European Commission

EUMOFA

European Market Observatory for fisheries and aquaculture products

The EU in the world

Market supply

Consumption

Import - Export

Landings in the EU

Aquaculture

The EU fish market

2025 Edition

Scope and objectives

"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

- **In 2024, despite a slowdown in inflation, fish prices remained elevated, leading to higher household expenditure for the third year in a row.** According to Europanel/Kantar/GfK data, total at-home fresh fish consumption has been declining since 2021 and fell, in the highest-consuming EU countries, by over 4% from 2023 to 2024.

- **EU trade flows decreased in value for the second consecutive year, while traded volumes decreased a marginal 0,5%.** Despite this modest downturn, 2024 still recorded the third-highest trade value of the 2015–2024 decade.

- **The EU trade balance in fishery and aquaculture products improved slightly in 2024, with the deficit decreasing by 2% compared to 2023,** driven by a 1% increase in export value and a 1% decline in import value.

- **Marine fuel prices continued their moderate decline**, decreasing from 0,70 EUR/l in 2023 to 0,66 EUR/l in 2024; in 2025, prices stabilised at around 0,59 EUR/l.

- **Consumer prices for fish and seafood products showed moderate growth after the sharp increases of 2022,** averaging around 3,5% in 2023 and easing to about 2% in 2024, with price growth remaining contained in 2025.

- **In 2023, apparent consumption of fishery and aquaculture products in the EU fell to the lowest level of the past decade and 3% below 2022**, namely 10,25 million tonnes LWE (22,89 kg LWE per capita). Farmed products maintained a stable share, while the share of wild products dropped to a ten-year low.

- **In 2023, the EU self-sufficiency rate for fishery and aquaculture products increased, for the first time since 2018, to 38,1%**, driven by declining imports and exports alongside lower apparent consumption, reaching a level comparable to that recorded in 2021.

Main producers in 2023 (1.000 tonnes)

World production increased by 2% in 2023, reaching a ten-year peak of 227,8 million tonnes, driven by a 10-year high in aquaculture while catches slightly decreased.

Total production in the **EU ranked eighth in the world with 4,6 million tonnes**, which was **1% higher than in 2022.** This was linked to increased catches of blue whiting, whereas EU aquaculture registered a slight decrease.

	Catches	Aquaculture	Total production	% of total	% evolution of total production 2023/2022
China	13.425	78.276	91.701	40%	+4%
Indonesia	7.817	15.353	23.170	10%	+5%
India	6.178	11.321	17.499	8%	+11%
Vietnam	3.417	5.379	8.796	4%	+0.4%
Russian Federation	5.393	365	5.759	3%	+8%
Bangladesh	2.063	2.853	4.915	2%	+3%
United States of America	4.156	456	4.612	2%	-3%
EU-27	**3.555**	**1.043**	**4.598**	**2%**	**+1%**
Norway	2.544	1.650	4.194	2%	-2%
Chile	2.596	1.503	4.099	2%	-3%
Philippines	1.715	2.384	4.099	2%	-0.4%
Japan	2.904	879	3.783	2%	-3%
Peru	3.519	105	3.624	2%	-34%
Republic of Korea	1.317	2.304	3.621	2%	+2%
Myanmar	1.623	1.197	2.820	1%	-8%
Others	29.458	11.071	40.529	16%	+2%
TOTAL	**91.681**	**136.140**	**227.820**	**100%**	**+2%**

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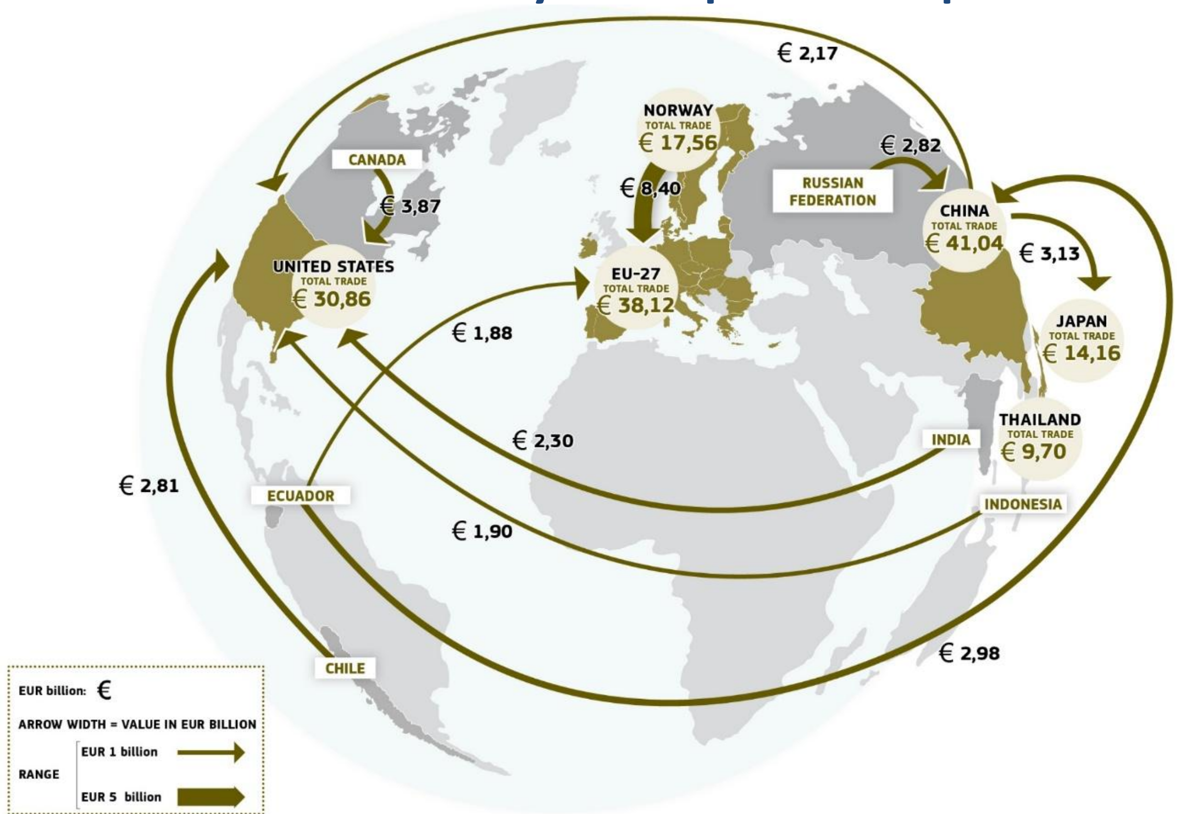
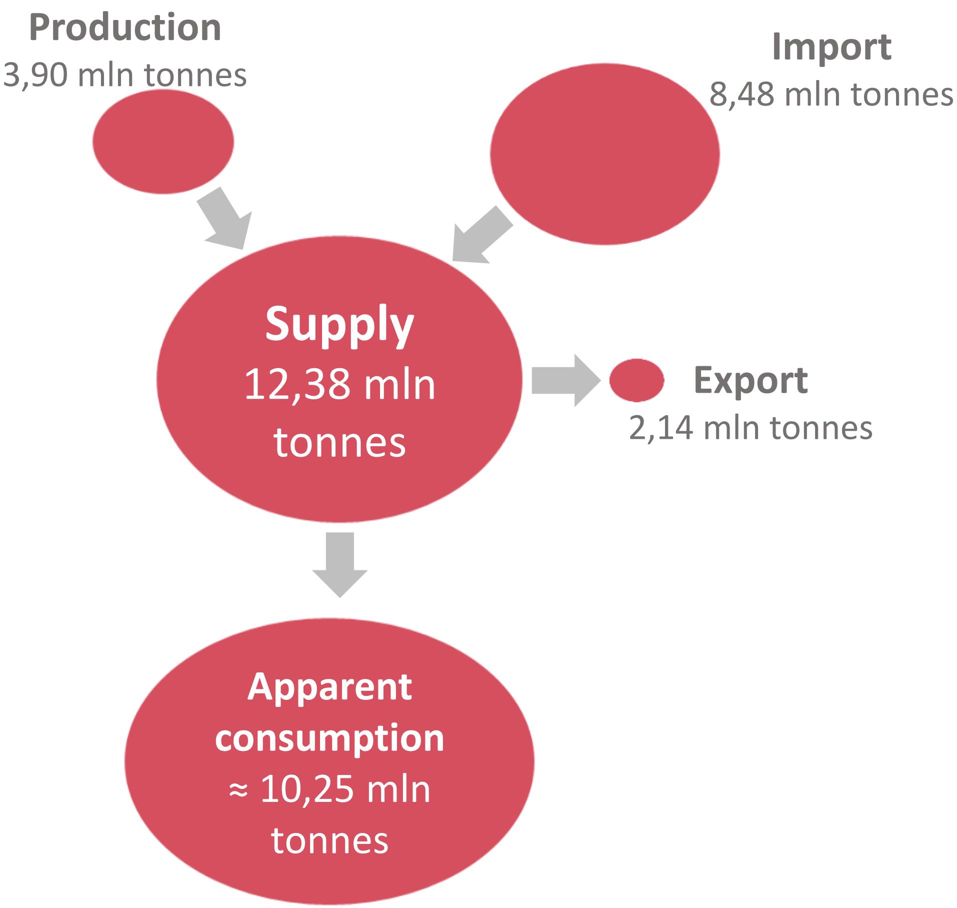
Main trade flows of fishery and aquaculture products in 2024



The EU's trade in fishery and aquaculture products (sum of imports and exports with third countries) was second only to China in 2024, in both value and volume.

- **Main EU imports**: salmon, tuna, shrimps, cod, Alaska pollock and fishmeal
- **Main EU exports**: herring, blue whiting, fishmeal and fish oil not destined for human consumption, and tuna

EU supply balance of fisheries and aquaculture products in 2022

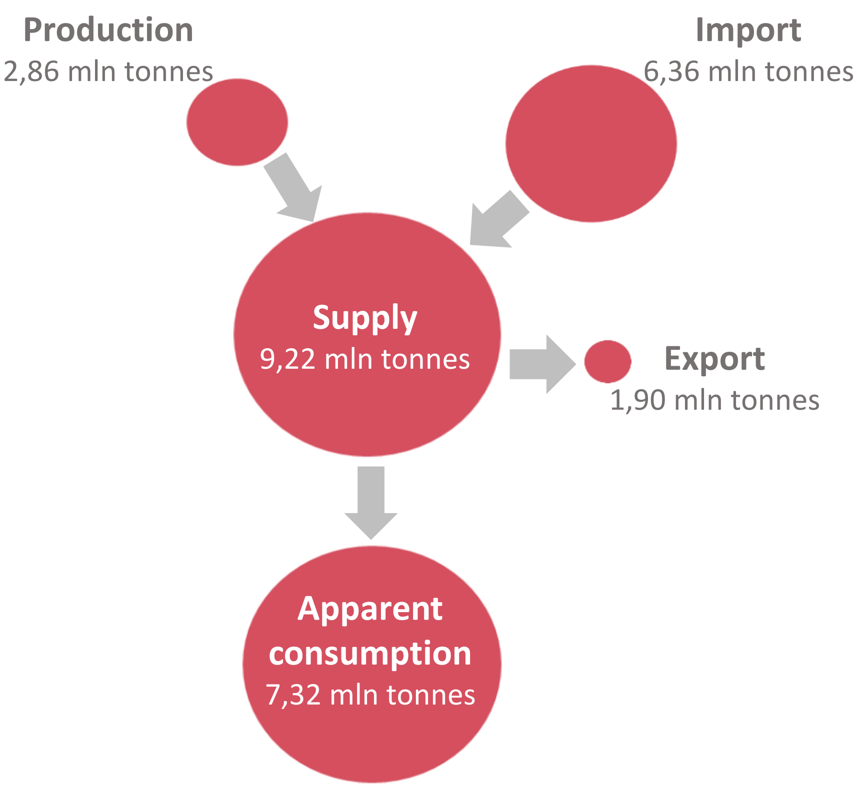


The EU supply for human consumption was 12,38 million tonnes LWE in 2023, which was 3% less than in 2022 and the lowest level of the decade.
2023 supply was much lower than its 10-year average of circa 13,4 million tonnes LWE.

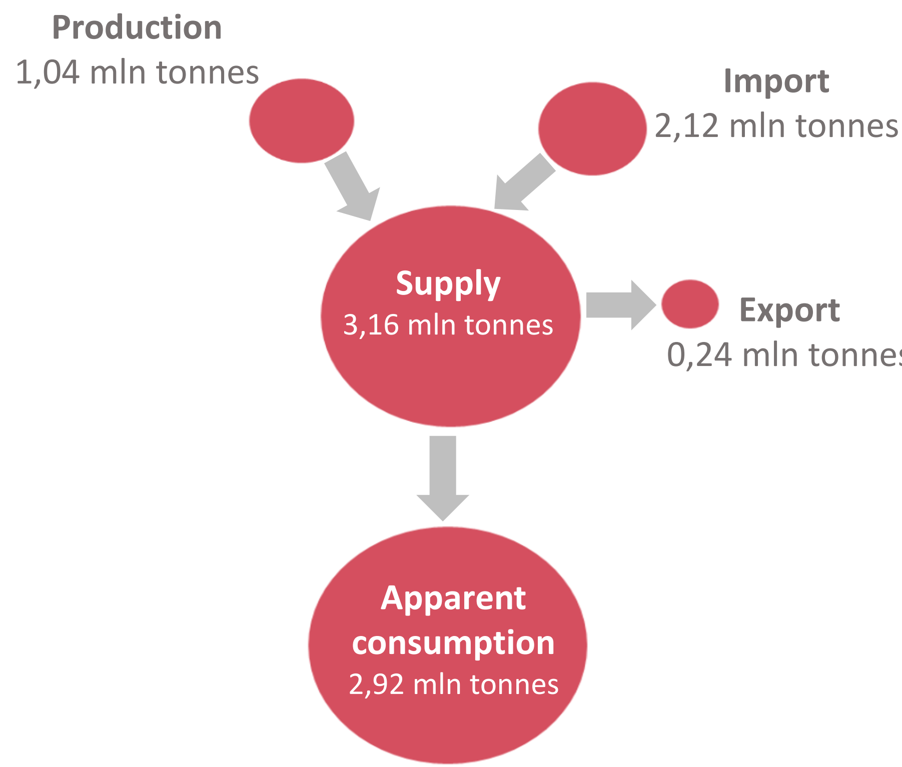
Data in live weight equivalent (LWE) deriving from the EUMOFA's EU supply balance sheet.

Market supply

Fishery products



Aquaculture products



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

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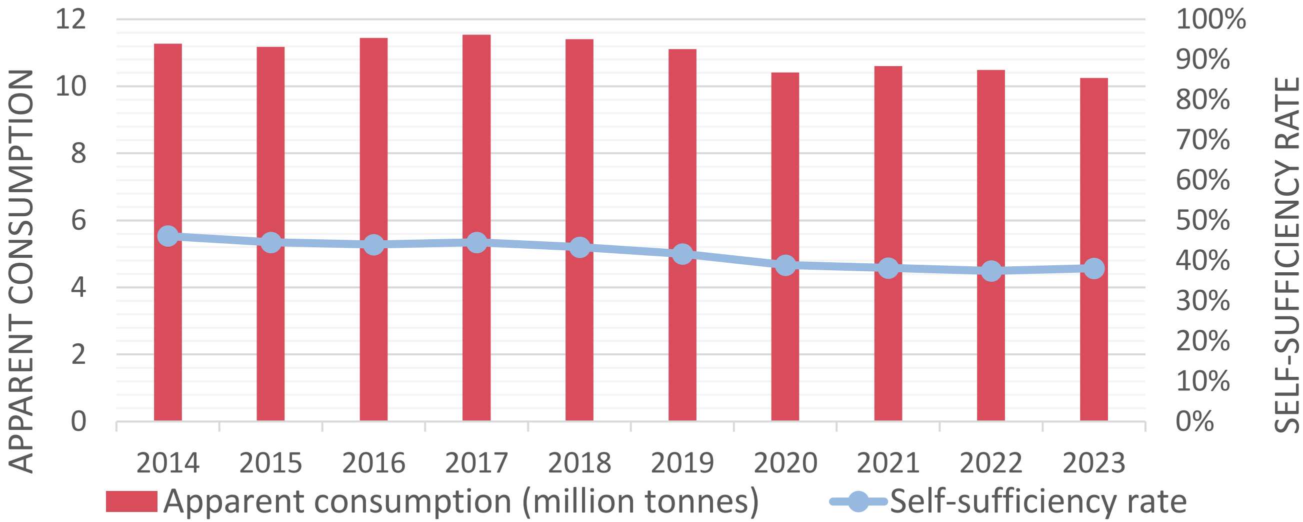
EU-27 market growth and self-sufficiency rates

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.



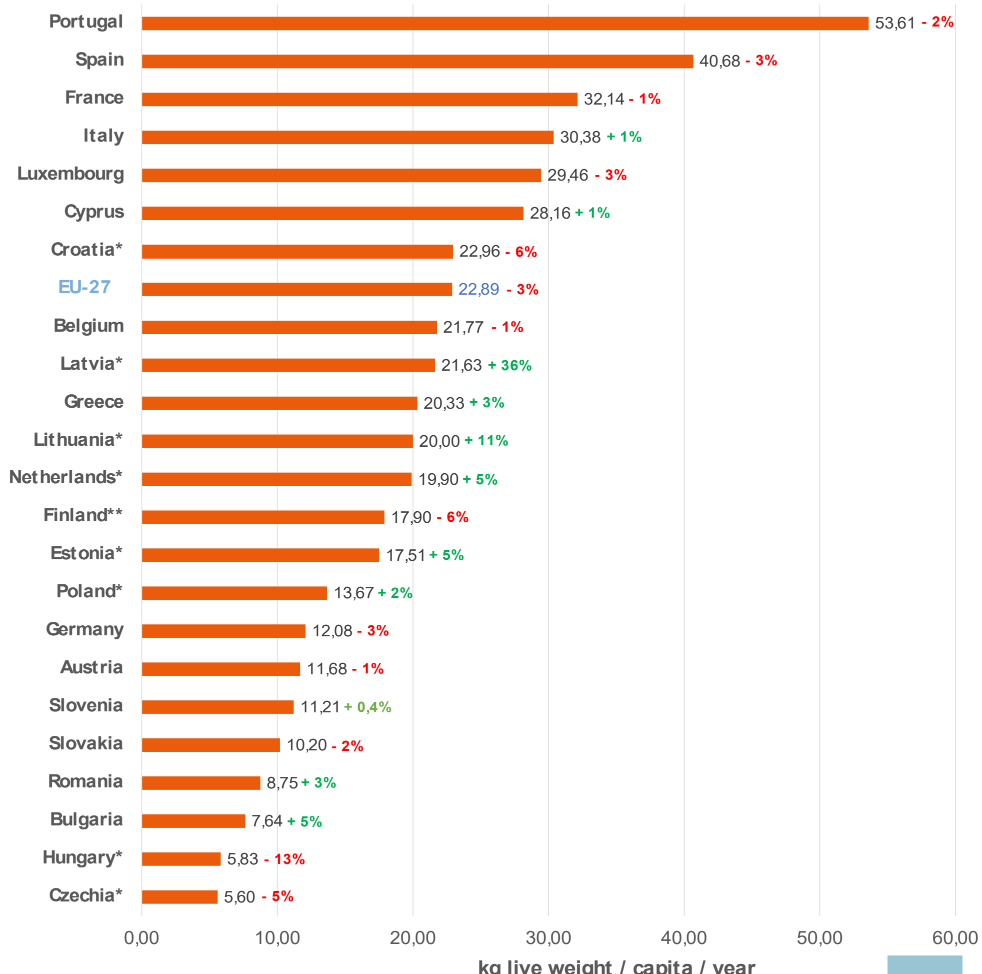
In 2023, the EU's self-sufficiency the rate rose slightly to 38,1%, returning to a level comparable with that of 2021. It was the first increase recorded since 2017.

Imports prevail for salmon, Alaska pollock, shrimps and cod. In 2023, the EU had an average self-sufficiency of just 4% for these four species, which at the same time represented 32% of the EU's total apparent consumption of fishery and aquaculture products.

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 2023 and % variation 2023/2022



In 2023, apparent consumption of fishery and aquaculture products in the EU was estimated at 10,25 million tonnes LWE, 3% less than in 2022 (22,89 kg LWE per capita, 71% of which including wild products and 29% including farmed products).

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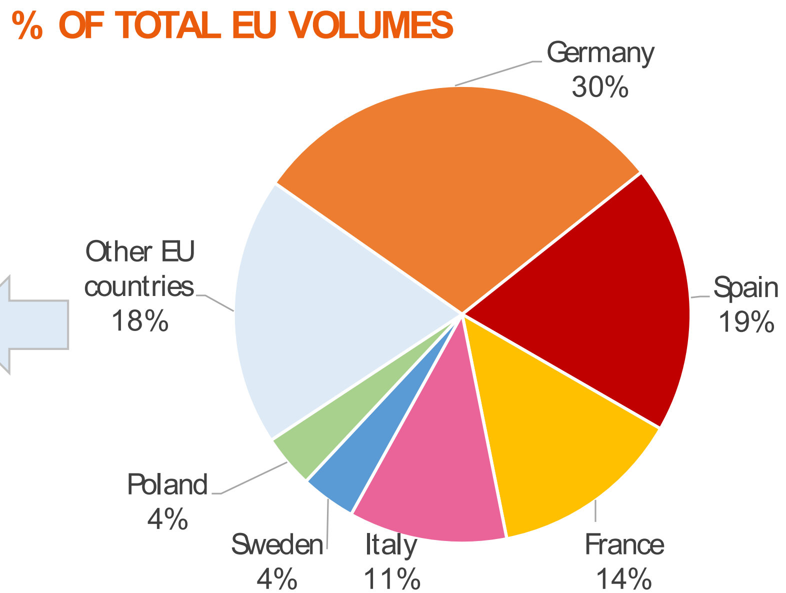
Apparent consumption of most important species

Products	Per capita consumption (kg, LWE)	Consumption evolution 2023/2022	% wild	% farmed
Tuna	2,68	-9%	98,2%	1,8%
Salmon	2,39	-5%	5,7%	94,3%
Alaska pollock	1,78	+7%	100%	0%
Shrimps	1,59	-6%	42,0%	58,0%
Cod	1,53	-6%	99,9%	0,1%
Mussel	1,14	-6%	7,1%	92,9%
Hake	1,01	-2%	100%	0%
Herring	0,98	+12%	100%	0%
Squid	0,61	-16%	100%	0%
Surimi	0,54	-10%	100%	0%
Mackerel	0,50	-9%	100%	0%
Sardine	0,49	-10%	100%	0%
Trout	0,46	-1%	0,9%	99,1%
Saithe (=Coalfish)	0,36	-3%	100%	0%
Gilthead seabream	0,33	+2%	2,4%	97,6%
Other products	6,48	+2%	77,4%	22,6%
Total	**22,89**	**-3%**	**71,5%**	**28,5%**

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.

Largest EU consuming countries of processed products in 2024: % of total volumes sold through retail and foodservices

Czechia, Belgium, Portugal, Austria, Denmark	2% each
The Netherlands, Croatia, Romania, Finland, Slovakia, Greece, Ireland, Lithuania	1% each
Hungary, Latvia, Bulgaria, Estonia, Slovenia, Cyprus, Malta, Luxembourg	less than 1% each



EU consumption of processed fish and seafood through foodservices and retail sales **reached nearly 2,1 million tonnes in 2024 (+1% over 2023), with 74% concentrated in Germany, Spain, France and Italy**. Germany alone accounted for 30%, followed by Spain (19%), France (14%), and Italy (11%).

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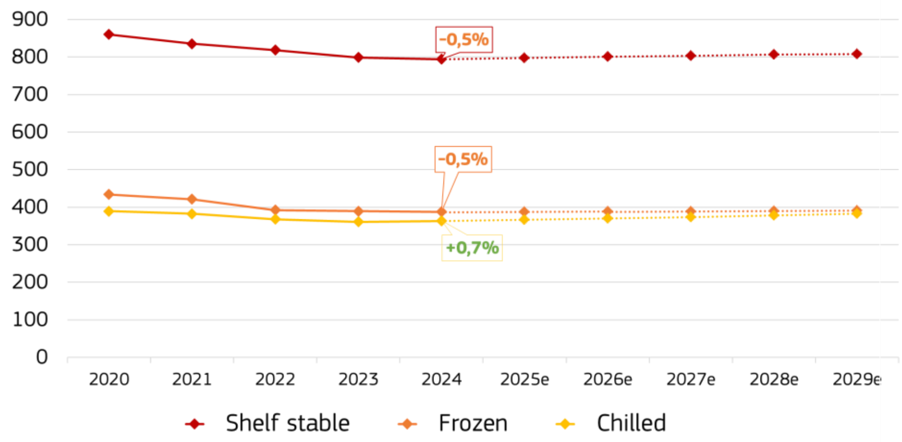
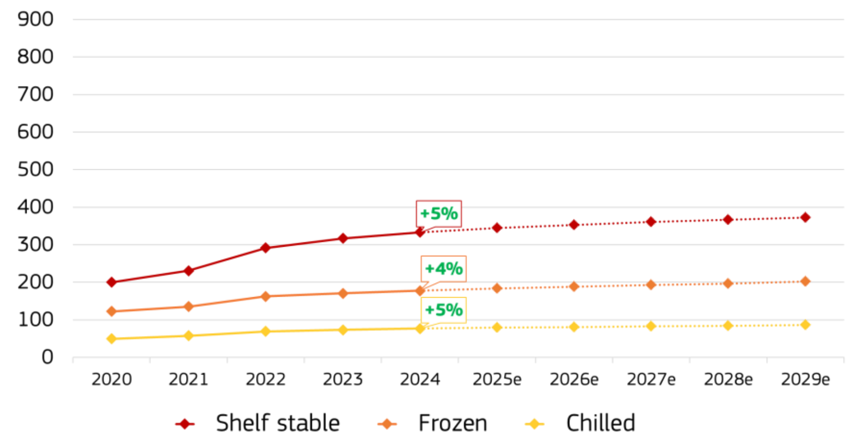
Sales of unprocessed products

Retail (left) and out of home consumption (foodservice, left + institutional channels, right)

Volumes in 1.000 tonnes, % variations for 2024 vs. 2023



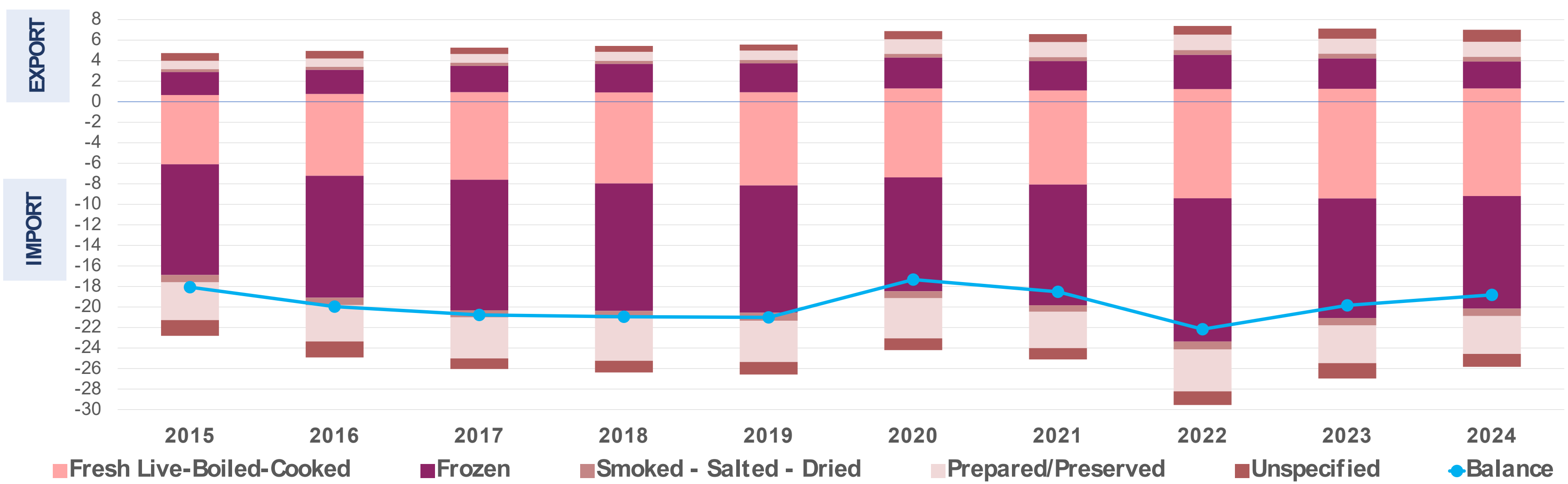


The **COVID-19 pandemic had a lasting impact on retail and foodservice sales,** with retail strengthening during lockdowns and foodservice sales contracting sharply in 2020.

- **Retail sales of unprocessed products** have been declining since COVID-19 restrictions eased in 2021. In 2024, they remained almost stable, only declining 0,4% over 2023.
- **Foodservice sales** saw an overall 5% increase in 2024 over 2023. Euromonitor estimates that sales of unprocessed products will continue to increase in the next five years and is expected to reach more than 660.000 tonnes by 2029.

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=2020).



The 2023 deficit was 2% or EUR 0,4 billion lower than in 2023, driven by a 1% decrease in the value of imports. In terms of volume, imports remained broadly stable.

Among Member States with deficits exceeding EUR 1 billion, trends were mixed, with deficits widening in Spain, France, Italy and the Netherlands, and improving in Denmark, Sweden and Germany.

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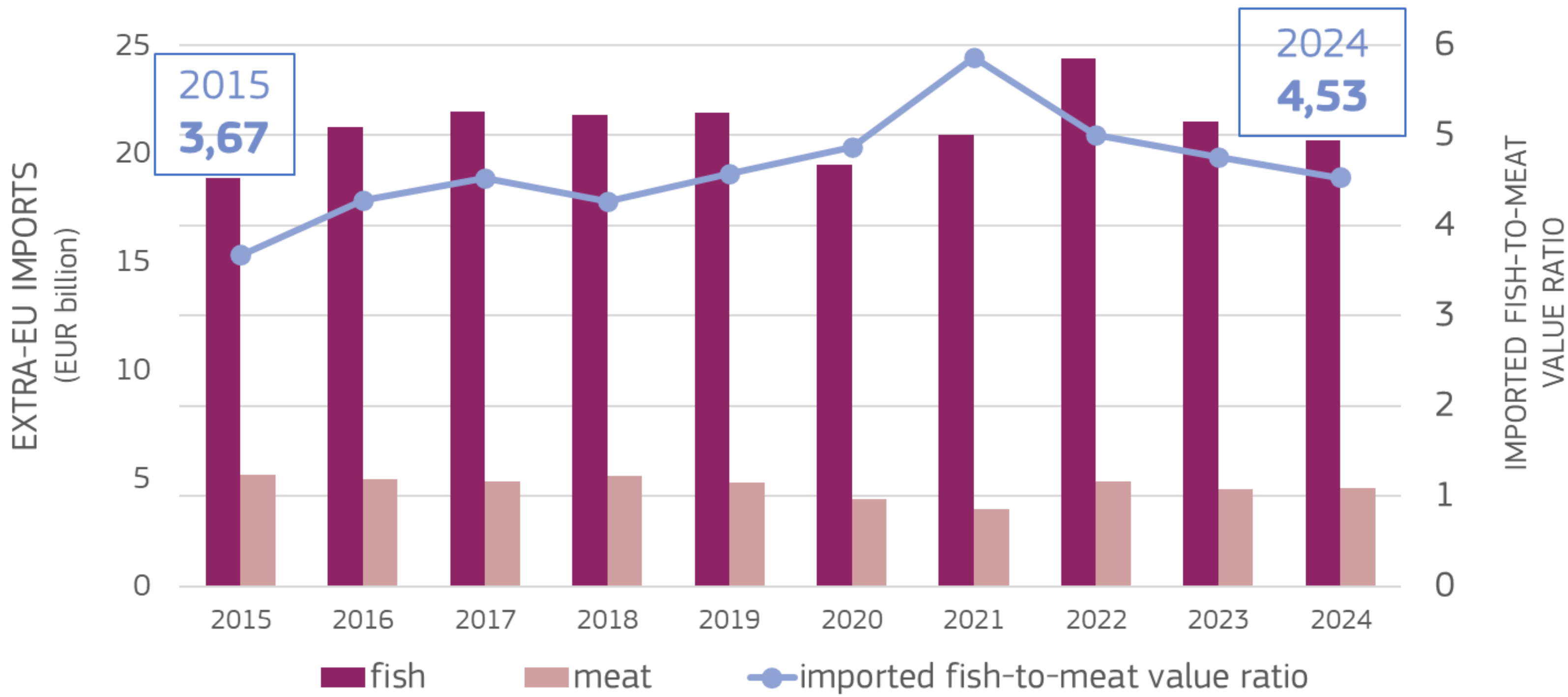
Extra-EU imports and ratio of imported fish value vs. meat

Data excludes prepared and non-edible products. Values are deflated by using the GDP deflator (base=2020).



In 2024, the **value of imported fish was nearly five times higher than that of imported meat,** back to levels observed before the COVID-19 outbreak.

EU-27 imports of agri-food and fishery products totalled EUR 201,75 billion, with fish accounting for 12% and meat for 3%.

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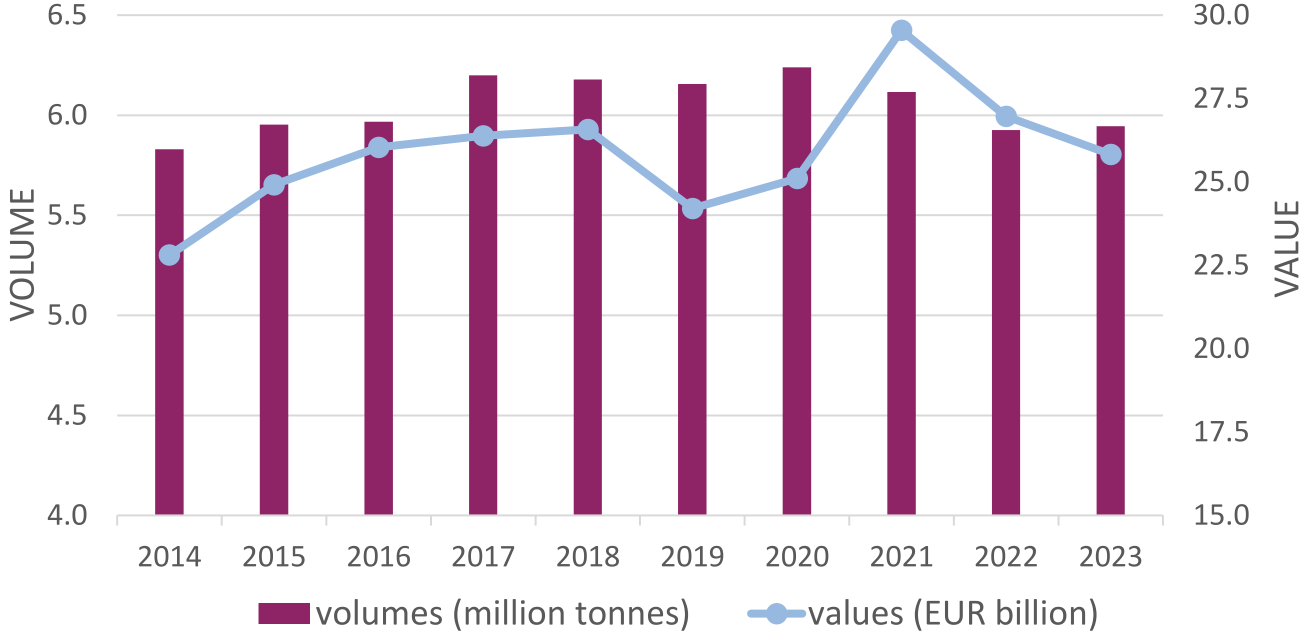
Extra-EU imports of fishery and aquaculture products

Values are deflated by using the GDP deflator (base=2020).



2024: 5,95 million tonnes worth EUR 29,87 billion

- In 2024, **salmon was the EU's top imported species**, making up 28% of the value and 17% of the volume of extra-EU imports, followed by shrimps.
- Nearly **one-third of extra-EU imports come from Norway**, followed by Ecuador, the United Kingdom, China, Iceland and Morocco at a distance.

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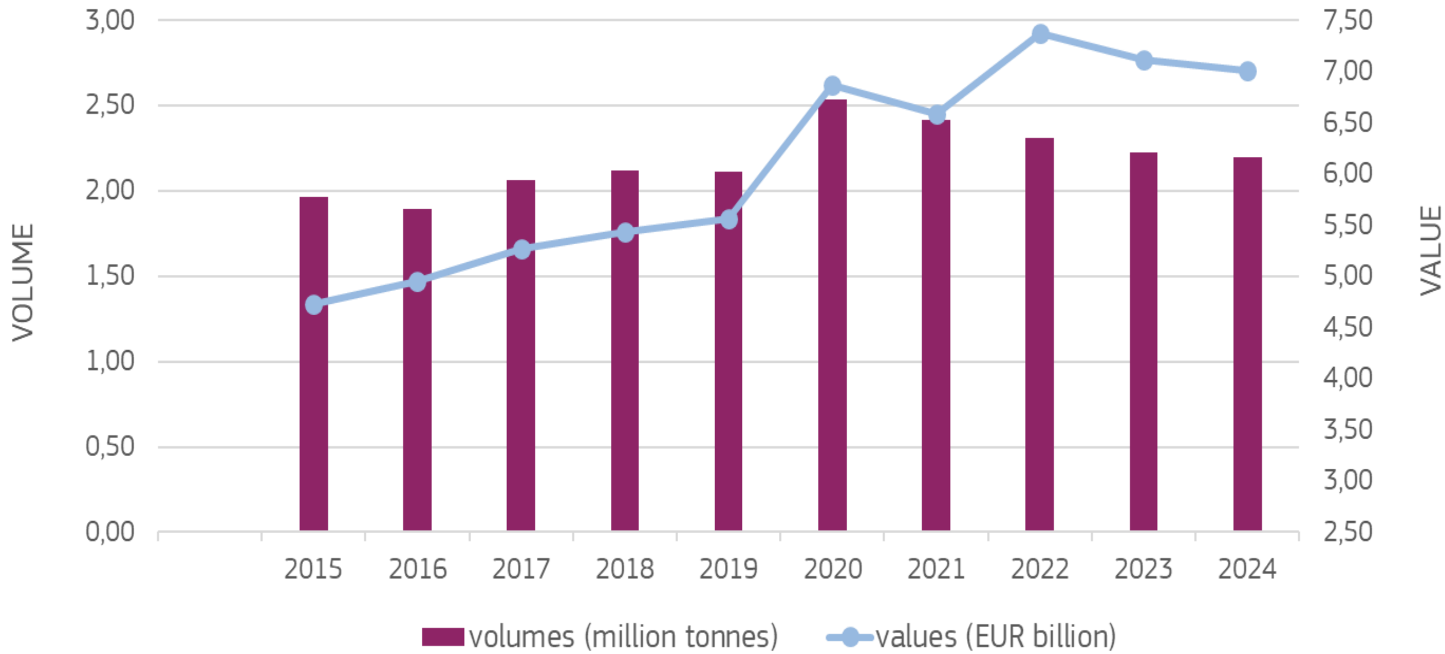
Extra-EU exports of fisheries and aquaculture products

Values are deflated by using the GDP deflator (base=2020).



2024: 2,20 million tonnes worth EUR 8,25 billion

- The EU primarily exports **herring, blue whiting, fishmeal, fish oil, mackerel, skipjack tuna, mackerel and salmon**.
- The **US** is the leading destination for extra-EU salmon exports in terms of value, mainly for salmon. **Norway** ranks first for volume and it receives mainly **fish oil and fishmeal**.

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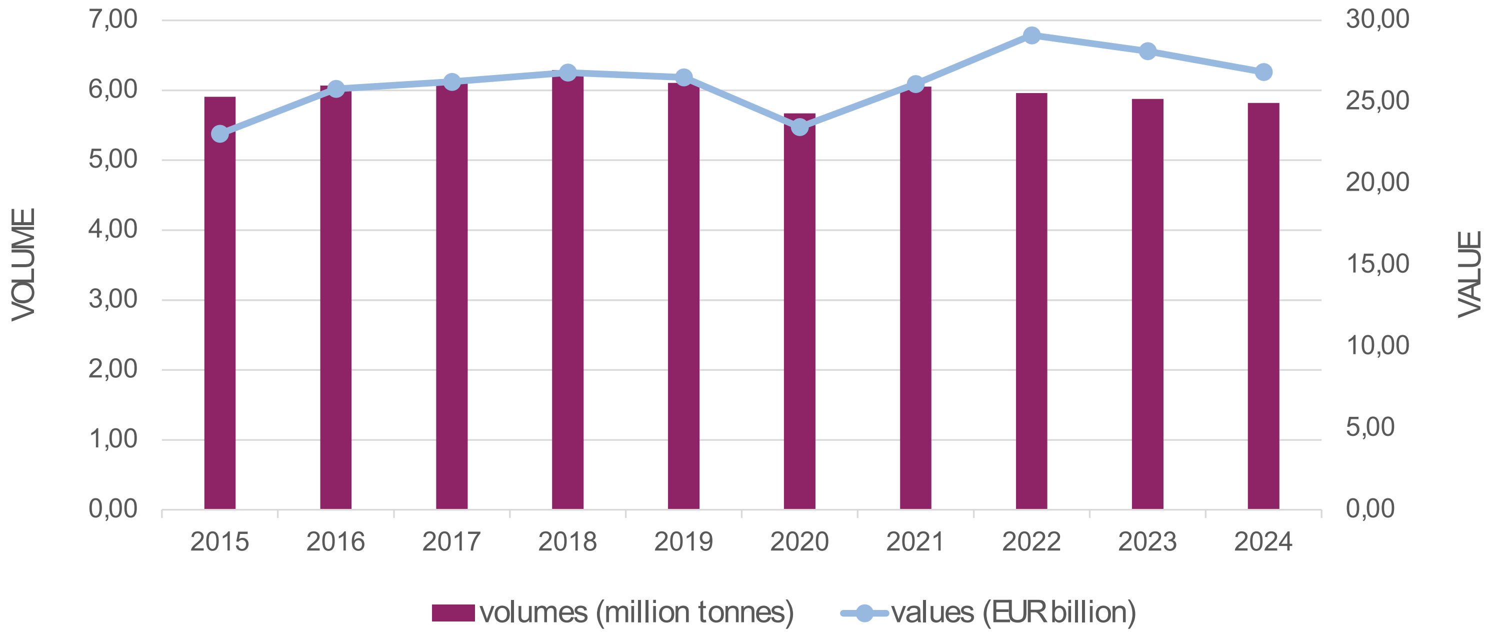
Intra-EU trade of fisheries and aquaculture products

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



2024: 5,8 million tonnes worth EUR 31,7 billion

Exchanges within the EU largely consist of re-exports of products originally imported from third countries (more than 33% in value is covered by salmon). These products may also be subject to multiple exchanges and processing steps taken by Member States once they enter the EU market.

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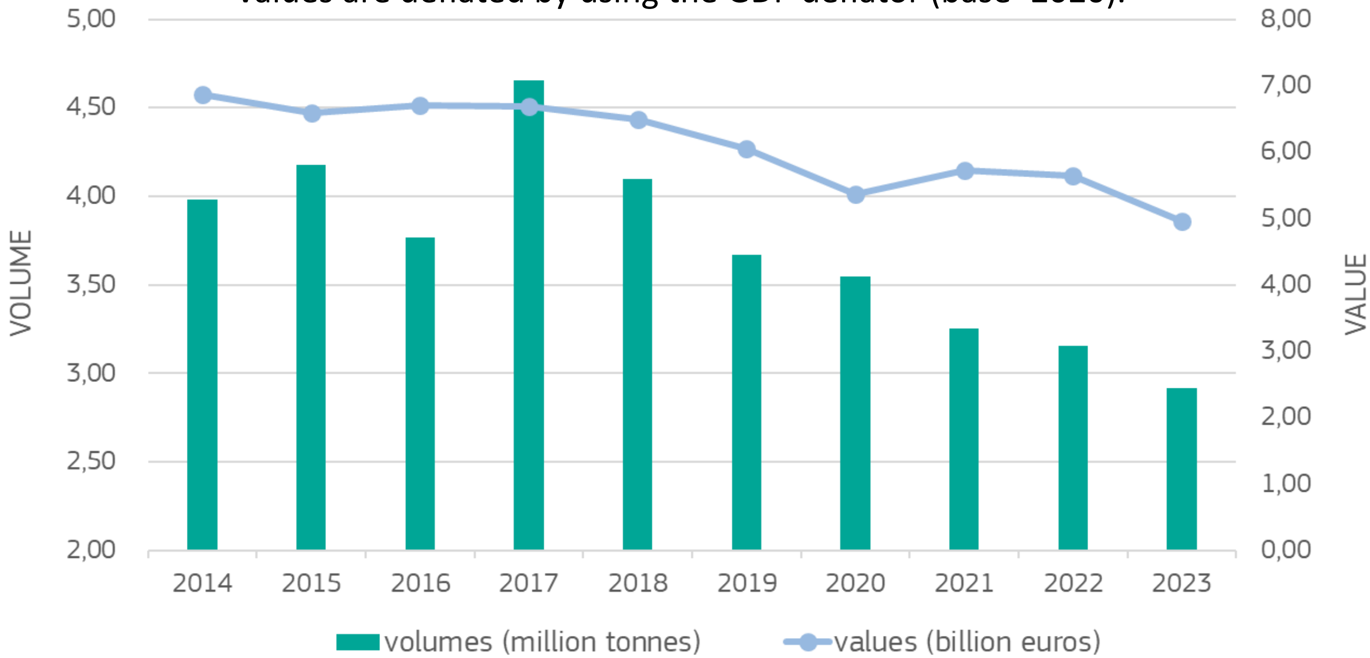
Landings in the EU-27

Values are deflated by using the GDP deflator (base=2020).

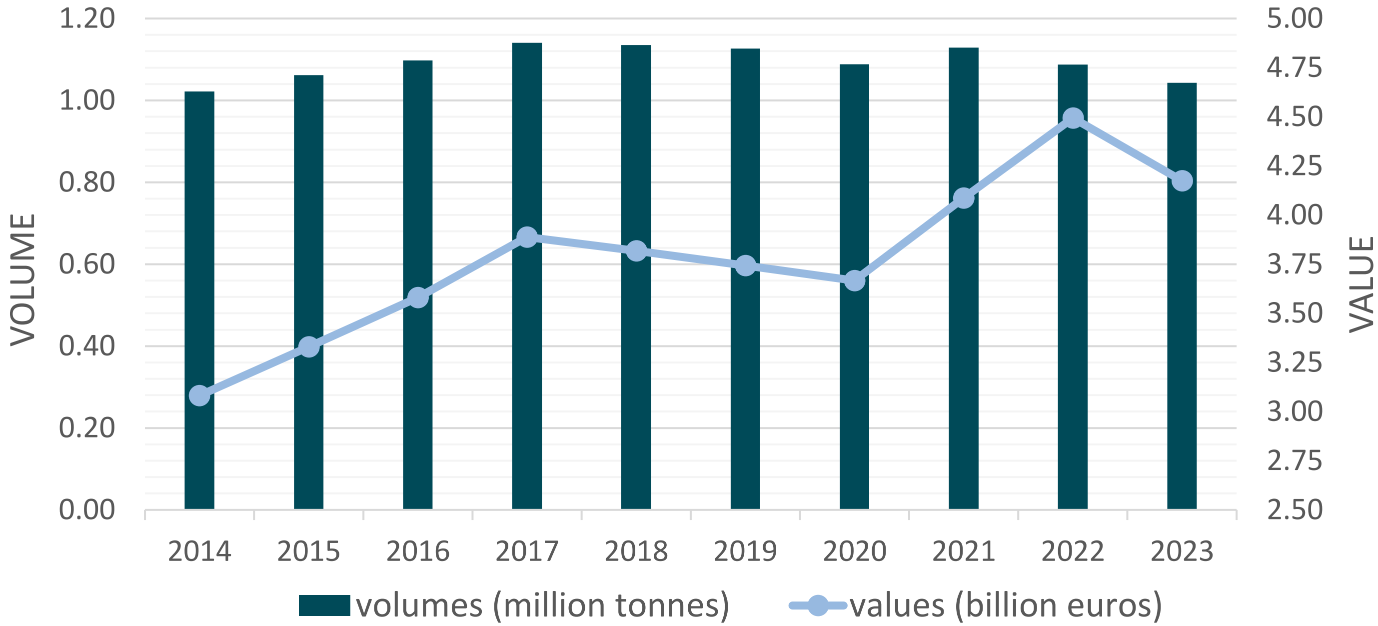


2023: 2,92 million tonnes and EUR 5,59 billion

- **EU landings fell to a decade low in volume,** continuing a downward trend since 2018.
- **Volume drops**: hake and skipjack tuna (mainly in ES), Atlantic horse mackerel (mainly in ES, DK), mackerel (mainly in NL), sardine (mainly in HR). **Herring and blue whiting** recorded increases in volume from 2022 to 2023.
- **The overall drop in value** was partly offset by a strong increase in the value of herring landings in Denmark.

Aquaculture production in the EU-27

Values are deflated by using the GDP deflator (base=2020).



2023: 1,04 million tonnes and EUR 4,76 billion

- **2023 marked the second-lowest production volume in the 2014-2023 decade,** the second-highest in value.
- **Volumes declined across all main groups**, while **values increased for all** except other marine fish.

Overview of publications for 2026*

European Commission

- ✓ EU fish market
- ✓ Blue bioeconomy report
- ✓ Study on consumption of fishery and aquaculture products in the EU
- ✓ Study on the EU tuna
- ✓ Short update of the report on caviar

Price structure analyses:

- ✓ Saithe in the EU (FR, DK, DE)
- ✓ Shrimp and prawns in the EU (PT, ES, IT)
- ✓ Carp in the EU (MS TBC)
- ✓ Octopus in the EU (PT, ES, IE, FR) or Squid in the EU (ES, FR, BE, NL)

**This service plan should be intended as a work in progress*

CASE STUDIES FOR THE MONTHLY HIGHLIGHTS

- ✓ Anchovy in the Atlantic
- ✓ Cod in the EU (PT)
- ✓ Croatian market since acceding to the EU (sardine, anchovy and hake)
- ✓ Fisheries and aquaculture in Iceland
- ✓ Fisheries and aquaculture in the Faroe Islands
- ✓ Fisheries and aquaculture in the UK
- ✓ Fishmeal and fish oil in the EU
- ✓ Fresh sardine in the EU (ES)
- ✓ Horse mackerel in the EU (ES)
- ✓ Impact of the fishing closure in bay of Biscay

- ✓ Invasive blue crab in the EU (Med)
- ✓ Monk in the EU
- ✓ Mussel production in the EU (FR and NL + *ES?*)
- ✓ Norway lobster in the EU
- ✓ Fishery and aquaculture in the UK
- ✓ Sharks in the EU
- ✓ Surimi in the EU
- ✓ The salmonid processing industry in the EU

4 other case studies to be defined (e.g. Baltic region species; The EU processing sector)

**This service plan should be intended as a work in progress*

THANK YOU FOR YOUR ATTENTION

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