European Commission

Study on the challenges of aquaculture products in food outlets

Market advisory council – WG3 Meeting – 05/06/2025

EUMOFA
European Market Observatory for Fisheries and Aquaculture Products

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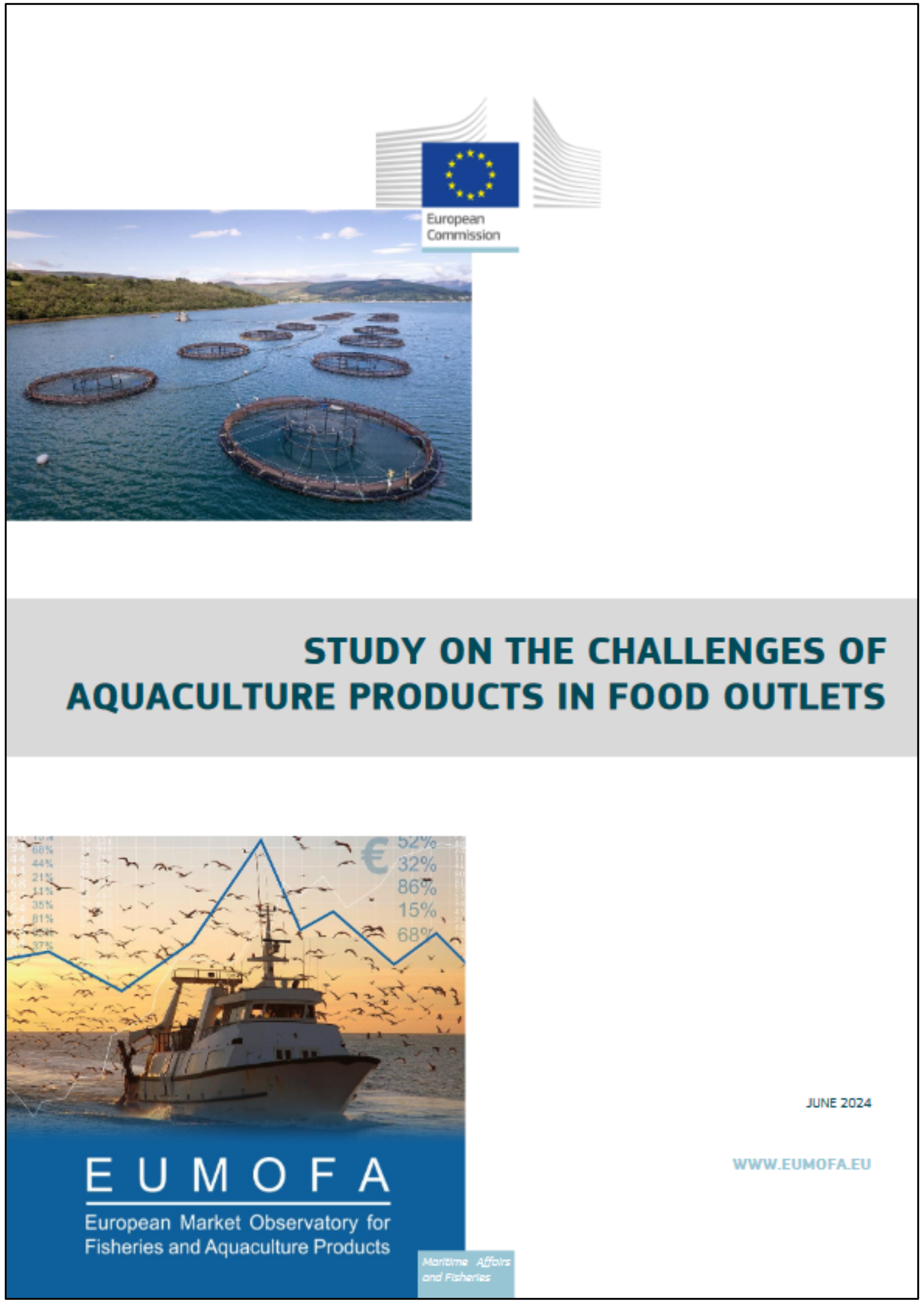
Introduction

- The European market observatory for fisheries and aquaculture products (**EUMOFA**) is an EU initiative (DG MARE) www.eumofa.eu

- Study on the challenges of aquaculture products in food outlets published in June 2024
  - Desk research
  - Interviews in CZ, DK, GR, ES, FR, IT, HU, PL,



Background: EU farmed products = 10% of EU consumption

- Farmed products accounted for 29% of EU apparent consumption (2022)
- This ratio falls to 10% if we only consider EU farmed products
- Several farmed products in the top 3 species consumed in several MS: salmon, gilthead seabream, mussel, carp and catfish

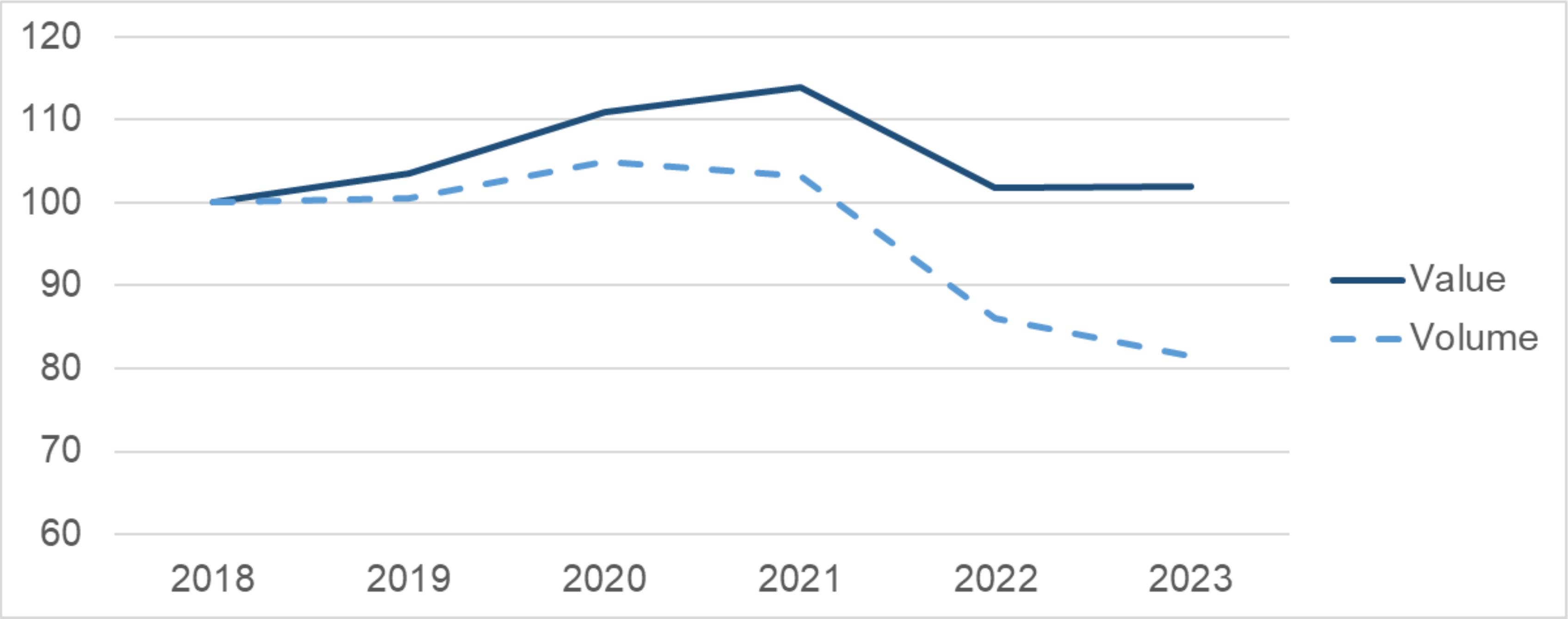
	Volume (Mt) 2022
EU apparent consumption of fishery and aquaculture products	10,48 Mt
EU apparent consumption of aquaculture products (= production + import – export)	3,04 Mt
EU production of aquaculture products	1,09 Mt
EU imports of aquaculture products	2,20 Mt

Source: EU Fish market - EUMOFA

Background: decrease of seafood consumption

Household consumption trends for fresh fishery and aquaculture products in 11 MS

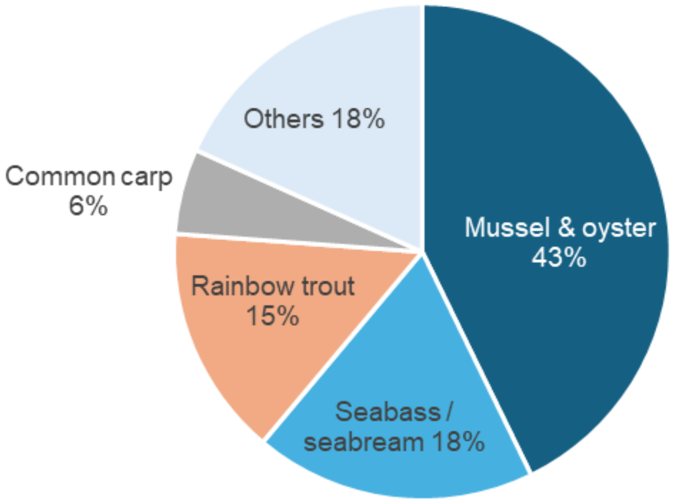
(index evolution 100 = 2018)



Source: EU Fish market - EUMOFA

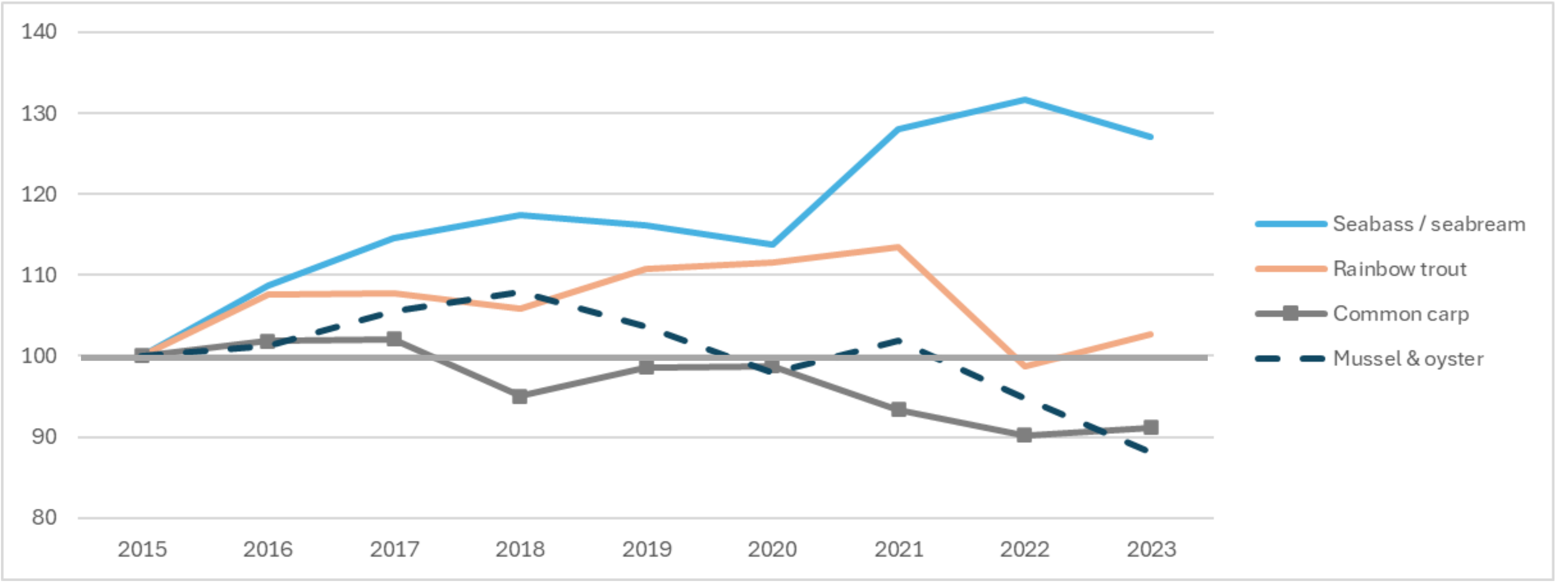
Background: 1,1 Mt of EU farmed products (2023)

Breakdown by main species (volume)



Production trends (volume) for the main farmed species

(index evolution 100 = 2015)



Source: Eurostat

Key challenges identified

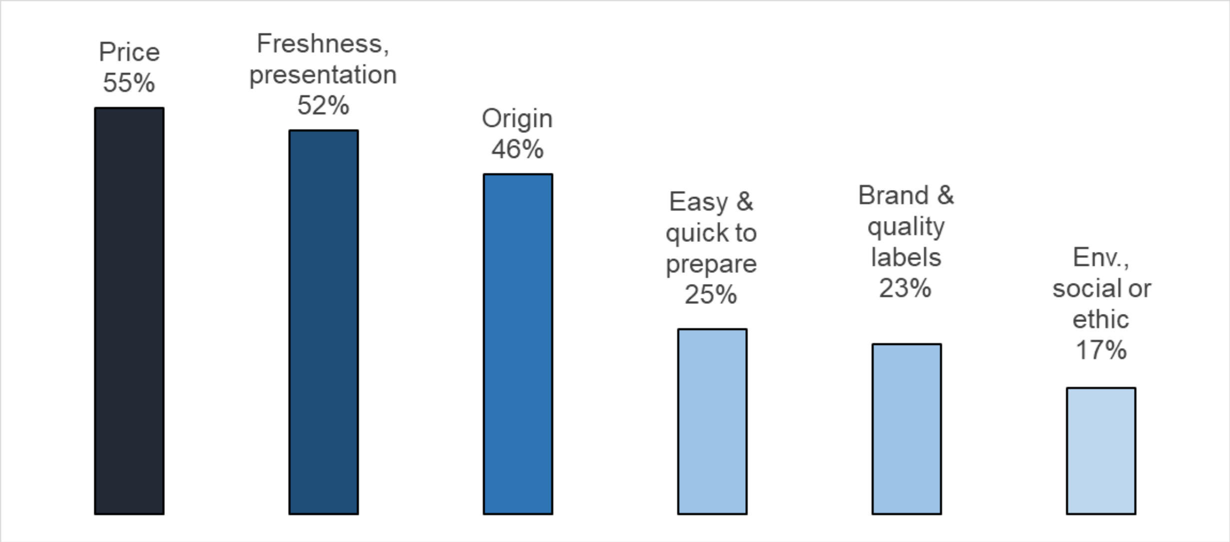
- Consumption trends
- Difficulties to increase the volume of production
- Increase of costs
- Strong competition on the market and importance of price
- Evolution of the number of fishmongers of fish counters in large-scale retail
- Low level of organisation in the sector

Various challenges faced by farmed products

	Market patterns	In line with consumption trends	Competition with wild caught fishery	Competition with third countries
Shellfish (mussel, oyster)	Production / consumption in ES, FR, IT Importance of quality schemes Fresh and processed (canned mussel) Important market in HORECA	+/-	+/-	+
Seabass / seabream	High production in GR, Consumption in IT, ES, FR and PT Fresh / frozen, whole or filleted	++	+++	+++
Trout	Production in IT, FR, ES, PL, consumption in DE, FR, IT Fresh or smoked Competition with salmon	++	+	+++
Carp	Produced and consumed in PL, HU, RO, CZ Traditional product at Christmas Importance of direct sales	+/-	++	++

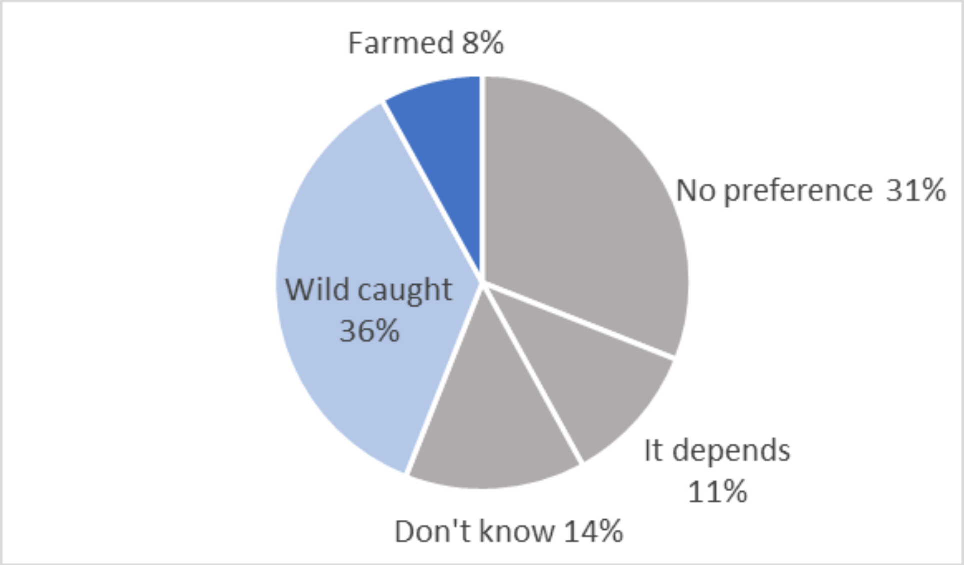
Consumer criteria

Main criteria for consumers when buying fish: price, appearance and origin



Source : Eurobarometer (2024 data at EU level)

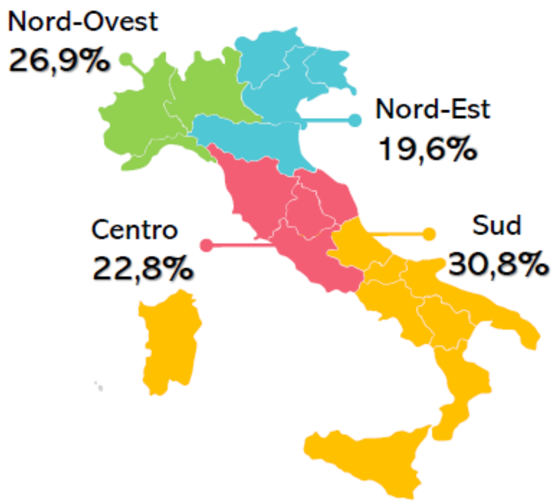
No clear preference between farmed and wild-caught products for 56% of the consumers



Coastal versus non-coastal consumers

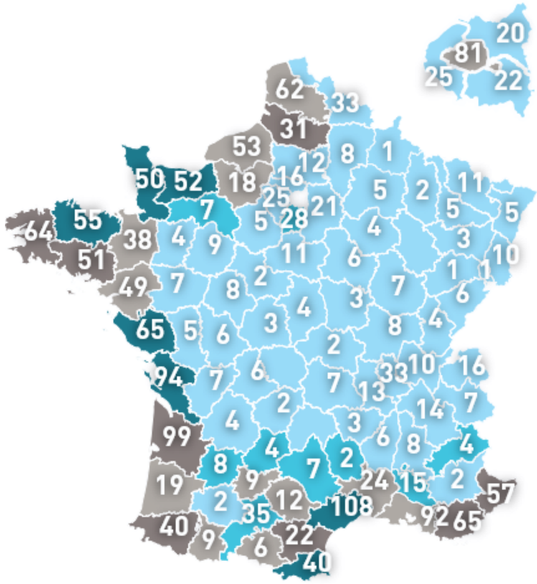
- In coastal areas (Italian study), higher preference toward:
  - specialised fishmongers
  - wild caught products
  - products from national origin

- Larger offer in coastal areas (see map in France)



% of consumers surveyed by area in Italy

La conoscenza e i comportamenti d acquisto dei prodotti dell'acquacultura e della pesca sostenibile – UnionCamere – 2022



Number of specialised fishmonger by NUTS 3 area in France in 2021

Source: Observatoire de l'alimentation du détail – Poissonneries - Tableaux de bord 2024

Certification schemes and brands

Organic scheme (mainly mussel and salmon) : 9% of the EU production

28 **PDOs / PGIs / TSGs**: carp, mussel, oyster, trout, etc.

Other **certification schemes** and **brands**: ASC, Label Rouge, Global GAP, Český kapr, Sistema di qualità nazionale acquacoltura sostenibile, etc.

→

Possible intermediate impacts

- Quality management
- Differentiation on the market

→

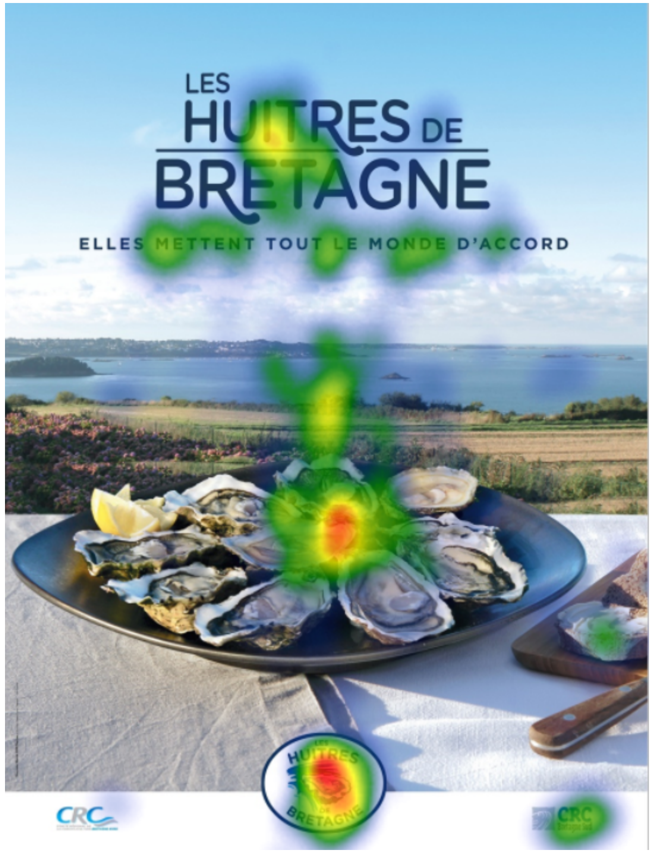
Possible final impacts

- Market access
- Price premium

Organic scheme, challenges in the narrative to provide to consumers:

- articulation between farmed and wild-caught products,
- added value of the organic scheme for shellfish.

What do consumers see?



- Protected name / brand is key
- Consumer may not see logos / understand certification

Certification is part of a whole strategy

Source: FranceAgriMer / AND International, 2024

Low level of organisation

- Large importance of small-scale companies
- Variable importance of cooperatives and producer organisations in the aquaculture sector : 33 POs, 1 APO, and 1 IBO
- Low organisation is a limitation in terms of:
  - bargaining power & access to the market
  - collective investments / innovation

Conclusion

- At the end of the story, farmed products are on the same shelf as wild-caught ones -> coherence is needed
- Need to provide consumers with:
  - products which complies with their expectations (price, appearance, origin,…).
  - relevant information, they are able to process (all consumers are not seafood experts),
- Investments are needed to be in line with market requirements (communication, quality management, processing…)
- Beyond consumer preference, farmed products have specific assets for retailers (in comparision with wild-caught products).

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Thank you