



# E U M O F A

European Market Observatory for  
fisheries and aquaculture products

## The EU fish market

2022 Edition

- The EU in the world 
- Market supply 
- Consumption 
- Import - Export 
- Landings in the EU 
- Aquaculture 





“The EU fish market” aims at providing a **description of the whole European fisheries and aquaculture industry**.

It replies to questions such as:

- *what is produced/exported/imported?*
- *when and where?*
- *what is it consumed?*
- *by whom?*
- *what are the main trends?*

A comparative analysis allows to assess the performance of fishery and aquaculture products in the EU market compared with other food products.

*More detailed and complementary data are available in the EUMOFA database, by species, place of sale, and country.*

*Data are updated daily.*

[www.eumofa.eu](http://www.eumofa.eu)



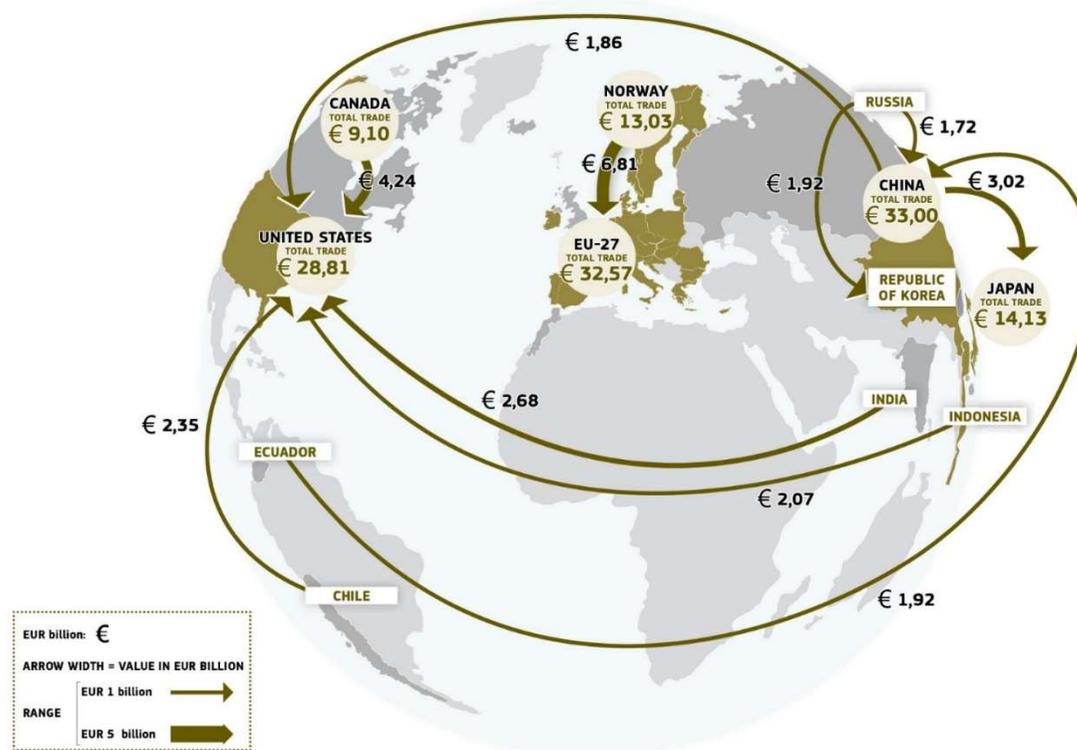


## Main producers in 2020 (1.000 tonnes)

	Catches	Aquaculture	Total production	% of total	% evolution of total production 2020 / 2019
China	13.446	70.483	83.929	39%	+2%
Indonesia	6.989	14.845	21.834	10%	-7%
India	5.523	8.641	14.164	7%	+7%
Vietnam	3.422	4.615	8.037	4%	+2%
Peru	5.675	144	5.819	3%	+16%
Russian Federation	5.081	291	5.372	3%	+3%
<b>EU-27</b>	<b>3.869</b>	<b>1.088</b>	<b>4.957</b>	<b>2%</b>	<b>-7%</b>
United States	4.253	449	4.702	2%	-11%
Bangladesh	1.920	2.584	4.503	2%	+3%
Philippines	1.912	2.323	4.235	2%	-4%
Japan	3.215	996	4.211	2%	+1%
Norway	2.604	1.490	4.094	2%	+4%
Republic of Korea	1.375	2.328	3.703	2%	-2%
Chile	2.183	1.505	3.688	2%	-3%
Myanmar	1.854	1.145	2.999	1%	-1%
Others	27.940	9.645	37.584	18%	-1%
<b>Total</b>	<b>91.260</b>	<b>122.573</b>	<b>213.832</b>	<b>100%</b>	<b>+0,1%</b>



## Main trade flows of fishery and aquaculture products in 2021



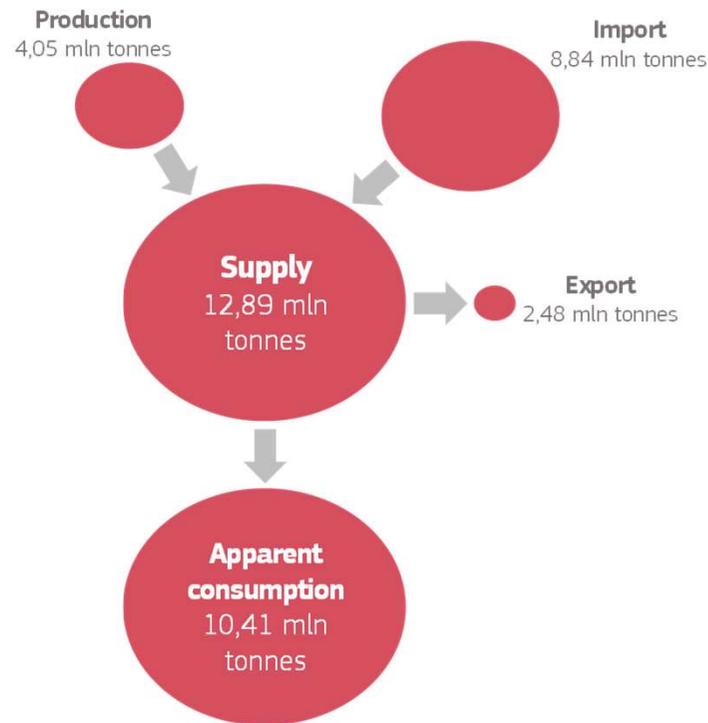
The EU's trade in fishery and aquaculture products, which is presented here as the sum of imports and exports with third countries, was second only to China in 2021, in both value and volume.

**Main EU imports:** salmon, cod, tuna, Alaska pollock, fishmeal and shrimps.

**Main EU exports:** herring, mackerel, blue whiting, tuna, fishmeal and fish oil.



## EU supply balance of fisheries and aquaculture products in 2020

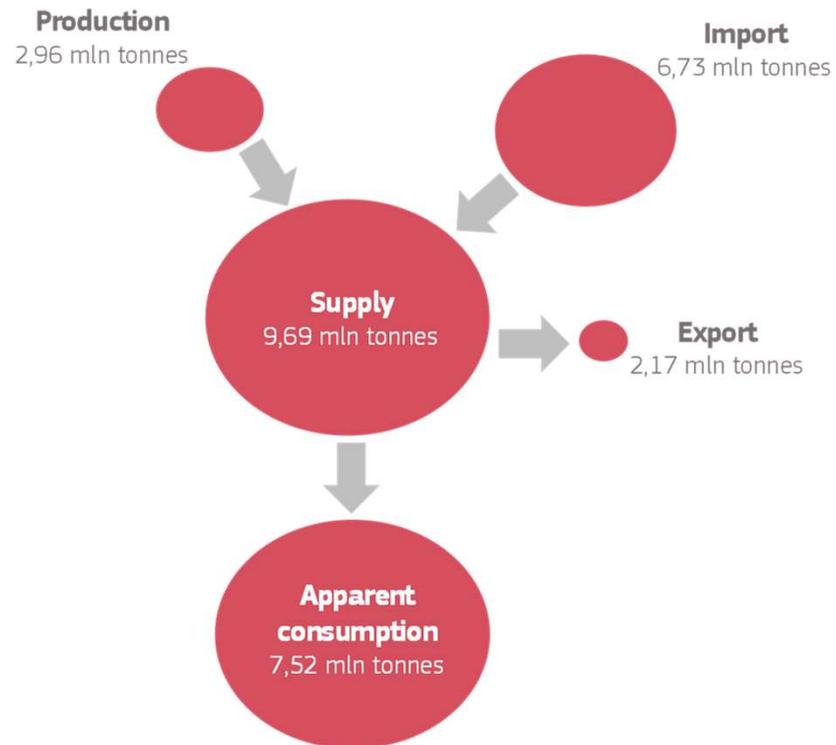


The EU supply for human consumption was 180.000 tonnes LWE lower than in 2019, and **one of the lowest amounts registered in the 2011-2020 decade.**

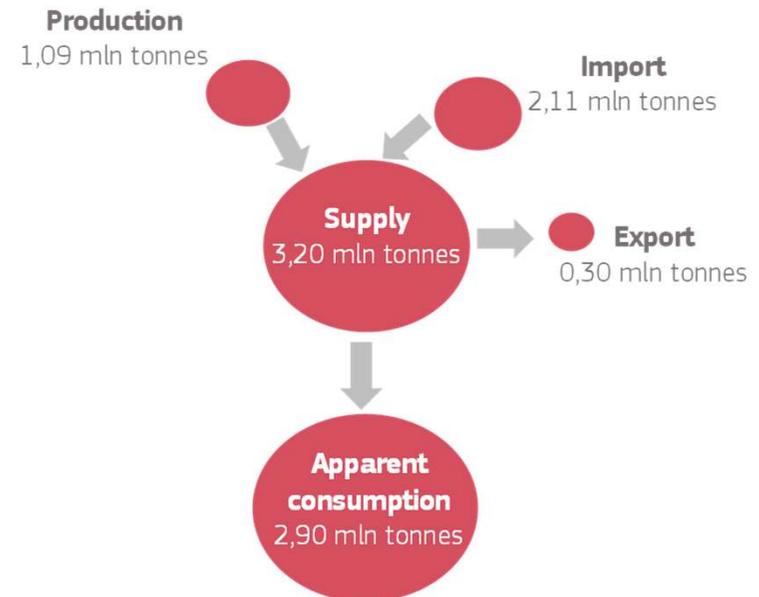
Data in live weight equivalent (LWE) deriving from the EUMOFA's EU supply balance sheet.



## Wild products



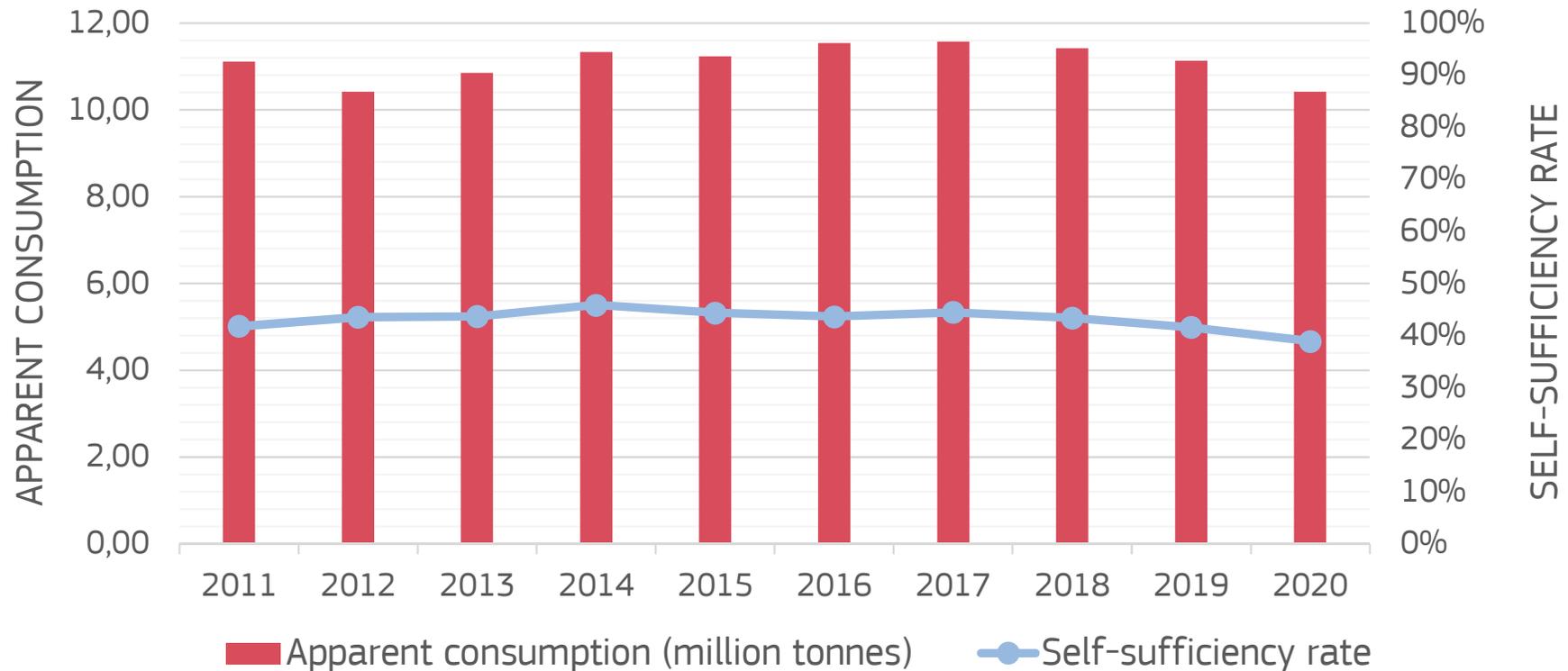
## Farmed products



Data in live weight equivalent (LWE) deriving from the EUMOFA's EU supply balance sheet.



## EU-27 market growth and self-sufficiency rates

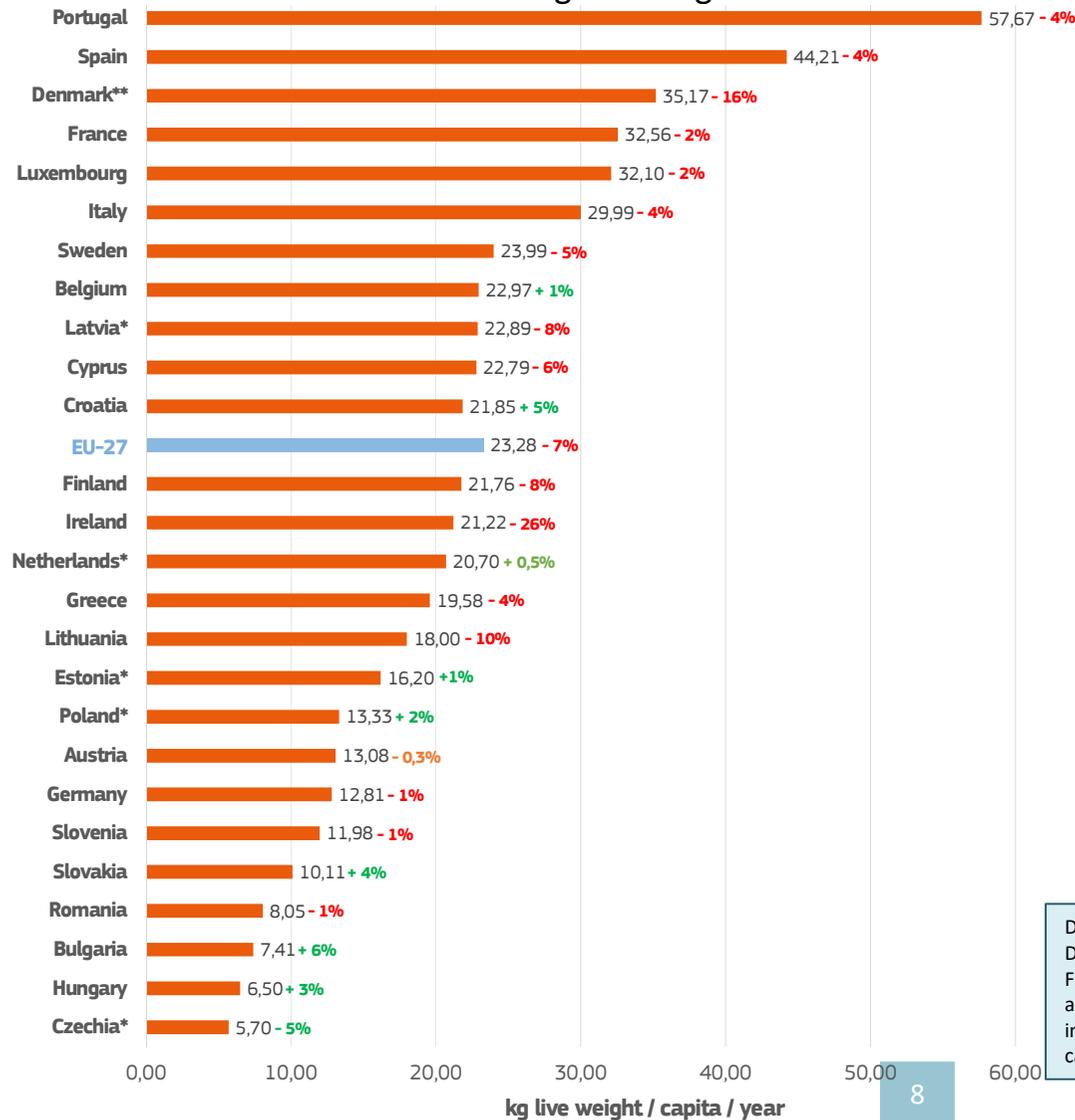


The EU is able to maintain a high level of fish and seafood apparent consumption mainly by sourcing it from other regions of the world through imports.

Data in live weight equivalent (LWE) deriving from the EUMOFA's EU supply balance sheet.



## Per-capita apparent consumption of fishery and aquaculture products by Member State kg live weight in 2020 and % variation 2020/2019

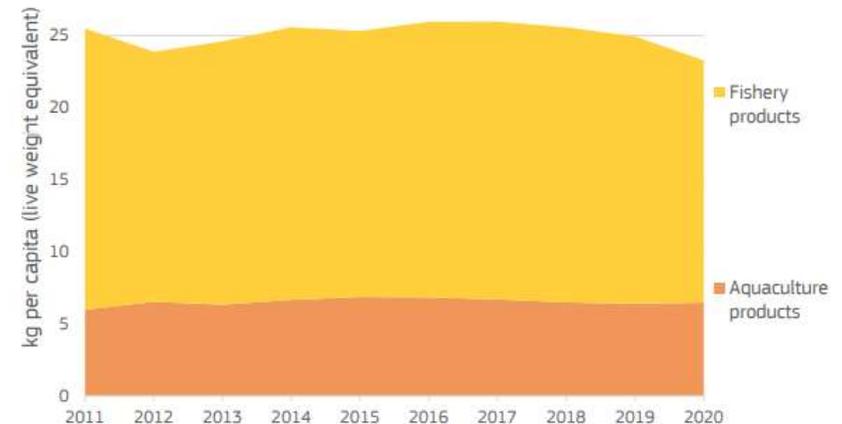


Data are from EUMOFA estimates and National administrations (\*). Estimates for Denmark (\*\*) were not confirmed by the National contact point. For Malta, given the significant relevance of imports of frozen fish likely used directly as fish feed in the Maltese bluefin tuna fattening industry, available data and information for Malta do not allow to produce precise estimates. However, annual per capita apparent consumption can be estimated between 30-40 kg LWE.



## Apparent consumption of most important species

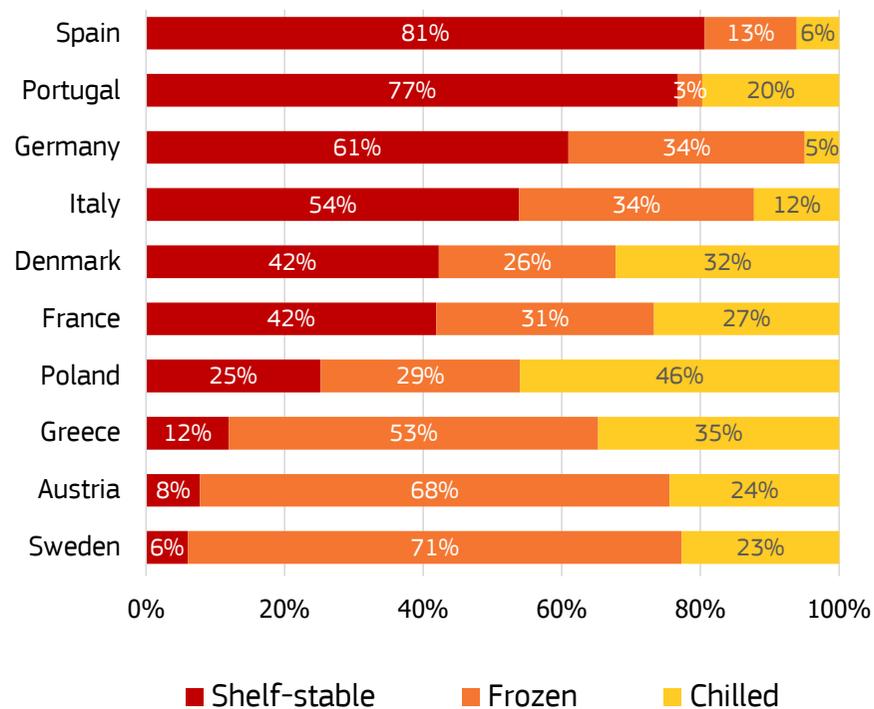
Products	Per capita consumption (kg, LWE)	Consumption evolution 2020/2019	% wild	% farmed
Tuna	3,06	-3%	98,65%	1,35%
Salmon	2,44	+4%	6%	94%
Alaska pollock	1,72	-1%	100%	0%
Cod	1,72	-13%	99,93%	0,07%
Shrimps	1,46	-1%	45,06%	54,94%
Mussel	1,19	+2%	6,21%	93,79%
Herring	1,10	+3%	100%	0%
Hake	1,03	-11%	100%	0%
Surimi	0,64	-3%	100%	0%
Squid	0,62	-11%	100%	0%
Mackerel	0,59	-4%	100%	0%
Sardine	0,56	-7%	100%	0%
Trout	0,49	+3%	1,63%	98,37%
Saithe (=Coalfish)	0,35	-10%	100%	0%
Clam	0,32	-3%	66,82%	33,18%
Other products	5,97	-15%	72,71%	27,29%
<b>Total</b>	<b>23,28</b>	<b>-7%</b>	<b>72,18%</b>	<b>27,82%</b>



Surimi is made from wild-caught species (mainly Alaska pollock, blue whiting, blue grenadier, and Pacific hake). Its apparent consumption is calculated as import *minus* export, as there are no statistics specifically referring to surimi production, neither estimating shares of catches of these species used for its production. In fact, the supply balance sheet is broken down by species, and calculating it for surimi would generate double counting.



## Out-of-home consumption of FAPs through the foodservice in top-10 countries by category in 2021, shares in volume

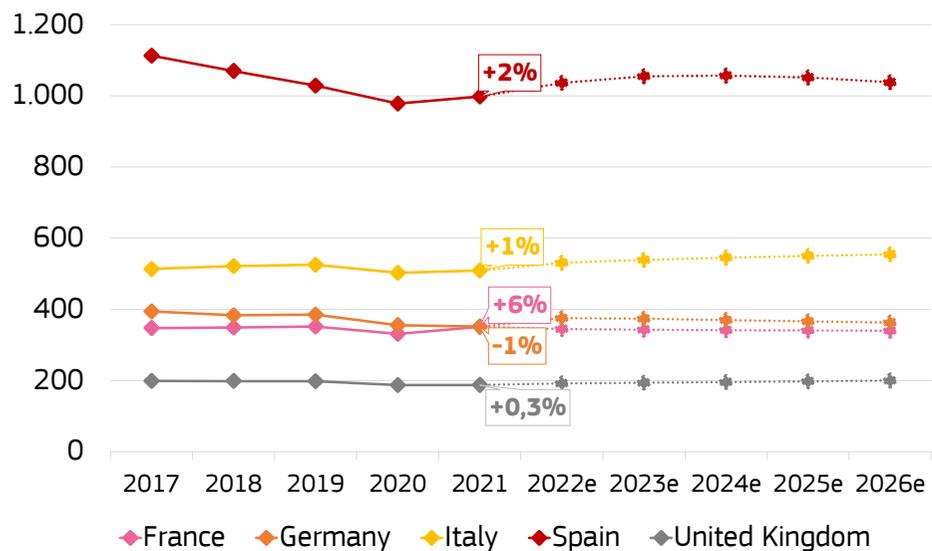




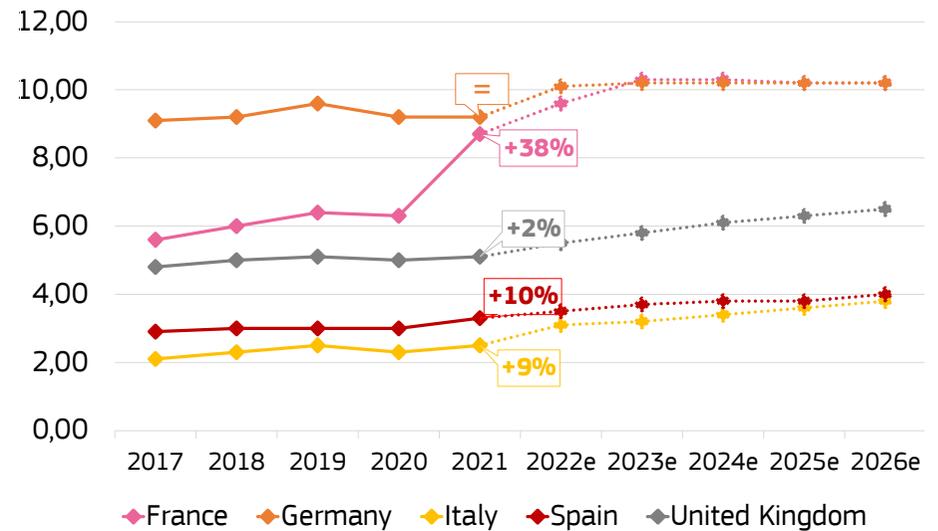
## Consumption of unprocessed products through retail, foodservice and institutional channels

Volumes in 1.000 tonnes.

### Total fishery and aquaculture products



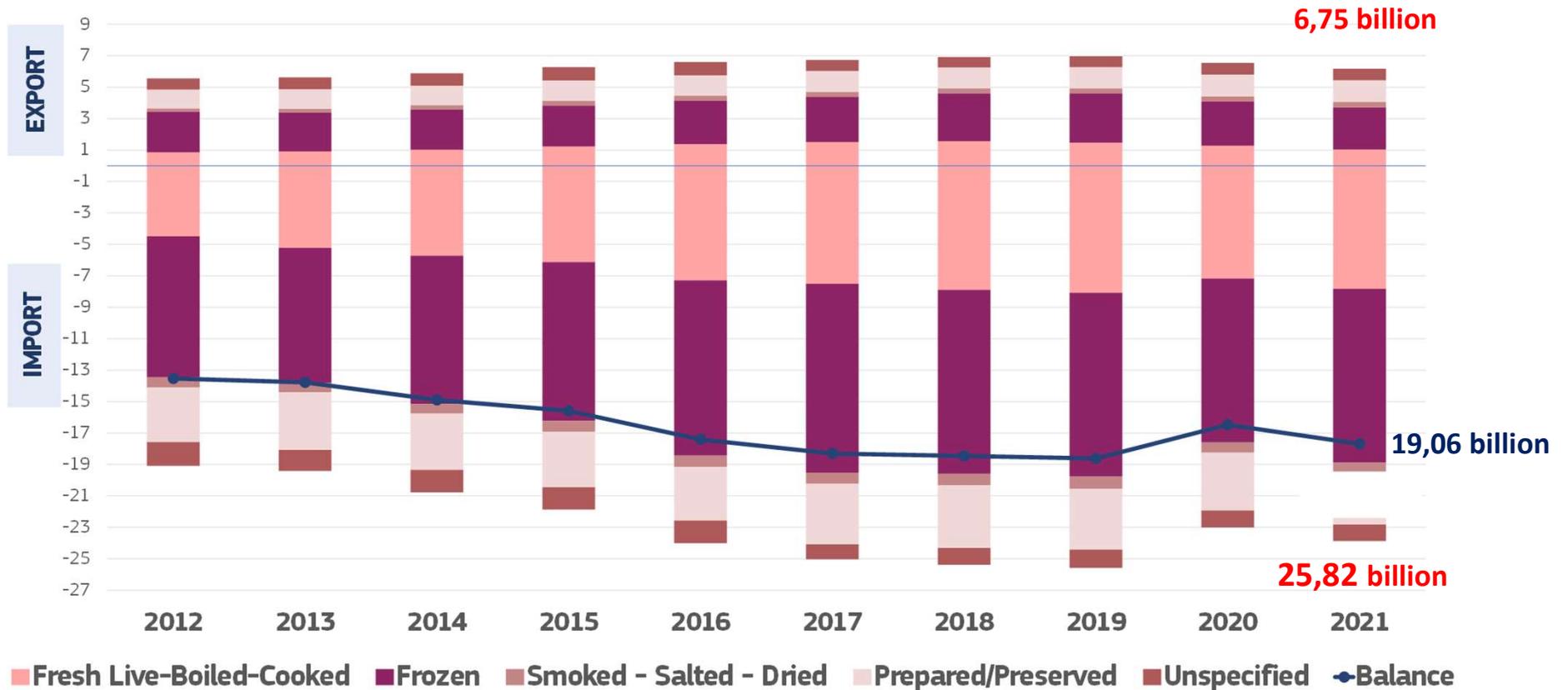
### Organic FAPs





## EU-27 trade of fishery and aquaculture products with non-EU countries

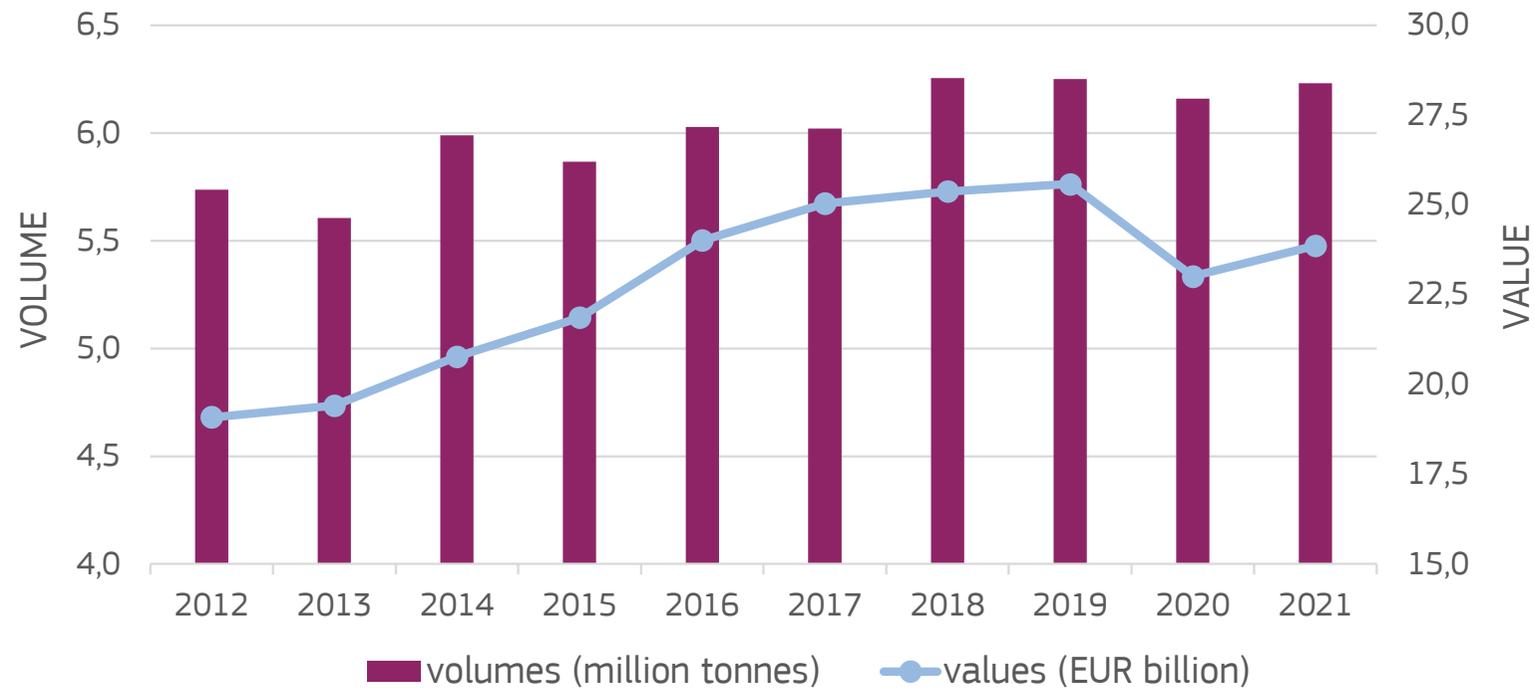
Data in EUR billion. Values are deflated by using the GDP deflator (base=2015).





## Extra-EU imports of fishery and aquaculture products

Values are deflated by using the GDP deflator (base=2015).

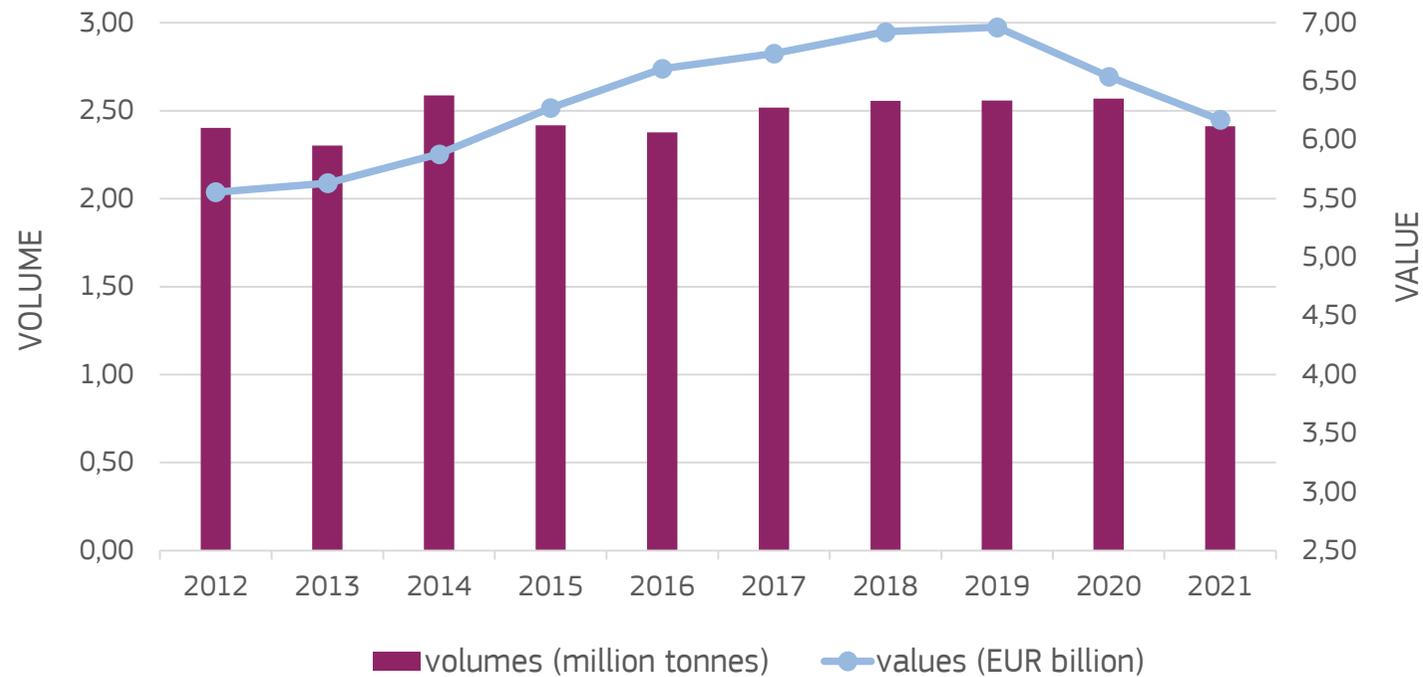


**2021: 6,23 million tonnes worth EUR 25,82 billion**



## Extra-EU exports of fisheries and aquaculture products

Values are deflated by using the GDP deflator (base=2015).

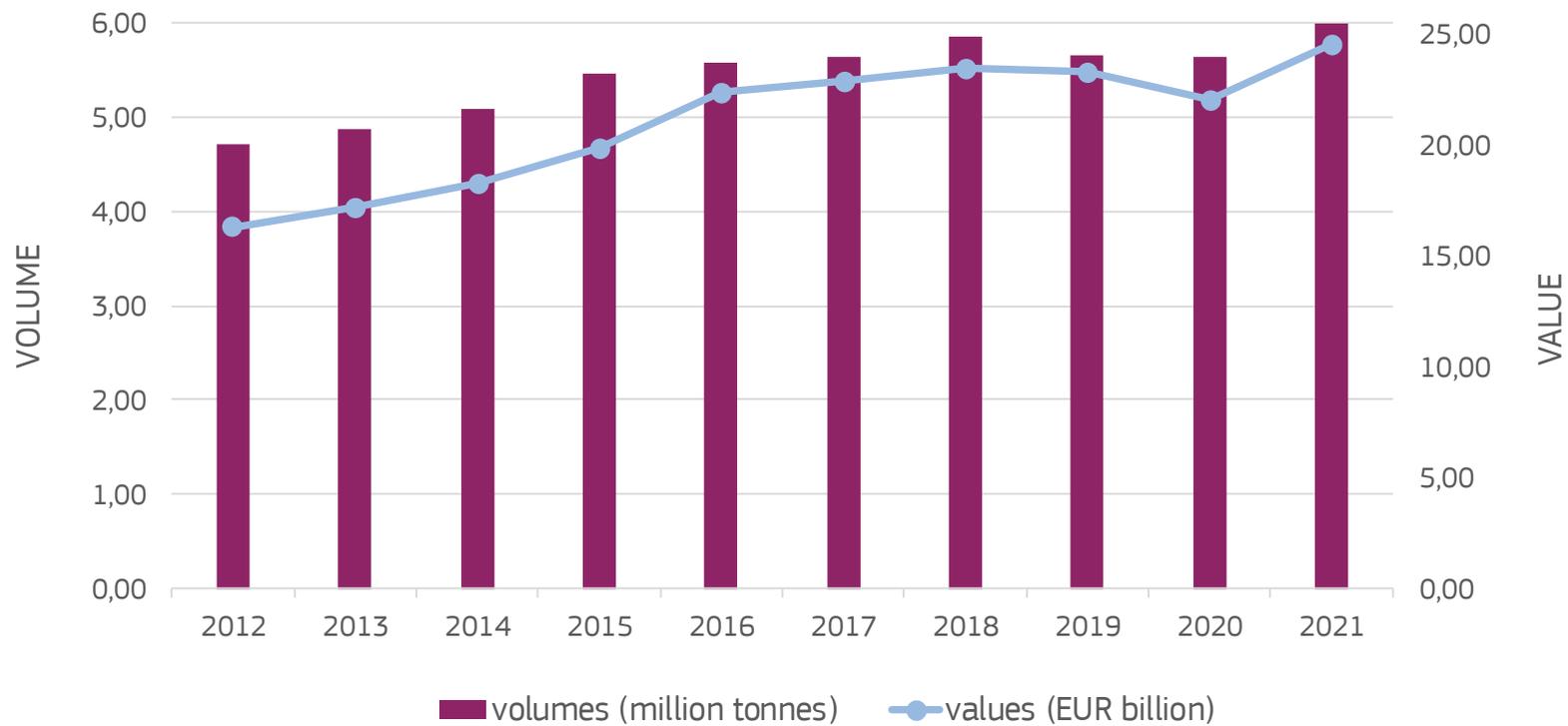


**2021: 2,41 million tonnes worth EUR 6,75 billion**



## Intra-EU trade of fisheries and aquaculture products

Values are deflated by using the GDP deflator (base=2015).

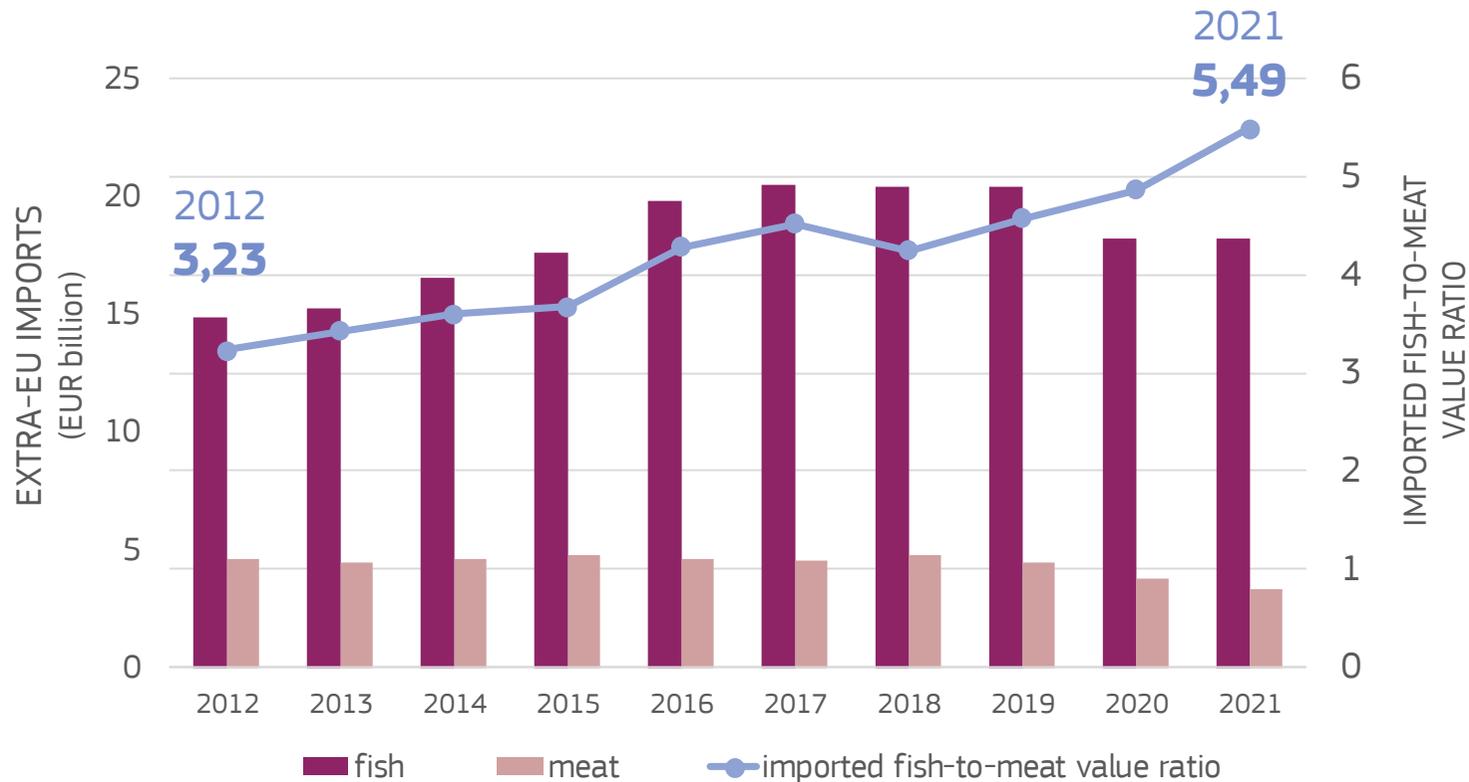


**2021: 6 million tonnes worth EUR 26,80 billion**



## Extra-EU imports and ratio of imported fish value vs. meat

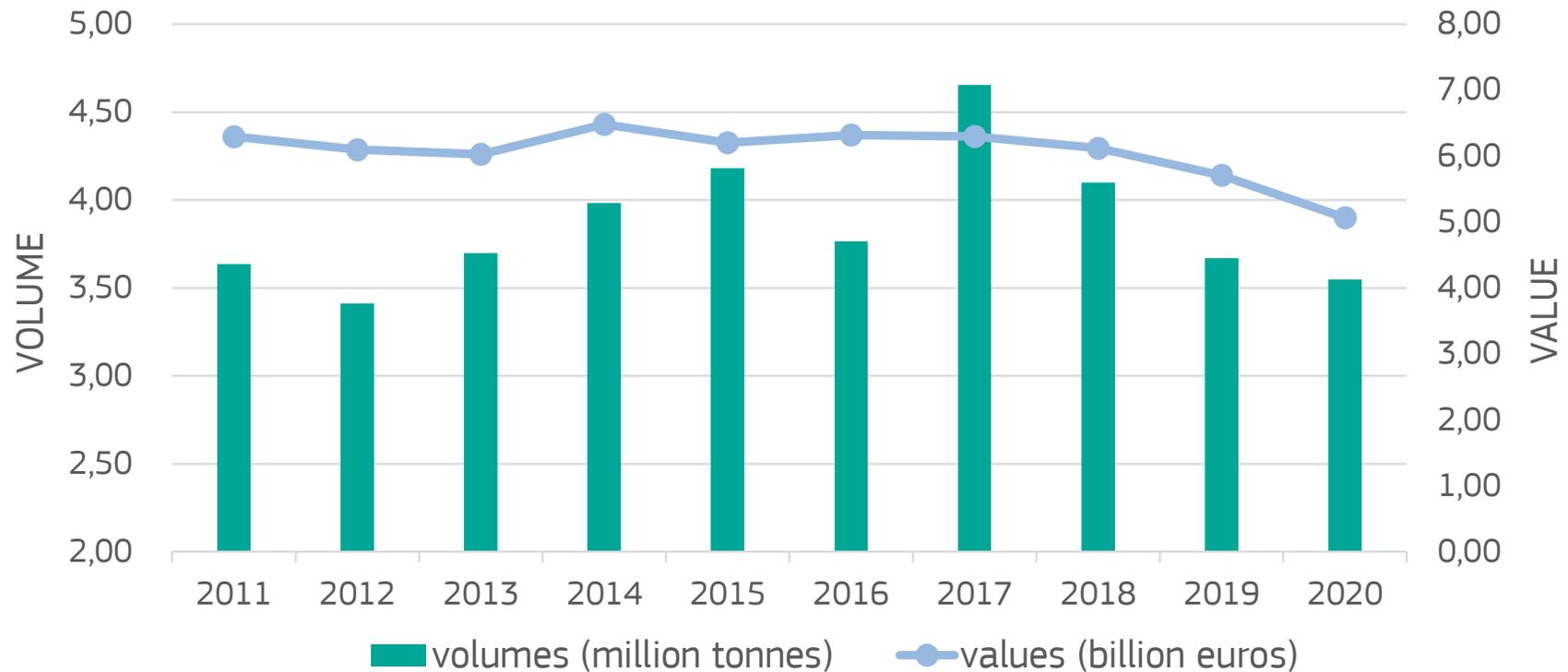
Data excludes prepared and non-edible products. Values are deflated by using the GDP deflator (base=2015).





## Landings in the EU-27

Values are deflated by using the GDP deflator (base=2015).

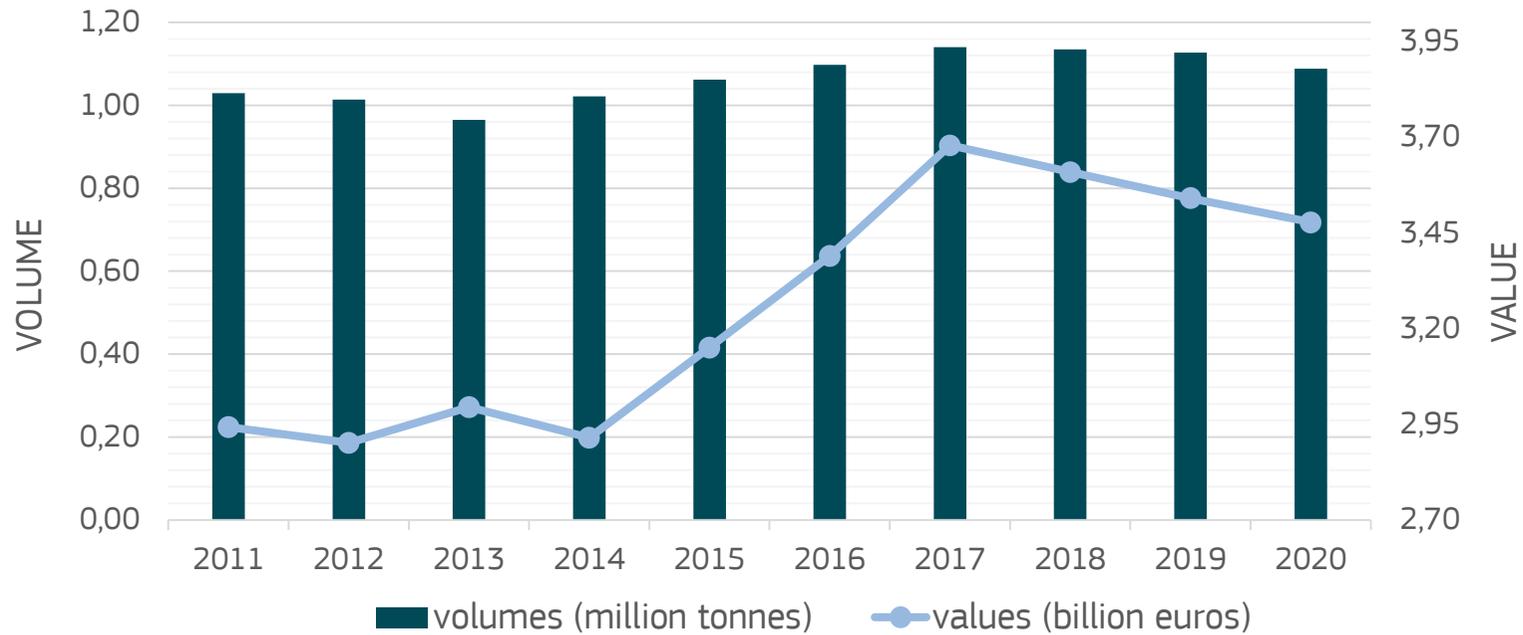


**2020: 3,55 million tonnes and EUR 5,36 billion (resp. -3% and -10 % /2019)**



## Aquaculture production in the EU-27

Values are deflated by using the GDP deflator (base=2015).



**2020: 1,09 million tonnes and EUR 3,67 billion (resp -3% and -1% /2019)**

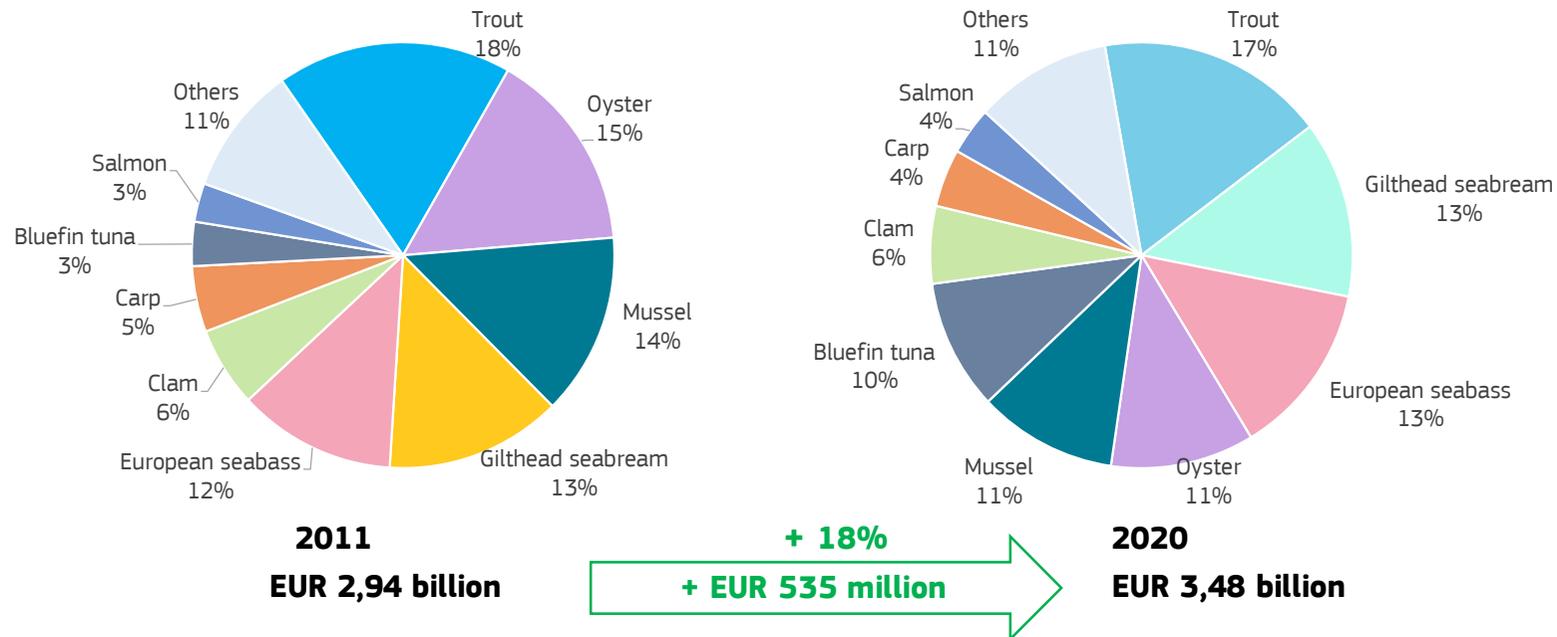
**2011**  
**EUR 2,94 billion**

**+ 18%**  
**+ EUR 535 million**

**2020**  
**EUR 3,48 billion**



## Composition of farmed species in the EU-27 (in real value, base= 2015)



In terms of volume, the species composition of EU aquaculture production remained similar to that of 10 years earlier, although there were some **significant changes in the value structure in real terms**.

Notable examples:

- bluefin tuna, which increased from 0,5% to 3% (due to an exceptional trend in Maltese production from 2011 to 2020);
- mussel and oyster, which decreased from 43% to 37% and from 15% to 11%. Their production increased but their shares in the total decreased due to more significant increases in other important species.

- ✓ **In 2021, the COVID-19 effects on consumption of fish in the EU continued:** household expenditure grew 7% from 2020.
- ✓ **There was a deterioration of the trade balance on fish (+10% from 2020),** due to both increased imports and decreased exports. Values of imports increased more than volumes.
- ✓ **2021 was also a record year for intra-EU flows of fish,** which were greater than extra-EU imports for the first time in 10 years.
- ✓ **The consumer price index for fish and seafood in the EU rose** by 2,4% from January 2021 to December 2021, and the growth was even faster in 2022.

- ✓ **Marine fuel prices started to rise in 2021**, gradually leading to a higher fuel cost for the EU fishing fleet, after the major drop during the COVID-19 pandemic. On average, marine fuel prices rose by 48% from 2020 to 2021, but this was still slightly lower than the 2019 average.
- ✓ **On the production side, 2020 was a year of decade lows in the supply of fish, mainly due to the COVID-19 pandemic's impact on the sector** (especially on logistics, production activities and international flows of goods).
- ✓ **Landings of fishery products**, including species not destined for human consumption and seaweed, **dropped in both volume and value**, due to both the effects of the outbreak of the COVID-19 pandemic, which caused a reduction in fishing efforts, as well as to the quotas, which were generally lower in 2020 than in 2019.



**THANK YOU FOR YOUR  
ATTENTION**

<https://www.eumofa.eu/en/market-analysis#yearly>