European Commission

Monthly Highlights

No. 9/2026

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

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

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1. GLOBAL HIGHLIGHTS

EU/EMFAC: On 21 September 2026, the European Commission proposed a targeted amendment of the European Maritime, Fisheries and Aquaculture Fund (EMFAF) Regulation to simplify and facilitate access to funding for fishers and aquaculture producers. Alongside the measures proposed by the Commission, Member States will continue to play an essential role in ensuring that administrative procedures on fishers, aquaculture producers and other beneficiaries remain limited and proportionate.[1]

Source: Eurofish International Organisation

EU/Mediterranean/Fishery management: On 16 September 2026, the Commission adopted its proposal for fishing opportunities for 2027 for the Mediterranean and the Black Sea. The proposal promotes the sustainable management of fish stocks in the Mediterranean and the Black Sea and delivers on the political commitments made in the MedFish4Ever and Sofia Declarations. This proposal will be complemented at a later stage, based on the outcome of the General Fisheries Commission for the Mediterranean (GFCM) annual session (24-30 October 2026) and the Scientific, Technical and Economic Committee for Fisheries (STECF) advice for demersal stocks covered by the Western Mediterranean Multiannual Management Plan (MAP).[2]

Global/FAO/Fisheries and aquaculture: From 7-11 September 2026, the 37th session of the FAO Committee on Fisheries (COFI37) brought together nearly 700 delegates to discuss the state of global fisheries and aquaculture and priorities for the sector's future. Members highlighted the sector's contribution to food security, livelihoods, trade, biodiversity and climate action, and called for accelerated implementation of the Blue Transformation roadmap. The Committee welcomed global aquaculture production of aquatic animals surpassing 100 million tonnes for the first time, while expressing concern that only 62,4% of marine fishery stocks are currently fished at biologically sustainable levels, and calling for strengthened science-based fisheries management, data collection and stock assessment, particularly in developing countries.[3]

GFCM/Fisheries management: On 4 September 2026 the Adriatic Sea Technical Unit of the General Fisheries Commission for the Mediterranean (GFCM) of the Food and Agriculture Organization of the United Nations (FAO) was officially inaugurated in Split, Croatia, marking a new step in strengthening scientific cooperation and sustainable fisheries management among the countries sharing the Adriatic Sea. The GFCM Adriatic Sea Technical Unit will provide a permanent subregional presence to strengthen scientific cooperation, support implementation of fisheries management measures and improve coordination among Albania, Bosnia and Herzegovina, Croatia, Italy, Montenegro and Slovenia.[4]

Global/Tuna industry/Trade and sustainability: From 14-16 September 2026, the 19th INFOFISH World Tuna Trade Conference & Exhibition (TUNA 2026) was held in Bangkok, Thailand, bringing together more than 500 representatives from across the global tuna value chain. Under the theme "Strengthening Value Chain Synergies, Blue Economies and Sustainability across the Global Tuna Industry", the conference addressed sustainable fisheries governance, market access, value-chain resilience, trade, investment and technological innovation, including artificial intelligence and digital traceability. [5]

[1] https://oceans-and-fisheries.ec.europa.eu/news/commission-proposes-simplify-fisheries-and-aquaculture-funding-2026-09-21_en?prefLang=ro
[2] https://oceans-and-fisheries.ec.europa.eu/news/commission-proposes-fishing-opportunities-2027-mediterranean-and-black-seas-2026-09-16_en?prefLang=ro
[3] https://www.fao.org/fishery/news/41569/en?status=published
[4] https://www.fao.org/newsroom/detail/new-adriatic-sea-fisheries-unit-inaugurated-in-split-to-strengthen-science-based-fisheries-management/en
[5] https://tuna.infofish.org/index.php/press-release

2. MACROECONOMIC CONTEXT

2.1. Marine fuel

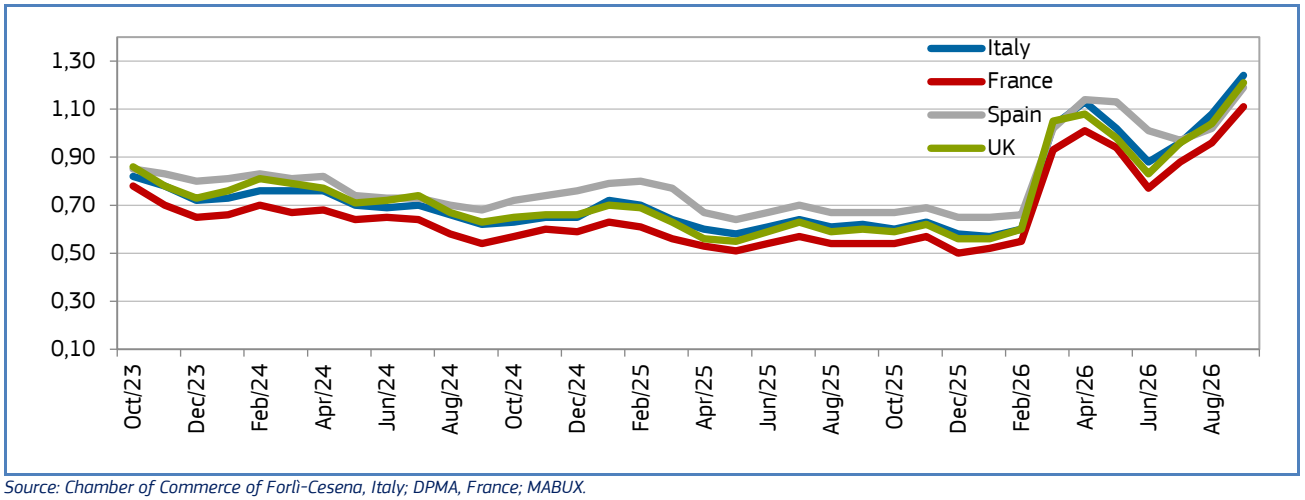
Average prices for marine fuel on **September 2026** ranged between 1,11 and 1,24 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of about 15,9% compared with the previous month and by an average of 95,5% compared with the same month in 2025.

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

Country	Sep 2026	Change from Aug 2026	Change from Sep 2025
France *(ports of Lorient and Boulogne)*	1,11	16%	106%
Italy *(ports of Ravenna and Livorno)*	1,24	15%	100%
Spain *(ports of A Coruña and Vigo)*	1,19	17%	78%
The UK *(ports of Grimsby and Aberdeen)*	1,21	16%	102%

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

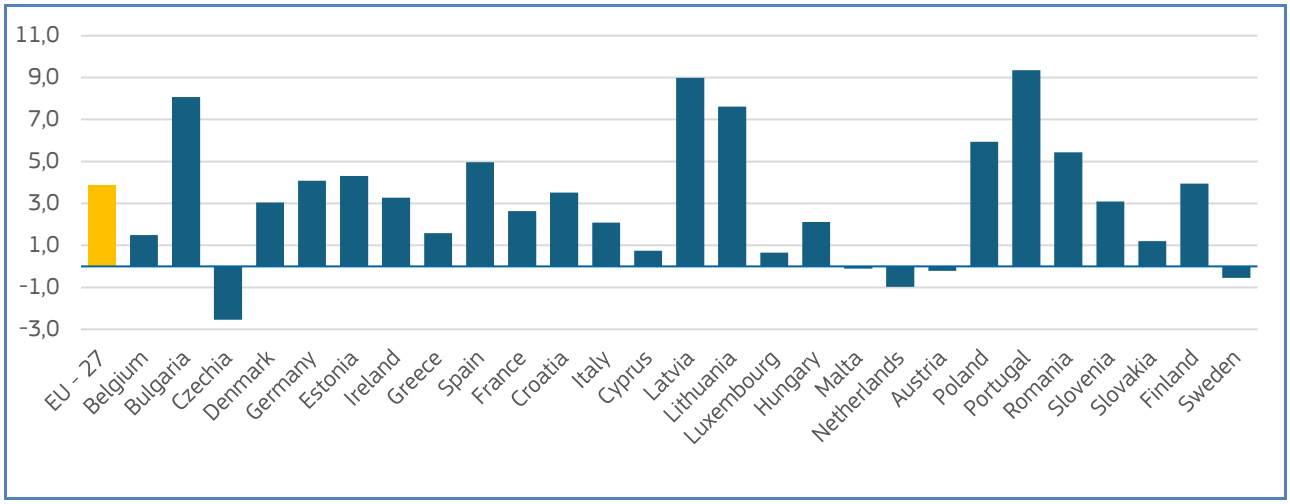
Table 2. **HIGHEST AND LOWEST INFLATION RATES FOR AUG 2026, COMPARED WITH AUG 2025**

Lowest inflation rates		Highest inflation rates	
Sweden	+0,3%	Romania	+6,3%
Estonia	+1,3%	Lithuania	+5,6%
Czechia	+1,5%	Cyprus	+5,2%

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 AUGUST 2026 (value expressed in percentage)**



Source: Eurostat.

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

	Aug 2024	Aug 2025	Jul 2026	Aug 2026	Change from Jul 2026	Change from Aug 2025
Food and non-alcoholic beverages	96,71	100,49	101,01	100,80	-0,2%	0,3%
Fish and other seafood	97,54	100,37	103,85	104,24	0,4%	3,9%
Fish, live, fresh, chilled or frozen	96,40	99,98	104,84	105,29	0,4%	5,3%
Fish, dried, salted, in brine or smoked	97,67	100,84	106,37	106,67	0,3%	5,8%
Fish preparations	99,53	100,32	102,42	102,68	0,3%	2,4%
Other seafood, live, fresh, chilled or frozen	98,28	101,26	100,93	101,30	0,4%	0,04%
Other seafood, dried, salted, in brine or smoked	98,90	104,09	99,04	100,00	1,0%	-3,9%
Other seafood preparations	97,86	101,01	103,49	104,16	0,6%	3,1%

Source: Eurostat.

2.4. Exchange rates

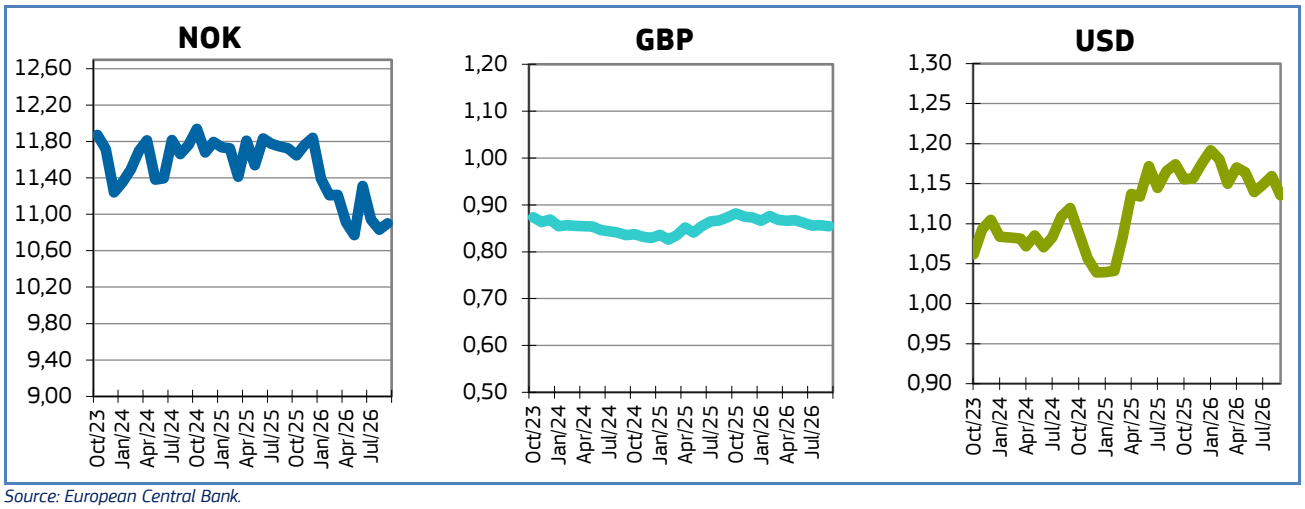
Table 4. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Sep 2024	Sep 2025	Aug 2026	Sep 2026
NOK	11,7645	11,7265	10,8320	10,9015
GBP	0,8354	0,8734	0,8565	0,8546
USD	1,1196	1,1741	1,1596	1,1355

Source: European Central Bank.

In September 2026, the euro appreciated against the Norwegian krone (0,6%) and depreciated against the British pound sterling (0,2%), and the US dollar (2,1%), relative to the previous month. For the past six months, the euro has fluctuated around 1,1529 against the US dollar, 10,9453 against the Norwegian krone and 0,8604 against the British pound sterling. Compared with September 2025, the euro depreciated 3,3% against the US dollar, 2,1% against the British pound sterling and 7,0% against the Norwegian krone.

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



Source: European Central Bank.

3. FIRST SALES IN EUROPE[6]

3.1. Year-to-date comparison of First sales

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

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

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

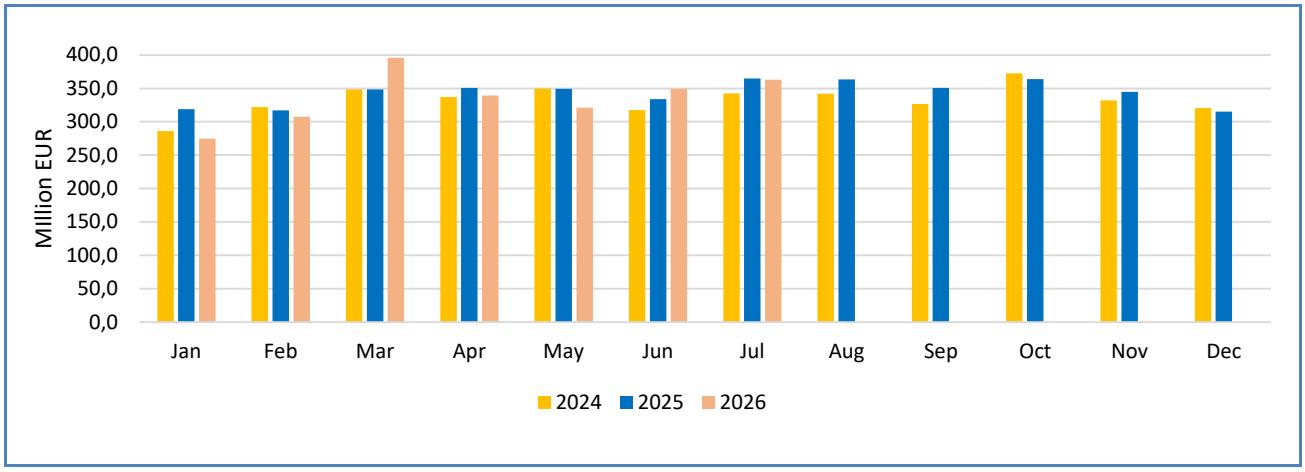
	January – July 2024		January – July 2025		January – July 2026		Change from January – July 2025	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	6.885	41,58	6.844	43,48	6.169	41,36	-10%	-5%
Bulgaria	2.359	1,29	2.288	1,56	1.189	1,00	-48%	-36%
Croatia	19.202	28,35	14.831	26,10	16.671	29,71	12%	14%
Cyprus	380	1,82	376	1,66	267	1,35	-29%	-19%
Denmark	476.647	282,11	460.789	302,83	264.503	261,60	-43%	-14%
Estonia	40.564	19,97	33.138	15,38	41.097	18,95	24%	23%
Faroe Islands	436.685	258,38	459.512	391,78	303.410	333,38	-34%	-15%
Finland	34.345	13,03	44.342	13,58	36.626	13,39	-17%	-1%
France	141.134	387,37	148.077	423,01	205.870	476,75	39%	13%
Germany	20.618	35,89	4.767	24,65	4.331	15,82	-9%	-36%
Ireland	145.046	164,33	157.434	200,80	127.799	168,56	-19%	-16%
Italy	33.309	156,32	29.726	149,29	39.868	208,93	34%	40%
Latvia	23.189	8,30	21.914	8,64	20.172	9,39	-8%	9%
Lithuania	286	0,38	183	0,23	229	0,28	25%	17%
Netherlands	11.861	80,58	11.717	75,64	11.183	63,19	-5%	-16%
Poland	38.076	20,01	36.607	18,21	47.089	23,33	29%	28%
Portugal	56.359	158,37	55.754	173,28	53.545	169,08	-4%	-2%
Spain	254.204	852,19	230.095	861,17	208.122	805,59	-10%	-6%
Sweden	75.829	51,44	55.292	43,23	45.348	42,05	-18%	-3%
Norway	1.757.414	1.751,65	1.664.392	2.004,54	1.371.532	1.980,91	-18%	-1%
United Kingdom	180.430	353,47	184.048	394,20	147.336	423,46	-20%	7%

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

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

The overall value of first sales, reported from the 18 MS, in the period January - July in 2026 was EUR 2,35 billion, marking a 1%-decrease compared to 2025, and a 2% increase compared to 2024. Overall volume was 1,1 billion tonnes, a 14% decrease compared to 2025, and an 18% decrease compared to 2024.

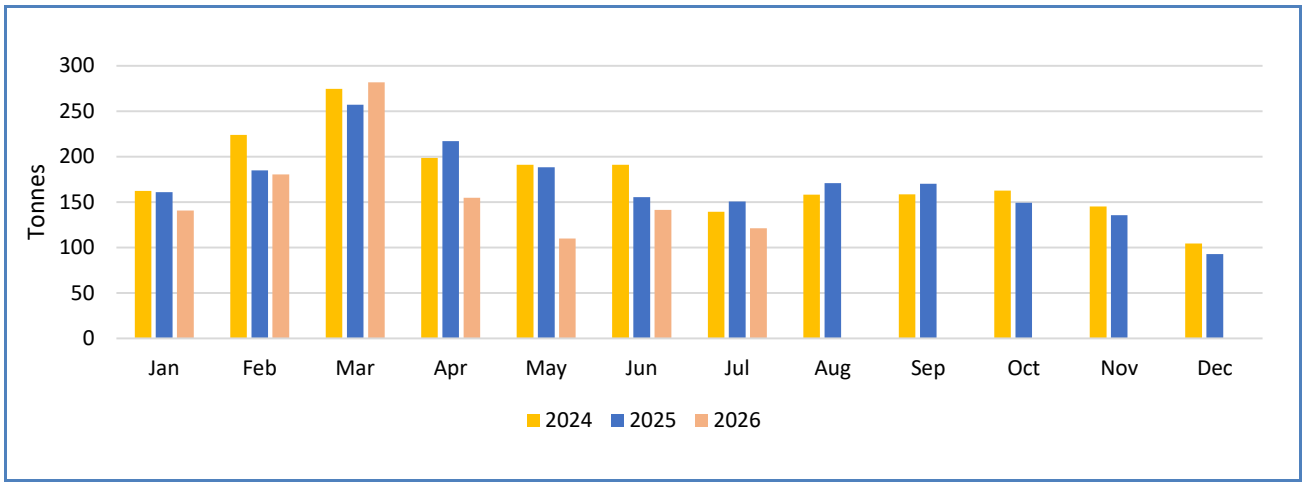
Figure 4. **ANNUAL OVERVIEW OF TOTAL FIRST-SALES VALUE FROM THE REPORTING COUNTRIES[6] (value in million EUR)**



Between January and July 2026, monthly first-sales value was lower than in the corresponding months of 2025 in January, February, April, May, and July. Compared with 2024, first-sales value was lower in January, February, and May. First-sales volume was lower in every month analysed compared with both 2025 and 2024, with the exception of March.

The decrease in first-sales value compared to 2025 was mainly driven by groundfish (-12%). Compared with 2024 the increase in first-sales value was driven by small pelagics (+20%). In the same period in 2026, the decrease in first-sales volume was mainly due to groundfish which fell by 44% and 48% respectively in comparison with both 2025 and 2024.

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



3.2. First-sales evolution at commodity group (CG) level[7,8]

Bivalves and other molluscs and aquatic invertebrates

In January-July 2026, first-sales value of "Bivalves and other molluscs and aquatic invertebrates" amounted to EUR 163,2 million, an 11% increase compared to the same period in 2025. First-sales volume reached 59.304 tonnes, an increase of 1% compared to 2025. Scallop (+23% and 11%) and clam (+9% and 16%) were the main commercial species of the commodity group driving the increase in value and volume.

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

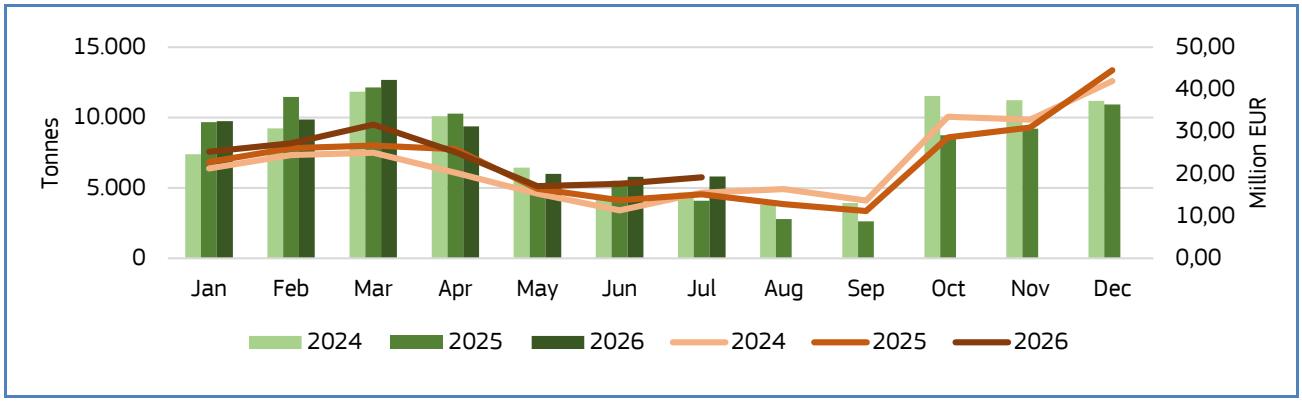


Table 6. **FIRST-SALES PRICE OF BIVALVES MAIN COMMERCIAL SPECIES (MCS) JAN - JUL 2025 & JAN - JUL 2026**

Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
Italy	Clam	2,88 EUR/kg	3,05 EUR/kg	+6%
France	Scallop	2,04 EUR/kg	2,28 EUR/kg	+11%
Ireland	Scallop	2,34 EUR/kg	2,20 EUR/kg	-6%

Cephalopods

In 2026, first-sales value of "Cephalopods" totalled EUR 163,1 million, a 7% decrease compared to 2025. First-sales volume totalled 23.146 tonnes, a decrease of 7% compared to 2025. The main commercial species driving the decrease in first-sales value and volume were squid (-13% and -16%) and octopus (-8% and -6%).

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

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

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

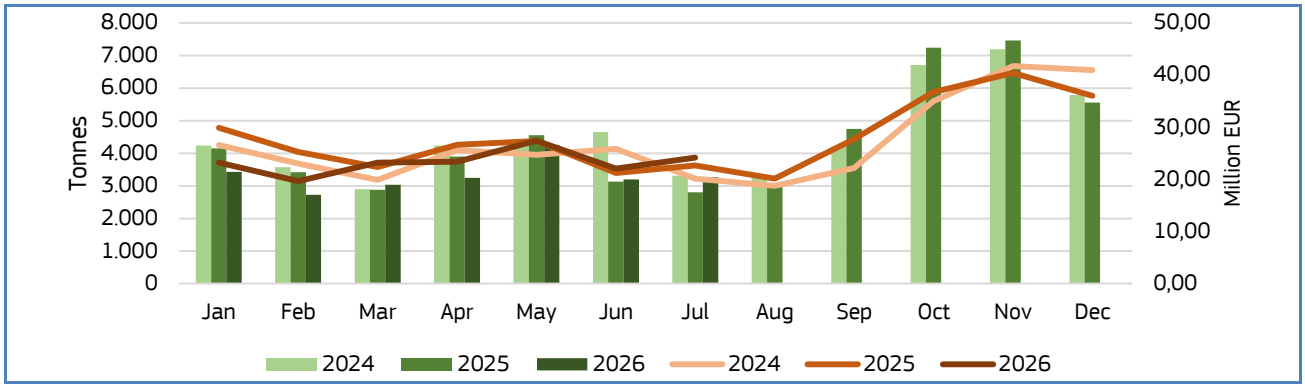


Table 7. **FIRST-SALES PRICE OF CEPHALOPODS MCS (JAN - JUL 2025 AND JAN - JUL 2026)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
Spain	Octopus	7,82 EUR/kg	8,46 EUR/kg	+8%
Spain	Squid	5,49 EUR/kg	5,44 EUR/kg	-1%
Portugal	Octopus	8,95 EUR/kg	8,37 EUR/kg	-7%

Crustaceans

Between January and July 2026, first-sales value of "Crustaceans" totalled EUR 337,2 million, a 5% decrease in value compared to 2025. First-sales volume amounted to 36.017 tonnes, a stable value compared to 2025. Shrimp *Crangon* spp. and Norway lobster (-36% and –10% respectively) were the two main products responsible for the decrease in first-sales value.

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

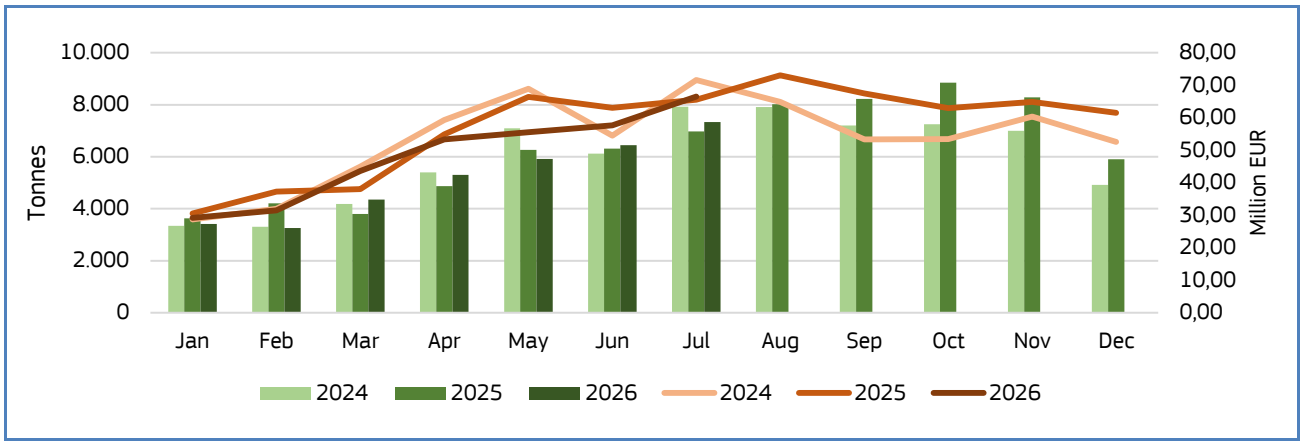


Table 8. **FIRST-SALES PRICE OF CRUSTACEANS MCS (JAN - JUL 2025 AND JAN - JUL 2026)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
Netherlands	Shrimp *Crangon* spp	9,37 EUR/kg	4,53 EUR/kg	-52%
Ireland	Norway lobster	11,84 EUR/kg	11,53 EUR/kg	-3%
Germany	Shrimp *Crangon* spp	11,18 EUR/kg	6,83 EUR/kg	-39%

Flatfish

In 2026, first-sales value of "Flatfish" totalled EUR 197 million, a 1% decrease compared to 2025. First-sales volume amounted to 24.880 tonnes, a decrease of 11% compared to 2025. European plaice and megrim (-7% and -4% respectively) were the main species driving the reduction in first-sales value while European plaice and common sole (-15% and -9% respectively) contributed most to the decrease in first-sales volume.

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

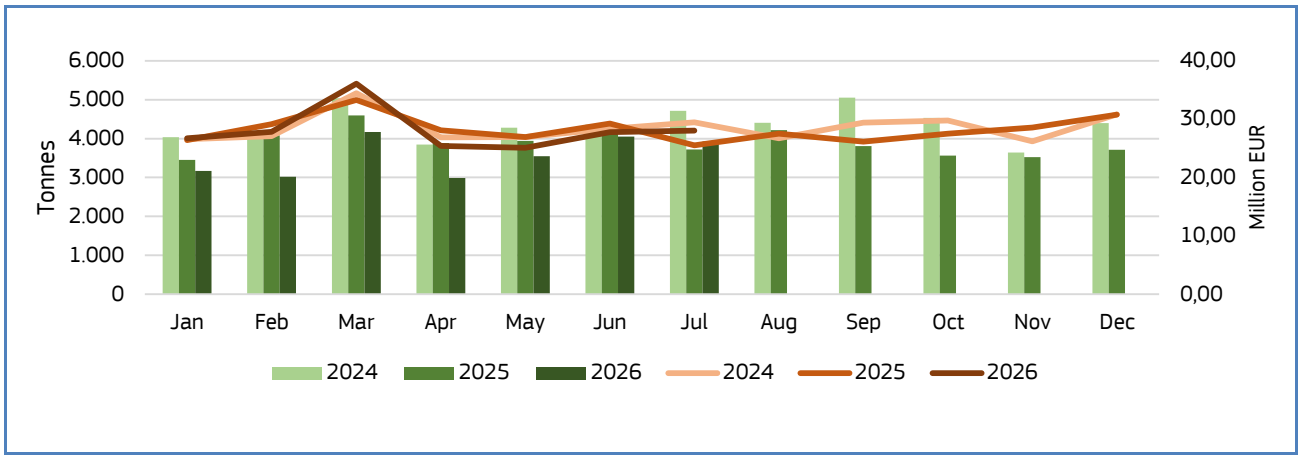


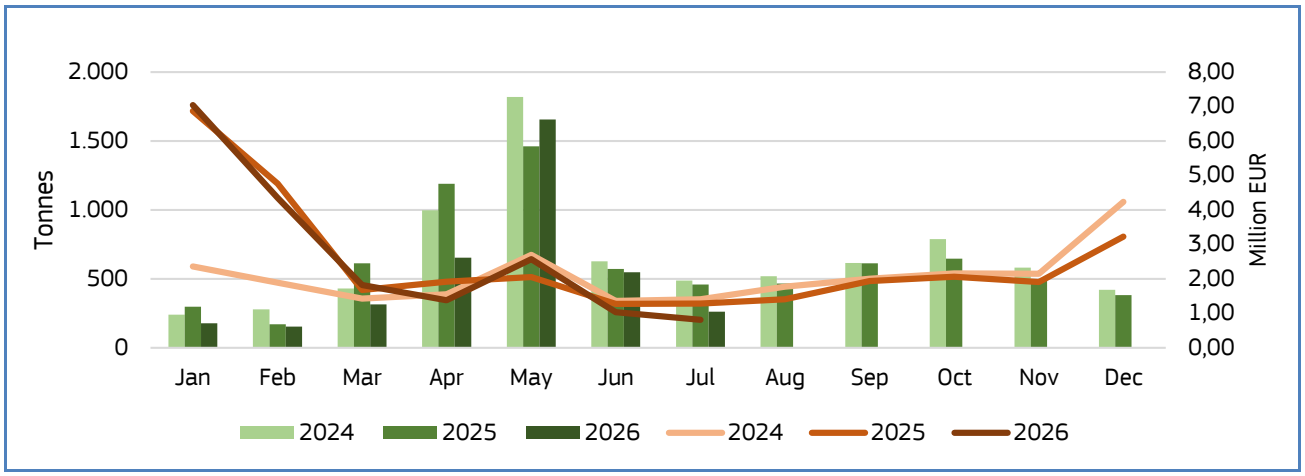
Table 9. **FIRST-SALES PRICE OF FLATFISH MCS (JAN - JUL 2025 AND JAN - JUL 2026)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
France	Common sole	17,94 EUR/kg	19,95 EUR/kg	+11%
Spain	Greenland halibut	6,68 EUR/kg	7,22 EUR/kg	+8%
Denmark	Turbot	16,87 EUR/kg	19,16 EUR/kg	+14%

Freshwater fish

In 2026, first-sales value of "Freshwater fish" reached EUR 19 million, marking a 4% decrease compared to 2025. First-sales volume amounted to 3.759 tonnes, a decrease of 21% compared to 2025. The category "other freshwater fish"[9] was the main contributor to the decrease in first-sales value and volume (-7% and -21%).

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



[9] „Other freshwater fish" comprises 27 products, and together round goby, European perch and freshwater bream represent 87% of first-sales value and 79% of first-sales volume.

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

Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
Denmark	Eel	9,50 EUR/kg	10,04 EUR/kg	+6%
Poland	Other freshwater fish[10]	0,86 EUR/kg	0,98 EUR/kg	+13%
Germany	Other freshwater fish[11]	0,78 EUR/kg	0,92 EUR/kg	+18%

Groundfish

In 2026, first-sales value of "Groundfish" totalled EUR 390,3 million, a decrease of 12% compared to 2025. First-sales volume amounted to 264.390 tonnes, a decrease of 44% compared to 2025. Blue whiting (-28% and -48%) was the main species responsible for the decrease in first-sales value and volume.

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

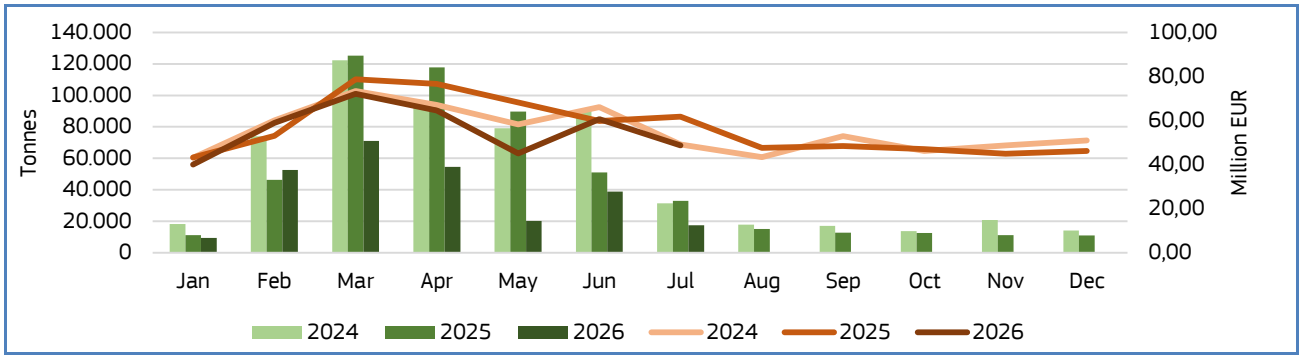


Table 11. **FIRST-SALES PRICE OF GROUNDFISH MCS (JAN - JUL 2025 AND JAN - JUL 2026)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
Denmark	Blue whiting	0,34 EUR/kg	0,44 EUR/kg	+30%
Denmark	Other groundfish[12]	0,40 EUR/kg	0,56 EUR/kg	+41%
Denmark	Cod	6,16 EUR/kg	7,43 EUR/kg	+20%

Other marine fish[13]

In 2026, first-sales value of the category "other marine fish" totalled EUR 336,5 million, a decrease of 1% compared to 2025. First-sales volume amounted to 83.333 tonnes, a decrease of 9% compared to 2025. Other sharks[14] (-22%) was the main commercial species contributing to the decrease in first-sales value, while the category "other marine fish"[15] was behind the decrease in first-sales volume (-15%).

[10] „Other freshwater fish" in Poland comprised 5 species of which freshwater bream and roach account together for 91% of total first-sales volume and 74% of first sales value.
[11] „Other freshwater fish" in Germany comprised 7 species of which freshwater breams nei and roach account together for 88% of total first-sales volume and 70% of first sales value.
[12] „Other groundfish" in Denmark comprised 8 species of which sandeels nei account for 93% of total first-sales value and 99% of total first-sales volume in the period January – July 2026.
[13] Seventeen Main Commercial Species are included in the Commmodity Group „Other Marine Fish".
[14] „Other sharks" MCS comprises 31 species of which blue shark and smooth-hounds nei accounting together for 74% of first-sale value.
[15] Of the „Other marine fish" Main Commercial Species (MCS), boarfish and boarfishes nei represent 68% of total first-sales volume.

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

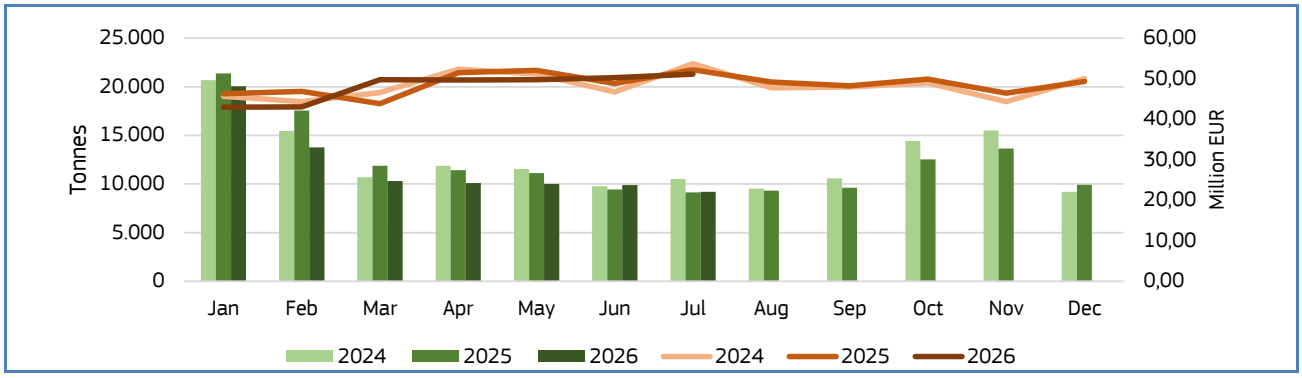


Table 12. **FIRST-SALES PRICE OF OTHER MARINE FISH MCS (JAN - JUL 2025 AND JAN – JUL 2026)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
Spain	Other sharks[16]	3,38 EUR/kg	3,19 EUR/kg	-6%
France	Monk	5,97 EUR/kg	6,01 EUR/kg	+1%
Portugal	Scabbardfish	4,61 EUR/kg	4,37 EUR/kg	-5%

Salmonids

In 2026, first-sales value of "Salmonids" totalled EUR 800.067, a decrease of 18% compared to 2025, while first-sales volume amounted to 81.258 kg, a decrease of 18% compared to 2025. Salmon (-13%) was the main species responsible for the decrease in first-sales value, while the category "other salmonids"[17] (-41%) was responsible for the decrease in first-sales volume of salmonids.

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

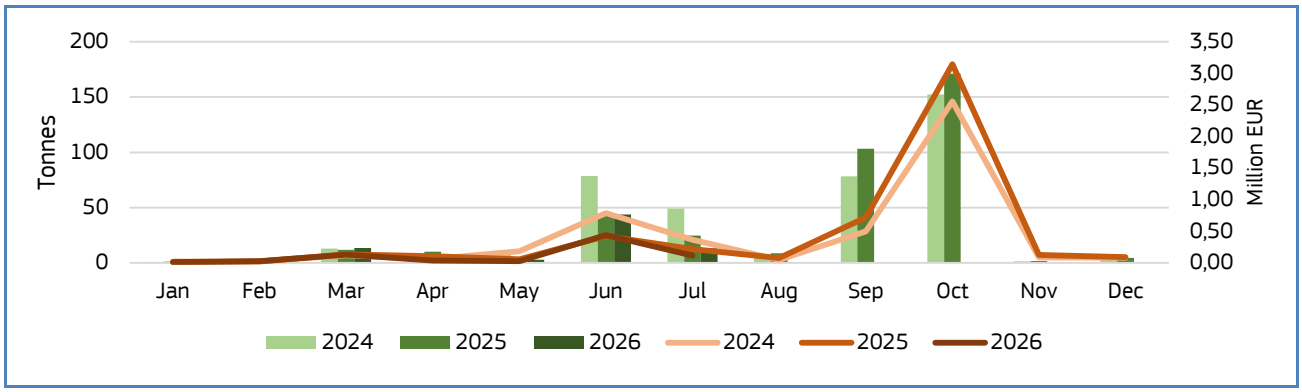


Table 13. **FIRST-SALES PRICE OF SALMONIDS MCS (JAN - JUL 2025 AND JAN - JUL 2026)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
Poland	Trout	12,65 EUR/kg	11,39 EUR/kg	-10%
Finland	Salmon	10,62 EUR/kg	10,14 EUR/kg	-4%
Sweden	Salmon	8,87 EUR/kg	9,28 EUR/kg	+5%

[16] "Other sharks" MCS in Spain comprises 20 species of which blue shark and shortfin mako represent together 94% of first-sales value and 88% of first-sales volume.
[17] „Other marine fish" MCS comprises 4 species in the period analysed of which European whitefish represented 78% of the total volume.

Small pelagics

In 2026, first-sales value of "Small pelagics" amounted to EUR 557 million, an increase of 10% compared to 2025. First-sales volume amounted to 568.100 tonnes, an increase of 12% compared to 2025. Sardine (+85% and +122%) was the commercial species contributing most to the increase in first-sales value and volume.

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

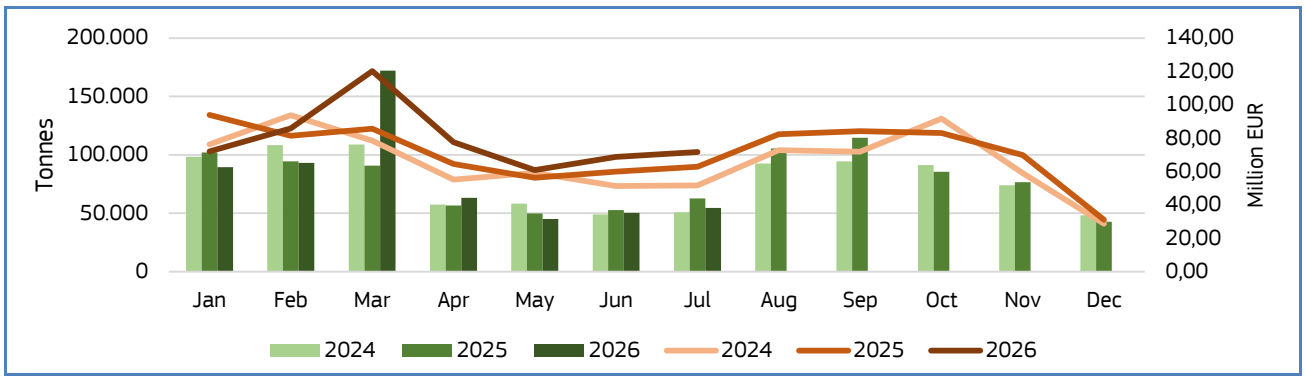


Table 14. **FIRST-SALES PRICE OF SMALL PELAGICS MCS (JAN - JUL 2025 AND JAN - JUL 2026)**

Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
France	Sardine	0,80 EUR/kg	0,64 EUR/kg	-21%
Denmark	Herring	0,72 EUR/kg	0,85 EUR/kg	+19%
Denmark	Sprat	0,46 EUR/kg	0,63 EUR/kg	+35%

Tuna and tuna-like species

In 2026, first-sales value of "Tuna and tuna-like species" totalled EUR 184,6 million, a decrease of 5% compared to 2025. First-sales volume totalled 42.829 tonnes, a decrease of 13% compared to 2025. Skipjack tuna (-54% and -49%) was 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 – JUL 2026**

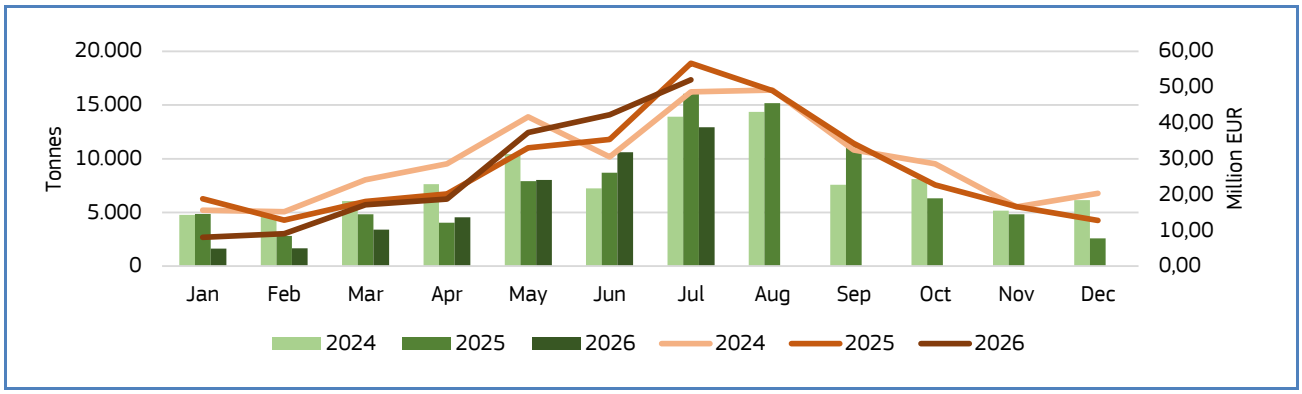


Table 15. **FIRST-SALES PRICE OF TUNA AND TUNA-LIKE SPECIES MCS (JAN - JUL 2025 AND JAN - JUL 2026)**

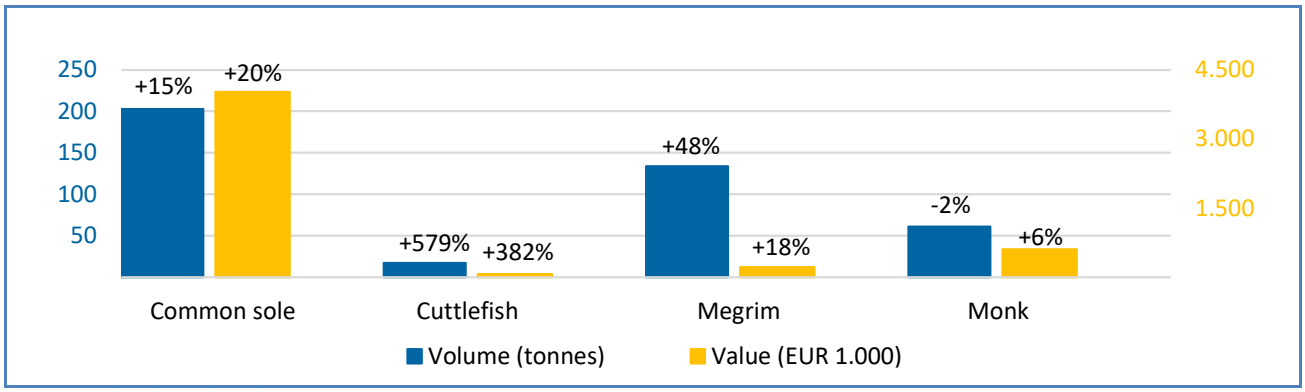
Country	Main Commercial Species	First-sales average price Jan-Jul 2025	First-sales average Price Jan-Jul 2026	Trend (Jan-Jul 2026 vs Jan-Jul 2025 %)
Spain	Yellowfin tuna	2,57 EUR/kg	2,22 EUR/kg	-14%
Spain	Swordfish	5,16 EUR/kg	5,74 EUR/kg	+11%
Portugal	Skipjack tuna	1,74 EUR/kg	1,68 EUR/kg	-3%

3.3. First sales in reporting countries[18]

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

Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 41,4 million, -5%	6.169 tonnes, -10%	Squid, cuttlefish, monk, common sole.
Jul 2026 vs Jul 2025	EUR 6,1, million, +9%	728 tonnes, +6%	Common sole, cuttlefish, megrim, monk.

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

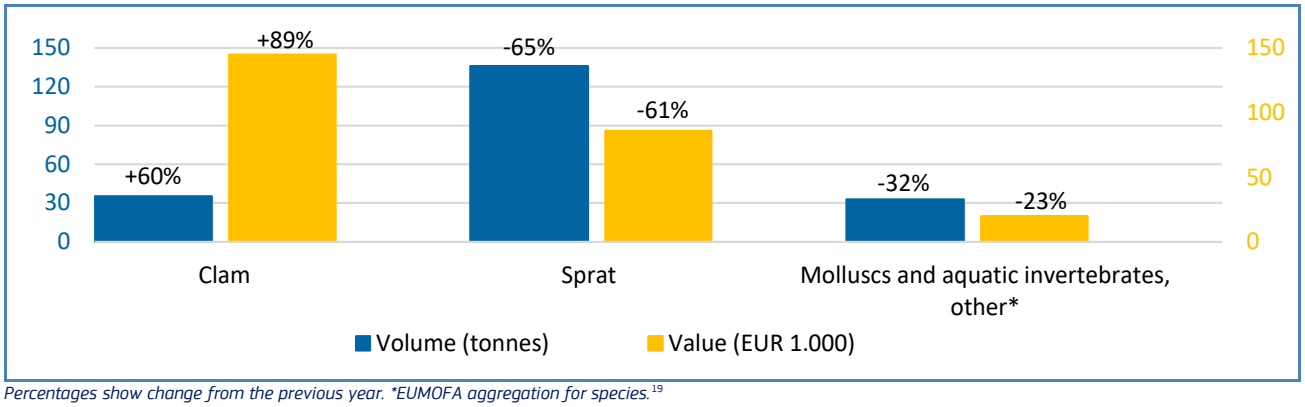


Percentages show change from the previous year.

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

Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 1 million, -36%	1.189 tonnes, -48%	Sprat, other molluscs and aquatic invertebrates*.
Jul 2026 vs Jul 2025	EUR 0,3 million, -20%	208 tonnes, -55%	Sprat, other molluscs and aquatic invertebrates*. *Clam was the main species bucking the downward trend.*

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



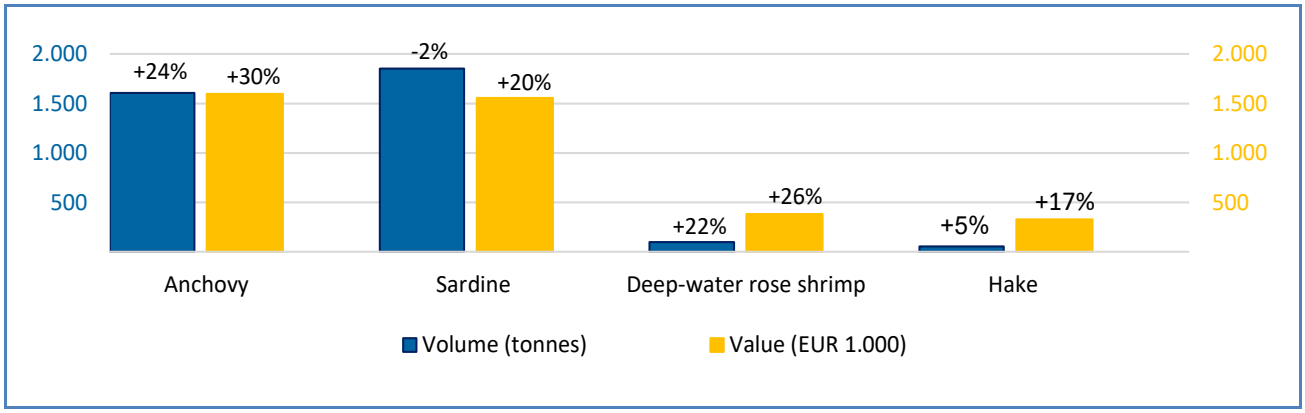
*Percentages show change from the previous year. *EUMOFA aggregation for species.*[19]

[18] First-sales data updated on 20. 09. 2026. This section covers all countries for which data are available on the date of extraction from the EUMOFA database and analysis.
[19] Metadata 2, Annex 3: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/data/metadata#data-management---metadata-2

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

Croatia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 29,7 million, +14%	16.671 tonnes, +12%	Sardine, John dory, hake, Other seabreams*, squid.
Jul 2026 vs Jul 2025	EUR 6,3 million, +14%	4.010 tonnes, +5%	Anchovy, sardine, deep-water rose shrimp, hake.

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

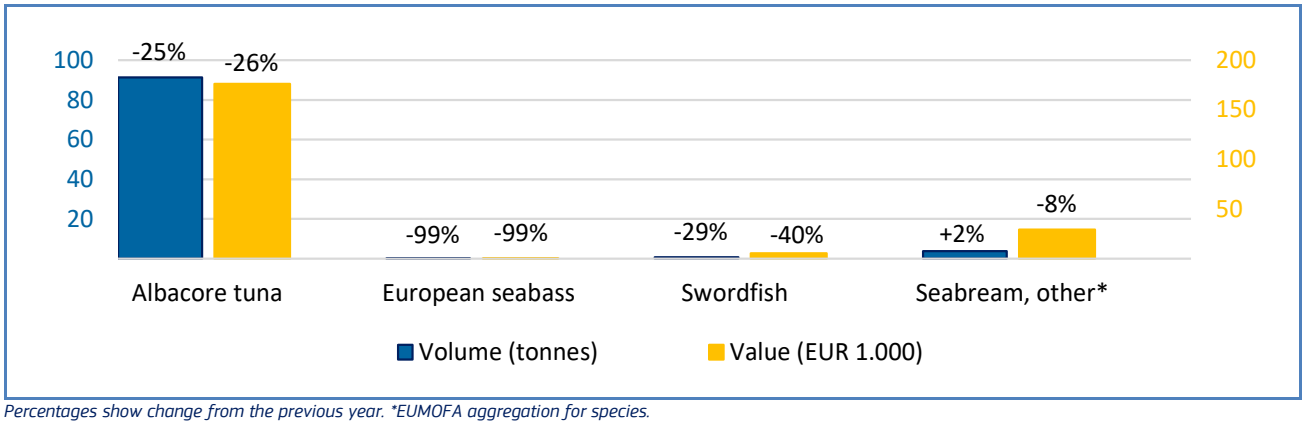


Percentages show change from the previous year.

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

Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 1,3 million, -19%	267 tonnes, -29%	Albacore tuna, red mullet, swordfish, Other seabreams*.
Jul 2026 vs Jul 2025	EUR 0,3 million, -18%	110 tonnes, -23%	Albacore tuna, European seabass, swordfish, Other seabreams*.

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



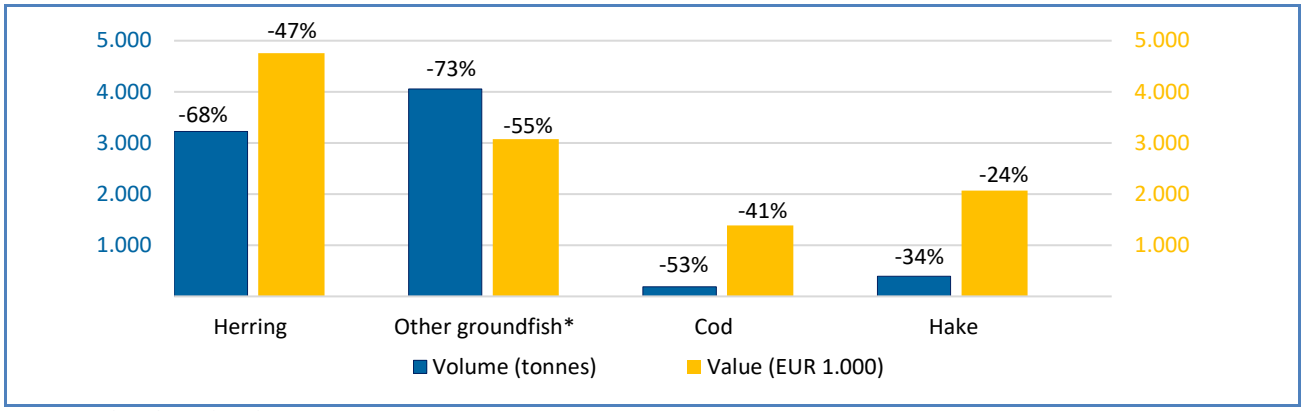
*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 261,6 million, -14%	264.503 tonnes, -43%	Blue whiting, other groundfish*, mackerel, cod.
Jul 2026 vs Jul 2025	EUR 34,9 million, -19%	21.170 tonnes, -54%	Herring, Other groundfish*, cod, hake.

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

Figure 20. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, JULY 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-Jul 2026 vs Jan-Jul 2025	EUR 18,9 million, +23%	41.097 tonnes, +24%	Sprat, herring, smelt, pike-perch, pike.
Jul 2026 vs Jul 2025	EUR 0,3 million, -44%	77 tonnes, -41%	Other freshwater fish*, eel, European flounder, pike.

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

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

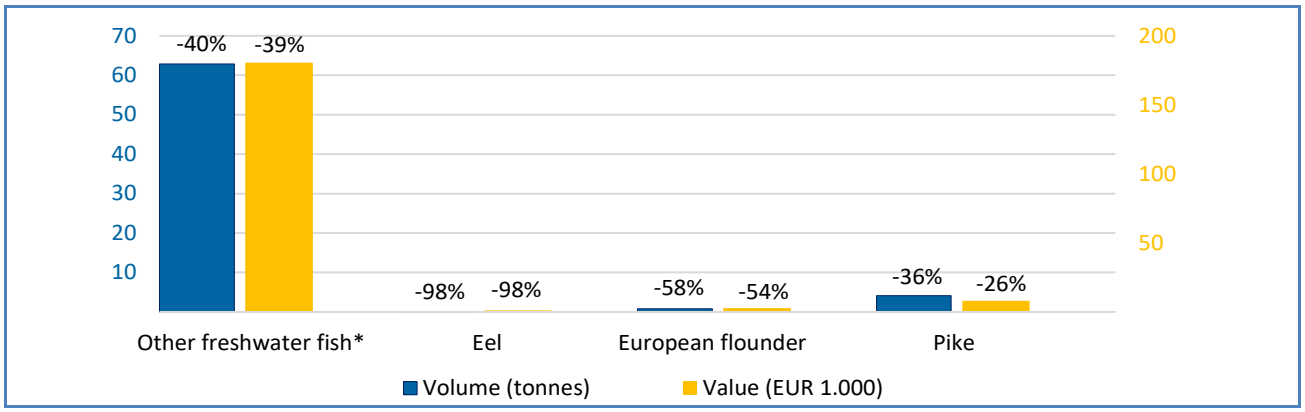
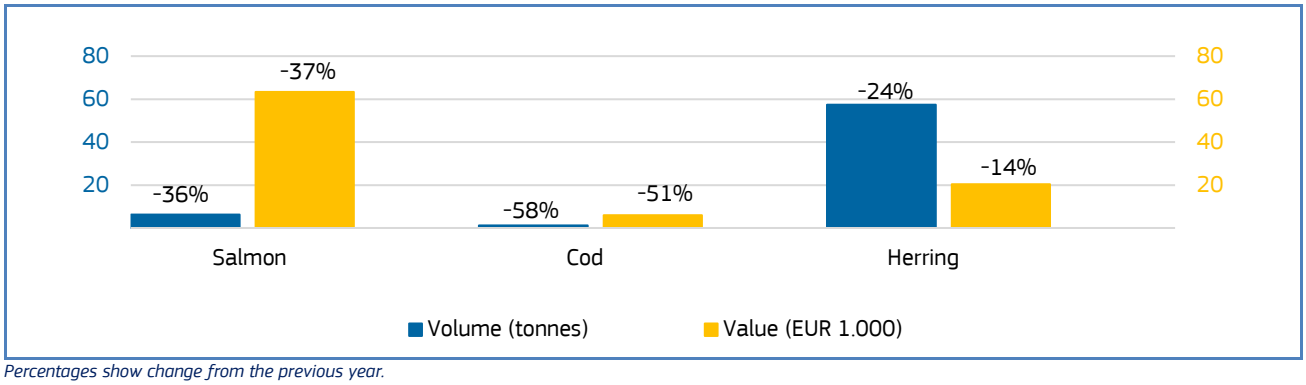


Table 22. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND**

Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 13,4 million, -1%	36.625 tonnes, -17%	Herring, salmon, cod.
Jul 2026 vs Jul 2025	EUR 0,1 million -34%	65 tonnes, -26%	Salmon, cod, herring.

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

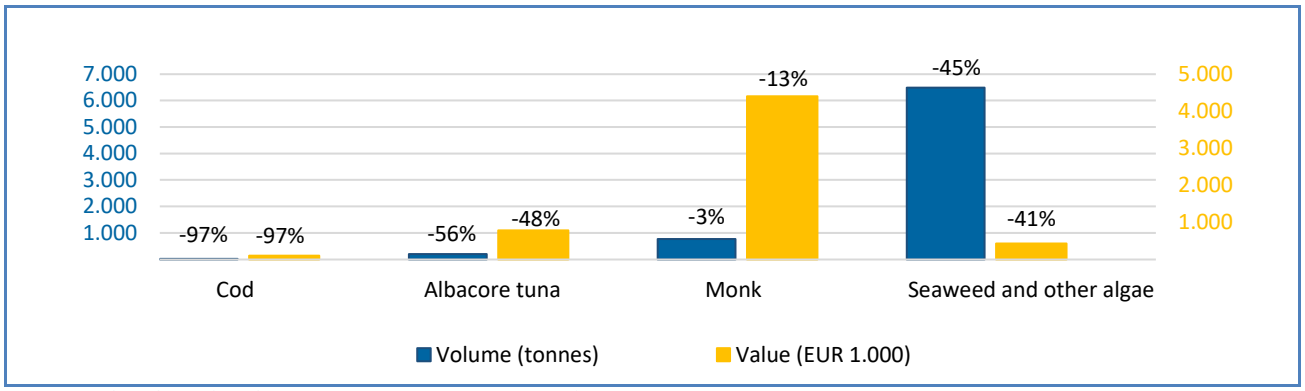


Percentages show change from the previous year.

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

France	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 476,8 million, +13%	205.870 tonnes, +39%	Sardine, scallop, anchovy, Other marine fish*.
Jul 2026 vs Jul 2025	EUR 54,7 million, -12%	21.654 tonnes, -22%	Cod, albacore tuna, monk, seaweed and other algae*.

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

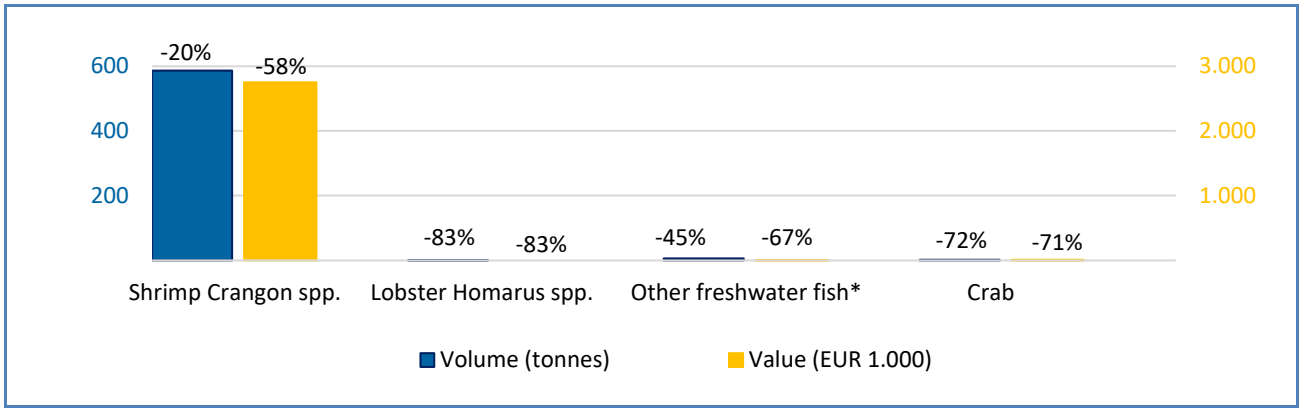


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 15,8 million, -36%	4.331 tonnes, -9%	Shrimp *Crangon* spp., mackerel, lobster *Homarus* spp., Other freshwater fish*.
Jul 2026 vs Jul 2025	EUR 2,8 million, -59%	599 tonnes, -22%	Shrimp *Crangon* spp.*, lobster *Homarus* spp., Other freshwater fish*, crab.

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

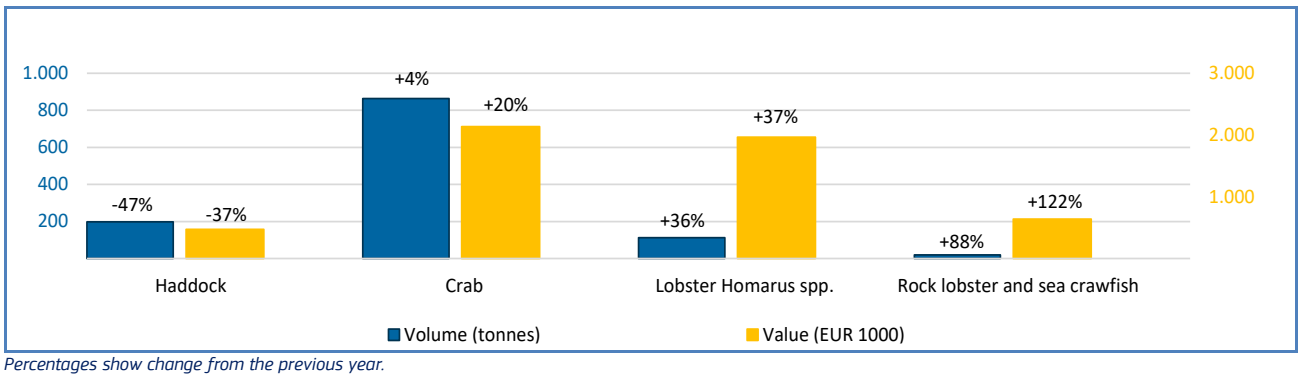


Percentages show change from the previous year.

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

Ireland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 168,6 million, -16%	127.799 tonnes, -19%	Mackerel, Norway lobster, Atlantic horse mackerel, haddock, cod.
Jul 2026 vs Jul 2025	EUR 14,5 million, +4%	3.063 tonnes, -3%	**Value**: haddock. **Volume**: Crab, lobster Homarus spp., rock lobster and sea crawfish.

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

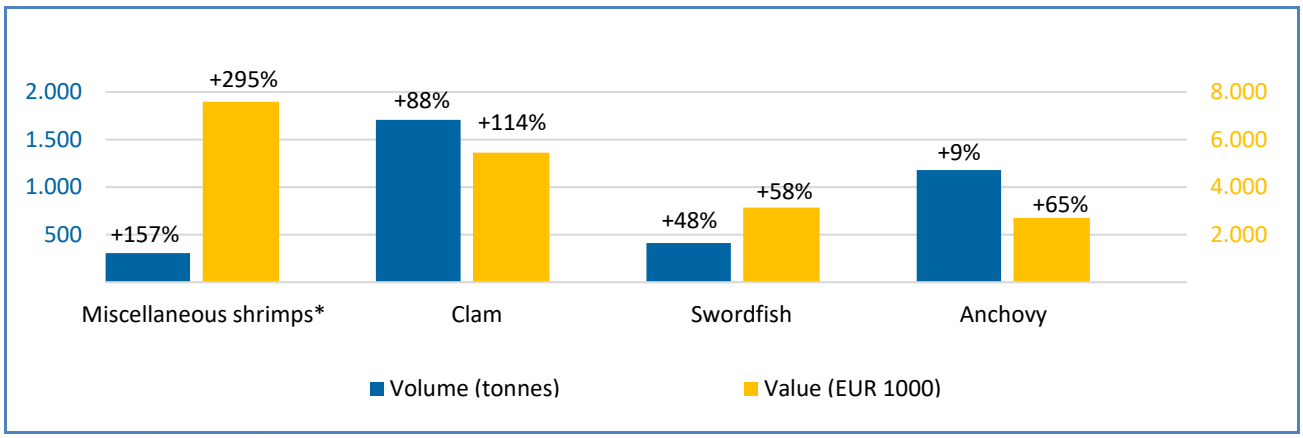


Percentages show change from the previous year.

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

Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Jul 2026 vs Jan-Jul 2025	EUR 208,9 million, +40%	39.868 tonnes, +34%	Miscellaneous shrimps*, sardine, anchovy, clam, cuttlefish.	**Miscellaneous shrimps**: In July 2026, first-sale value increased by 295%, while volume rose by 157% compared with July 2025. Italian first-sale data show a particularly strong year-on-year increase in this category. The substantially higher growth in value than in volume points to both increased landings and a higher average first-sale value. This may reflect a greater share of high-value deep-water shrimp, including giant red shrimp and blue and red shrimp, as well as differences in species and size composition and market prices. The timing of the national allocation measures may also have contributed to the marked increase in July landings. The 2025 allocation decree (D.D. No. 166047) was adopted on 10 April, whereas the corresponding 2026 decree (D.D. No. 306220) was adopted only on 25 June. The later definition of the 2026 allocations may have resulted in a greater concentration of fishing activity and landings in July, particularly ahead of subsequent summer closures. Overall, the exceptional increase in July 2026 appears to reflect a combination of higher landings, a potentially more valuable species and size composition, and higher average first-sale prices, possibly reinforced by the later timing of the 2026 allocation measures.
Jul 2026 vs Jul 2025	EUR 35,8 million, +73%	6.689 tonnes, +50%	Miscellaneous shrimps*, clam, swordfish, anchovy.	

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

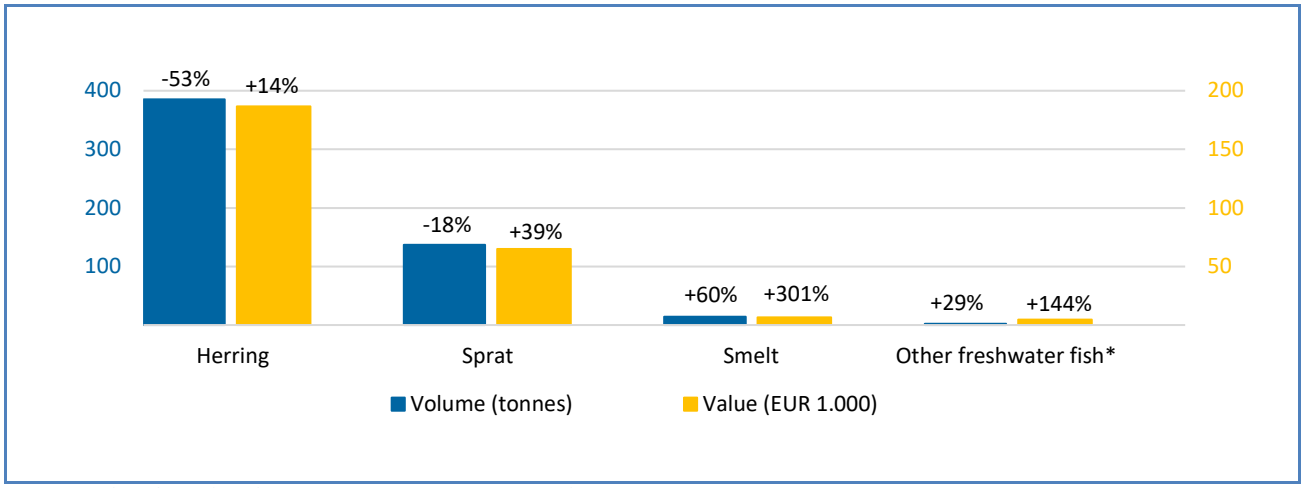


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Latvia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 9,4 million, +9%	20.172 tonnes, -8%	**Value**: sprat, other freshwater fish*. **Volume**: herring.
Jul 2026 vs Jul 2025	EUR 0,3 million, +17%	541 tonnes, -47%	**Value**: herring, sprat, smelt. **Volume**: herring, sprat.

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

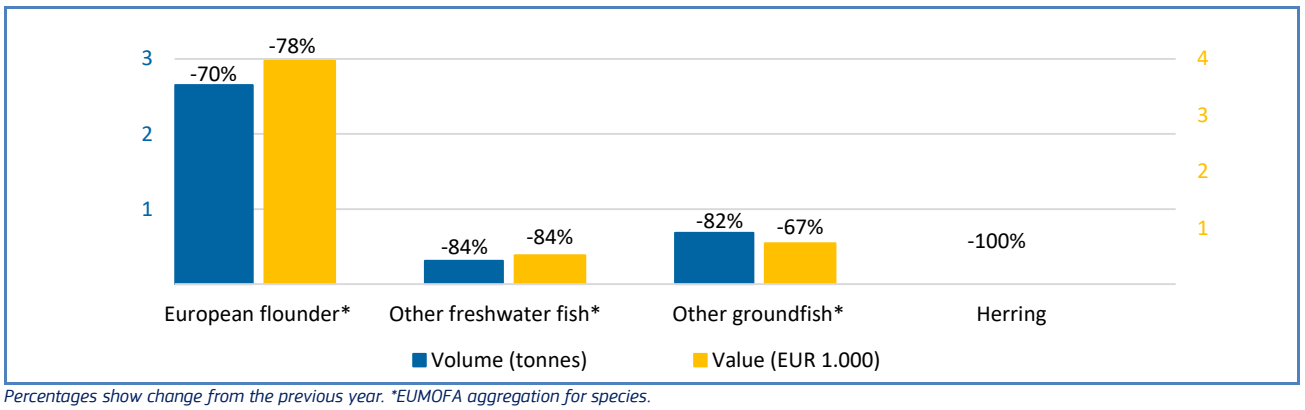


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

Lithuania	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 0,3 million, +17%	229 tonnes, +25%	Other groundfish*, herring, turbot, smelt.
Jul 2026 vs Jul 2025	EUR 0,06 million, -79%	4 tonnes, -79%	European flounder, Other freshwater fish*, Other groundfish*, herring.

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

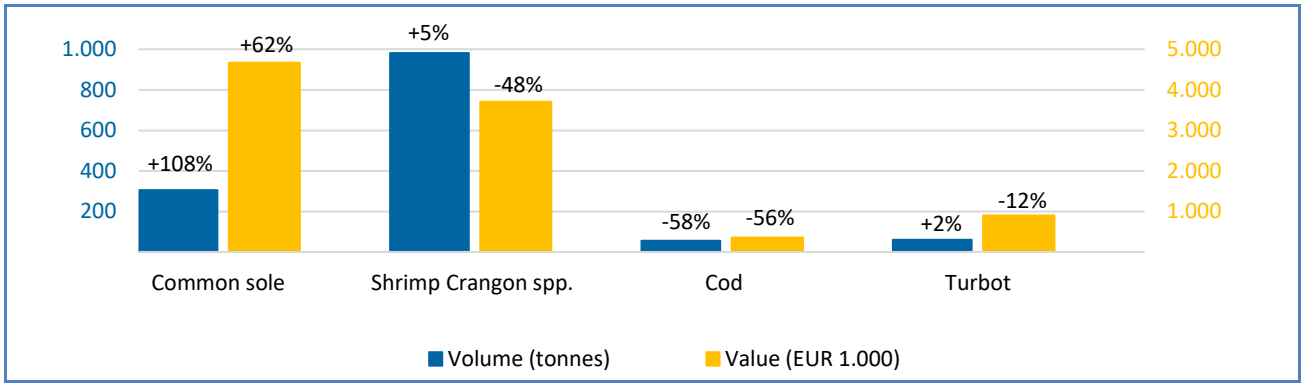


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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

The Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 63,2 million, -16%	11.183 tonnes, -5%	Shrimp *Crangon* spp., squid, mackerel, European plaice.
Jul 2026 vs Jul 2025	EUR 12,4 million, -14%	2.328 tonnes, +7%	Common sole, shrimp *Crangon* spp., cod, turbot.

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

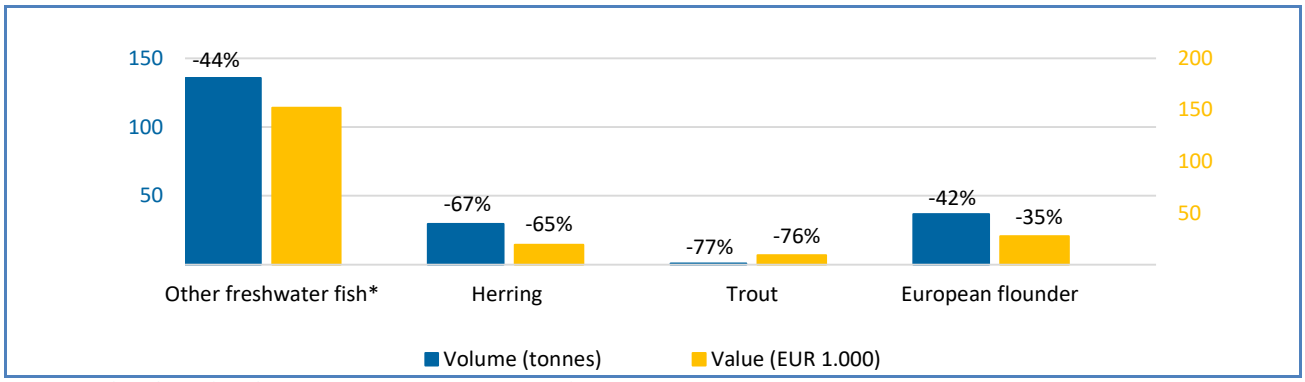


Percentages show change from the previous year.

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

Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 23,3 million, +28%	47.089 tonnes, +29%	Sprat, herring, eel.
Jul 2026 vs Jul 2025	EUR 0,3 million, -28%	221 tonnes, -47%	Other freshwater fish*, herring, trout, European flounder.

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

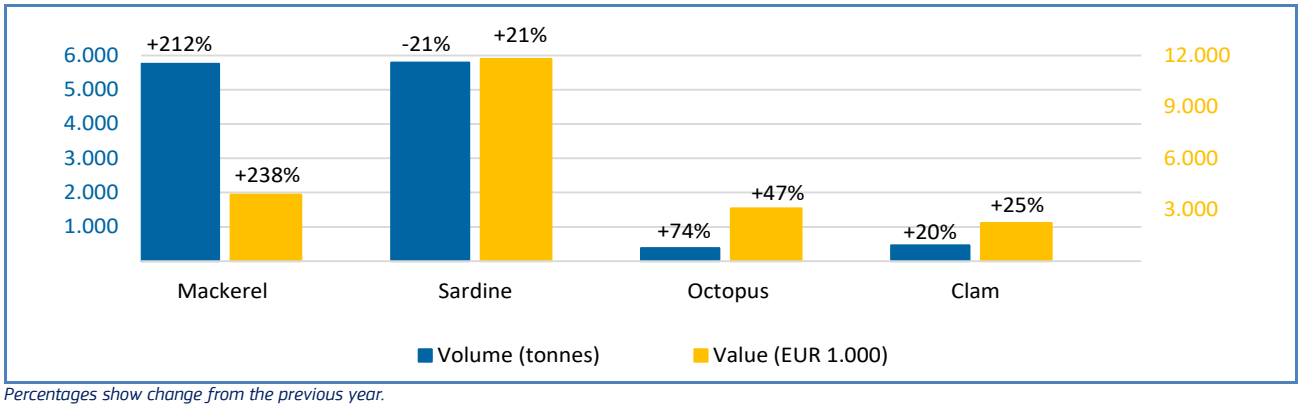


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Jul 2026 vs Jan-Jul 2025	EUR 169,1 million, -2%	53.545 tonnes, -4%	Anchovy, skipjack tuna, octopus, scabbardfish, sardine.	**Mackerel**: In July 2026, first-sale value increased by 238%, while volume rose by 212% compared with July 2025. The strong year-on-year increase was largely driven by the unusually low level of catches recorded in July 2025, when Portuguese mackerel catches were 43% lower than in July 2024.[20] The increase also reflects changes in the 2026 quota management, including an upward revision of Portugal's quota and use of flexibility in quota management through the possibility to carrying over up to 10% of unused 2025 quota.[21] These measures may have supported higher fishing activity in 2026. The rise in value slightly exceeded the increase in volume, indicating that higher average first-sale prices also contributed to the result. Overall, the July 2026 increase mainly represents a recovery from the exceptionally low 2025 level, supported by a flexible quota management and higher prices.
Jul 2026 vs Jul 2025	EUR 39,3 million, +8%	16.921 tonnes, +8%	Mackerel, sardine, octopus, clam.	

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



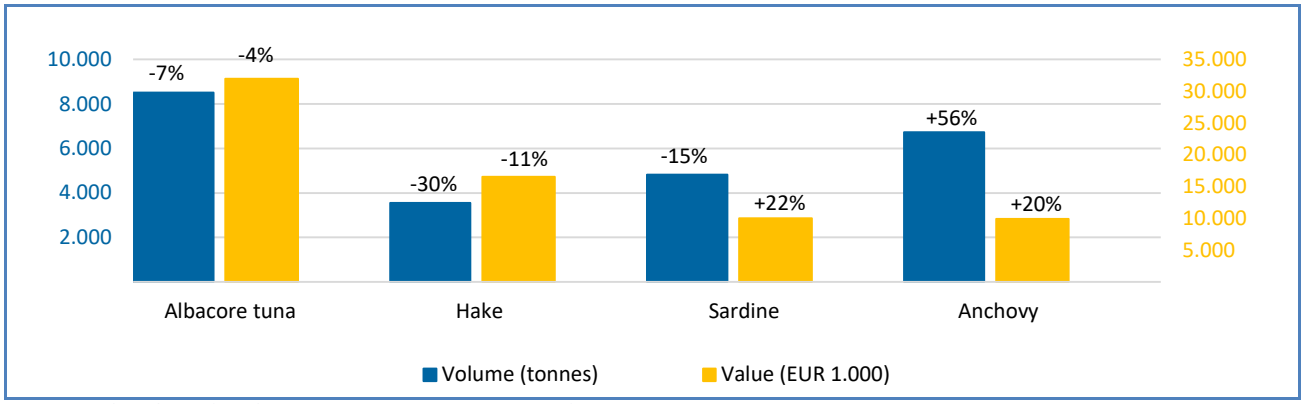
Percentages show change from the previous year.

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

Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 805,6 million, -6%	208.122 tonnes, -10%	Mackerel, other sharks*, octopus, Miscellaneous shrimps*, hake.
Jul 2026 vs Jul 2025	EUR 149,7 million 0%	40.060 tonnes, +2%	Albacore tuna, hake, sardine, anchovy.

[20] Instituto Nacional de Estadistica, I.P.(INE). *Agricultura Floresta e Pescas. Boletim Mensal da Agricultura e Pescas Setembro 2026*. Lisboa: Instituto Nacional de Estatística, 2026.
[21] *Portara n.º 106/2026/1, de 5 de março polo que se estabelece o modelo de gestão da quota portuguesa de sarda e revoga a Portaria n.º 286-C/2014, de 31 de dezembro, na sua atual redação. Diário da República n.º 45/2026, Série I de 5 de março de 2026.*

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

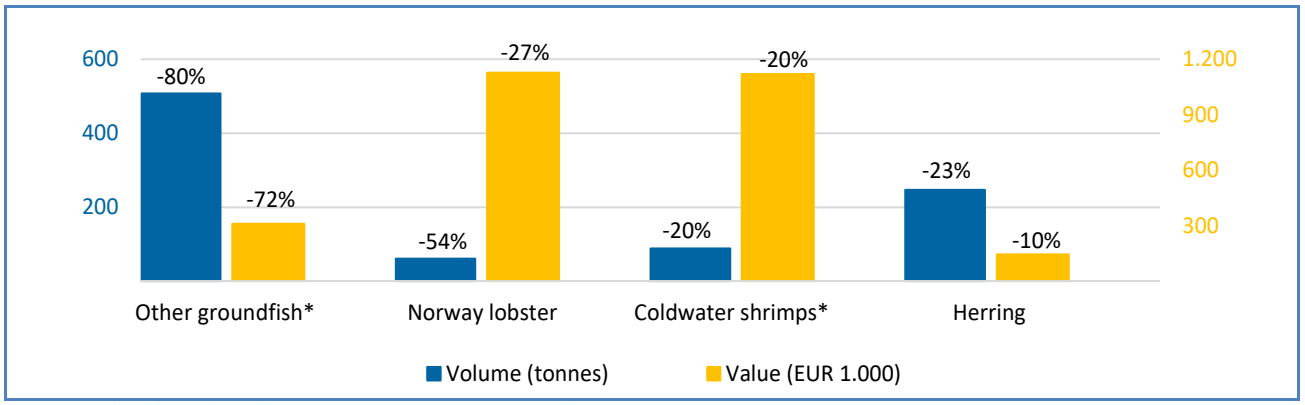


*Percentages show change from the previous year. *EUMOFA aggregation for species*

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

Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Jul 2026 vs Jan-Jul 2025	EUR 42,0 million, -3%	45.348 tonnes, -18%	Norway lobster, herring, Other groundfish*, blue whiting.	**Sprat**: In July 2026, first-sale value increased by 397%, while volume rose by 153% compared with July 2025. The increase appears to be mainly related to a change in the seasonal fishing pattern, with sprat fishing taking place earlier in the year than previously. The strong increase in value also reflects higher prices, particularly for sprat destined for industrial use. Strong demand for edible sprat, including for processed and canned products and export markets, may have further supported prices.
Jul 2026 vs Jul 2025	EUR 4,8 million, -6%	2.863 tonnes, -27%	Other groundfish, Norway lobster, Coldwater shrimps*, herring.	

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



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

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

The Faroe Islands	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 333,4 million, -15%	303.410 tonnes, -34%	Cod, blue whiting, mackerel, coldwater shrimps*.
Jul 2026 vs Jul 2025	EUR 26,2 million, -47%	10.403 tonnes, -64%	Mackerel, cod, blue whiting, ling.

Figure 34. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE FAEROE ISLANDS, JULY 2026**

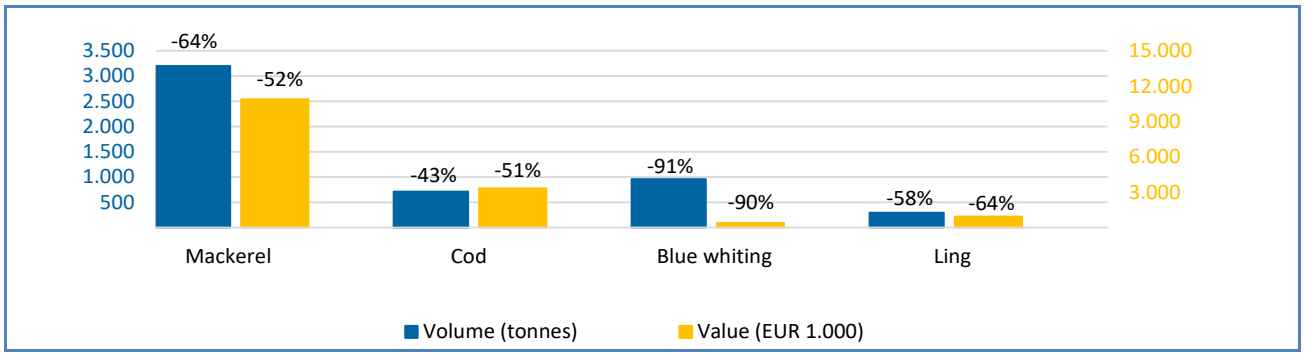
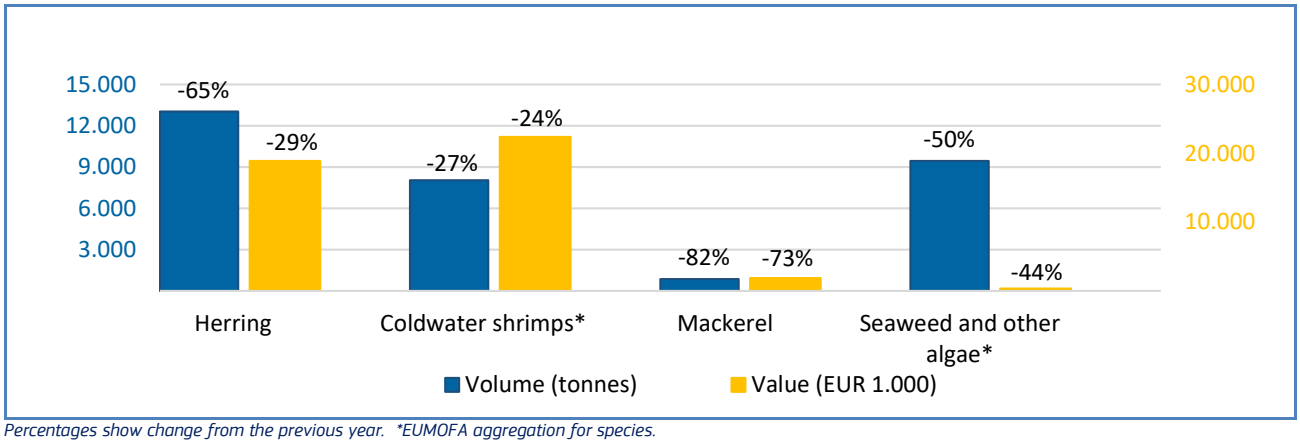


Table 35. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY**

Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Jul 2026 vs Jan-Jul 2025	EUR 1,98 billion, -1%	1.371.532 tonnes, -18%	Mackerel, crab, blue whiting, cod.
Jul 2026 vs Jul 2025	EUR 159,7 million -1%	127.769 tonnes, -18%	Herring, Coldwater shrimps*, mackerel, Seaweed and other algae*.

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

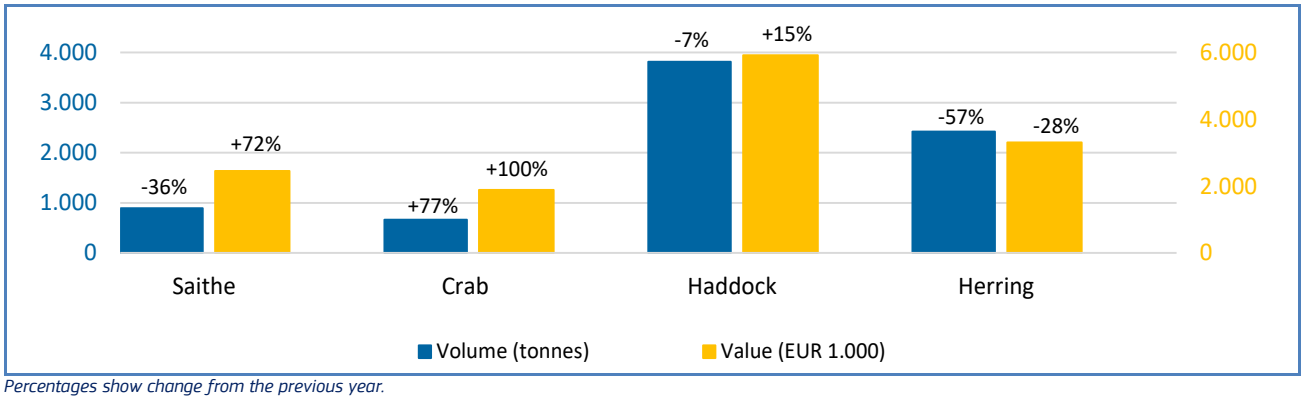


*Percentages show change from the previous year. *EUMOFA aggregation for species.*

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-Jul 2026 vs Jan-Jul 2025	EUR 424,5 million, +7%	147.336 tonnes, -20%	**Value**: mackerel, haddock, saithe. **Volume**: mackerel, blue whiting, herring.
Jul 2026 vs Jul 2025	EUR 48,4 million +2%	17.753 tonnes, -15%	Saithe, crab, haddock, herring.

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



Percentages show change from the previous year.

4. EXTRA-EU IMPORTS

From January to July 2026, the value of extra-EU imports increased by 1% compared to the same period in 2025, while volume decreased by 5%. The MCSs contributing most to the increase in import values were whiting (+16%), and saithe (+1%), while blue whiting (-53%), other non-food uses[22] (-25%), contributed most to the decrease in volume.

Increases in value and volume: Austria, Bulgaria, Czechia, Finland, Latvia, Lithuania, Poland, Slovakia and Sweden recorded an increase in extra-EU imports in both value and volume. The most significant increases in value and volume in absolute terms were recorded in Sweden driven by an increase in salmon (+11 and + 13% respectively%).

Decreases in value and volume: Belgium, Croatia, Cyprus, France, Luxemburg, Malta, Portugal, Romania, Slovenia, and Spain recorded decreases in extra-EU imports in value and volume. Belgium recorded the largest decline in absolute terms value driven by warmwater shrimps (-34%) while Denmark recorded the highest decrease in volume driven by a fall in imports of blue whiting (-94%).

[22] This includes products not reported as fish oil nor fishmeal.

Table 37. **JANUARY - JULY OVERVIEW OF EXTRA-EU IMPORTS AT EU LEVEL DISAGGREGATED PER MS (volume in tonnes and value in million EUR)[23]**

	January - July 2025			January - July 2026			Change from January - July 2025		
Country	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**	**Volume**	**Value**	**Price**
Austria	5.656	38,6	6,83	6.831	46,9	6,86	21%	21%	0%
Belgium	90.342	571,0	6,32	63.919	391,4	6,12	-29%	-31%	-3%
Bulgaria	8.020	23,5	2,93	9.047	28,3	3,13	13%	20%	7%
Croatia	9.976	26,2	2,63	4.887	17,1	3,50	-51%	-35%	33%
Cyprus	4.765	29,1	6,11	4.543	27,6	6,09	-5%	-5%	0%
Czechia	8.495	40,2	4,73	8.978	44,2	4,93	6%	10%	4%
Denmark	574.476	1770,6	3,08	467.396	1.849,1	3,96	-19%	4%	28%
Estonia	6.690	34,2	5,12	6.681	37,8	5,66	0%	11%	11%
Finland	23.499	150,7	6,41	25.984	174,8	6,73	11%	16%	5%
France	346.208	1822,5	5,26	340.248	1.798,9	5,29	-2%	-1%	0%
Germany	250.033	1055,5	4,22	243.506	1.084,7	4,45	-3%	3%	6%
Greece	89.279	359,5	4,03	89.452	379,4	4,24	0%	6%	5%
Hungary	1.406	6,3	4,47	1.501	6,7	4,45	7%	6%	-1%
Ireland	170.988	147,8	0,86	155.331	170,3	1,10	-9%	15%	27%
Italy	295.754	1.764,8	5,97	295.945	1.772,1	5,99	0%	0%	0%
Latvia	12.715	36,5	2,87	13.318	40,2	3,02	5%	10%	5%
Lithuania	26.042	78,9	3,03	28.571	103,8	3,63	10%	31%	20%
Luxembourg[24]	2	0,3	185,58	1	0,2	264,22	-61%	-44%	42%
Malta	7.472	25,1	3,36	3.277	9,8	2,98	-56%	-61%	-11%
Netherlands	412.481	2263,8	5,49	381.324	2340,3	6,14	-8%	3%	12%
Poland	141.274	622,7	4,41	153.563	675,8	4,40	9%	9%	0%
Portugal	113.681	536,7	4,72	108.906	476,7	4,38	-4%	-11%	-7%
Romania	14.111	63,6	4,51	13.344	61,8	4,63	-5%	-3%	3%
Slovakia	2.684	8,8	3,29	2.824	9,4	3,32	5%	6%	1%
Slovenia	4.111	17,6	4,28	3.316	13,9	4,18	-19%	-21%	-2%
Spain	747.494	3646,6	4,88	723.247	3.488,0	4,82	-3%	-4%	-1%
Sweden	411.573	2915,4	7,08	435.512	3.169,4	7,28	6%	9%	3%
EU-27	**3.779.229**	**18.056,7**	**4,78**	**3.591.452**	**18.218,4**	**5,07**	**-5%**	**1%**	**6%**

Source: EUMOFA elaboration of Eurostat COMEXT

Increases in value and volume: salmonids and small pelagics recorded an increase in value and volume of extra-EU imports. Small pelagics recorded the highest increase in both value and volume in absolute terms with mackerel (+43% and +11%) and herring (+18% and +25%) driving the increase.

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

Decreases in value and volume: crustaceans, freshwater fish and tuna and tuna-like species were the commodity group recording a decline in both value and volume of extra-EU imports. Tuna and tuna-like species recorded the largest decline in absolute terms attributed to skipjack tuna (-21% and -15%).

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

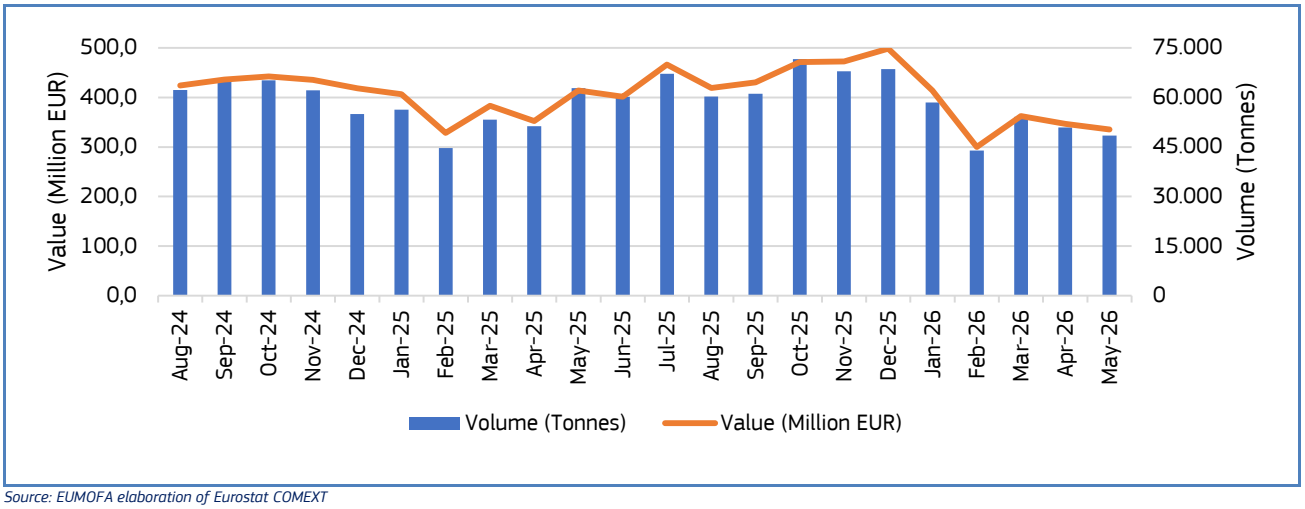
	January - July 2025			January - July 2026			Change from January – July 2025			
Commodity group	**Value**	**Volume**	**Price**	**Value**	**Volume**	**Price**	**Value**	**Volum**	**Price**	**MCS**
Bivalves	427,2	94.411	4,52	462,6	89.268	5,18	8%	-5%	15%	Clam, scallop.
Cephalopods	2.052,3	332.095	6,18	2.013,6	338.531	5,95	-2%	2%	-4%	Other cephalopods.
Crustaceans	2.753,2	395.803	6,96	2.600,7	376.905	6,90	-6%	-5%	-1%	Warmwater shrimp, lobster *Homarus* spp.
Flatfish	278,7	54.008	5,16	305,0	50.146	6,08	9%	-7%	18%	Greenland halibut, Atlantic halibut.
Freshwater fish	354,9	89.420	3,97	311,8	83.874	3,72	-12%	-6%	-6%	Tilapia, freshwater catfish.
Groundfish	2.935,6	715.657	4,10	3.037,7	591.821	5,13	3%	-17%	25%	Alaska pollock, other groundfish.
Other marine fish	1.112,3	182.834	6,08	1.156,6	173.824	6,65	4%	-5%	9%	European seabass, other marine fish.
Salmonids	4.433,5	591.643	7,49	4.724,5	635.982	7,43	7%	7%	-1%	Salmon.
Small pelagics	610,6	237.310	2,57	754,5	263.002	2,87	24%	11%	11%	Mackerel, herring.
Tuna and tuna-like species	2.126,5	451.221	4,71	1.813,5	410.728	4,42	-15%	-9%	-6%	Skipjack tuna, miscellaneous tuna.

Source: EUMOFA elaboration of Eurostat COMEXT

4.1. Extra EU imports of crustaceans in EU Member States

In January – July 2026, extra-EU imports of crustaceans accounted for a total value of EUR 2.600,7 million and a total volume of 376.906 tonnes, marking a 6% decrease in value and 5% decrease in volume compared to the same period in 2025.

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



Source: EUMOFA elaboration of Eurostat COMEXT

In the period analysed, extra-EU imports volume of crustaceans peaked in October, while volumes were lowest in February.

Between January and July 2026, Spain, France and Denmark were the EU's main importers of crustaceans. Together they accounted for 53% of total extra-EU import volumes of crustaceans, with Spain representing 25%, France 16% and Denmark 12% of the total import volume.

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

EU MS	Value (million EUR)			Volume (tonnes)			Main commercial species
	Jan–July 2025	Jan-July 2026	Trend (%)	Jan–July 2025	Jan-July 2026	Trend (%)	
Spain	629,4	611,1	-3%	94.989	94.120	-1%	Miscellaneous shrimps.
France	518,5	461,1	-11%	70.543	61.426	-13%	Warmwater shrimps.
Denmark	254,4	282,6	+11%	46.446	45.912	-1%	Coldwater shrimps.

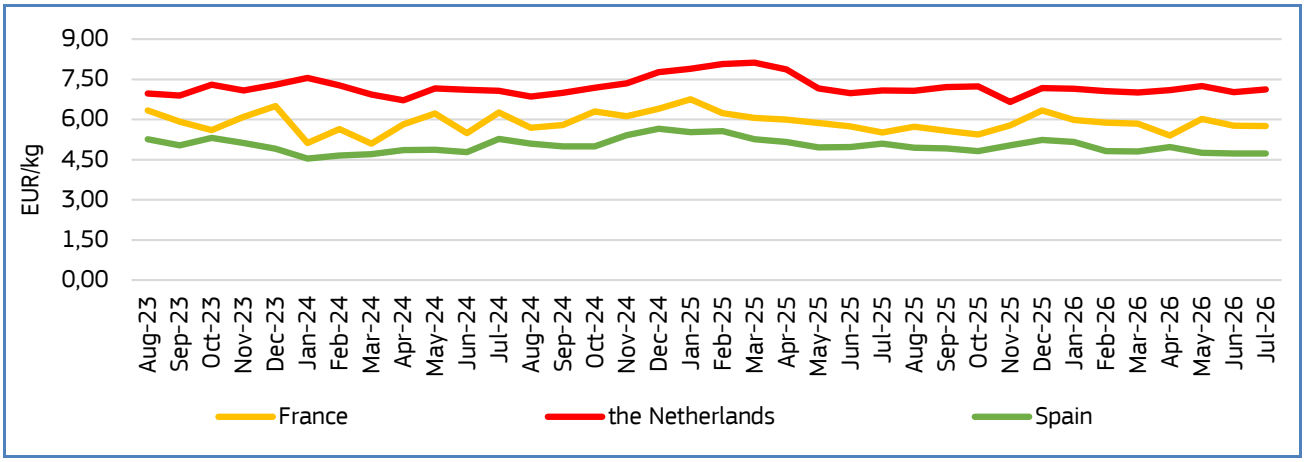
Source: EUMOFA elaboration of Eurostat COMEXT

4.2. Extra-EU imports of warmwater shrimp in EU Member States

In terms of value, warmwater shrimp was the main imported species within the "Crustaceans" commodity group, accounting for 46% of the total value, followed by miscellaneous shrimp at 33%.

The price analysis below focuses on the main EU importers from non-EU countries of warmwater shrimp, namely Spain, France and the Netherlands.

Figure 38. **EXTRA-EU IMPORT PRICE OF WARMWATER SHRIMP IN SPAIN, FRANCE AND THE NETHERLANDS (AUG 2023 – JUL 2026)**



Between August 2023 and July 2026, the price of warmwater shrimp fluctuated and decreased in France (-3%) and Spain (-3%), while it increased by 1% in the Netherlands. Between January and July 2026, the volume of warmwater shrimp imported to France was 42.170 tonnes, 15% less compared with the same period in 2025, while the price decreased by 3%. Imports by volume came from Ecuador (70%), followed by the India (10%) and Madagascar (4%).

During the same period, 26.506 tonnes of warmwater shrimp were imported to the Netherlands, 2% more compared to 2025, with a price decrease of 5% compared to 2025. Ecuador accounted for 33% of the total imported volume of warmwater shrimp in 2026, followed by India with 29% and Venezuela 22%.

In Spain, 51.829 tonnes of warmwater shrimp were imported in 2026, coming mostly from Ecuador (90%) followed by Venezuela (2%). Import volumes decreased by 6% while prices decreased by 7%.

In the three countries, imports showed similar behaviour: in France, import volumes peaked in June and August/September; in the Netherlands in January and July/August and October/November and in Spain import volumes peaked in July/August and October/November.

Figure 39. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF WARMWATER SHRIMP IN FRANCE, AUG 2023 – JULY 2026 (volume in tonnes, price in EUR/kg)**

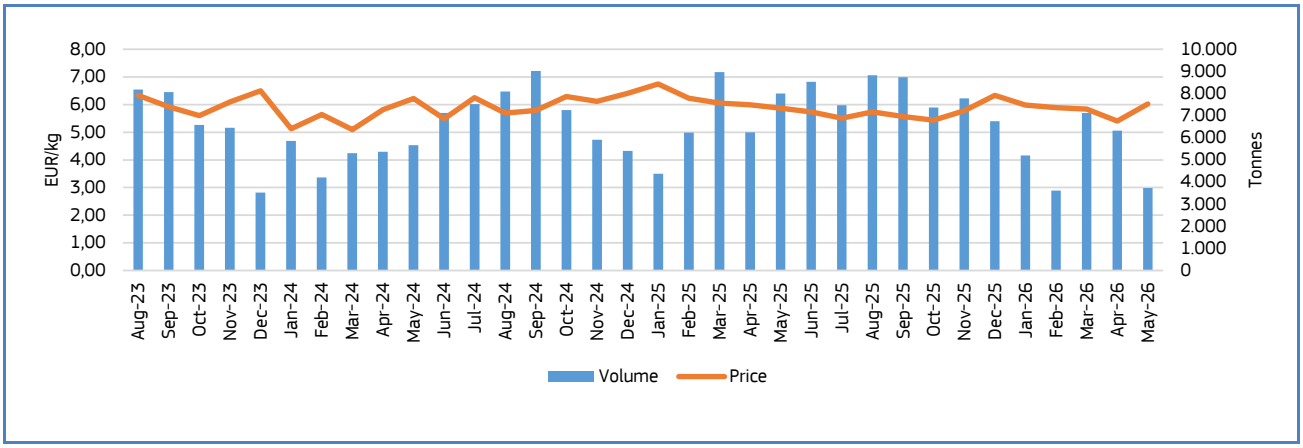


Figure 40. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF WARMWATER SHRIMP IN THE NETHERLANDS, AUG 2023 – JULY 2026 (volume in tonnes and price in EUR/kg)**

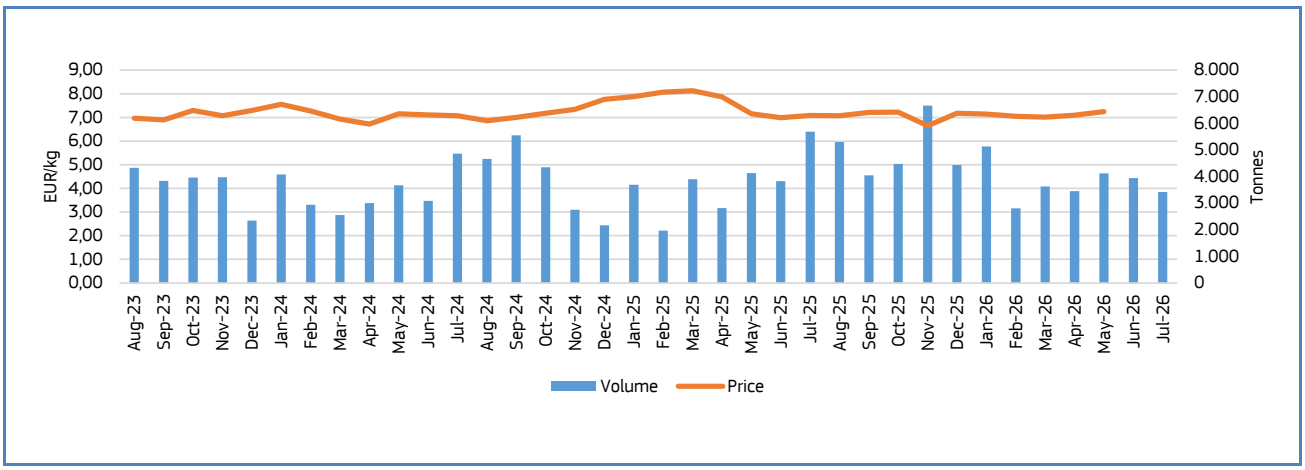


Figure 41. **EXTRA-EU IMPORT UNIT VALUE AND VOLUME OF WARMWATER SHRIMP IN SPAIN, AUG 2023 – JULY 2026 (volume in tonnes and price in EUR/kg)**

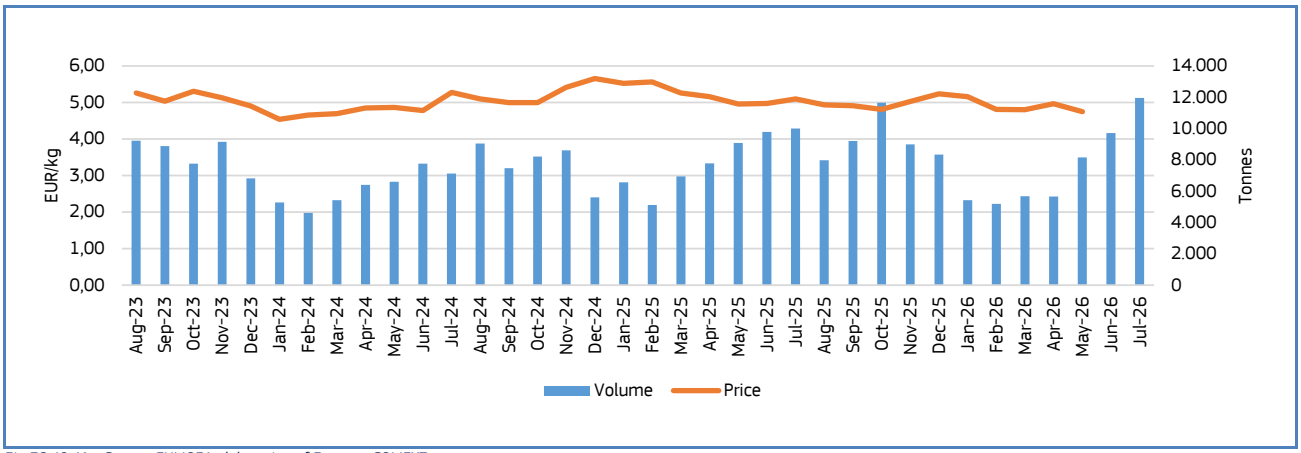


Fig 39,40,41 - Source: EUMOFA elaboration of Eurostat COMEXT

4.3. Extra-EU imports of warmwater shrimp by origin

Between January and July 2026, EU imports of warmwater shrimp[25] recorded a decreasing trend in volume (-9%) and in value (-14%) compared with the same period in 2025. Between January and July 2026, the EU imported 220.330 tonnes of warmwater shrimp for a value of EUR 1,2 billion. The main extra-EU countries supplying warmwater shrimp to the EU in 2026 were Ecuador (63%), followed by India (16%), Vietnam (7%) and Venezuela (5% respectively). Compared to the same period in 2025, import volume increased from the India (+12%) as well as from Vietnam (+3%), Madagascar (+9%), and Nigeria (+1%). Over the same period, imports decreased from Ecuador (-9%), Venezuela (-32%), Bangladesh (-40%) and Honduras (-11%).

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

Country	Jan – July 2024		Jan – July 2025		Jan – July 2026		Jan – July 2026/2025	
	Value	Volume	Value	Volume	Value	Volume	Value	Volume
Ecuador	495,6	97.927	754,8	139.137	637,8	126.958	-15%	-9%
India	161,1	22.948	213,7	28.582	220,2	32.125	3%	12%
Vietnam	105,0	13.121	121,9	14.565	120,3	14.994	-1%	3%
Venezuela	125,8	24.932	77,5	13.488	55,2	9.174	-29%	-32%
Others	178,8	20.898	207,6	23.353	154,4	17.079	-26%	-27%
Total	**1.066,2**	**179.826**	**1.375,5**	**219.124**	**1.187,9**	**200.330**	**-14%**	**-9%**

Source: EUMOFA elaboration of Eurostat COMEXT

[25] 03061792 - Frozen shrimps of the genus "*Penaeus*", even smoked, whether in shell or not, incl. shrimps in shell, cooked by steaming or by boiling in water

5. CONSUMPTION

5.1. Household consumption in the EU

Data analysed in the section "*Consumption*" are extracted from EUMOFA, as collected from Europanel[26]. They cover the consumption of fresh fishery and aquaculture products in a selection of EU Member States.

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

The most notable increases were in the Netherlands where consumption increased in volume by 20% and in value by 24% respectively, compared to 2025. Germany recorded the most notable decrease: 19% in volume and 19% in value, respectively.

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

Country	Per capita consumption 2023[27]* (live weight equivalent, LWE) kg/capita/year	July 2024		July 2025		July 2026		Change from July 2025 to July 2026	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark*	20,00-25,00	998	19,31	926	18,85	909	19,28	-2%	2%
France	32,14	15.287	196,38	13.781	183,16	14.045	182,34	2%	0%
Germany	12,08	3.749	70,10	4.500	80,68	3.657	65,44	-19%	-19%
Hungary	5,83	270	2,16	223	2,10	237	2,43	6%	16%
Ireland*	20,00	813	14,66	946	17,97	939	17,62	-1%	-2%
Italy	30,38	17.244	211,07	17.504	231,89	17.288	220,24	-1%	-5%
Netherlands*	19,90	2.469	45,07	2.743	46,43	3.280	57,45	20%	24%
Poland	13,67	2.725	32,29	2.761	34,83	2.969	38,50	8%	11%
Portugal	53,61	4.897	39,10	4.687	38,49	4.765	43,63	2%	13%
Spain	40,68	38.955	391,67	36.633	383,32	35.774	388,87	-2%	1%
Sweden	10,00	596	9,36	618	9,27	616	9,10	0%	-2%

** 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.*

[26] Last update: 10.09.2026.
[27] Estimates of per capita consumption for 2024 are already available online at EU-27 level in the EUMOFA **Supply Balance Dashboard**, while estimates for individual MS will soon be published in *The EU fish market 2026*.

5.2. Overview of household consumption[28] of crustaceans consumed in the EU

In the household consumption data used by EUMOFA, consumption of fresh crustaceans is monitored in four Member States: Germany, Ireland, the Netherlands, and Portugal. At species level, all four Member States monitor miscellaneous shrimp species, while shrimp, *Crangon spp.* is only monitored in the Netherlands.

Figure 42. **HOUSEHOLD PURCHASES (in value) OF CRUSTACEANS IN GERMANY, IRELAND, THE NETHERLANDS, AND PORTUGAL AUG 2023 – JUL 2026**

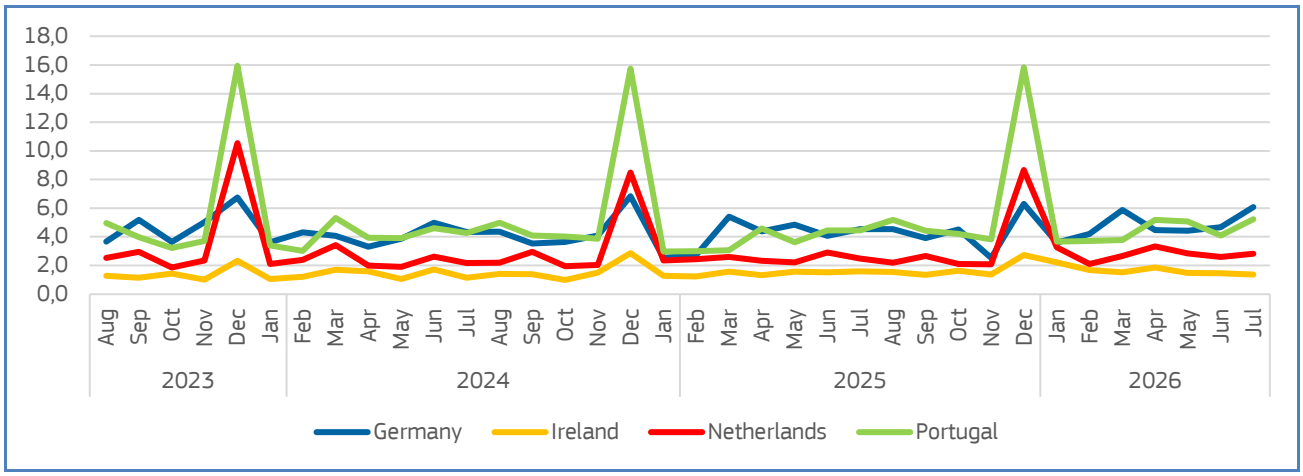
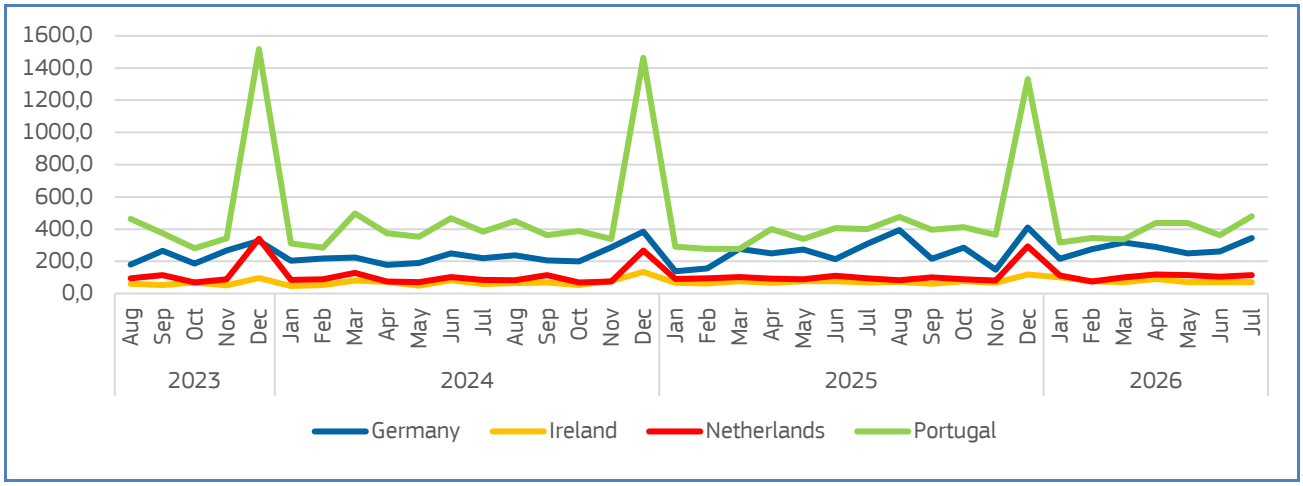


Figure 43. **HOUSEHOLD PURCHASES (in volume) OF CRUSTACEANS IN GERMANY, IRELAND, THE NETHERLANDS, AND PORTUGAL AUG 2023 – JUL 2026**

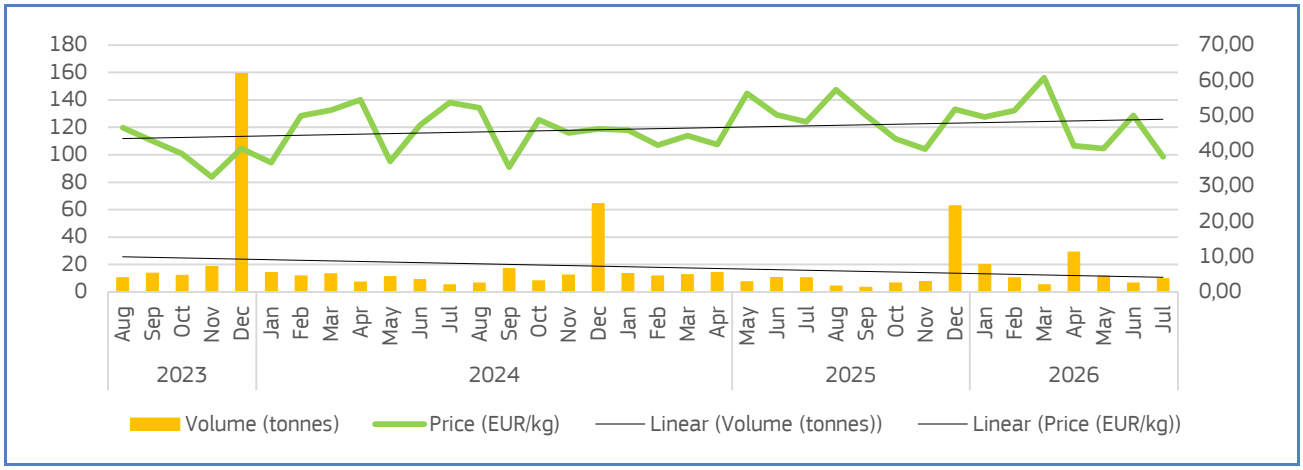


[28] The household consumption data analysed in this report relate exclusively to those countries that have reported data on consumption. This should not be interpreted as an indication that only those Member States (MS) considered consume this product within the EU-27. The analysis is limited to the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

5.3. Household consumption trends of shrimps, *Crangon spp.* – an important species of crustaceans in the Netherlands

Long-term trend (Aug 2023 to July 2026): Annual variations with a strong peak in December in volume and fluctuating prices.
Yearly average retail price (Jan – July): 47,23 EUR/kg (2024), 46,89 EUR/kg (2025), 47,46 EUR/kg (2026)
Yearly consumption (Jan – July): 72 tonnes (2024), 80 tonnes (2025), 93 tonnes (2026)
Short-term trend (Aug 2025 to July 2026): Fluctuating prices and seasonal variations with a strong peak in December and a smaller one in April in volume.
Average retail price (Aug 2025 to July 2026): 47,95 EUR/kg.
Consumption (Aug 2025 to July 2026): 177 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME OF FRESH SHRIMP, *CRANGON SPP.* PURCHASED BY HOUSEHOLDS IN THE NETHERLANDS, AUG 2023 – JUL 2026**



Consumption of shrimp, *Crangon spp.* in the Netherlands fluctuates seasonally, peaking strongly in December, with a lower peak in April this year, due to higher consumption of the species typically during the Christmas period. The fluctuation in prices is related to demand and availability.

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

Global highlights: Instituto Nacional de Estadistica - Portugal.

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

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

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