%	Herring, sprat.

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



Percentages show change from the previous year.

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


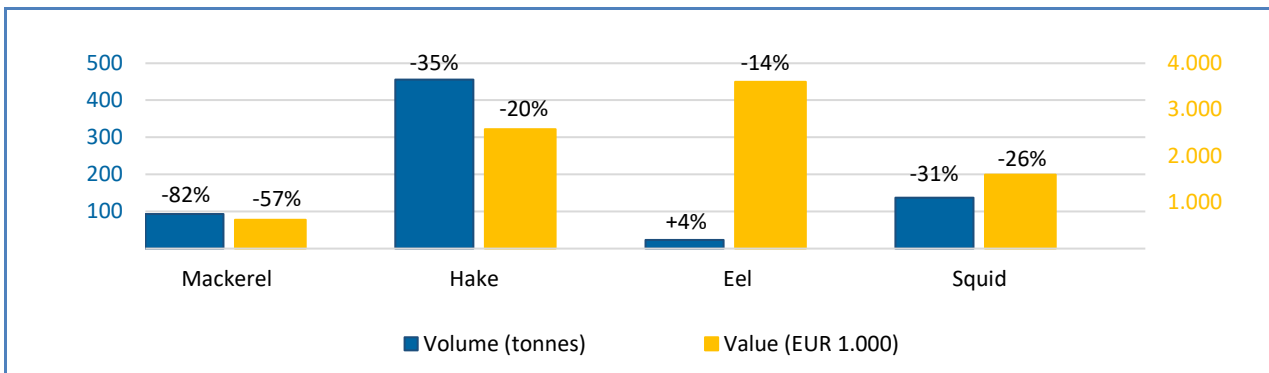
 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 125,8 million, +1%	32.136 tonnes, -3%	Value: scallop, European seabass, Other seabream* Volume: mackerel, crab, ray.
Feb 2026 vs Feb 2025	EUR 60,5 million, -2%	16.090 tonnes, -10%	Mackerel, hake, eel, squid.

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



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



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


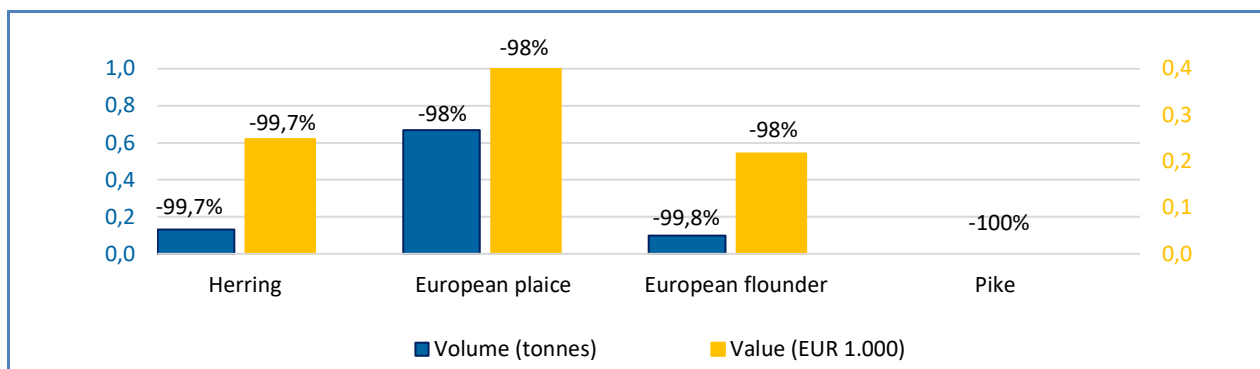
 Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 1,3 million, -51%	264 tonnes, -88%	Mackerel, European plaice, Other freshwater fish*, European flounder.
Feb 2026 vs Feb 2025	EUR 0,3 million, -20%	46 tonnes, -76%	Herring, European plaice, European flounder, pike.

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



Percentages show change from the previous year.

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


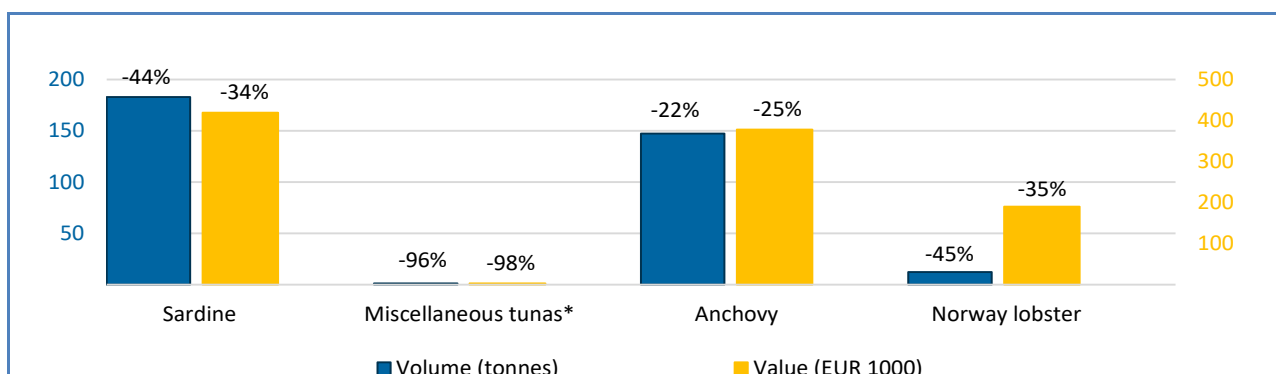
 Greece	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Feb 2026 vs Jan-Feb 2025	EUR 10,6 million, -14%	2.516 tonnes, -14%	Sardine, Miscellaneous tunas*, hake, Other seabream*.	In February, Greek imports or landings of miscellaneous tuna fell sharply compared to a year earlier, declining by 98% in value and 96% in volume. The category should be treated as an aggregated residual group, mainly reflecting Mediterranean small tunas such as Atlantic bonito, little tunny, and bullet tuna. These species are largely associated with incidental catches by the purse-seine fleet, which primarily targets small pelagics. The steep decline is most plausibly linked to weather-related disruption, when repeated rough-sea conditions, gale-force winds, and suspended ferry services likely reduced fishing activity and affected trip timing, rather than to any newly identified regulatory change.
Feb 2026 vs Feb 2025	EUR 5,0 million, -7%	1.188 tonnes, -12%	Sardine, Miscellaneous tunas*, anchovy, Norway lobster.	

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



Percentages show change from the previous year.

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


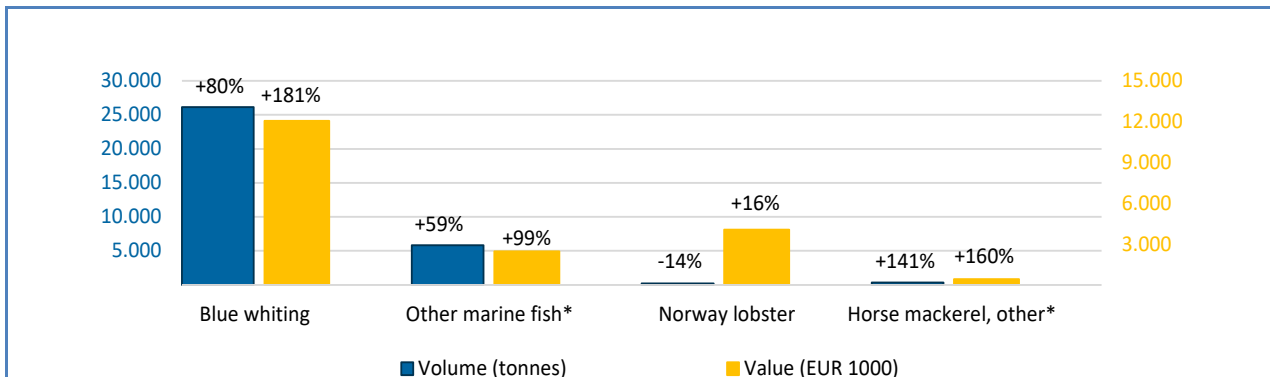
 Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 77,3 million, -17%	57.853 tonnes, -15%	Mackerel, Atlantic horse mackerel, sprat, herring.
Feb 2026 vs Feb 2025	EUR 48,2 million, +1%	42.165 tonnes, +12%	Blue whiting, Other marine fish*, Norway lobster, Other horse mackerels* (other than Atlantic horse mackerel).

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



Percentages show change from the previous year.

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


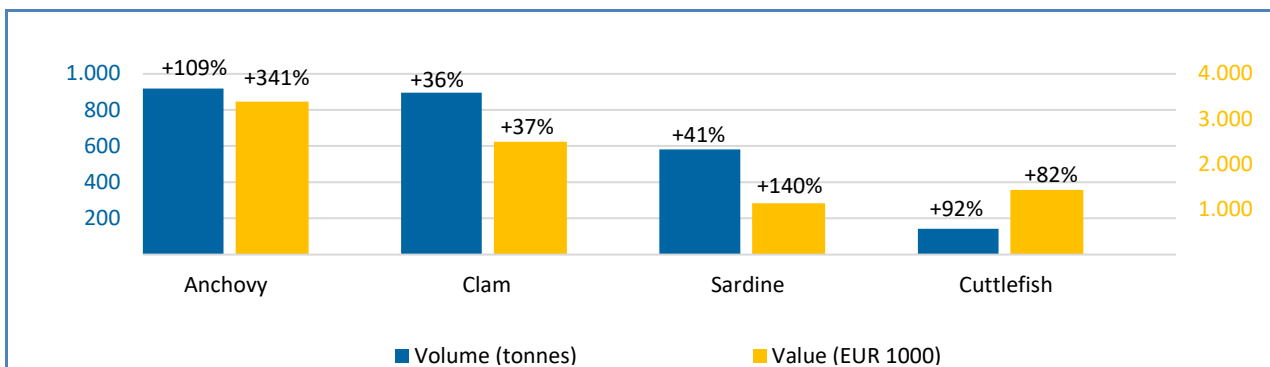
 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 41,4 million, +9%	8.378 tonnes, +12%	Anchovy, clam, sardine, Other marine fish*.
Feb 2026 vs Feb 2025	EUR 21,3 million, +19%	4.463 tonnes, +30%	Anchovy, clam, sardine, cuttlefish.

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



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



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


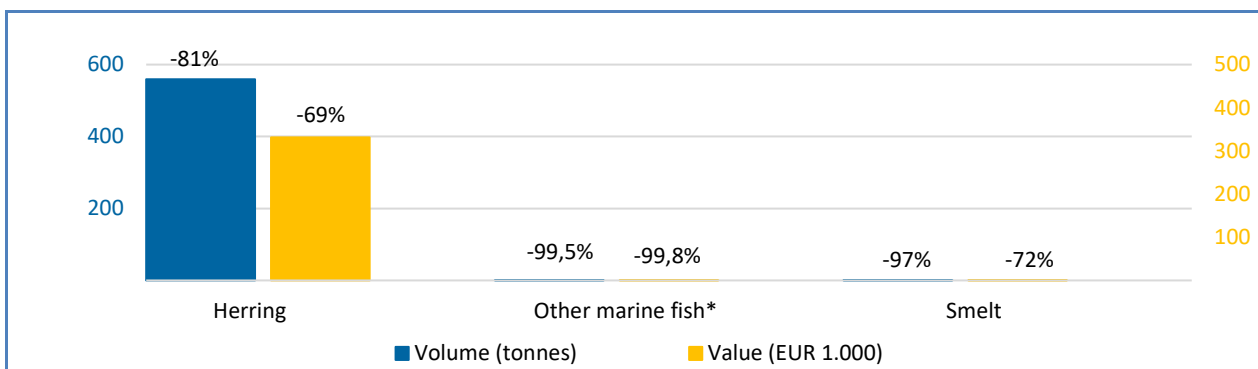
 Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 3,0 million, -23%	5.734 tonnes, -40%	Herring, Other marine fish*, Other groundfish*, smelt.
Feb 2026 vs Feb 2025	EUR 1,6 million, -27%	2.777 tonnes, -47%	Herring, Other marine fish*, smelt.

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



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

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


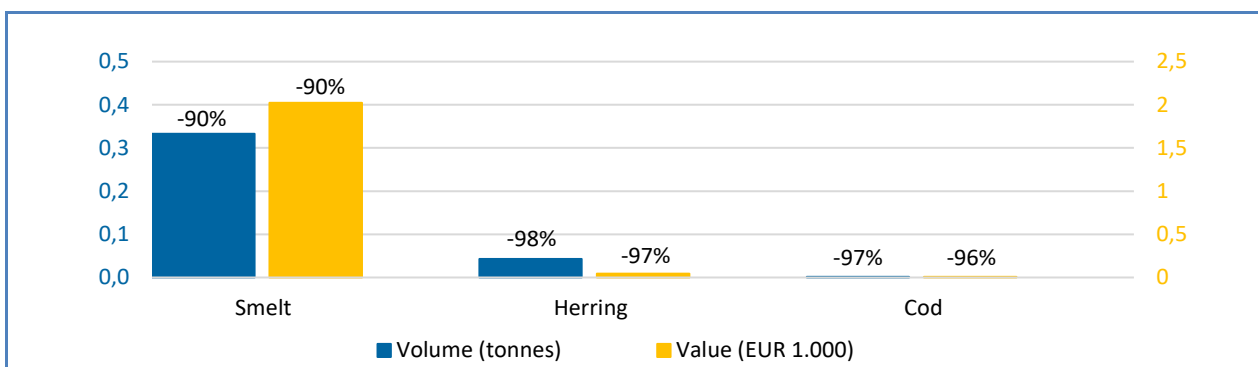
 Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species	Notes
Jan-Feb 2026 vs Jan-Feb 2025	EUR 0,08 million, +11%	13 tonnes, -19%	Value: smelt Volume: herring.	In February, Lithuania recorded a substantial decline in total value and volume, falling by 91% and 93%, respectively, compared with a year earlier. The decrease was mainly linked to the disruption of small-scale coastal fisheries operating in the Baltic Sea coastal area, where supply is highly dependent on local weather and environmental conditions. During January and February, severe frost led to extensive coastal ice cover, while persistent strong winds increased safety risks and made access to nearshore fishing grounds more difficult. These conditions significantly restricted fishing activity, reducing market supply and contributing directly to the sharp fall.
Feb 2026 vs Feb 2025	EUR 0,002 million, -91%	0,4 tonnes, -93%	Smelt, herring, cod.	

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



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



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


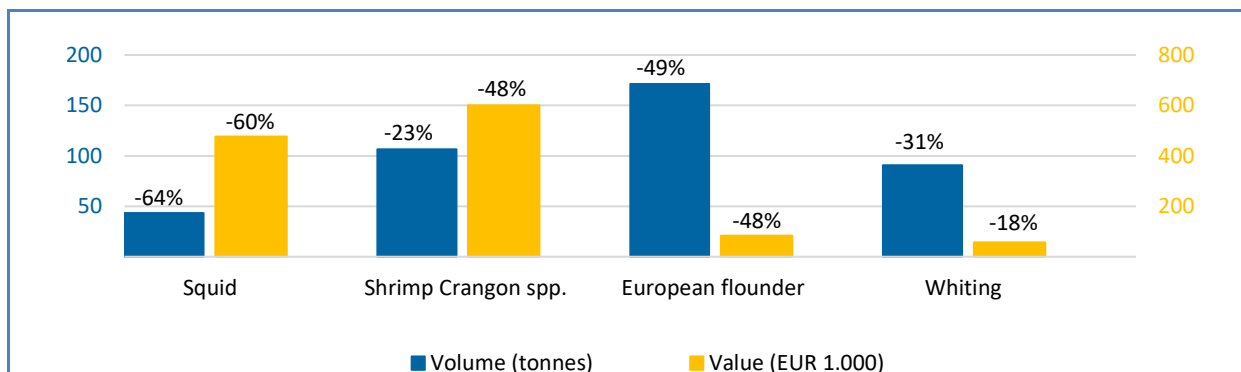
 The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 17,5 million, -11%	2.711 tonnes, -13%	Shrimp <i>Crangon</i> spp., squid, European flounder, cuttlefish.
Feb 2026 vs Feb 2025	EUR 7,9 million, -12%	1.076 tonnes, -24%	Squid, shrimp <i>Crangon</i> spp., European flounder, whiting.

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



Percentages show change from the previous year.

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


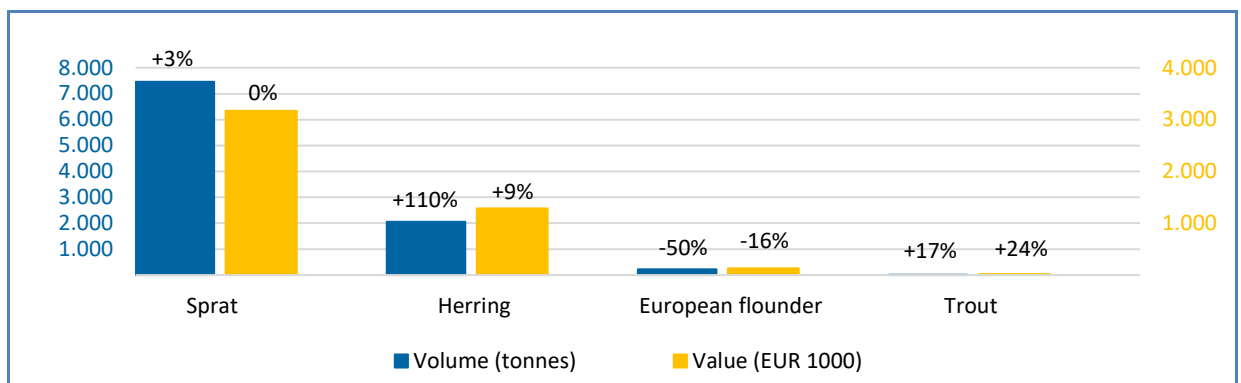
 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 7,2 million, +2%	15.023 tonnes, +7%	Herring, speat, trout.
Feb 2026 vs Feb 2025	EUR 4,6 million, 0%	9.729 tonnes, +12%	Sprat, herring, European flounder, trout.

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



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



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


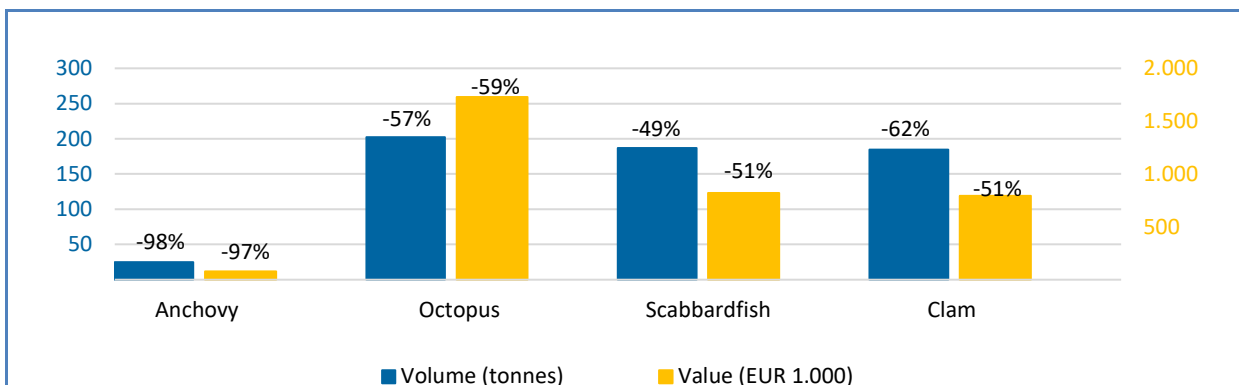
 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 24,4 million, -39%	4.600 tonnes, -49%	Anchovy, octopus, scabbardfish, Atlantic horse mackerel.
Feb 2026 vs Feb 2025	EUR 13,5 million, -42%	2.507 tonnes, -54%	Anchovy, octopus, scabbardfish, clam.

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



Percentages show change from the previous year.

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


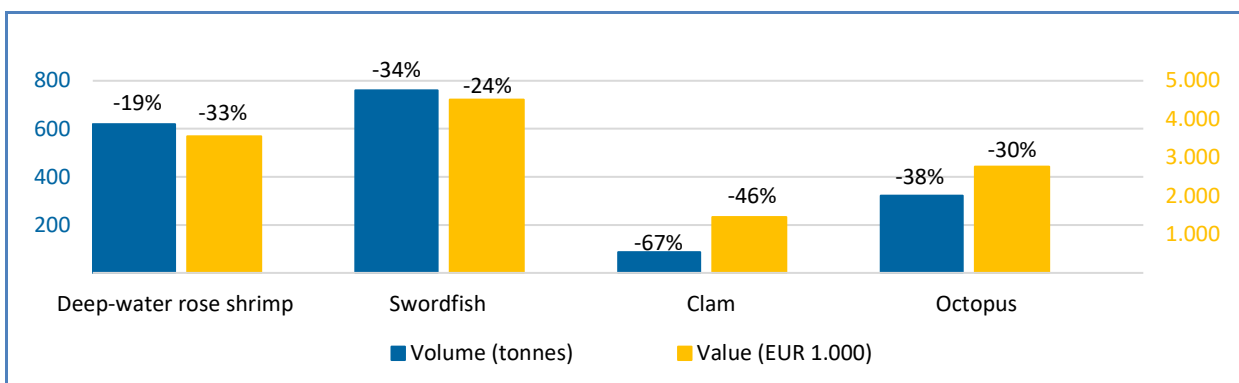
 Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 147,9 million, -17%	30.090 tonnes, -23%	Swordfish, yellowfin tuna, hake, Other sharks*.
Feb 2026 vs Feb 2025	EUR 80 million, -9%	16.732 tonnes, -14%	Deep-water rose shrimp, swordfish, clam, octopus.

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



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

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


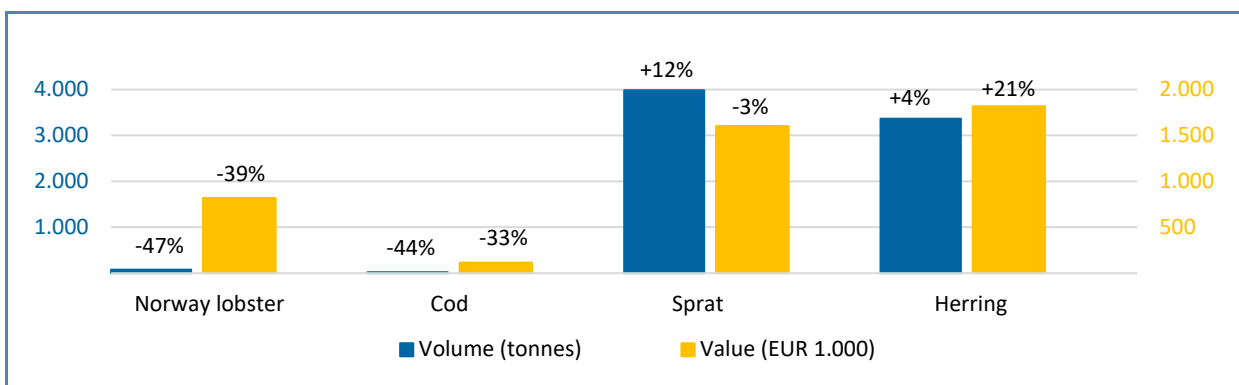
 Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 14,2 million, +6%	19.695 tonnes, +17%	Herring, sprat, saithe, coldwater shrimps*,
Feb 2026 vs Feb 2025	EUR 6,1 million, -5%	7.639 tonnes, +5%	Value: Norway lobster, cod. Volume: sprat, herring.

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



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

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


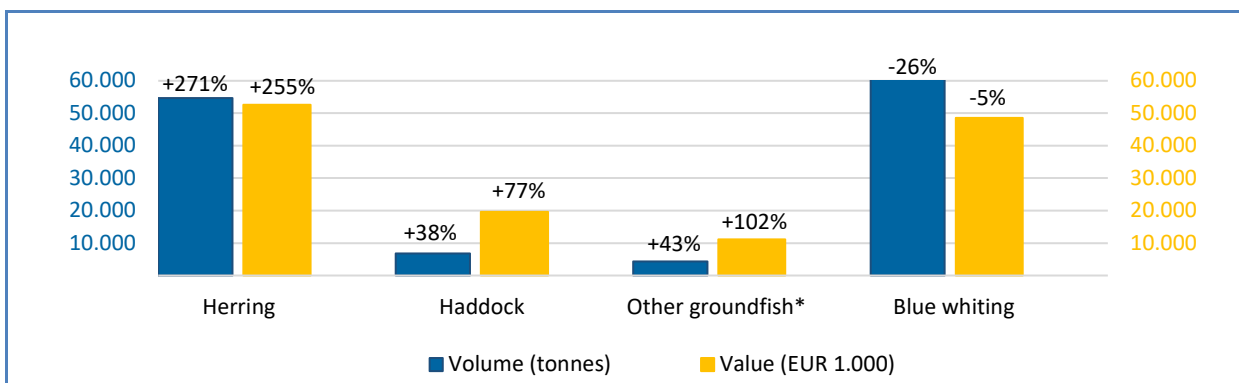
 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 660,7 million, -3%	511.211 tonnes, 0%	Value: mackerel, crab, saithe. Volume: herring, blue whiting, Other crustaceans*.
Feb 2026 vs Feb 2025	EUR 374,9 million +7%	296.819 tonnes, 0%	Value: herring, haddock, Other groundfish*. Volume: blue whiting.

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


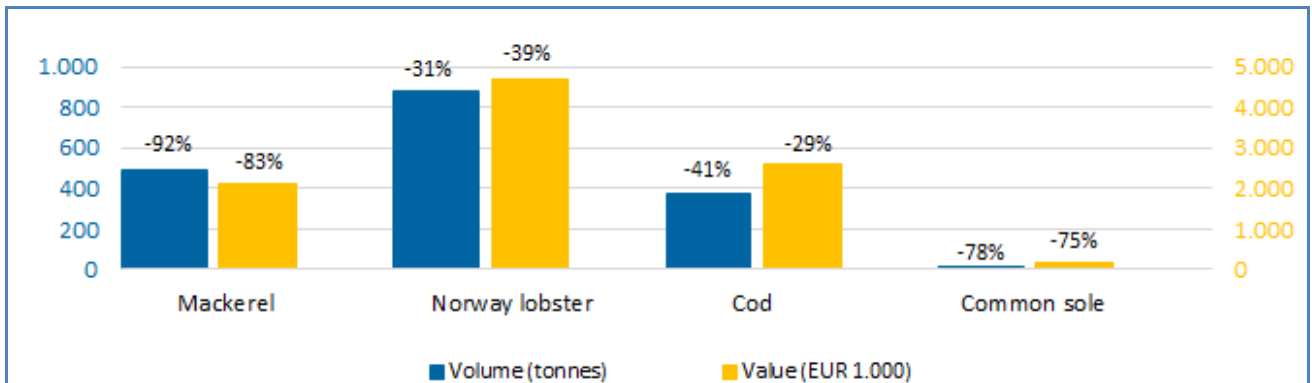
 The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Feb 2026 vs Jan-Feb 2025	EUR 194,7 million, +18%	57.816 tonnes, -24%	Value: mackerel, scallop, monk. Volume: mackerel, blue whiting, cod.
Feb 2026 vs Feb 2025	EUR 38,9 million, -21%	15.583 tonnes, -32%	Mackerel, Norway lobster, cod, common sole.

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



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

From January to February 2026, the value of extra-EU imports decreased by 5% compared to the same period in 2025, while volume decreased by 4%. The MCSs contributing most to the decrease in import values were skipjack tuna (-29%) and octopus (-21%), while skipjack tuna (-19%) and mackerel (-20%) contributed most to the increase in volume.

Increases in value and volume: Bulgaria, Cyprus, Denmark, Germany, Lithuania, Poland, Portugal, Slovenia 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 mackerel (+215%) and salmon (+142%). The highest increase in volume occurred in Slovenia, driven by hake (+148%).

Decreases in value and volume: Belgium, Croatia, Czechia, Estonia, Finland, France, Hungary, Latvia, Luxembourg, Portugal, Romania and Spain recorded decreases in extra-EU imports in value and volume. Croatia experienced the most significant decline in absolute terms due primarily to lower imports of salmon (-91%) in terms of value and sardine (-76%) in terms of volume.

Table 37. JANUARY - FEBRUARY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS
(volume in tonnes and value in million EUR)¹⁸

Country	January - February 2025			January - February 2026			Change from January - February 2025		
	Volume	Value	Price	Volume	Value	Price	Volume	Value	Price
Austria	1.467	9,8	6,68	1.457	9,9	6,79	-1%	1%	2%
Belgium	25.526	171,3	6,71	19.029	119,3	6,27	-25%	-30%	-7%
Bulgaria	2.518	6,6	2,61	2.792	7,6	2,72	11%	15%	4%
Croatia	2.711	7,4	2,73	1.135	3,8	3,32	-58%	-49%	21%
Cyprus	1.423	9,2	6,46	1.679	9,5	5,64	18%	3%	-13%
Czechia	3.804	17,1	4,50	3.449	15,6	4,51	-9%	-9%	0%
Denmark	121.183	475,8	3,93	132.772	539,2	4,06	10%	13%	3%
Estonia	1.998	11,2	5,58	1.358	7,4	5,45	-32%	-34%	-2%
Finland	6.176	46,5	7,53	5.883	39,7	6,75	-5%	-15%	-10%
France	86.066	461,5	5,36	84.823	415,9	4,90	-1%	-10%	-9%
Germany	69.620	309,7	4,45	79.516	336,6	4,23	14%	9%	-5%
Hungary	521	2,2	4,21	324	1,4	4,39	-38%	-35%	4%
Ireland	70.191	45,3	0,65	57.426	63,8	1,11	-18%	41%	72%
Italy	79.898	489,8	6,13	80.737	465,1	5,76	1%	-5%	-6%
Latvia	5.411	14,1	2,60	4.021	10,0	2,50	-26%	-29%	-4%
Lithuania	7.622	22,5	2,95	9.156	31,7	3,46	20%	41%	17%
Luxembourg ¹⁹	0	0,1	205,72	0	0,0	190,96	-87%	-88%	-7%
Malta	447	1,5	3,34	592	1,3	2,25	32%	-11%	-32%
Netherlands	108.420	604,2	5,57	102.653	618,1	6,02	-5%	2%	8%
Poland	43.550	179,2	4,12	44.605	193,4	4,33	2%	8%	5%
Portugal	34.543	152,0	4,40	26.259	114,5	4,36	-24%	-25%	-1%

¹⁸ During January - February 2026, the 26 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.

¹⁹ Luxembourg imports values and volumes are shown separately, as the large unit of measurement used for the rest of the countries analysed does not reflect the real values: Jan-Feb 2025: First sales volume = 418 kg; first sales value = 85.990 EUR - Jan 2026: First sales volume = 56 kg; first sales value 10.690.

Country	January - February 2025			January - February 2026			Change from January - February 2025		
	Volume	Value	Price	Volume	Value	Price	Volume	Value	Price
Romania	4.240	18,8	4,43	3.142	15,3	4,87	-26%	-18%	10%
Slovakia	1.708	5,7	3,33	1.909	5,7	2,98	12%	0%	-11%
Slovenia	765	3,5	4,57	1.074	4,3	4,03	40%	24%	-12%
Spain	219.721	1168,3	5,32	187.380	932,9	4,98	-15%	-20%	-6%
Sweden	103.189	810,1	7,85	110.969	834,1	7,52	8%	3%	-4%
EU-27	1.002.716	5043,2	5,03	964.140	4795,9	4,97	-4%	-5%	-1%

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: Salmonids and small pelagics were the commodity groups recording an increase in both value and volume of extra-EU imports. Highest increases were observed for small pelagics with herring (+18% and +46%, respectively) driving the increase in terms of value and volume.

Decreases in value and volume: Bivalves, cephalopods, freshwater fish, other marine fish and tuna and tuna-like species were the commodity groups recording a decrease in both value and volume of extra-EU imports. Freshwater fish recorded the largest decline in absolute terms in value due primarily to freshwater catfish (-33%). Bivalves also recorded the highest decline in import volume mainly due to other mussels (-53%) and mussel *Mytilus* spp. (-58%).

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

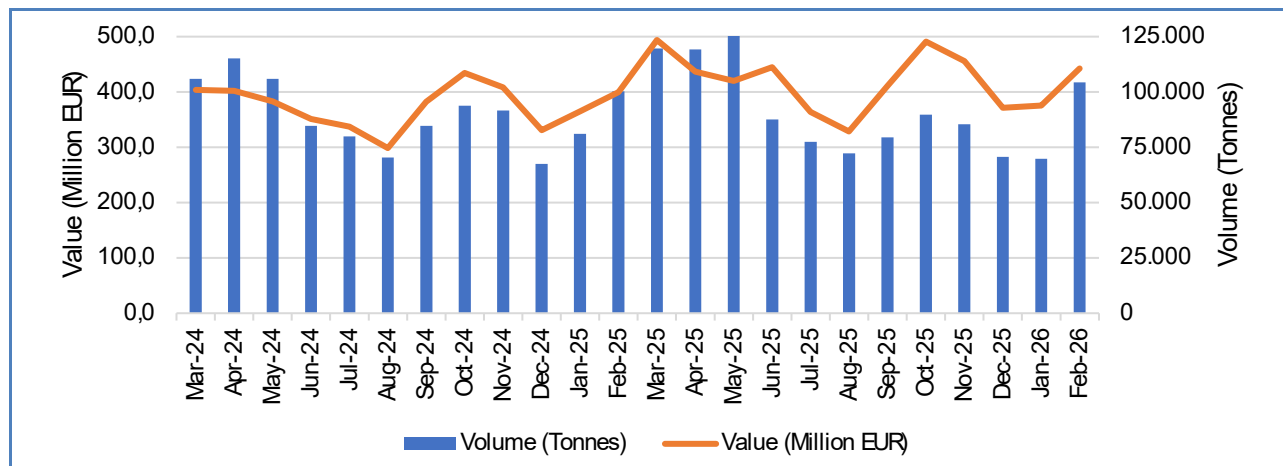
Commodity group	January - February 2025			January - February 2026			Change from January - February 2025			MCS
	Value	Volume	Price	Value	Volume	Price	Value	Volume	Price	
Bivalves	103,7	23.419	4,43	96,1	18.348	5,24	-7%	-22%	18%	Other mussel, mussel <i>Mytilus</i> spp.
Cephalopods	529,9	77.448	6,84	451,4	68.938	6,55	-15%	-11%	-4%	Octopus, other cephalopods.
Crustaceans	719,1	98.287	7,32	689,4	98.457	7,00	-4%	0%	-4%	Warmwater shrimp, lobster <i>Homarus</i> spp.
Flatfish	64,4	12.313	5,23	68,9	11.928	5,78	7%	-3%	10%	Greenland halibut, megrim.
Freshwater fish	106,2	25.611	4,15	79,8	21.201	3,76	-25%	-17%	-9%	Freshwater catfish, other freshwater fish.
Groundfish	765,0	181.303	4,22	817,9	174.154	4,70	7%	-4%	11%	Cod, blue whiting.
Other marine fish	265,3	43.960	6,04	254,7	40.460	6,29	-4%	-8%	4%	Other marine fish, monk.
Salmonids	1.280,1	146.753	8,72	1.290,1	164.052	7,86	1%	12%	-10%	Salmon.
Small pelagics	215,6	82.096	2,63	234,0	92.657	2,53	9%	13%	-4%	Herring, mackerel.
Tuna and tuna-like species	779,5	162.511	4,80	590,7	135.297	4,37	-24%	-17%	-9%	Skipjack tuna, yellowfin tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of groundfish in EU Member States

In January – February 2026, extra-EU imports of groundfish accounted for a total value of EUR 817,9 million and a total volume of 174.154 tonnes, marking a 7% increase in value and 4% decrease in volume compared to the same period in 2025.

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



Source: EUMOFA elaboration of Eurostat COMEXT

Extra-EU imports of groundfish peak between March and April, both in terms of value and volume but also in October in terms of value, while lowest drops are August and December.

Between January and February 2026, Germany, the Netherlands and Ireland were the EU’s main importers of groundfish. Together they accounted for 49% of total extra-EU import volumes of groundfish, with Germany representing 18%, the Netherlands 16% and Ireland 14% of the total import volume.

Table 39. MAIN IMPORTERS OF EXTRA-EU PRODUCTS FOR GROUND FISH

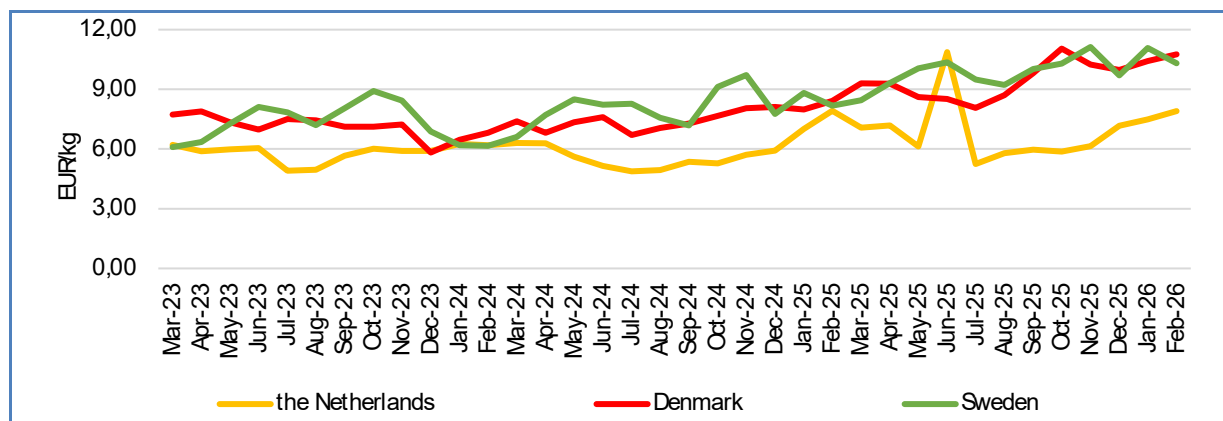
EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan–Feb 2025	Jan–Feb 2026	Trend (%)	Jan–Feb 2025	Jan–Feb 2026	Trend (%)	
Germany	111,9	123	33.727	32.289	10%	-4%	Alaska pollock
Netherlands	196,9	216	31.152	28.059	10%	-10%	Cod
Ireland	10,5	31	17.400	24.889	198%	43%	Blue whiting

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

In terms of value, cod was the main imported species within the “groundfish” commodity group, accounting for 48% of the total value, followed by Alaska pollock with 16%.

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

Figure 38. EXTRA-EU IMPORT PRICE OF COD IN THE NETHERLANDS, DENMARK AND SWEDEN (MAR 2023 – FEB 2026)



Between March 2023 and February 2026, the price of cod fluctuated and increased in the three countries analysed: Denmark (+8%), the Netherlands (+12%), and Sweden (+19%). Between January and February 2026, the volume of cod imported to Denmark was 8.792 tonnes, 19% more compared with the same period in 2025, while the price increased by 3%. Most imports by volume came from Norway (44%), followed by Greenland (37%).

During the same period, 15.104 tonnes of cod were imported to the Netherlands, 13% less compared to 2025, with a price increase of 29% compared to 2025. Iceland accounted for 58% of the total imported volume of cod in 2026, followed by the Faroe Islands with 11%.

In Sweden, 5.528 tonnes of cod were imported in 2026, of which almost 88% came from Norway and 8% from China. Import volumes decreased by 7% while prices increased by 26%.

In the three countries, imports showed similar behaviour: in Denmark and the Netherlands, import volumes peaked in March-April and September-November; in Sweden volume imports reached their maximum in March.

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

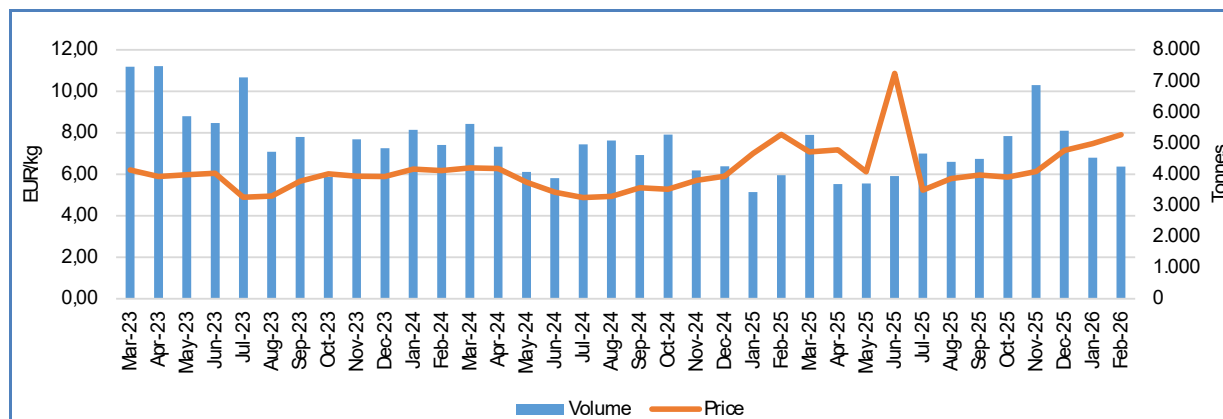


Figure 40. EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF COD IN THE NETHERLANDS, MAR 2023 – FEB 2026 (volume in tonnes and price in EUR/kg)

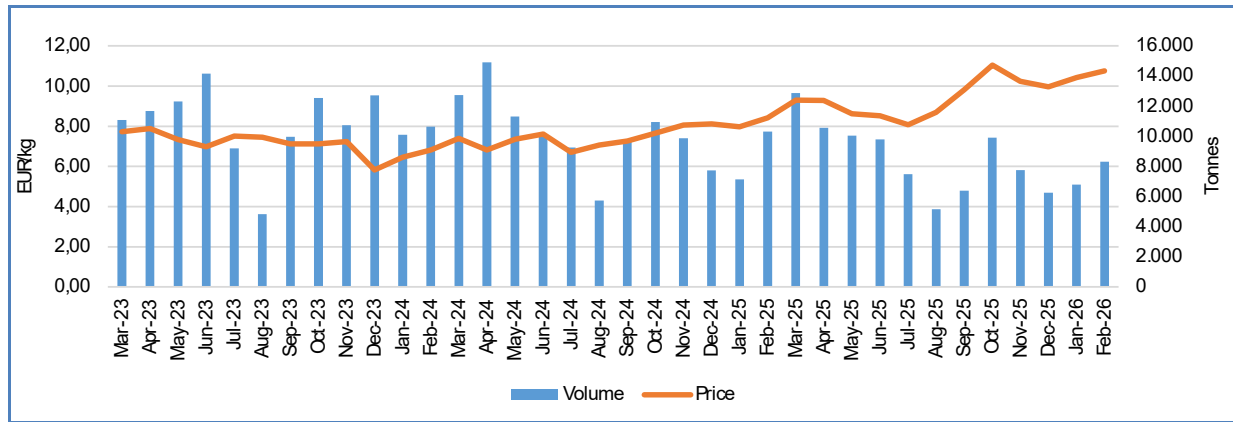
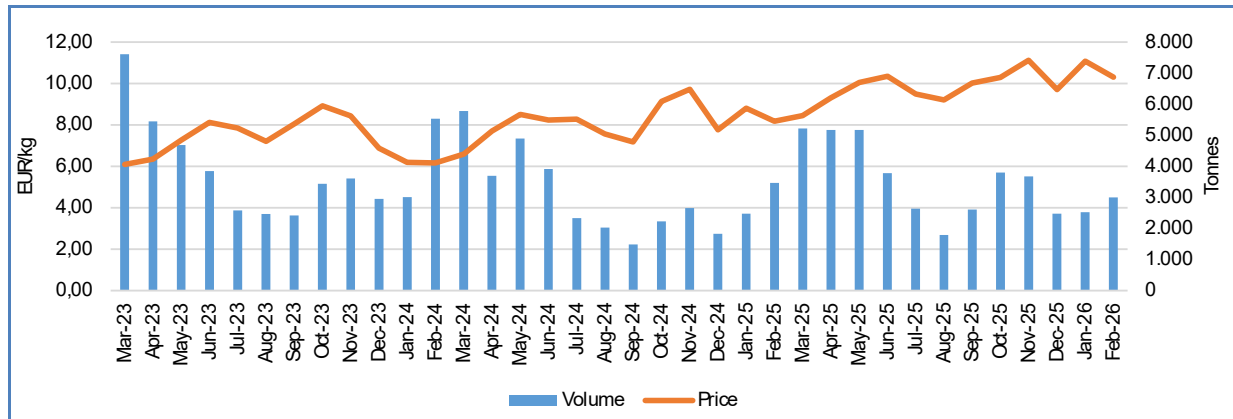


Figure 41. EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF COD IN SWEDEN, MAR 2023 – FEB 2026 (volume in tonnes and price in EUR/kg)



4.3. Extra-EU imports of cod by origin

Between January and February 2026, EU imports of cod²⁰ recorded a decreasing trend in volume (-9%) and increasing trend in value (+12%) compared with the same period in 2025. In 2026, the EU imported 40.875 tonnes of cod for a value of EUR 397,0 million. The main extra-EU countries supplying cod to the EU in 2026 were Norway (29%), followed by Iceland (26%), Russian Federation and China (11% respectively). Compared to the same period in 2025, imports decreased from most of these countries, except Greenland (+47%), United States (+32%) and Canada (+225%). Over the same period, imports decreased from Norway (-6%), Iceland (-9%), Russian Federation (-36%) and China (-25%).

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

Country	Jan – Feb 2024		Jan – Feb 2025		Jan – Feb 2026		Jan – Feb 2026/2024	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Norway	129,6	19.045	113,3	12.673	141,2	11.948	25%	-6%
Iceland	110,8	13.698	109,9	11.893	115,3	10.784	5%	-9%
Russian Federation	47,5	9.387	46,4	6.997	39,0	4.484	-16%	-36%
China	21,1	3.702	37,4	5.936	34,5	4.479	-8%	-25%
Others	43,2	7.692	48,6	7.278	66,9	9.180	37%	26%
Total	352,2	53.524	355,7	44.777	396,9	40.875	12%	-9%

²⁰ 03025110 - Fresh or chilled cod "*Gadus morhua*"

03025190 - Fresh or chilled cod "*Gadus ogac*, *Gadus macrocephalus*"

03025910 - Fresh or chilled Polar cod "*Boreogadus saida*"

03036310 - Frozen cod "*Gadus morhua*"

03036390 - Frozen cod "*Gadus macrocephalus*"

03036910 - Frozen Polar cod "*Boreogadus saida*"

03044410 - Fresh or chilled fillets of cod "*Gadus morhua*, *Gadus ogac*, *Gadus macrocephalus*" and of Polar cod "*Boreogadus saida*"

03047110 - Frozen fillets of cod "*Gadus macrocephalus*"

03047190 - Frozen fillets of cod "*Gadus morhua*, *Gadus ogac*"

03047910 - Frozen fillets of Polar cod "*Boreogadus saida*"

03049521 - Frozen meat, whether or not minced, of cod "*Gadus macrocephalus*" (excl. fillets and surimi)

03049525 - Frozen meat, whether or not minced, of cod "*Gadus morhua*" (excl. fillets and surimi)

03049529 - Frozen meat, whether or not minced, of cod "*Gadus ogac*" and Polar cod "*Boreogadus saida*" (excl. fillets and surimi)

03053211 - Fillets, dried, salted or in brine, but not smoked, of cod "*Gadus macrocephalus*"

03053219 - Fillets, dried, salted or in brine, but not smoked, of cod "*Gadus morhua*, *Gadus ogac*" and Polar cod "*Boreogadus saida*"

03055110 - Cod "*Gadus morhua*, *Gadus ogac*, *Gadus macrocephalus*", dried, unsalted, not smoked stockfish (excl. fillets and offal)

03055190 - Cod "*Gadus morhua*, *Gadus ogac*, *Gadus macrocephalus*", dried, salted, not smoked clipfish (excl. fillets and offal)

03055310 - Dried polar cod "*Boreogadus saida*", even salted but not smoked (excl. fillets and offal)

03056200 - Cod "*Gadus morhua*, *Gadus ogac*, *Gadus macrocephalus*", salted or in brine only (excl. fillets and offal)

03056910 - Polar cod "*Boreogadus saida*", salted or in brine only (excl. fillets and offal)

16041992 - Cod of the species *Gadus morhua*, *Gadus ogac*, *Gadus macrocephalus*, prepared or preserved, whole or in pieces (excl. finely minced and fillets, raw, merely coated with batter or breadcrumbs, whether or not pre-fried in oil, frozen)

5. CONSUMPTION

5. 1. Household consumption in the EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel²¹. They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

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

The most notable increases were in Poland where consumption increased in volume by 10% and in value by 21% respectively, compared to 2025. Denmark recorded the most notable decrease in volume (-17%) and Germany in value (-2%).

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	February 2024		February 2025		February 2026		Change from February 2025 to February 2026	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	969	18,41	971	18,90	809	17,75	-17%	-6%
France	32,14	14.243	203,97	13.093	186,93	12.097	187,18	-8%	0%
Germany	12,08	4.670	82,87	4.870	84,57	4.672	82,65	-4%	-2%
Hungary	5,83	248	2,33	285	2,94	261	2,90	-9%	-1%
Ireland*	20,00	1.028	18,36	891	16,25	953	18,85	7%	16%
Italy	30,38	16.955	216,86	16.087	222,97	16.118	229,17	0%	3%
Netherlands*	19,90	2.048	41,88	2.094	44,49	2.197	44,36	5%	0%
Poland	13,67	4.046	34,58	3.425	41,15	3.763	49,80	10%	21%
Portugal	53,61	4.241	33,83	3.896	34,67	3.758	36,61	-4%	6%
Spain	40,68	35.807	371,02	32.969	348,60	29.819	344,28	-10%	-1%
Sweden	10,00	504	8,15	405	6,70	434	6,94	7%	4%

* 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.

²¹ Last update: 28.04.2026.

5. 2. Overview of household consumption²² of groundfish consumed in the EU

In the household consumption data used by EUMOFA, consumption of groundfish is monitored in nine²³ Member States of which France, Germany, Italy and Spain are the main consumers. At species level, France monitors cod, hake, saithe, and whiting, Germany monitors Alaska pollock, cod, and saithe, Italy hake, and Spain cod and hake.

Figure 42. HOUSEHOLD PURCHASES (in value) OF GROUND FISH IN FRANCE, GERMANY, ITALY AND SPAIN MAR 2023 – FEB 2026

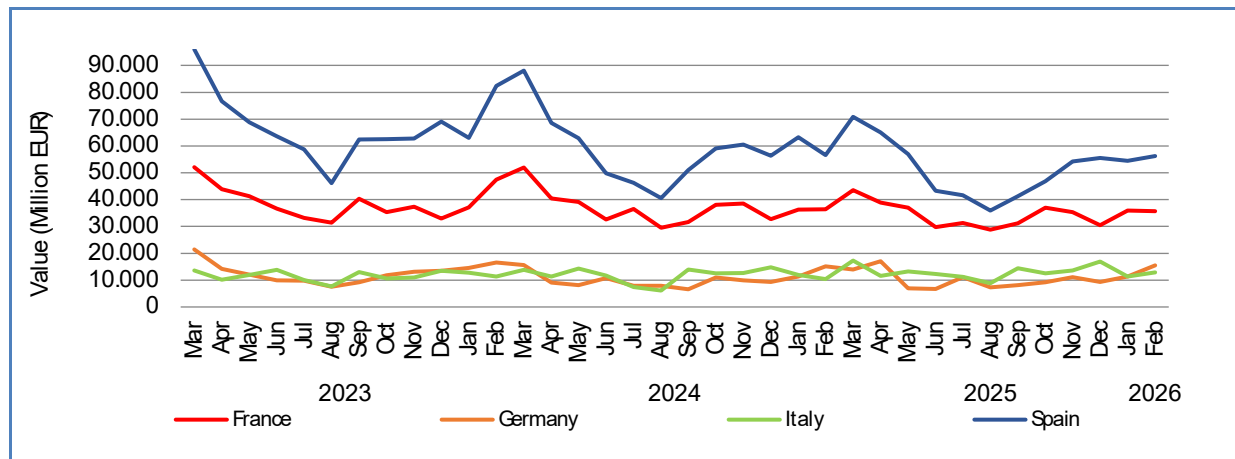
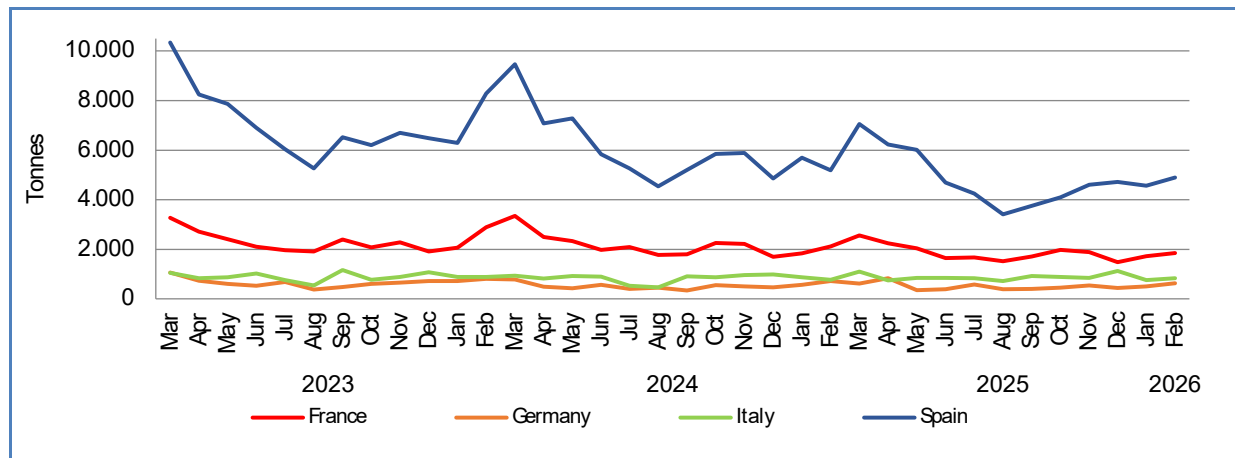


Figure 43. HOUSEHOLD PURCHASES (in volume) OF GROUND FISH IN FRANCE, GERMANY, ITALY AND SPAIN MAR 2023 – FEB 2026



²² The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the available data and does not reflect the full scope of consumption across all Member States.

²³ Denmark, France, Germany, Ireland, Italy, Netherlands, Portugal, Spain, Sweden.

5. 3. Household consumption trends of cod - the main species of groundfish in reporting countries

Long-term trend (Mar 2023 to Feb 2026): Downward trend in volume and upward trend in price.

Yearly average retail price (Jan – Dec): 12,82 EUR/kg (2023), 12,99 EUR/kg (2024), 15,28 EUR/kg (2025)

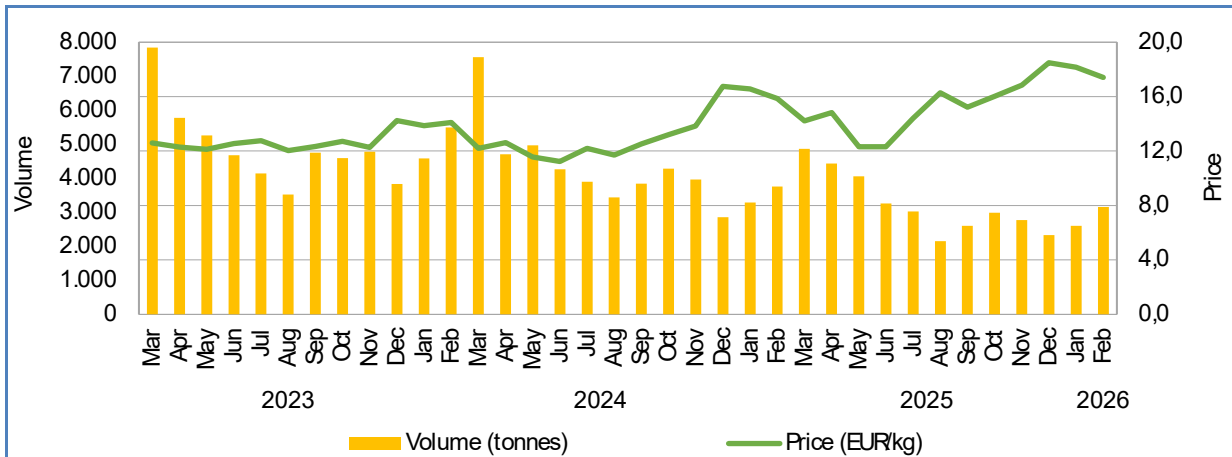
Yearly consumption (Jan – Dec): 59.493 tonnes (2023), 53.842 tonnes (2024), 39.532 tonnes (2025)

Short-term trend (Mar 2025 to Feb 2026): Slightly upward trend in price and downward trend in volume.

Average retail price (Mar 2025 to Feb 2026): 15,54 EUR/kg.

Consumption (Mar 2025 to Feb 2026): 38.324 tonnes.

Figure 44. RETAIL PRICE AND VOLUME OF COD PURCHASED BY HOUSEHOLDS IN REPORTING COUNTRIES, MAR 2023 – FEB 2026



Consumption of cod in the reporting countries shows a downward trend, peaking in March but at decreasing levels. Prices show an upward trend, also related to the availability of the resource.

6. CASE STUDY: Fishmeal and fish oil in the EU²⁴

Fishmeal is a high-protein powder made from whole fish or fish by-products. It is produced by cooking, pressing, drying, and grinding raw materials. Fishmeal typically contains 60–72% protein, is digested by fish and animals, and is rich in essential amino acids, minerals, and omega-3 fatty acids EPA²⁵ and DHA²⁶.

Fish oil is the marine oil extracted during the fishmeal production process. It is valued for its very high content of long-chain omega-3 fatty acids, especially EPA and DHA, which support animal health, growth, immunity, and overall metabolic functions²⁷.

Fishmeal and fish oil are important for global food security. They are produced from both forage fish and by-products from fish processing that would otherwise be wasted. Using more by-products increases resource efficiency and provides an important raw material for the fast-growing aquaculture industry. However, forage fish still makes up most of the raw material used for producing fishmeal.



Source: Shutterstock

Over the past ten years, global production of marine ingredients has remained stable. Average annual production is around 5–6 million tonnes of fishmeal and 1 to 1,3 million tonnes of fish oil. Across global production systems, about 1 kg of wild fish used for marine ingredients can produce around 5 kg of farmed fish, highlighting the efficiency of aquaculture²⁸. Global aquaculture production is dominated by species with low inclusion of fishmeal in their feed. This is mainly species like carp, pangasius, tilapia etc which can be produced by a mainly plant-based and low marine ingredients diet in their feed. In Europe, aquaculture production is dominated by species like salmon, trout and seabass/seabream which require much higher inclusion of marine ingredient in their feed. Salmon and other finfish thus consume a disproportionate share of the marine ingredient, especially fish oil²⁹.

The European Union produces annually between 420.000 tonnes to over 520.000 tonnes of fishmeal and from 90.000 tonnes to 140.000 tonnes of fish oil. This constitutes each year 8-10% of the global fishmeal production and 10-12% of the global fish oil production (FAO). The high-quality production is based on landings of small, oily, short-lived species such as blue whiting, capelin, sand eel, Norway pout and sprat as well as trimmings from the fish processing sector. Denmark is by far the largest producer in the EU, accounting for 39% to above 50% of the total EU production.

6. 1. World fishmeal and fish oil production and raw material sources

According to FAO figures, estimated fisheries are stable at around 91 to 93 million tonnes each year. This level has been broadly stable for many decades. Of the catches, 15-18 million tonnes annually are used as raw material for producing marine ingredients (fishmeal, fish oil). At the same time the global aquaculture sector is growing reaching a production level of 102 million tonnes in 2024. Fish processing by-products from fisheries as well as from aquaculture is increasingly valued as a raw material for the fishmeal and fish oil production and the share of raw material coming from by-products is increasing. According to IFFO (the Marine Ingredients Organisation)³⁰, in 2016, around 71% of the raw material producing fishmeal and 74% of the raw material producing fish oil came from whole catches, the rest from by-products. In 2024, around 66% of the raw material producing fishmeal and 47% of the raw material producing fish oil came from fisheries, the rest from by-products.

²⁴<https://eumofa.eu/fishmeal-and-fish-oil-2025-edition>

²⁵ Eicosapentaenoic acid

²⁶ Docosahexaenoic acid

²⁷ <https://www.worldwildlife.org/our-work/oceans/sustainable-seafood/farmed-seafood/fishmeal-and-fish-oil/>

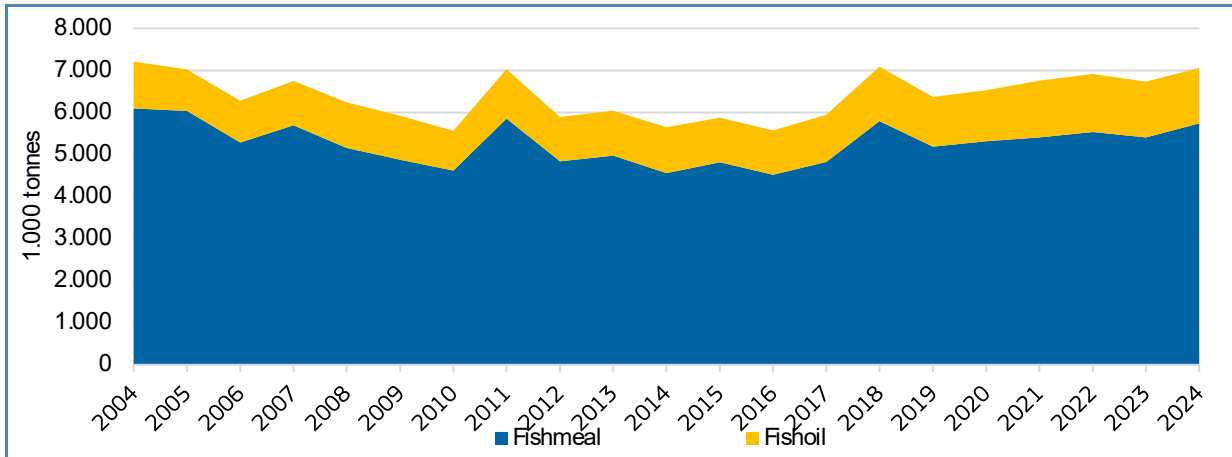
²⁸ <https://www.iffo.com/key-facts>

²⁹ <https://www.iffo.com/aquaculture>

³⁰ <https://www.iffo.com/about-us>

Annual global fishmeal production remains stable at around 5 to 6 million tonnes while annual average fish oil production increased by 16% in the period 2014-2024 compared to the period 2003-2013. This is mainly due to better utilisation of by-products with high oil-yield (salmon and pangasius by-products)³¹. According to IFFO, The Marine Ingredients Organisation there is a potential of almost 12 million tonnes of by-product produced in processing plants that are not collected to produce marine ingredients. Asia has by far the largest potential for the utilisation of by-products, although other regions such as Europe and Latin America are also believed to have a great unutilised tonnage of offcuts³².

Figure 45. **WORLD FISHMEAL AND FISHOIL PRODUCTION**

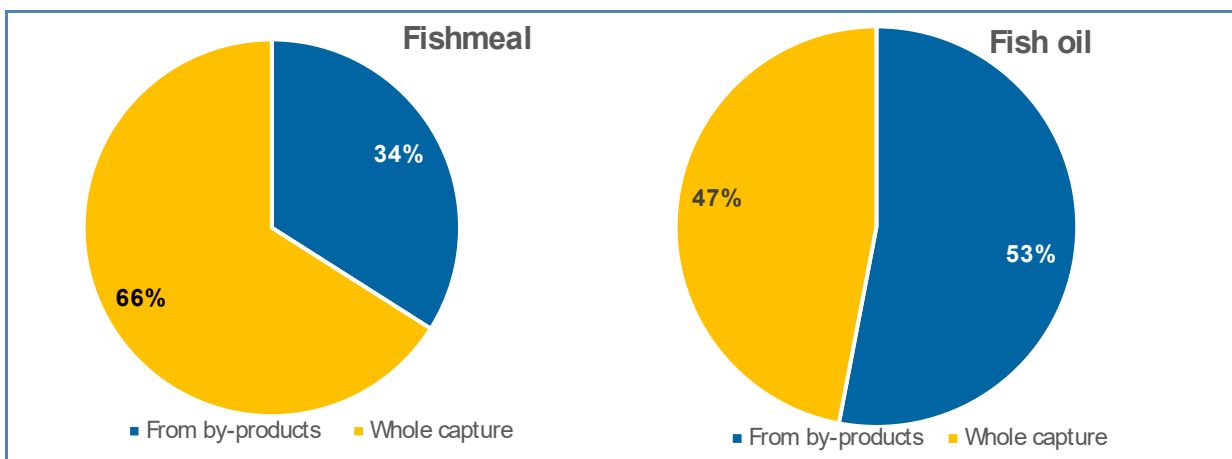


Source: FAO/IFFO.

By-products can come from wild caught fish or aquaculture processing. Most of the raw material comes from finfish such as white fish trimmings (pollock, cod, hake, haddock and others), pelagics such as herring and mackerel, as well as other species such as salmon (wild and from aquaculture), tuna, pangasius and tilapia. As for the reduction of such by-products into valuable marine ingredients, some fishing vessels are equipped to preserve or process by-products on board into fishmeal and oil. Onshore facilities have also developed rapid collection methods to ensure that processors have a reliable outlet for their by-products. Nowadays, large aquaculture operators also tend increasingly to have access to advanced facilities that preserve and process by-product raw material into fishmeal and oil. This is particularly the case for farmed Atlantic salmon, pangasius and tilapia³³.

In 2024, of the share coming from fish oil by-products, 41% came from Asia (without China), 21% from Europe, 19% from Latin America, 7% from North America, 5% from China and 5% from Africa³⁴.

Figure 46. **WORLD FISHMEAL AND FISH OIL PRODUCTION BY RAW MATERIAL SOURCES IN 2024**



Source: IFFO.

³¹ <https://www.iffo.com/by-product>

³² *Ibidem*

³³ <https://www.iffo.com/by-product>

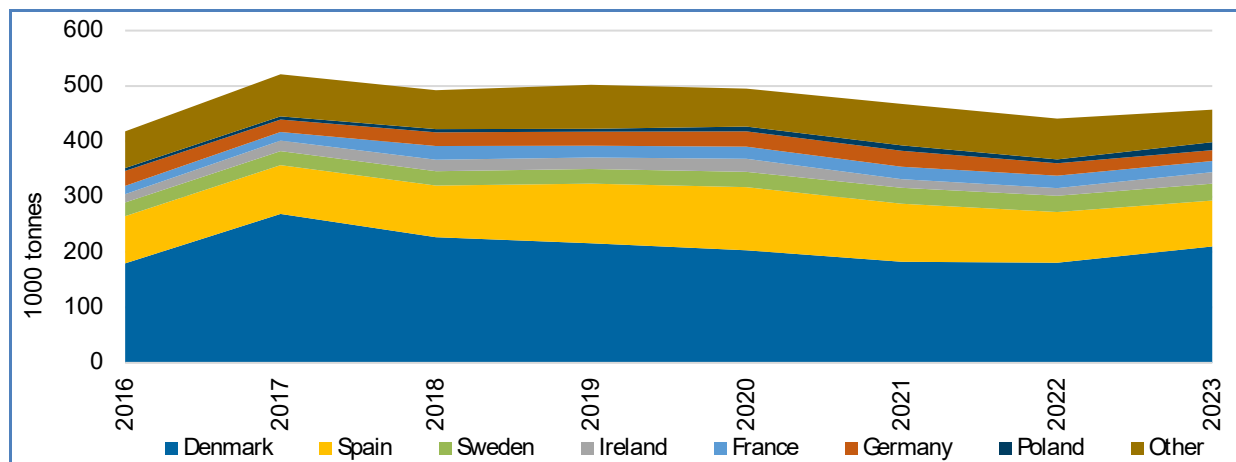
³⁴ IFFO

6. 2. Fishmeal and fish oil production in the EU

In 2023, total EU fishmeal production was 457.000 tonnes, a 4% increase from the year before. Denmark was the leading producer, accounting for around 46% of the total. Spain followed, accounting for around 18% of the total, driven by the increased use of by-products and processing trimmings.

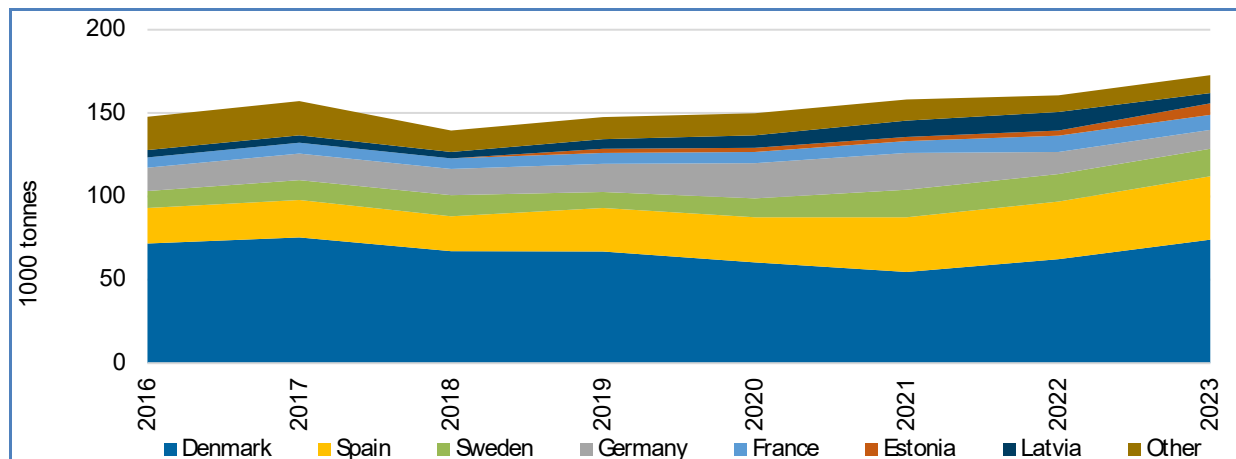
Fish oil production in the EU has shown an upward trend in recent years ending at 173.000 tonnes in 2023, an 8% increase compared to the year before. Denmark was the leading producer, accounting for around 43% of the total. Spain followed, accounting for around 22% of the total. Since 2016, EU fish oil production has increased by 17%. Spain was a main driver increasing its production by 78% in the period driven by the increased use of by-products and processing trimmings.

Figure 47. EU FISHMEAL PRODUCTION BY COUNTRY



Source: FAO.

Figure 48. EU FISH OIL PRODUCTION BY COUNTRY



Source: FAO.

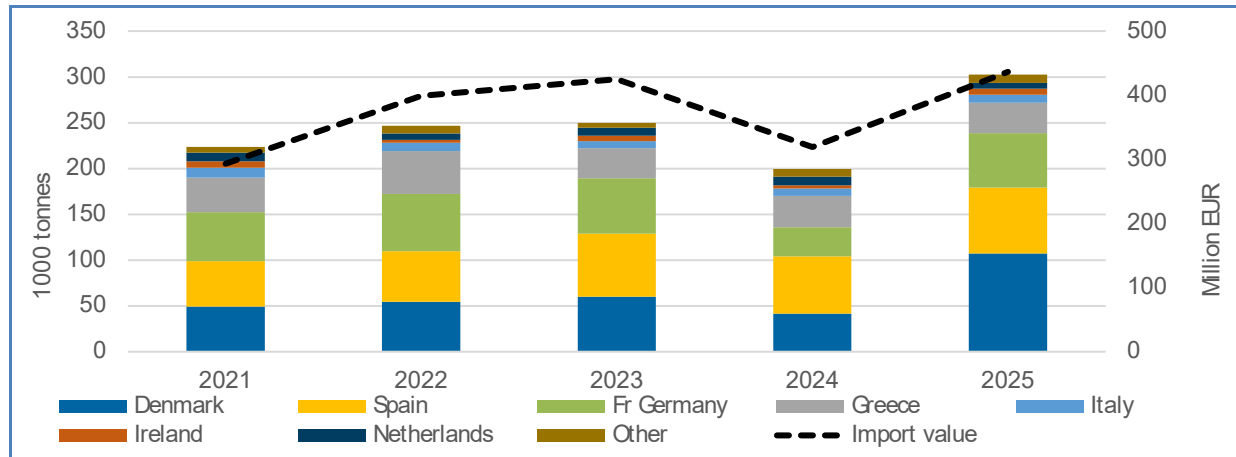
6. 3. EU import of fishmeal and fish oil

Despite the EU's own production capacity of fishmeal and fish oil, the EU is dependent on imports to meet its demand. In 2025, EU imports of fishmeal and fish oil amounted to 302.000 tonnes valued at 437 million EUR. This was a 52% increase in terms of volume and a 37% increase in terms of value from 2024. Denmark was by far the largest recipient accounting for 35% of the volume and 39% of the value, followed by Spain 24% of the volume and 21% of the value, and Germany 20% of the volume and 19% of the value. Strong growth in the supply from Peru (587%), South Africa (68%), Chile (151%), and the UK (94%) contributed to the highest import volumes since 2014 (337.000 tonnes).

In 2025, EU imports of fish oil reached 208.000 tonnes valued at 495 million EUR, increasing by 44% in terms of volume and decreasing by 17% in terms of value compared to 2024. Denmark is by far the largest EU recipient accounting for 47% of the volume and 44% of the value, followed by Spain 16% of the volume and 15% of the value, Greece 12% of the volume and 13% of the value, and the Netherlands 10% of the volume and 9% of the value. Strong growth in the supply from Norway (51%), Peru (39%), Chile (84%), Mexico (634%) and Morocco (113%) contributed to the highest import volumes since 2020 (217.000 tonnes).

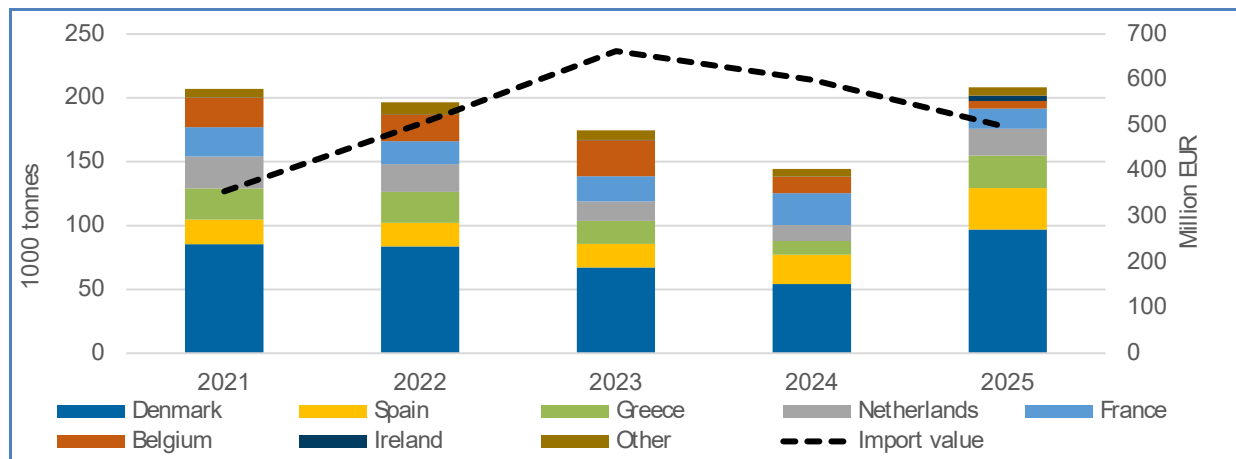
The rise in EU fish oil imports in 2025 was due to increased demand from aquaculture while EU production was limited, and global supply briefly recovered after El Niño. It was likely a short-term spike, which has strengthened EU interest in alternatives such as algae-based omega-3s and better use of by-products.

Figure 49. EU IMPORT OF FISHMEAL BY MEMBER STATE



Source: EUMOFA elaboration of Eurostat-Comext data.

Figure 50. EU IMPORT OF FISH OIL BY MEMBER STATE



Source: EUMOFA elaboration of Eurostat-Comext data.

6. 4. Fishmeal and fish oil prices in the EU

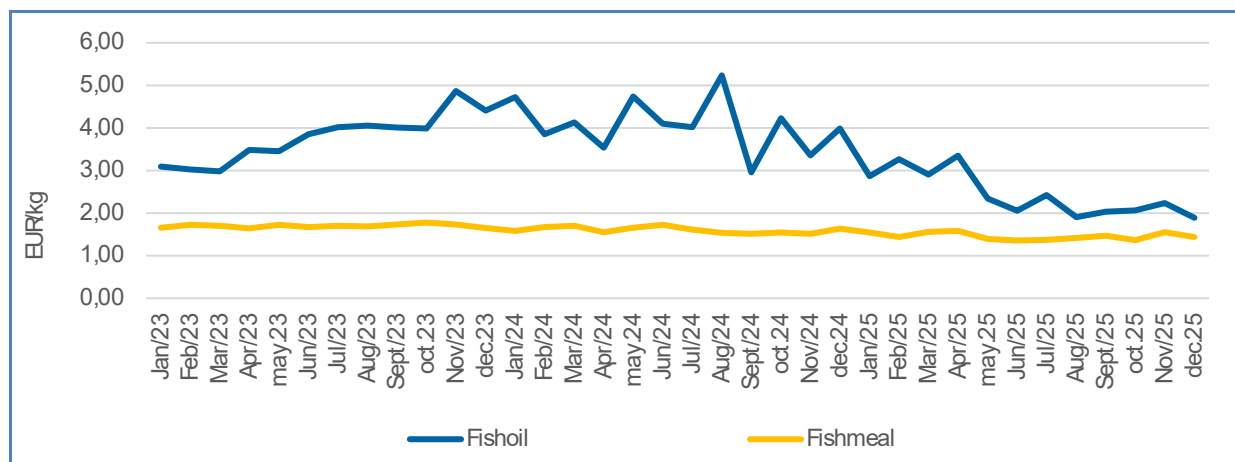
EU import prices for fishmeal followed a downward trend from January 2023 to December 2025. Throughout most of 2023, prices were relatively high and stable, ranging between EUR 1,64 and EUR 1,78/kg, with a peak in October 2023. From late 2023 into the first half of 2024, prices began to decline gradually. Import prices fell from about EUR 1,74/kg in November 2023 to around EUR 1,55/kg by April 2024. The downward trend continued during the second half of 2024 and into mid-2025, when prices reached a low of approximately EUR 1,36/kg in June 2025.

Overall, fishmeal prices moved from a high but stable level in 2023 to a lower and more stable level in 2025. From peak to trough, prices declined by an estimated 15–20%, indicating a gradual market adjustment rather than a sharp correction.

Fish oil prices developed differently. After rising strongly in 2023 and 2024, fish oil prices peaked at historically high levels in August 2024 at EUR 5,24/kg. These high prices were followed by a decline during 2024 and into 2025. Fish oil behaves like a high-value specialty product, with stronger price swings and clearer boom-and-bust cycles. As a result, while both fishmeal and fish oil prices fell after 2023, the reasons behind the declines were different. The drop in fishmeal prices reflects a controlled normalization toward a more balanced market. In contrast, the fall in fish oil prices represents a cyclical correction following an exceptional price boom. This underlines the need to treat fishmeal and fish oil as distinct markets, despite their shared raw material base.

Fishmeal and fish oil prices are volatile commodities. They are affected by fishing quotas in Peru, weather events such as El Niño, demand from Asian aquaculture producers, and exchange rates evolutions. This makes it difficult to predict how prices will develop. As a result, pricing and contracts play an important role in how risk is managed along the value chain. Fixed-price contracts, volume agreements with clear pricing rules, and index-linked pricing can make costs more predictable for both suppliers and buyers. In contrast, relying only on spot market prices exposes both sides to short-term price fluctuations³⁵.

Figure 51. EU MONTHLY IMPORT PRICES – FISHMEAL AND FISH OIL



Source: EUMOFA elaboration of Eurostat-Comext data.

6. 5. EU export of fishmeal and fish oil

In 2025, EU exports of fishmeal reached 220.000 tonnes, valued at EUR 402 million. This was a 29% increase in volume and a 13% increase in value compared with 2024, making 2025 the highest export year since 2015. Norway was the main destination, accounting for 63% of total volume and 62% of total export value. Exports to Norway rose by 55% YOY³⁶ to 138.000 tonnes.

The United Kingdom was the second-largest market, taking 16% of volume and 17% of value, with exports increasing by 22% to 36.000 tonnes. Other important markets included China, Canada, and Serbia.

On the supply side, Denmark dominated EU fishmeal exports, accounting for 78% of total volume in 2025. Ireland and Germany each supplied 7%.

EU exports of fish oil reached 179.000 tonnes in 2025, with a total value of EUR 564 million. Export volume increased by 31% compared with 2024, reaching the highest level seen in several decades. At the same time, export value declined by 14%, reflecting lower fish oil prices.

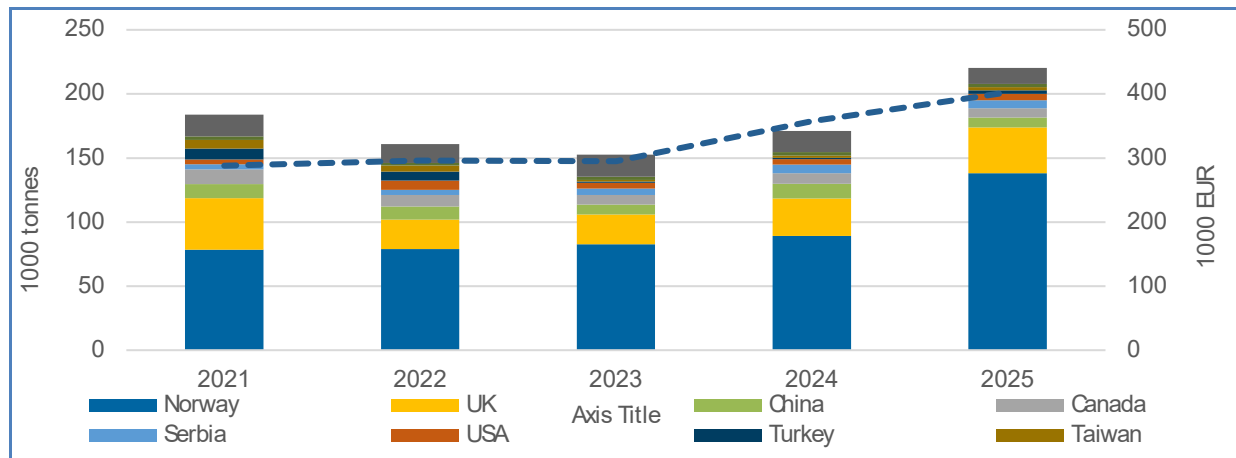
Norway was again the largest market, accounting for 77% of export volume and 70% of export value. The United Kingdom followed with 12% of volume and 11% of value, while Ireland accounted for 3% of volume and 5% of value.

Denmark was by far the largest EU supplier of fish oil, accounting for 75% of export volume in 2025. France followed with 8%, and Belgium with 5%.

³⁵ <https://tuvaeuro.eu/fish-meal-suppliers-in-europe-7-critical-factors/>

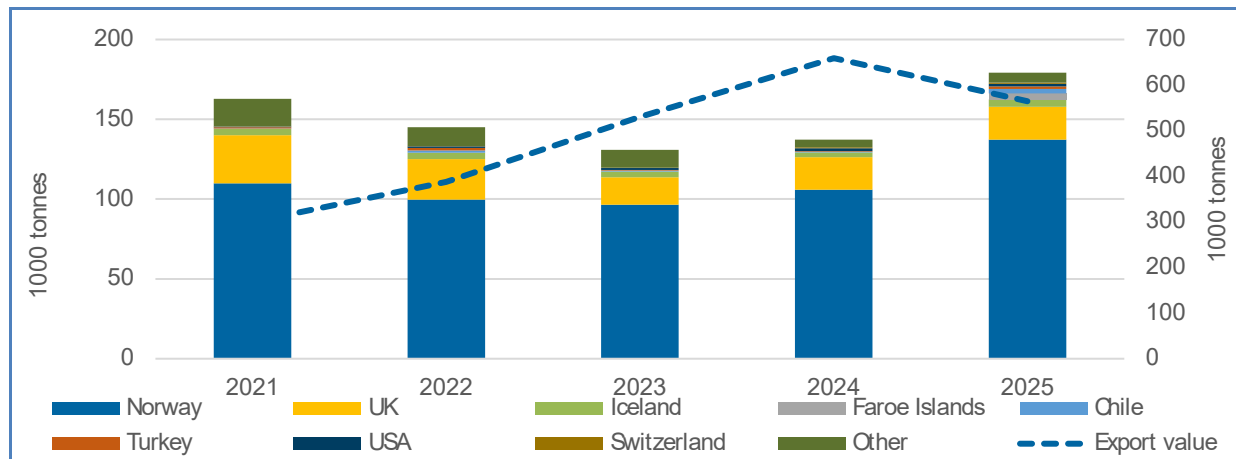
³⁶ Year on year

Figure 52. EU EXPORT OF FISHMEAL BY DESTINATION MARKET



Source: EUMOFA elaboration of Eurostat-Comext data.

Figure 53. EU EXPORT OF FISH OIL BY DESTINATION MARKET



Source: EUMOFA elaboration of Eurostat-Comext data.

6. 6. Key fishmeal and fish oil countries in the EU

Denmark is a key EU producer of fishmeal and fish oil and a leader in circular marine ingredient production. In addition to direct fisheries, it relies on by-products from whitefish and salmon processing, using advanced technologies to maximize raw-material use and reduce environmental impact. Through strong industry collaboration, innovation, and public support, Denmark produces high-value speciality ingredients for aquaculture and pet food, making its model a benchmark for sustainable marine ingredient production in Europe³⁷.

Spain is one of the leading fishmeal and fish oil producers in the EU. Its strength comes from strong port infrastructure, a large processing base in Galicia, and flexible sourcing from both domestic fisheries and imported raw materials. Spanish producers rely heavily on by-products from the fish processing industry, especially tuna and sardines, supporting a circular economy. This ensures a stable supply of marine ingredients for Europe’s aquaculture and pet food sectors³⁸.

The **French** market is driven by vertically integrated operations, linking fishing fleets, processing plants, and feed manufacturers. French production is based mainly on sardines and anchovies from the Bay of Biscay, processed quickly to preserve high oil quality. Strong collaboration with aquafeed companies and a focus on traceability, sustainability, and low carbon footprint make France a premium supplier to Europe’s aquaculture sector, particularly in the UK³⁹.

³⁷ <https://www.marketdataforecast.com/market-reports/europe-fishmeal-and-fish-oil-market>

³⁸ Ibidem

³⁹ Ibidem

The Netherlands plays a key role in the European fishmeal and fish oil market as Europe's central logistics and trading hub. The port of Rotterdam acts as a major entry, storage, and distribution point for marine ingredients serving markets across Europe and beyond. Strong integration with the Dutch animal feed and aquafeed industry, combined with advanced logistics, quality control, and certification infrastructure, makes the Netherlands a critical link in Europe's marine ingredient supply chain, rather than a primary producer⁴⁰.

7. Market opportunities

Growing use of fish processing by-products instead of whole fish offers a major growth opportunity for Europe's fishmeal and fish oil market. Improved conversion of seafood by-products into high-value marine ingredients supports sustainability, reduces pressure on wild stocks, and lowers environmental impacts.

This circular production model making by-product-based marine ingredients a key solution in the sustainable protein economy. Alternative marine ingredients such as algae and microalgae are being developed to further reduce reliance on wild caught fisheries as a raw material source for fishmeal and fish oil⁴¹.

The European Commission has launched EU4Algae, a three-year stakeholder platform to accelerate the development of a sustainable European algae industry. The initiative brings together producers, businesses, researchers, investors, and public authorities to boost algae production and use for food, industrial applications, and environmental benefits. It also serves as a central hub for funding opportunities, knowledge sharing, and best practices across the algae value chain⁴².

Although algae and other alternatives are expanding, they remain more expensive, limited in volume and go largely for human consumption⁴³. Compared to fishmeal and fish oil produced from industrial-scale fisheries and by-products, algae are therefore not a fully viable alternative. Compared to conventional marine ingredients, algae lack the cost efficiency, established supply chains, and production scale required to meet the large and consistent demand of the aquaculture industry.

⁴⁰ Ibidem

⁴¹ https://environment.ec.europa.eu/strategy/circular-economy_en

⁴² https://oceans-and-fisheries.ec.europa.eu/news/european-commission-launches-platform-promote-production-and-use-algae-europe-2022-02-09_en

⁴³ <https://www.futuremarketinsights.com/reports/europe-fish-oil-market>

7. CASE STUDY: Invasive blue crab in the EU

Blue crab is an invasive crustacean species in the Mediterranean Sea, originating from the western Atlantic. The market for blue crab is very limited in the EU, as the presence of the species in EU waters is relatively recent. The invasion by blue crab has become a concern as it alters biodiversity and has significant impacts on artisanal fisheries. Landings of blue crab significantly increased over the last five years (66%), reaching 543 tonnes in 2024. Spain is the main landing country in the EU, accounting for 61% of the landed volumes in 2024. Trade data for blue crab is aggregated with other crab species, and the share of blue crab is likely to be negligible. However, another invasive blue crab species is present in the south-eastern Mediterranean and has been targeted by coastal fishers for several years, especially in Tunisia. National Tunisian statistics reported exports of frozen whole blue crab to EU countries. Due to the relatively recent emergence of blue crab in EU waters, there is so far no clear information on consumption. However, several studies on species management have highlighted the market potential of blue crab.

7. 1. Biology resource and exploitation

Biology

The blue crab (*Callinectes sapidus*), also known as the Atlantic blue crab is a benthic crustacean species which lives on sandy and muddy seafloors⁴⁴, both in brackish and marine habitats, at depths of up to 35 metres⁴⁵.

The blue crab is native to the western Atlantic, from Canada to the Argentinean coastline⁴⁶. The geographical distribution now includes the Mediterranean and Black Sea following accidental introduction through ballast waters⁴⁷.

Blue crabs have a large body and can easily be identified by their sexual dimorphism, with males and females displaying different abdominal shapes. The carapace (the hard upper shell of a crustacean) is wider than long (on average twice as wide as long) and can reach a maximum width of 23 cm. The colour of the body is brownish to bluish due to a carotenoprotein⁴⁸.

Blue crabs grow by moulting, a process by which they crawl out of their exoskeletons, allowing the body to take up water and increase in size before the new shell hardens. It occurs in low-salinity waters with high osmotic pressure. Moulting is strongly influenced by water temperature, salinity, and food availability, with the frequency of shedding their exoskeletons increasing with warmer temperatures and greater food availability. Blue crabs can moult up to 25 times during their life⁴⁹.

Mating takes place in spring and summer between April and September⁵⁰ after the female migration to the upper reaches of estuaries. Females then migrate to the mouth of estuaries and lay between 700.000 and 1.200 000 eggs, hatching when water salinity is above 20‰. Larval development takes between 31 and 41 days, occurring in waters with a temperature above 15°C⁵¹. The juvenile stage occurs in brackish waters and develops rapidly. Sexual maturity is reached after about 12 to 18 months, and blue crabs have an average lifespan of 3 to 4 years⁵².

Blue crabs are omnivores; their main diet includes benthic invertebrates like oysters and clams, as well as fish, plants, detritus and carrion⁵³. Their omnivorous diet contributes to keeping the seafloor free from organic debris.



⁴⁴ <https://www.fao.org/fishery/en/aqspecies/2632/en>

⁴⁵ [https://doris.ffessm.fr/Especies/Callinectes-sapidus-Crabe-bleu-americain-4312/\(rOffset\)/1](https://doris.ffessm.fr/Especies/Callinectes-sapidus-Crabe-bleu-americain-4312/(rOffset)/1)

⁴⁶ Ibidem

⁴⁷ https://fish-commercial-names.ec.europa.eu/fish-names/species/callinectes-sapidus_en?fao-code=CRB

⁴⁸ <https://www.globalseafood.org/advocate/potential-to-valorize-byproducts-from-the-invasive-atlantic-blue-crab-in-the-mediterranean-region/>

⁴⁹ <https://www.bluecrab.info/molting.html>

⁵⁰ [https://doris.ffessm.fr/Especies/Callinectes-sapidus-Crabe-bleu-americain-4312/\(rOffset\)/1](https://doris.ffessm.fr/Especies/Callinectes-sapidus-Crabe-bleu-americain-4312/(rOffset)/1)

⁵¹ Ibidem

⁵² <https://www.fao.org/fishery/en/aqspecies/2632/en>

⁵³ Ibidem

Another invasive blue crab species in the Mediterranean is the blue swimming crab (*Portunus segnis*), originating from the Indian Ocean via the Suez Canal. This species is mostly present in the south-eastern part of the Mediterranean, especially in Tunisia. For now, EU coasts have not been significantly impacted⁵⁴.

Resource, exploitation, and management in the EU

The blue crab is a non-native species to the Mediterranean Sea and European waters. Its recent spread has become a concern as blue crabs grow rapidly, reproduce at high rates, and feed on a variety of resources. They alter the biodiversity of marine environments by preying on other marine species⁵⁵. Blue crabs also have a significant impact on artisanal fisheries, destroying gear and reducing the quantity and quality of catches⁵⁶, as well as physically harming fishers. There is no management plan or EU regulation yet.

Following the expansion of blue crab in the Mediterranean Sea, a project was carried out by the fishing community of El Palmar (Spain) and researchers from the University of Valencia to study the migration movements of blue crab and limit the spread of the species in European waters⁵⁷. Similar projects were carried out in 2024, with an Interreg control project implemented to target blue crab and reduce its population,⁵⁸ and a study focusing on the socio-economic impacts of the blue crab invasion on small-scale artisanal fishing in southern Italy and Portugal⁵⁹.

However, blue crab is interesting in terms of nutritional value and could benefit the local fisheries economies. Several projects are being carried out to valorise this invasive species, including the valorisation of by-products in the food, pharmaceutical, and cosmetic sectors⁶⁰. These studies allowed the implementation of management plans at local levels, for example, in France, in the Provence-Alpes-Côtes-d'Azur region and in Corsica. These action plans aim to limit the spread of blue crab through education and information campaigns, and by encouraging fisheries at specific times of the year depending on the life cycle of the blue crab⁶¹.

7. 2. Production

Catches

In 2024 global production of blue crab amounted to 60.462 tonnes. The leading producer by volume was the United States, accounting for 85% of global catches, followed by Venezuela (8%) and Mexico (4%). The only EU countries in terms of catch volumes were Spain and Italy, together accounting for 1% of total global catches.

Between 2015 and 2024, global catches of blue crab species have decreased by 22%, driven by a 26% fall in United States catches. Venezuelan catches also experienced a significant decrease over the period (31%). In contrast, EU catches increased by 66% between 2020 and 2024. This increase can be explained by the recent expansion of this non-native species in the Mediterranean Sea.

⁵⁴<https://geoconfluences.ens-lyon.fr/informations-scientifiques/dossiers-regionaux/la-mediterranee-une-geographie-paradoxe/articles-scientifiques/la-mediterranee-au-defi-de-l-arrivee-de-nouvelles-especes-crabes-bleus-france-tunisie>

⁵⁵ https://oceans-and-fisheries.ec.europa.eu/news/tasty-blue-accident-2022-06-02_en

⁵⁶ <https://www.globalseafood.org/advocate/potential-to-valorize-byproducts-from-the-invasive-atlantic-blue-crab-in-the-mediterranean-region/>

⁵⁷ Ibidem

⁵⁸ <https://www.interregeurope.eu/good-practices/blue-crab>

⁵⁹ <https://www.frontiersin.org/journals/marine-science/articles/10.3389/fmars.2024.1466132/full>

⁶⁰ <https://www.globalseafood.org/advocate/potential-to-valorize-byproducts-from-the-invasive-atlantic-blue-crab-in-the-mediterranean-region/>

⁶¹ <https://geoconfluences.ens-lyon.fr/informations-scientifiques/dossiers-regionaux/la-mediterranee-une-geographie-paradoxe/articles-scientifiques/la-mediterranee-au-defi-de-l-arrivee-de-nouvelles-especes-crabes-bleus-france-tunisie>

Table 42. TOTAL WORLD CATCHES OF BLUE CRAB (volume in tonnes)

Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
USA	69.366	73.352	67.006	63.401	69.028	55.927	53.550	52.317	54.865	51.577
Venezuela	6.826	7.119	5.990	4.228	3.998	4.688	4.640	4.265	4.300	4.690
Mexico	0	0	0	0	0	0	0	0	0	2.564
Nicaragua	817	515	727	411	1.076	777	825	747	874	860
EU	0	0	0	0	0	327	266	400	740	543
Others	311	262	237	239	226	253	360	371	370	228
Total	77.320	81.248	73.960	68.278	74.328	61.972	59.641	58.099	61.149	60.462

Source: FAO.

Despite the rapid expansion of blue crab fisheries in Tunisia—primarily involving *Portunus segnis* and, to a lesser extent, *Callinectes sapidus*—and the significant volumes reported in trade statistics, these species remain effectively absent from FAO capture data. This discrepancy cannot be explained solely by aggregation into residual categories such as “marine crabs nei” or “swimming crabs nei,” as reported volumes under these groups are also negligible. It more likely reflects a combination of underreporting and structural limitations in national data collection systems. The Tunisian blue crab fishery is a recent development, emerging after the invasion by the species in the mid-2010s and initially characterized by opportunistic harvesting and diffuse, small-scale landings, which may not have been fully captured in official statistics. In contrast, export data — recorded through formalized processing and trade channels — provide a more reliable indication of actual production levels, highlighting a significant disconnect between catch and trade statistics.

Landings in the EU

In 2024, landings of blue crab in the EU-27 amounted to 543 tonnes, at a value of EUR 2,1 million. Landings are reported in four Member States, namely Spain, Italy, and to a lesser extent Croatia and Portugal. Since 2020, Spain has been the main landing EU country, accounting for 61% of the total EU landing volumes in 2024, followed by Italy (37%).

From 2020 to 2024, EU-27 landings of blue crab increased by 66%, driven by the rise in Italian landings in the last three years (111% since 2022), while Spanish landings remained stable overall (+1% between 2020 and 2024).

Table 43. LANDINGS OF BLUE CRAB IN THE EU (volume in tonnes)

Country	2020	2021	2022	2023	2024	Evol. 2024/2020
Spain	326	264	300	358	331	1%
Italy	-	-	96	377	202	n.a.
Croatia	-	0	3	4	8	n.a.
Portugal	1	1	1	1	2	243%
Total	327	265	400	740	543	66%

Source: EUMOFA elaboration of Eurostat data.

7. 3. Blue crab: first sales in the EU

Blue crab first sales data were available for five EU countries where it is sold fresh, probably live. In 2025, blue crab first sales in reporting countries amounted to 567 tonnes at a value of over EUR 2 million and an average nominal price of 3,65 EUR/kg. Among the reporting countries, Spain is by far the most important country in first sales (83% of volume and 86% of value in 2025). Other reporting countries were Italy (15% of volume), France (1%), Croatia (1%) and Portugal (less than 1%).

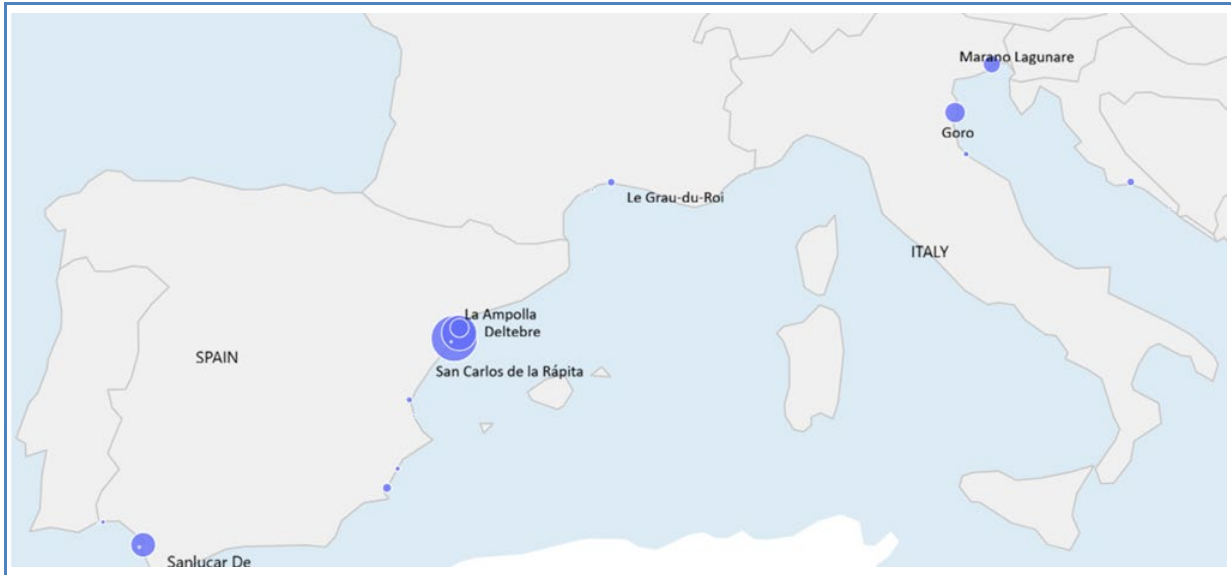
Blue crab first sales volumes significantly increased between 2018 and 2019 (433%), driven exclusively by the development of Spanish first sales. First sales of blue crab continued to increase with a 20% rise at EU level between 2019 and 2025, driven by the development of Italian first sales.

First-sales data show a high degree of seasonality, with the most first sales occurring between September and November. Over the 2023-2025 period, monthly Spanish first-sales volumes peaked at 82 tonnes in November 2023. The variation in first sales prices appears to be correlated with first sales volumes, with prices peaking each year (between February and May) when volumes are at their lowest levels, and low prices in summer and autumn during the high-volume season.

Nominal prices recorded in Spain between January 2023 and December 2025 reached 4,53 EUR/kg on average.

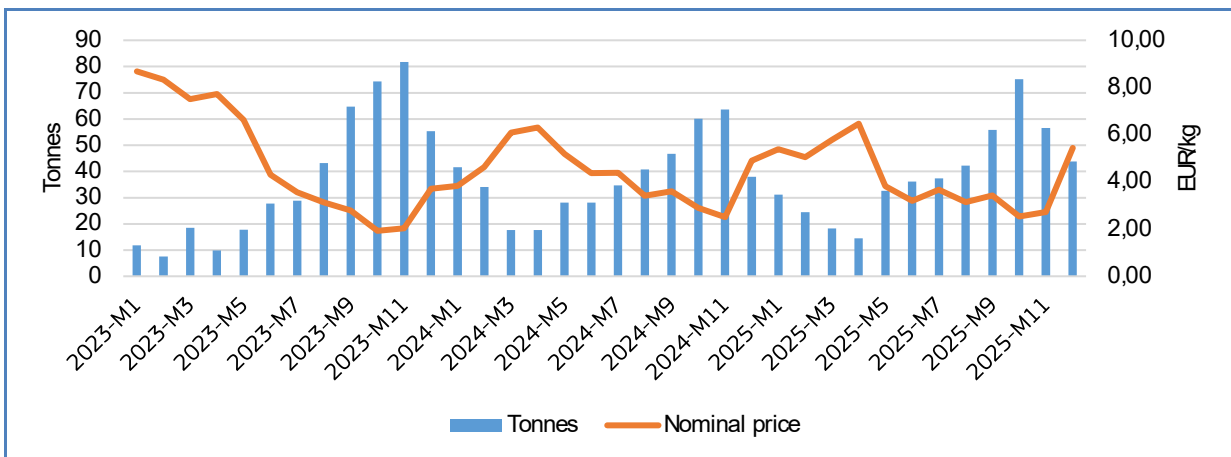
In 2025, the most important places of sale for blue crab in value terms were: San Carlos de la Rápita, Deltebre, Sanlúcar de Barrameda, La Ampolla in Spain, and Goro in Italy.

Figure 54. MAIN PLACES OF SALES FOR BLUE CRAB IN THE EU (in volume terms)



Source: EUMOFA.

Figure 55. MONTHLY FIRST SALES OF BLUE CRAB IN SPAIN BETWEEN 2023 AND 2025



Source: EUMOFA.

7. 4. International trade

In the Combined Nomenclature⁶² (CN) used for registering EU import-export data, there is no code specific to blue crab. Blue crab is reported frozen (cooked or not), aggregated with *Paralithodes camchaticus* (Red king crab) and *Chionoecetes* species⁶³. The share represented by blue crab is not specified and is likely to be negligible.

7. 5. Market outlets and consumption

There is no available data on the consumption of blue crab in the EU. However, recent studies following the emergence of blue crab in European waters – particularly in the Mediterranean Sea - have highlighted its market potential. For example, a survey was conducted in Italy in 2023 to explore the market for blue crab, revealing a strong consumer acceptance of this new species, and highlighting a mismatch between consumer interest and availability of the species in the market⁶⁴. Commercial harvesting and consumption of blue crab are key solutions to control the spread of the species across EU waters, and consumer acceptance and availability on the market are key factors. In Corsica, France, blue crab from local fisheries is sold at approximately 10 EUR/kg in supermarkets while processed blue crab (peeled) is sold between 2,50 and 3,00 EUR/kg in Tunisia, and 1,20 EUR/kg in Spain⁶⁵.

While the studies carried out and the local management plans implemented by EU Member States focus on limiting the spread of blue crab (*C. sapidus*) in order to protect marine biodiversity and resources for the local fisheries, the invasion by the blue swimming crab (*P. segnis*) in Tunisia was treated as an economic opportunity to valorise this species. A new fishing industry has been developed around the processing and export of blue crab in Tunisia. In 2026, the sector comprised 49 fisheries and seafood factories processing the species, including 17 specialised exclusively in blue crab⁶⁶. The Tunisian sector was estimated to process around 25.000 tonnes of blue crab in 2022, of which one third was exported⁶⁷.

Blue crab exports from Tunisia consist almost exclusively of frozen whole crab (99% of the exports in volume), and of canned products to a very limited extent (less than 1% of the exported volume)⁶⁸. Tunisian blue crab exports generated a value of almost EUR 25 million in 2025. The EU was the second destination of Tunisian exports of blue crab in 2025, accounting for 12% of the exported value (equivalent to 727 tonnes), after the Asian market (39% of the exported value; equivalent to 2.885 tonnes)⁶⁹.

The development of the snow crab (*Chionoecetes opilio*) fishery in Norway illustrates how an invasive species can evolve into a highly valuable and regulated fishery. Snow crab is native from the Northwest Atlantic and North Pacific, it has been present in the Barents Sea since the end of the 20th century⁷⁰. Snow crab fishery started in 2012 in Norwegian waters after the species reached commercially viable volumes. The fishery was initially open to Norwegian, Russian and EU vessels⁷¹. However, since 2015, it is restricted to only Norway and Russia following the designation shift of the species towards “sedentary” to limit foreign access⁷². Snow crab fishery in Norway is managed by quotas since 2017. The first established TAC reached 4.000 tonnes, and in 2024 it exceeded 10.000 tonnes⁷³. Technical measures were also implemented focusing on minimum shell width and gear maintenance. In 2026, the minimum shell width is set at 95 mm⁷⁴. Several risks are associated with the snow crab fishery, and more generally with invasive species fishery, including geopolitical risks regarding access to the resource, management and regulatory issues, and environmental risks regarding ecological impacts of invasive species⁷⁵. These examples show how invasive species can turn into valuable fisheries, given suitable management and regulation, communication and consumer awareness, and sufficient and adapted processing facilities to supply the market and meet consumer expectation.

⁶² The Combined Nomenclature (CN) is the EU's eight-digit coding system, comprising the Harmonised System (HS) codes with further EU subdivisions. It serves the EU's common customs tariff and provides statistics for trade within the EU and between the EU and the rest of the world.

⁶³ 03061410 - Frozen crabs "*Paralithodes camchaticus*, *Chionoecetes* spp. and *Callinectes sapidus*", even smoked, whether in shell or not, incl. crabs in shell, cooked by steaming or by boiling in water

⁶⁴ Ernesto Azzurro, Sara Bonanomi, Marina Chiappi, Rocco De Marco, Gian Marco Luna, Matilde Cella, Stefano Guicciardi, Francesco Tiralongo, Andrea Bonifazi, Pierluigi Strafella, Uncovering unmet demand and key insights for the invasive blue crab (*Callinectes sapidus*) market before and after the Italian outbreak: Implications for policymakers and industry stakeholders, *Marine Policy*, Volume 167, 2024, 106295, ISSN 0308-597X, <https://doi.org/10.1016/j.marpol.2024.106295>.

⁶⁵ <https://www.pdm-seafoodmag.com/regions/mediterranee/le-crabe-bleu-corse-face-a-la-concurrence-etrangere/>

⁶⁶ <https://geoconfluences.ens-lyon.fr/informations-scientifiques/dossiers-regionaux/la-mediterranee-une-geographie-paradoxe/articles-scientifiques/la-mediterranee-au-defi-de-larrivee-de-nouvelles-especes-crabes-bleus-france-tunisie>

⁶⁷ Ibidem

⁶⁸ République Tunisienne, Ministère de l'Agriculture

⁶⁹ Ibidem

⁷⁰ <https://www.sciencedirect.com/science/article/pii/S0308597X24001787>

⁷¹ <https://archimer.ifremer.fr/doc/00917/102901/114390.pdf>

⁷² Shift of the designation from “pelagic” to “sedentary”. Snow crab is now a continental shelf resource, granting exclusive harvest to Norway and Russia.

⁷³ <https://archimer.ifremer.fr/doc/00917/102901/114390.pdf>

⁷⁴ <https://thefishingdaily.com/norwegian-fishing-industry-blog/norwegian-government-announces-stable-snow-crab-quota-in-2026/>

⁷⁵ <https://archimer.ifremer.fr/doc/00917/102901/114390.pdf>

Manuscript completed in May 2026.

The European Commission is not liable for any consequence stemming from the reuse of this publication.

Luxembourg: Publications Office of the European Union, 2026
© European Union, 2026



The reuse policy of European Commission documents is implemented based on Commission Decision 2011/833/EU of 12 June 2011 on the reuse of Commission documents (OJ L 330, 14.12.2011, p. 39).

Except otherwise noted, the reuse of this document is authorised under a Creative Commons Attribution 4.0 International (CC-BY 4.0) licence (<https://creativecommons.org/licenses/by/4.0/>). This means that reuse is allowed provided appropriate credit is given and any changes are indicated.

For any use or reproduction of elements that are not owned by the European Union, permission June needs to be sought directly from the respective rightsholders. The European Union does not own the copyright in relation to the following elements:

Images: Cover photo, page 2 © EUROFISH, page 34 © Shutterstock, page 41 © Scandinavian Fishing Year Book.

PDF ISSN 2314-9671 KL-01-26-002-EN-N

ISBN: 978-92-68-36309-6 DOI: 10.2771/5688770

FOR MORE INFORMATION AND COMMENTS:

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

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

Global highlights: European Commission, Eurostat, MisPeces.

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

First sales:

Case studies: WWF, IFFO, Tuva Euro, Market Data Forecast, enhesa, fmi, FAOSTAT, Eurostat, Eurostat COMEXT, République Tunisienne, DORIS, Global Seafood, Bluecrab.Info, Geo confluences, European Commission, Interreg Europe, frontiers, ScienceDirect, Produits de la Mer, Elsevier, The Fishing Daily.

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

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

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

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

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

The EUMOFA website is publicly available at the following address: www.eumofa.eu.

[EUMOFA Privacy Policy](#)



Publications Office
of the European Union