



# Study on the consumption of FAPs in the EU

Market Advisory Council – Working Group 3: EU control and sanitary issues, consumer rules – 16/09/2026



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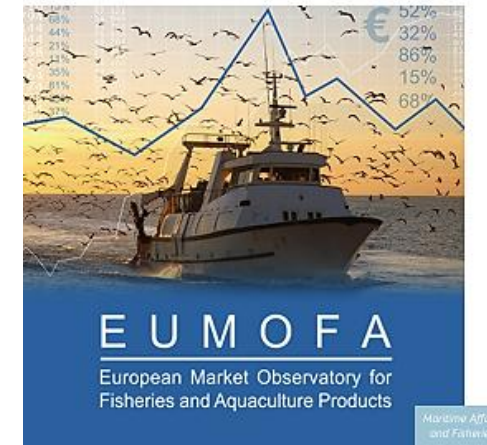
# Introduction

- The European market observatory for fisheries and aquaculture products (**EUMOFA**) is an EU initiative (DG MARE) [www.eumofa.eu](http://www.eumofa.eu)
- The study is available on EUMOFA website:
  - The report
  - A separate annex, including case studies in 6 Member States: ES, FR, IT, PL, NL, AT



## CASE STUDY

## CONSUMPTION OF FISHERY AND AQUACULTURE PRODUCTS IN THE EU



JULY 2025

# Context and objectives

## Context

- Decline of the EU FAP over the past decade
- Trends differ substantially across Member States, species and product forms, suggesting different **changing consumer behaviour**

## Study objectives

1. Analyse consumption trends
2. Understand changes in consumption behaviour
3. Identify key drivers shaping consumption
4. Identify challenges affecting FAP consumption

# Methodology and limitations

## Methodology

- **Consumption and Market data**
- **Eurobarometer survey**: 4 waves of surveys: 2016, 2018, 2021 and 2024
- **Literature review**
- **Six case studies** (consultation of stakeholders), covering different market profiles in terms of consumption levels and trends

## Limitations/Considerations

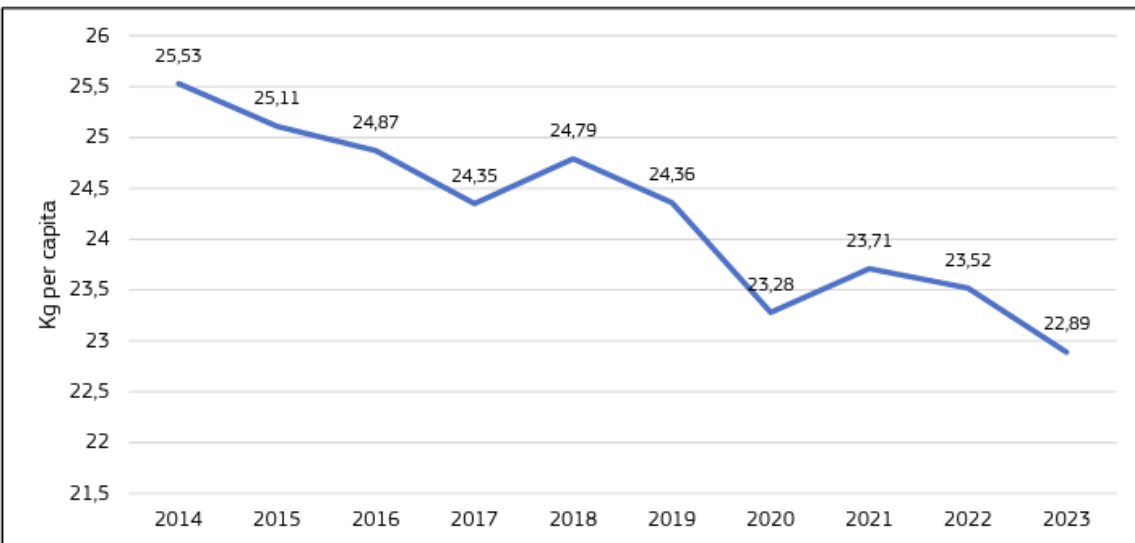
- **Limited availability and comparability of consumption data at EU level**
- **Consumption is inherently multifactorial**: the literature shows that food choices result from the interaction of **economic, behavioural, cultural, product-related and market factors**

## 2. Main findings

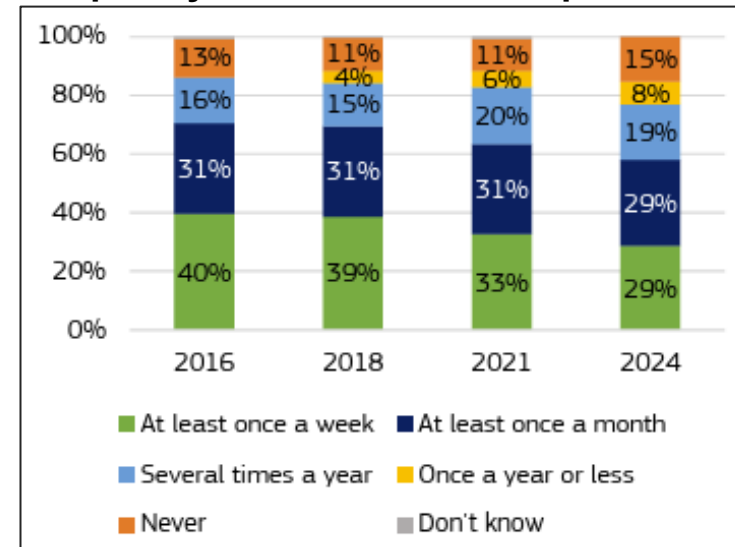
# A decline in consumption driven by changing habits

- **Decline of consumption of FAPs** from 25.5 to 22.9 kg/capita (LWE).
- Shift from regular consumption patterns towards more occasional patterns.
- Strong shift among younger consumers (weak cooking skills, low familiarity with fish, different expectations, etc.)

Per capita apparent consumption of FAPs (LWE)



Frequency of at-home consumption of FAPs



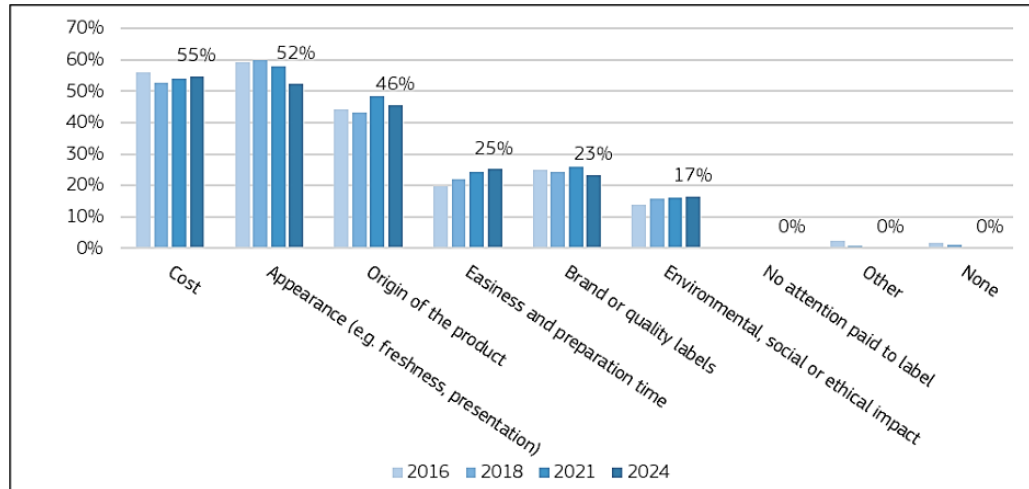
# Convenience, a key driver for consumption but a vector of standardisation

- Growing demand for **easy-to-prepare, portioned, prepacked, ready-to-cook and ready-to-eat products**.
- Convenience responds partly to declining familiarity and cooking skills, particularly among younger consumers.
- It favours products combining **ease of preparation + year-round availability + predictable supply (e.g. salmon, tuna and shrimps)**
- Convenience may also reduce consumers' familiarity with the FAPs, particularly in Southern Mediterranean Countries.

# Price is a key but insufficient driver of FAP consumption

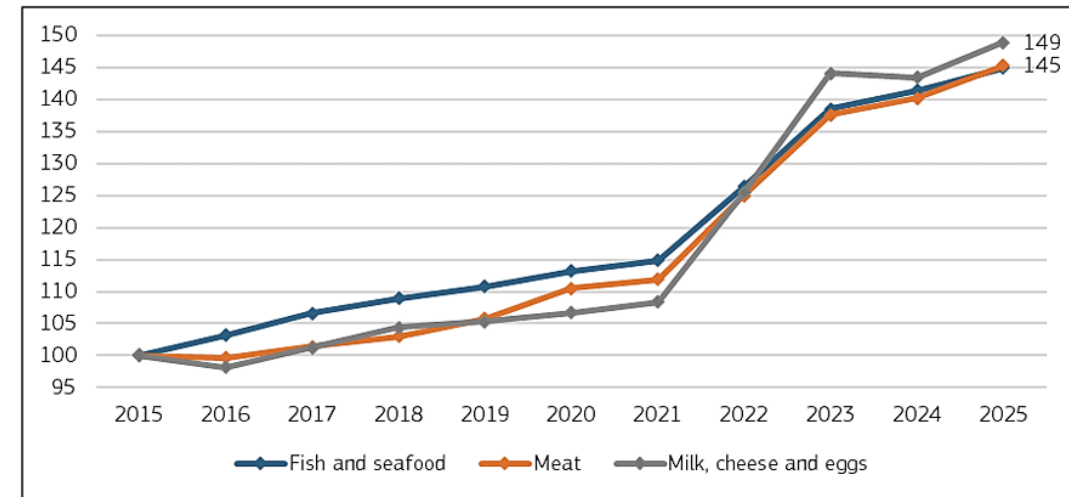
55% of EU consumers cited price as a key purchasing consideration in 2024

Most important aspects when buying FAPs (Eurobarometer)



Fish price is not an exception

Consumer price index evolution for different animal proteins (Eurostat)



Price alone can not explain choices

Relatively expensive products such as **salmon** continue to perform strongly (convenience, availability, image, predictable supply, perceived value)

# Polarisation of consumers and fragmentation of the demand

| Price-sensitive consumers                             | Higher-income consumers                   | Younger consumers                                        |
|-------------------------------------------------------|-------------------------------------------|----------------------------------------------------------|
| Shift towards more affordable options within the FAPs | Maintain consumption more easily          | Consumer less frequently                                 |
| Seek promotions / affordable formats                  | Especially convenient or premium products | Lower familiarity with FAPs and lower preparation skills |
| May substitute towards cheaper proteins*              | Associated with specific occasions        | Higher convenience expectations                          |

\*) Stakeholder evidence but less supported by literature

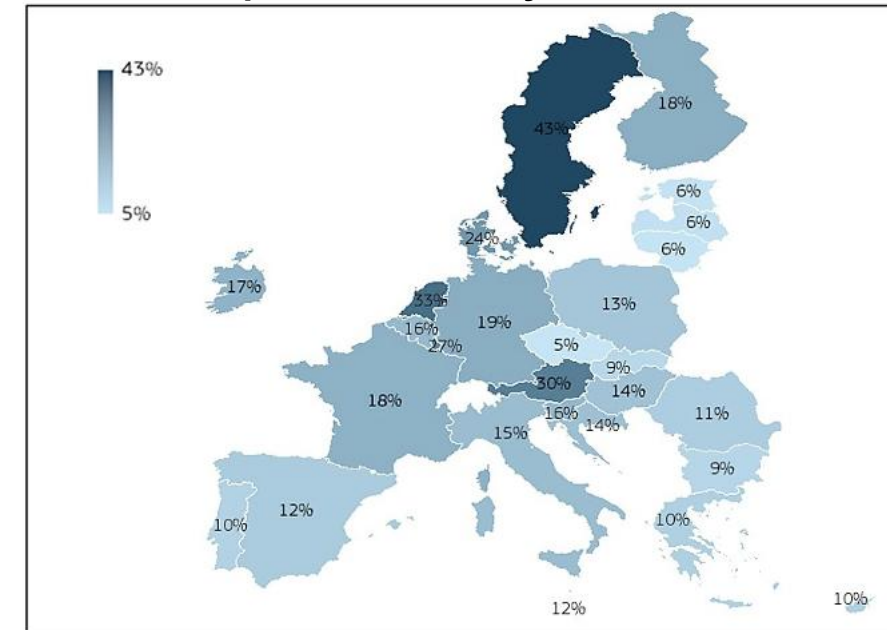
# Availability and retail structure shape the consumption of FAPs



# Sustainability is gaining attention, but remains a secondary purchasing criterion

- **Growing attention**
  - Environmental, social and ethical considerations are gaining importance.
  - Younger consumers tend to report greater attention to these dimensions.
  - Strong differences between Member States
- **But limited influence on final choices overall**
  - Price, appearance and convenience remain stronger purchasing drivers.
  - Sustainability appears more influential in B2B relationships
  - Complex information may overwhelm consumers.

Importance of environmental, social and ethical aspects of FAPs by MS in 2024



# Conclusion

- The decline in FAP consumption **cannot be attributed to one single driver.**
- There are broader changes in consumption habits, lifestyles and consumer profiles, interacting with price pressures and with changes in supply and retail structures.
- The issue is not simply how much fish EU consumers consume, but increasingly **which products they consume, how often, in what form, and under what conditions fish continues to fit into their everyday lives.**

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# Thank you



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