

# Assessing the impact of seafood imports on EU self-sufficiency

# Agenda

- 1. Introduction to the study**
- 2. Extra-EU seafood imports**
- 3. Competitiveness in capture fisheries**
- 4. Competitiveness in aquaculture**
- 5. Innovation in EU aquaculture production**
- 6. Stimulating investment in EU aquaculture**
- 7. Policy and regulatory mechanisms**
- 8. Policy recommendations**

# Introduction to the study

# 01

# Background

- ❑ In 2023 the **EU supply of fishery and aquaculture products (FAPs)** for human consumption – including both domestic production and imports – totalled 12.38 million tonnes.
- ❑ Of this, the EU **imported** 8.48 million tonnes (**68%**), while **only producing** 3.9 million tonnes (**32%**).
- ❑ The overall **self-sufficiency rate** was **38.1% in 2023**, down from **46.1% in 2014**.

# Objective of the study

The **overall objectives** of this study are therefore to provide:

- ❑ A robust, up-to-date assessment of the **evolution, impact** and **policy implications** of **extra-EU imports of FAPs**, and
- ❑ a critical assessment of the **potential options of increasing the self-sufficiency rate** in the different market segments of EU seafood production.

# Extra-EU seafood imports

# 02

# State of play

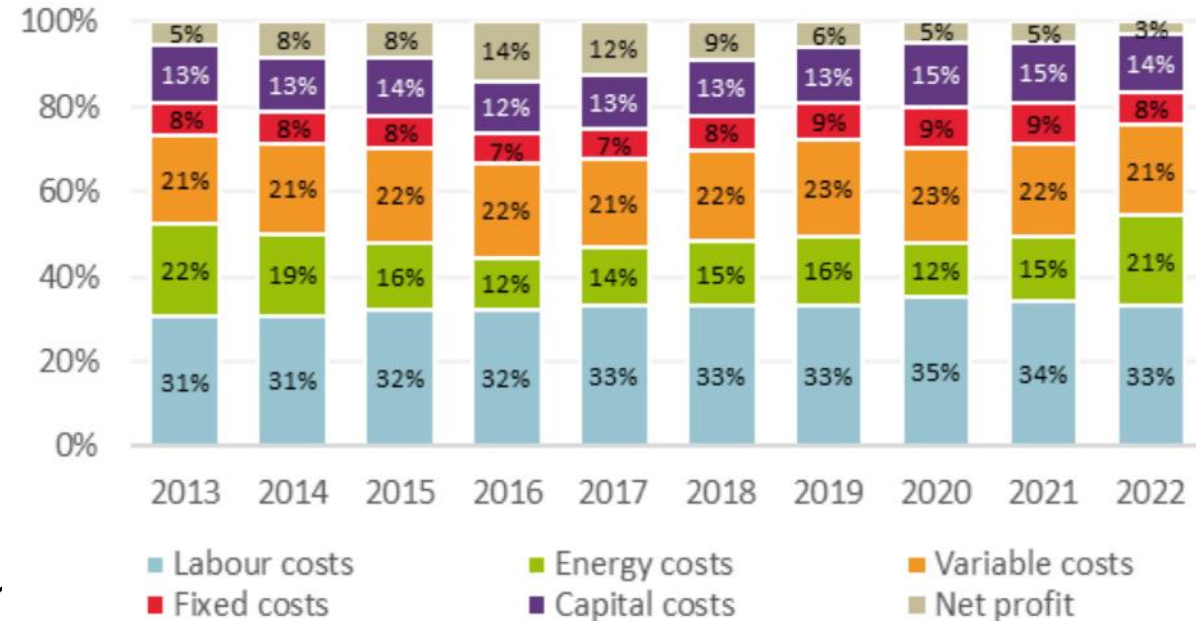
- ❑ **EU self-sufficiency continues to decline** over time and **in 2023 was 38%**.
- ❑ Assuming all production remains within the EU, the **EU domestic supply** represents **31%** of the total available supply. **After EU exports**, EU domestic production covers **only 14% of total EU consumption**.
- ❑ Groundfish account for 21% of total EU apparent consumption. But **only 1 in 5 groundfish come from the EU production**. EU landings of these species are under quota management and **decreased by 43%** between 2020 and 2023.
- ❑ **Inflation** and **raw material supply constraints** due to Ukraine war and Brexit have led to reduced EU seafood consumption and increased reliance on cheaper non-EU imports.

# Competitiveness in capture fisheries

# 03

## 03 Competitiveness in capture fisheries

- ❑ **Competitiveness is strongly impacted by production costs**, which for fishing are mainly wages (33%), fuel (21%) and other variable costs (21%).
- ❑ **Wages in some of the main non-EU countries** supplying seafood to the EU market **are significantly lower** than those of most EU producers.
- ❑ **Several key non-EU supplier countries also have lower energy prices**, creating a comparative benefit for non-EU processing companies.
- ❑ Despite EU Member States subsidising the fuel costs of fishing fleets, **fuel prices are still higher than of those of some non-EU fishery products suppliers**.
- ❑ **Competitiveness** is not only impacted by the unit cost of production inputs, but also the **productivity and efficiency of production**.



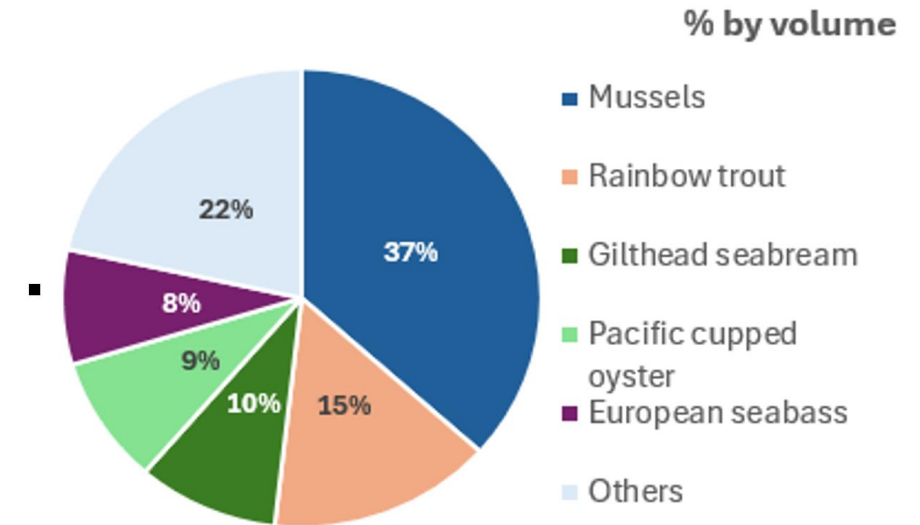
# Competitiveness in aquaculture

04

## 04 Competitiveness in aquaculture

- ❑ European aquaculture production of around 1 million tonnes.
- ❑ The **competitiveness of EU aquaculture** has been challenged by a combination of rising costs, environmental challenges and imports from third countries, such as Türkiye and Chile.
- ❑ **Turkish seabass/seabream farms** have extensive vertical integration and a lower cost base than Greece. Output prices are similar, but Greece can leverage its processing capability and EU access to penetrate niche and premium markets.
- ❑ **The cost of mussel production in Galicia** is around EUR 0.74 per kg vs. EUR 0.69 per kg in Chile, reflecting the latter's lower wage and energy costs. Chile's main advantage is its willingness to adopt more modern farming techniques than Galicia's traditional *batea* rafts.

■ **Figure: Main species produced in the EU-27 aquaculture, 2022** |



Source: FAO FishStatJ database (FAO, 2025) |

# Innovation in EU aquaculture production

# 05

# Innovation in EU aquaculture production

- ❑ With finite capture fisheries resources, **increasing aquaculture production is the main avenue to growing the FAPs supply.**
- ❑ Innovation is well supported through both Horizon and EMFAF funding. Despite this, **uptake of new and innovative aquaculture practices is slow**, and upscaling limited.
- ❑ **Moving bivalve shellfish production offshore:** traditional extensive bivalve aquaculture has limited option for growth, but moving offshore has challenges. Research is needed help automate production, adapt to changing conditions and allow real-time remote monitoring.
- ❑ **Upscaling and diversifying EU aquaculture thorough RAS:** RAS can be used to reduce freshwater use, control environmental impacts and diversify the species grown. There are technical challenges, but these can be overcome through innovation and adaptive research.

# Stimulating investment in EU aquaculture

# 06

# Stimulating investment in EU aquaculture

- ❑ The EU aquaculture sector has strong potential but **requires more coordinated and targeted investment to reach scale.**
- ❑ **Public funding should be better aligned across the EU.** A coordinated, mission-oriented approach would channel capital towards sustainability and competitiveness.
- ❑ **Private capital is crucial to scale-up aquaculture innovation.** The EU should support blended and de-risking mechanisms; facilitate bond, equity, and revenue-based financing for sustainable projects; offer tax incentives; and improve market access and predictability.
- ❑ By aligning **public** and **private capital** around **innovation, resilience, and sustainability**, the EU can make aquaculture a key pillar of the Blue Economy.

# Policy and regulatory mechanisms

# 07

# Policy and regulatory mechanisms

- ❑ The EU has identified that the key risks to it remaining competitive require it to **close the innovation gap, decarbonise the economy and reduce dependencies**.
- ❑ There are several FAP-specific policies and regulations that apply **environmental and social standards** to EU production. The competitiveness of EU production is negatively impacted by the **absence of reciprocal requirements for imports** or the ability to differentiate these standards in the market.
- ❑ 2026 sees the **introduction of sustainability criteria** associated with **autonomous tariff quotas (ATQs)** to ensure minimum environmental and social standards. But to date non-EU countries are **not required to meet the same high standards** as EU seafood production.

# Policy recommendations

# 08

# Policy recommendations

1. Strengthen **direct support** & introduce innovative funding mechanisms for green and digital transition.
2. Develop a **fisheries-specific technology policy** to introduce efficiency gains.
3. Increase emphasis on **growing and diversifying EU aquaculture**.
4. **Strategic realignment of EU aquaculture** to adapt to, and benefit from, **climate change**.
5. Develop **coexistence** between aquaculture, local communities and other marine economic activities.
6. Develop a coordinated, focused approach to **encourage investment in aquaculture**, framing aquaculture within the Green Deal and Blue Economy.
7. Ensure **seafood imports** are consistent with the EU's commitment to **sustainable trade agreements**
8. Expand marketing standards and consumer labelling to include **sustainability criteria**.