European Commission

EUMOFA

European Market Observatory for fisheries and aquaculture products

The EU in the world

EU market supply

Consumption

Trade

EU landings

Aquaculture production

The EU fish market

Edition 2018

European Commission

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 consumed,*
- *by whom and*
- *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, Member State, partner country. Data are updated daily.

www.eumofa.eu

World production in 2016

(1.000 tonnes)

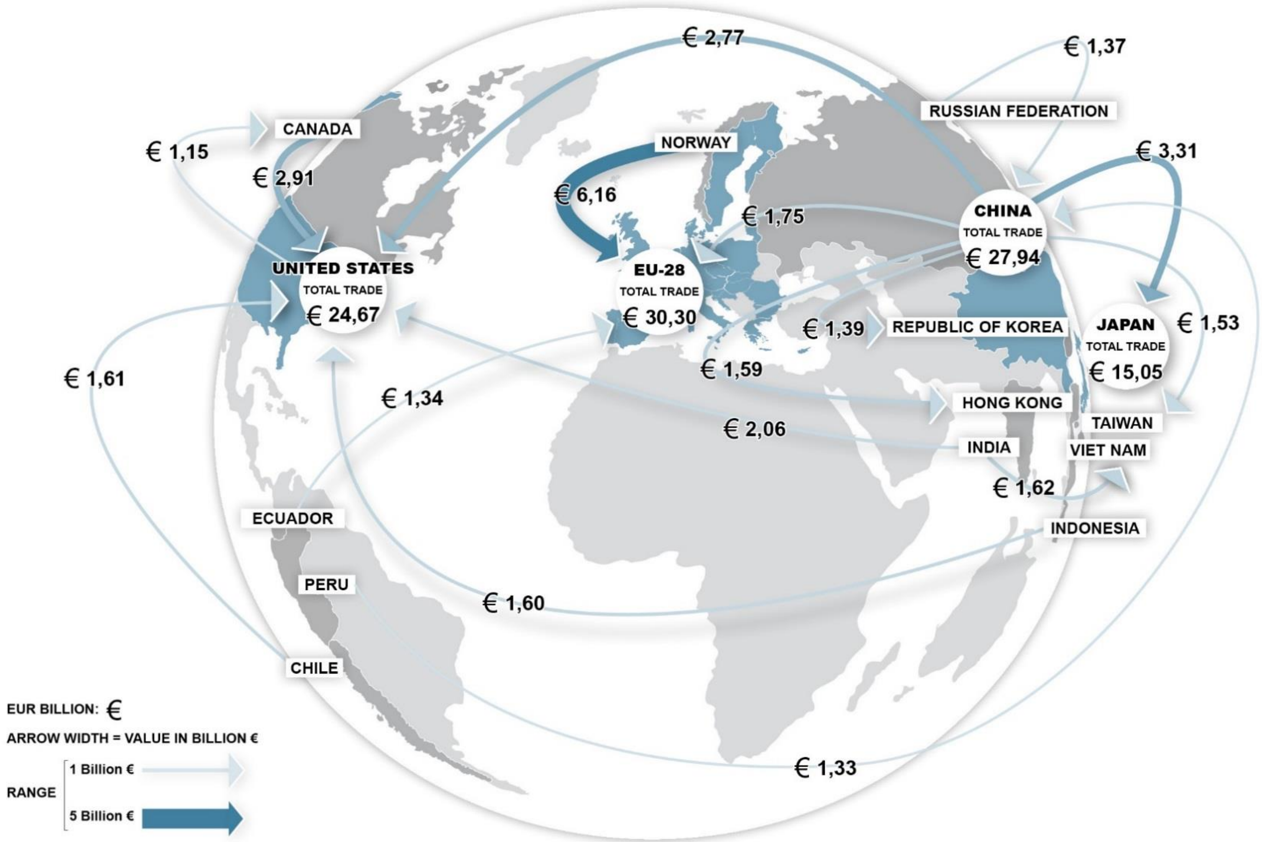
Country	Fishery	Aquaculture	Total production	% total
China	17.807	63.722	81.529	41%
Indonesia	6.584	16.616	23.200	12%
India	5.082	5.703	10.785	5%
Viet Nam	2.786	3.635	6.421	3%
EU - 28	5.014	1.290	6.304	3%
USA	4.931	444	5.375	3%
Russian Federation	4.773	174	4.947	2%
Japan	3.275	1.068	4.343	2%
Philippines	2.028	2.201	4.229	2%
Peru	3.812	100	3.912	2%
Bangladesh	1.675	2.204	3.879	2%
Norway	2.203	1.326	3.529	2%
Republic of Korea	1.396	1.859	3.255	2%
Myanmar	2.072	1.018	3.090	2%
Chile	1.829	1.050	2.879	1%
Thailand	1.531	963	2.494	1%
Others	23.347	6.834	30.181	15%
Total	90.145	110.207	200.352	100%

[1] Eurostat does not include inland waters.

Globally, aquaculture production exceeds the share of fisheries on total production, thanks to farmed production in Asian countries.

By contrast, **the EU accounts only for 1,2% of the global aquaculture production**. This figure represents **about 20% of its own domestic production**.

Main trade flows in 2017



The **EU is the top trader** of fishery and aquaculture products in the world.
Salmon, cod, shrimps and tuna are the most imported products. On the other hand, the EU exports in particular salmon, tuna, mackerel and fishmeal.

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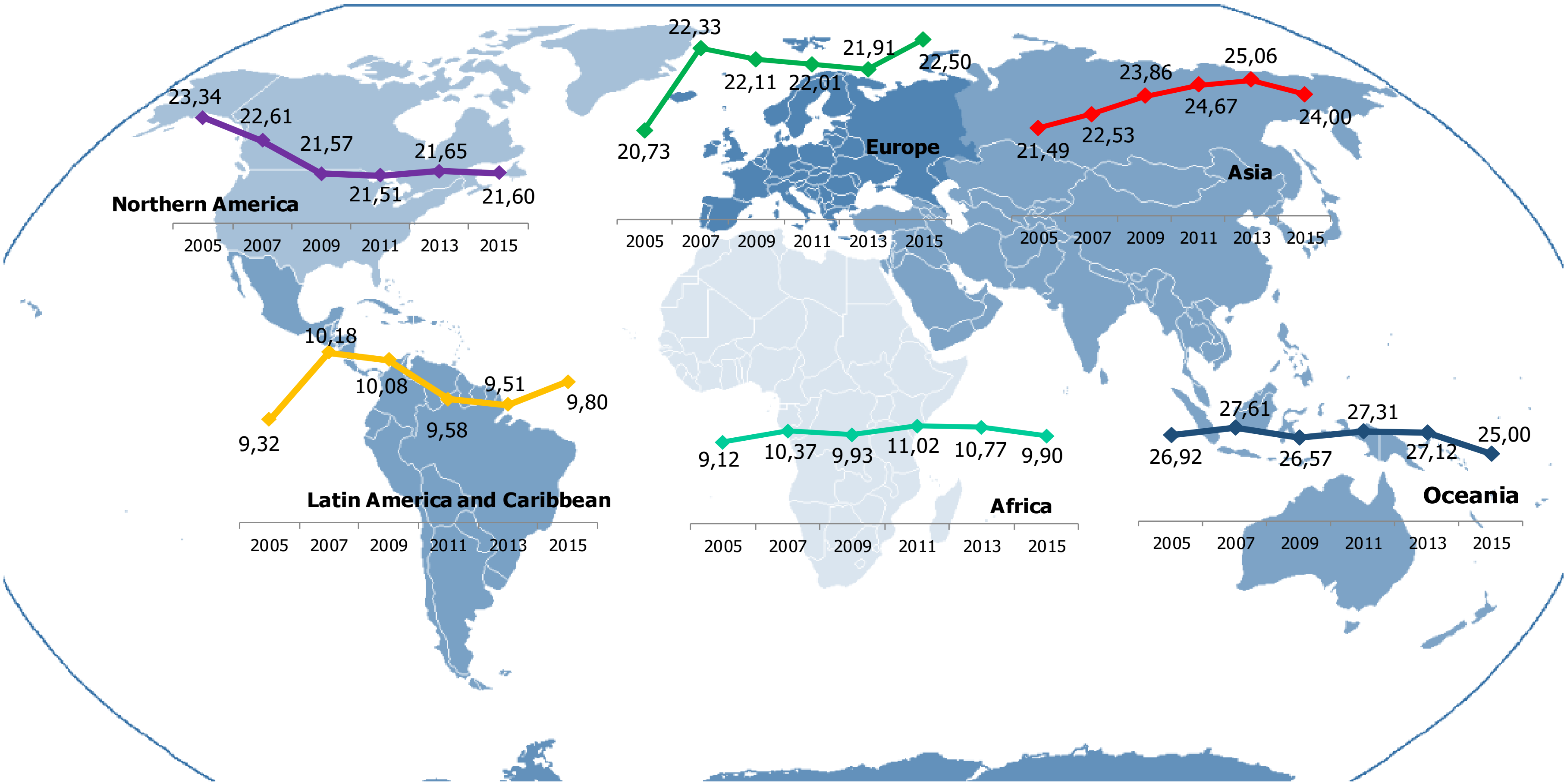
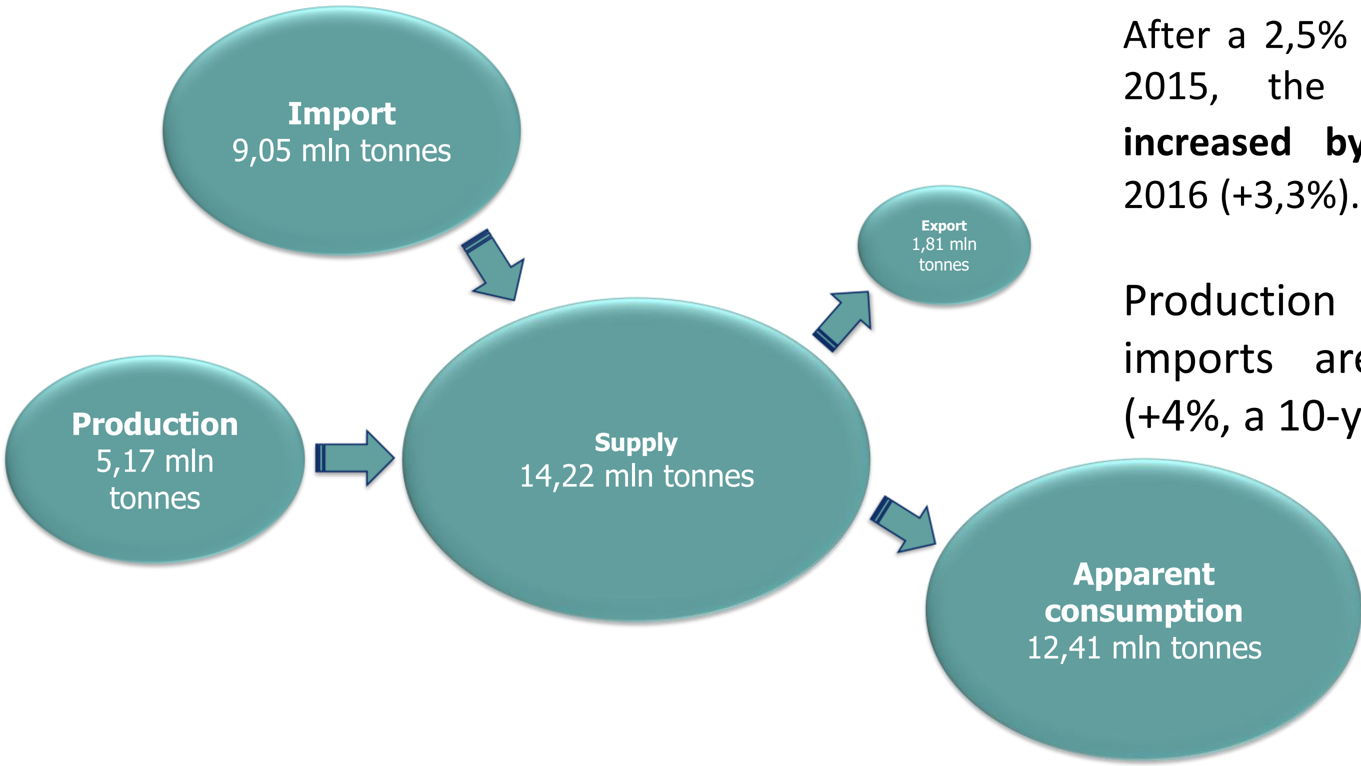
World consumption of seafood

(kg per capita)



Supply balance in 2016



After a 2,5% decrease from 2014 to 2015, the **EU seafood supply increased by** 450.000 **tonnes** in 2016 (+3,3%).

Production increased, but imports are the main driver (+4%, a 10-year peak).

Data provided in live weight equivalent deriving from the EUMOFA's Supply balance sheet.

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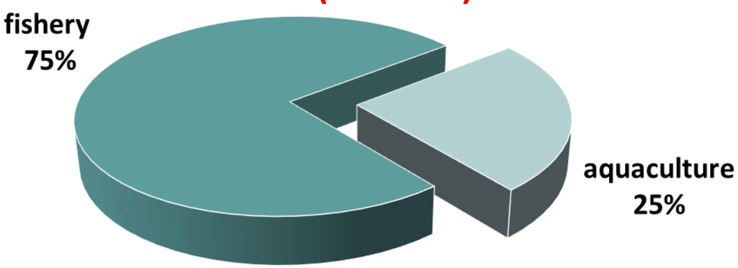
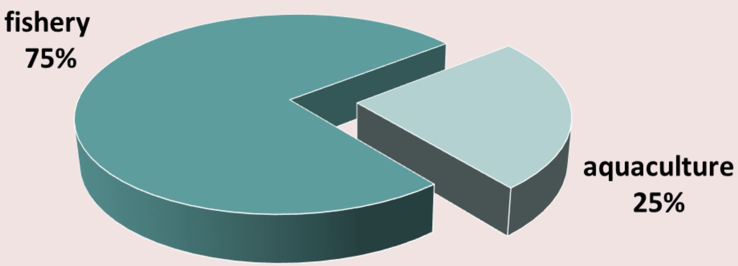
Production (food use)



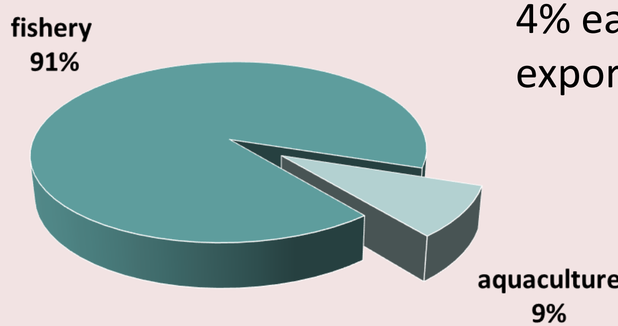
In 2016, catches increased by 2%, marking a recovery from 2015's 9% decrease. Aquaculture production increased as well by 2%, continuing the upward trend started in 2014.

Trade

Import

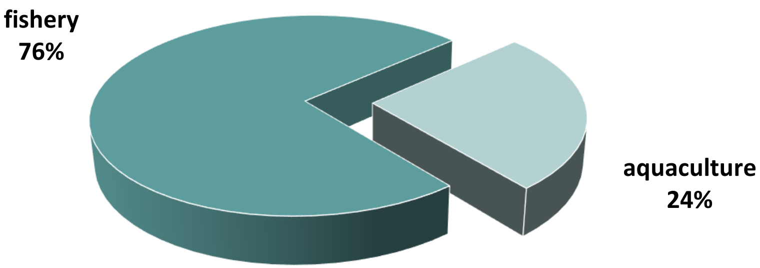


Export



In 2016, imports of both farmed and wild products increased by 4% each compared to 2015 while exports increased by 1%.

Apparent consumption



Consumption in the EU market is dominated by wild products, representing three-fourths of the total.
In 2016, 18,61 kg per capita of wild fish were consumed, while farmed products totalled 5,72 kg per capita.

Data provided in live weight equivalent deriving from the EUMOFA's Supply balance sheet

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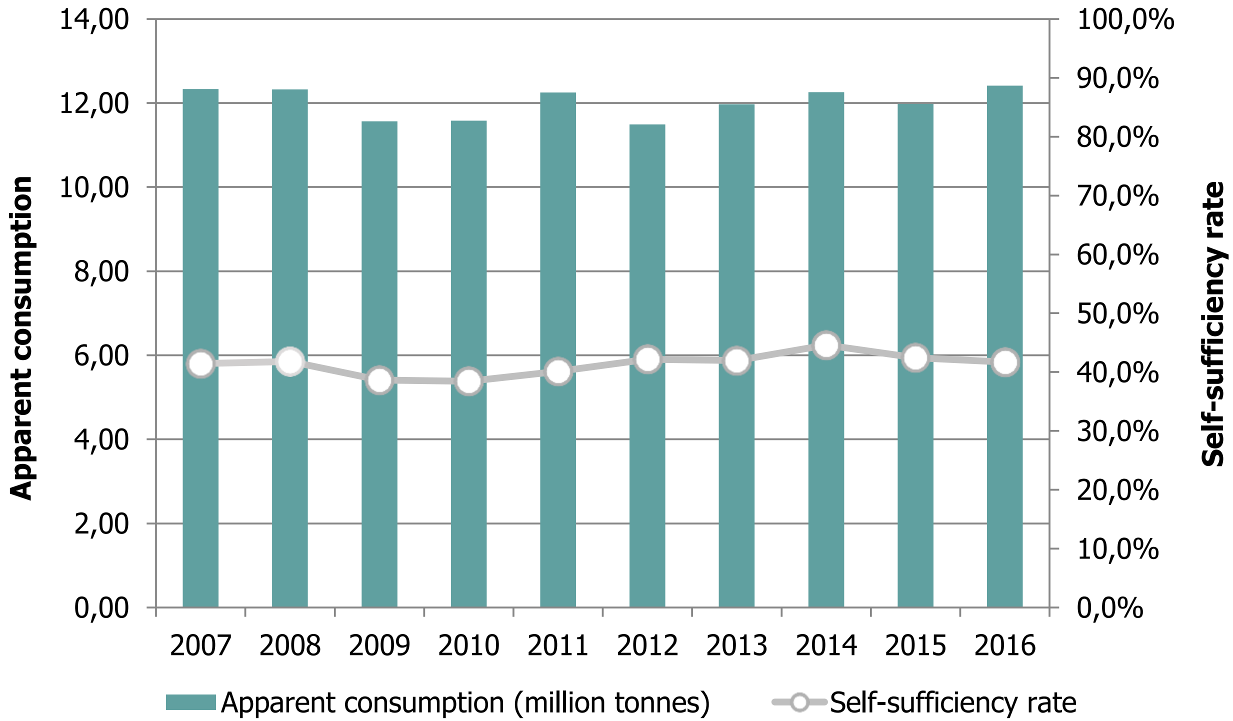
EU market growth and self-sufficiency rates



The EU self-sufficiency rate, which is the ratio of domestic supply over domestic demand, **decreased to 41,7% in 2016** compared to 2015.
This decrease was mainly due to a substantial increase of imports which was much more intense than that registered for farmed and wild EU production.

Data provided in live weight equivalent deriving from the EUMOFA's Supply balance sheet

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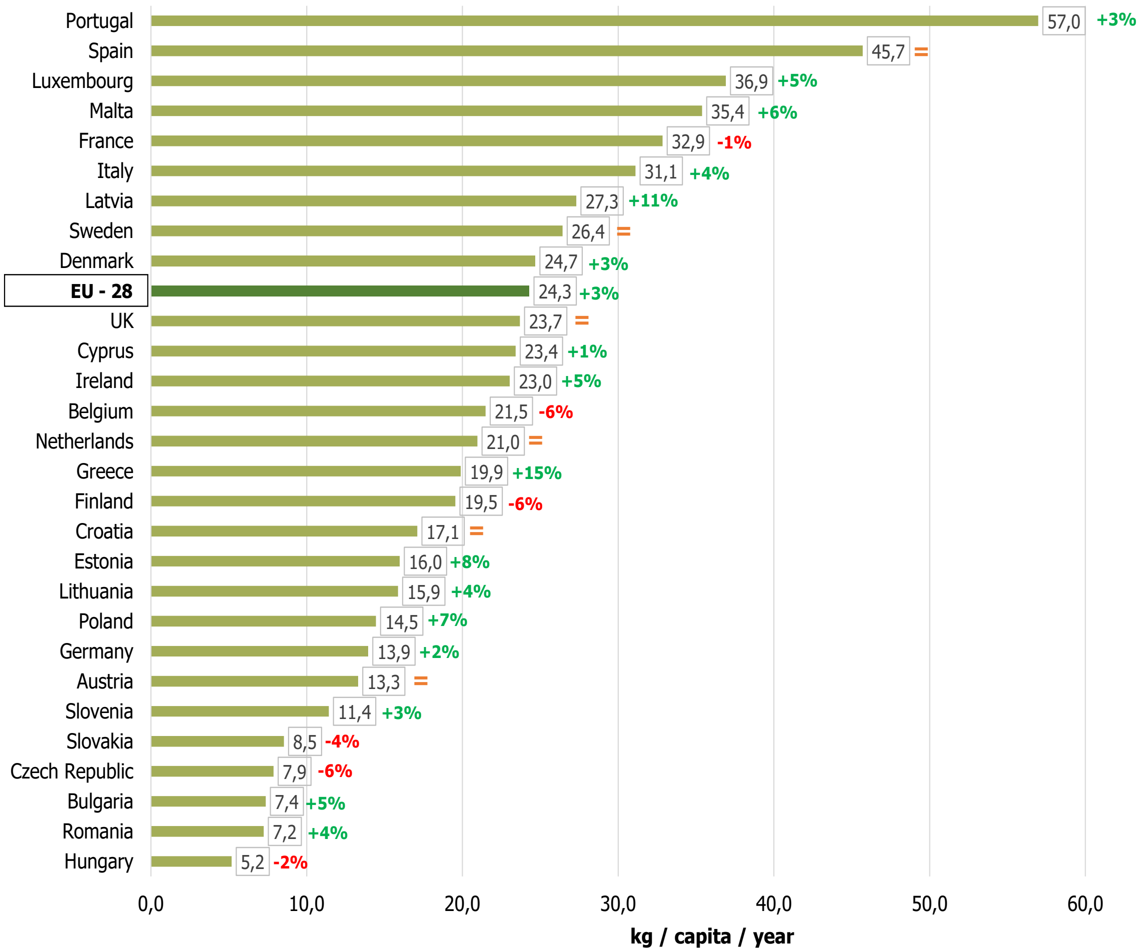
Per-capita consumption of fish and seafood per Member State

(kg per capita in 2016 and % variation 2016/2015)



Portugal has continued to have the highest per capita consumption of fishery and aquaculture products since 2001, although it contracted slightly, from 57,5 kg in 2001 to 57 kg in 2016.

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Apparent consumption of most important species

(2016)

Products	Per capita (kg)	% wild	% farmed
Tuna	2,78	99%	1%
Cod	2,33	100%	0%
Salmon	2,19	5%	95%
Alaska pollock	1,59	100%	0%
Shrimps	1,56	62%	38%
Mussel	1,27	20%	80%
Herring	1,23	100%	0%
Hake	0,96	100%	0%
Squid	0,72	100%	0%
Sardine	0,69	100%	0%
Mackerel	0,58	100%	0%
Surimi	0,58	100%	0%
Freshwater catfish (including pangasius)	0,50	1%	99%
Trout	0,42	1%	99%
Scallop	0,35	84%	16%
Others	6,59	84%	16%
Total	24,33	76%	24%

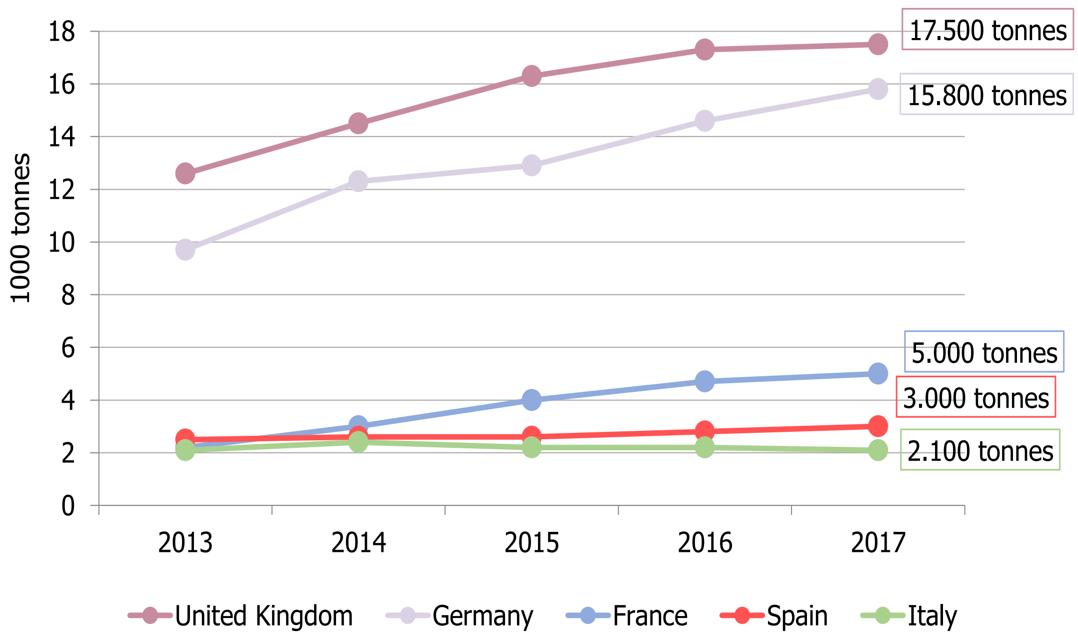
Tuna (mostly canned) remained the most consumed species in the EU

Tuna, cod and salmon accounted for 30% of total consumption.

Data provided in live weight equivalent deriving from the EUMOFA's Supply balance sheet

Organic fish consumption

(1.000 tonnes)



Since 2013, the **consumption of organic fish and seafood** products has been constantly increased by 49%, registering almost **45.000 tonnes in 2016**.

Of the five most relevant countries, **only Italy** shows a relatively stable level of consumption.

EU quality schemes in the seafood sector

(2018)

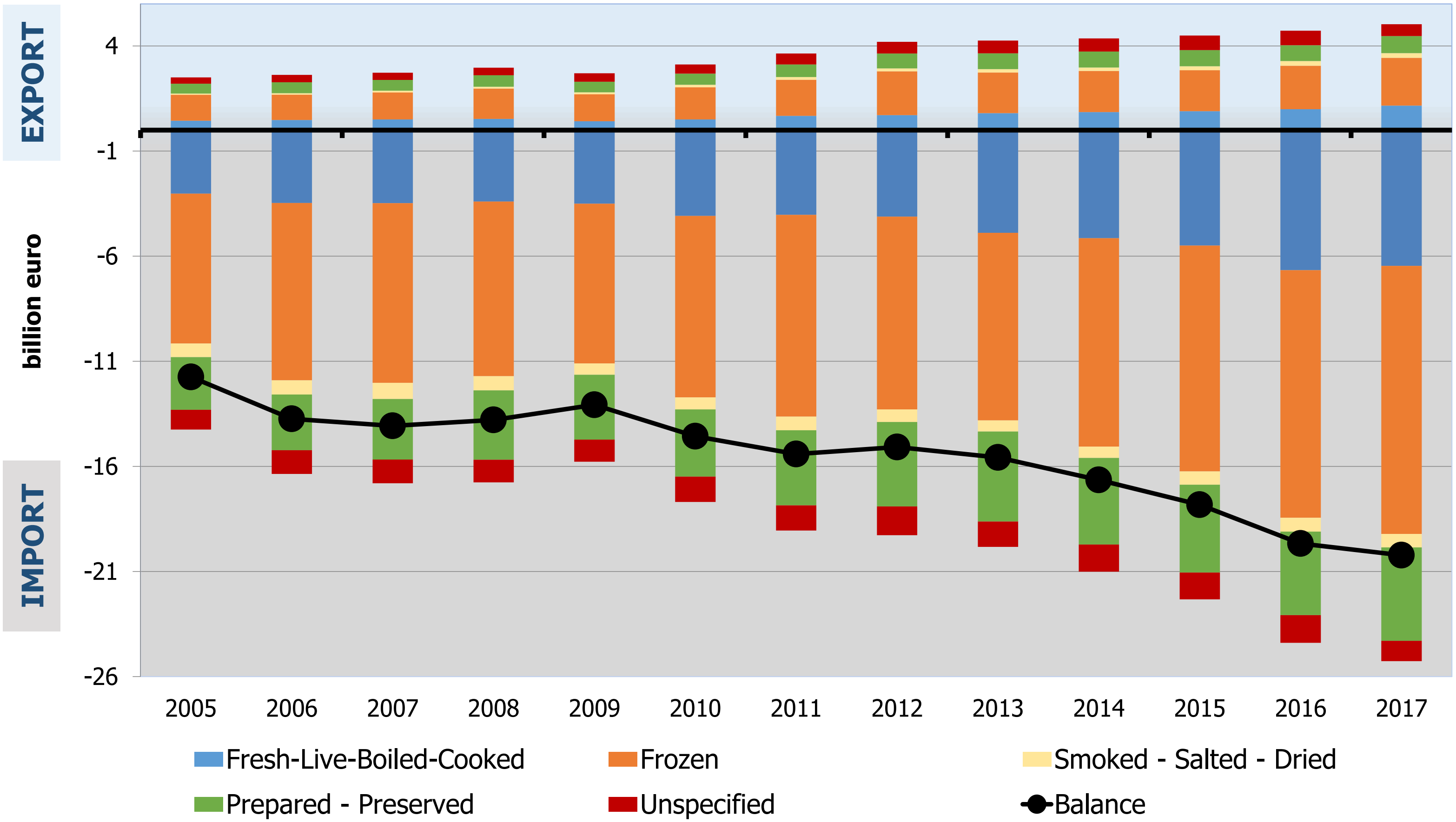
	Unprocessed	Processed	Unprocessed/ Processed	Total	% of total
Fishery	8	16	5	29	57%
Aquaculture	15	1	5	21	41%
Fishery / Aquaculture	0	1	0	1	2%
Total	23	18	10	51	100%
% Total	45%	35%	20%	100%	

51 products are registered with EU quality schemes in the seafood sector.

Two-thirds of the products (34) are PGIs, 14 are PDOs, and 3 are TSGs.

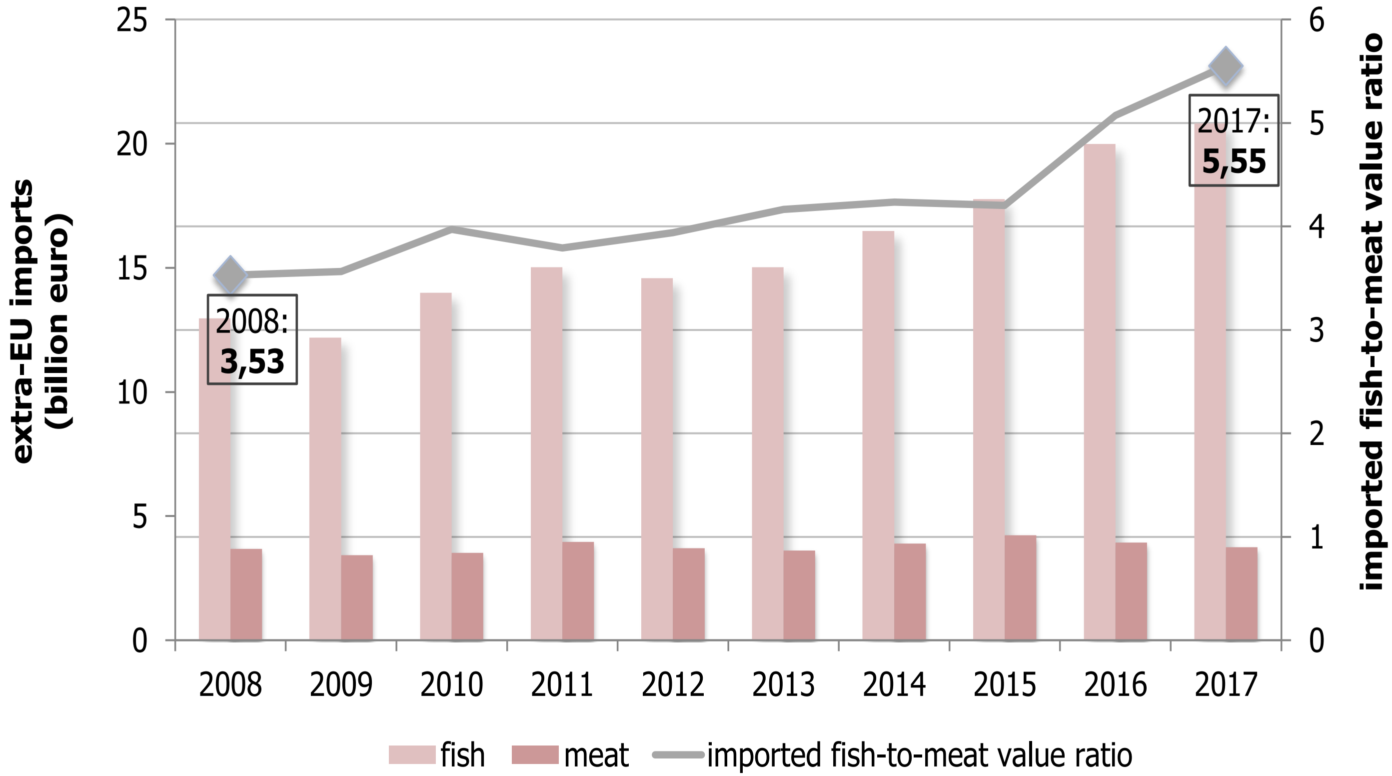
29 are fishery products (19 different species), 21 are aquaculture products (mainly carp, mussel, salmon and oyster) and one product (processed) may use fishery or aquaculture product (PGI “London Cure Smoked Salmon”).

Structure of extra-EU trade of fishery and aquaculture products



The EU trade balance deficit of FAPs **has been rising since 2013**. Despite exports reaching a 13-year value peak in 2017, the deficit also reached a negative peak. Compared with 2016, the deficit increased EUR 558 million or 3% in 2017, reaching a total of EUR 20,2 billion.

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



In 2017, fish represented **18% of the overall EUR 143 bln worth of food products imported** by the EU.

The EU imported **more than 5 times more fish than meat** in 2017 in value.

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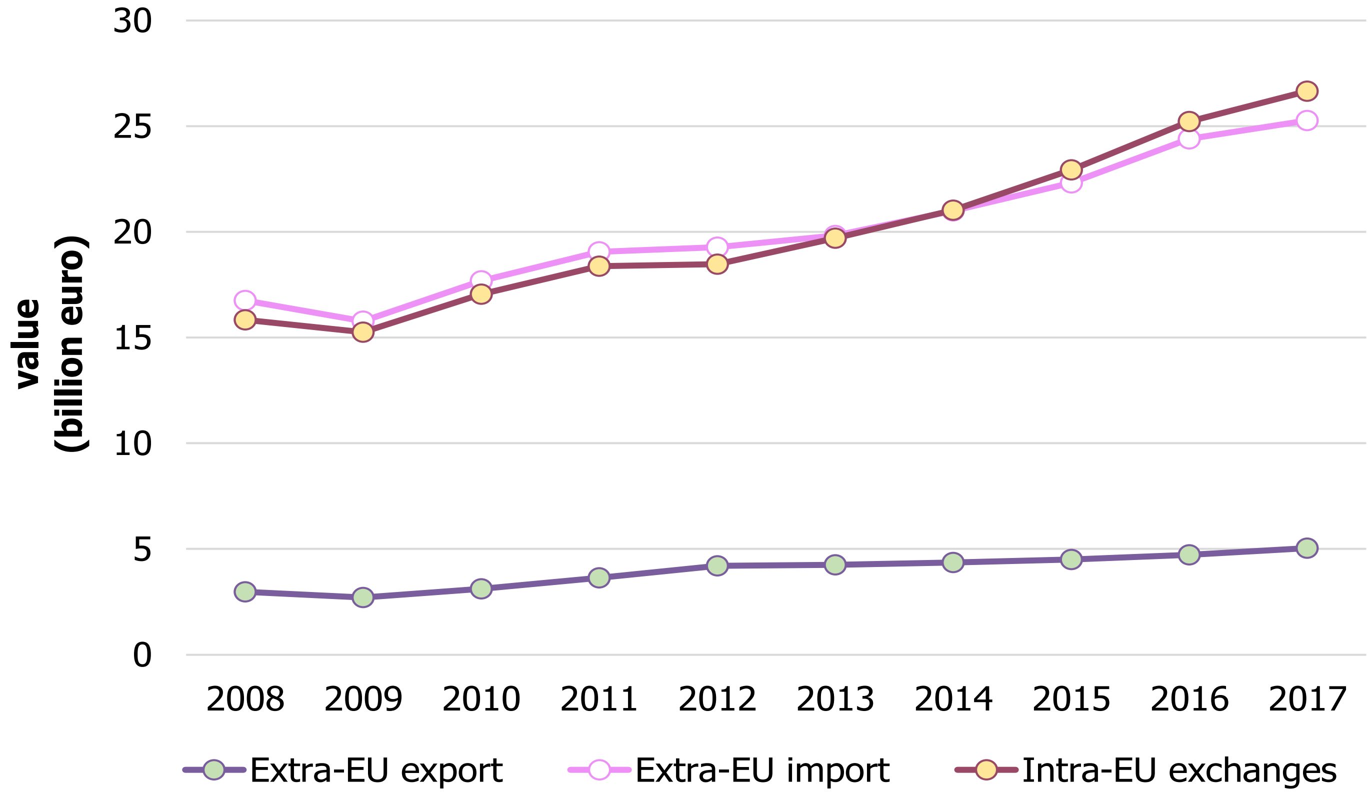
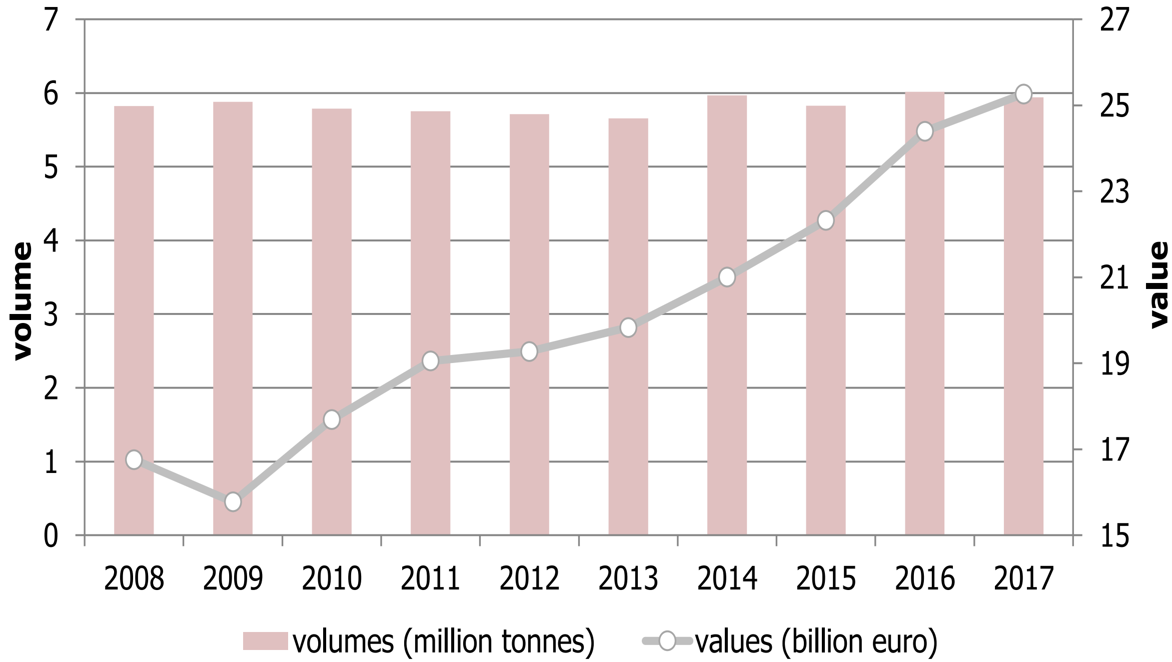
EU trade flows of fisheries and aquaculture products



EU trade, which encompasses trade flows with extra-EU countries and exchanges between Member States, has been **increasing since 2010 with an average annual growth rate of 6%**. In **2017**, the total value of trade flows amounted to **EUR 57 bln** (+ EUR 2,6 bln from 2016).

Extra-EU imports of fisheries and aquaculture products

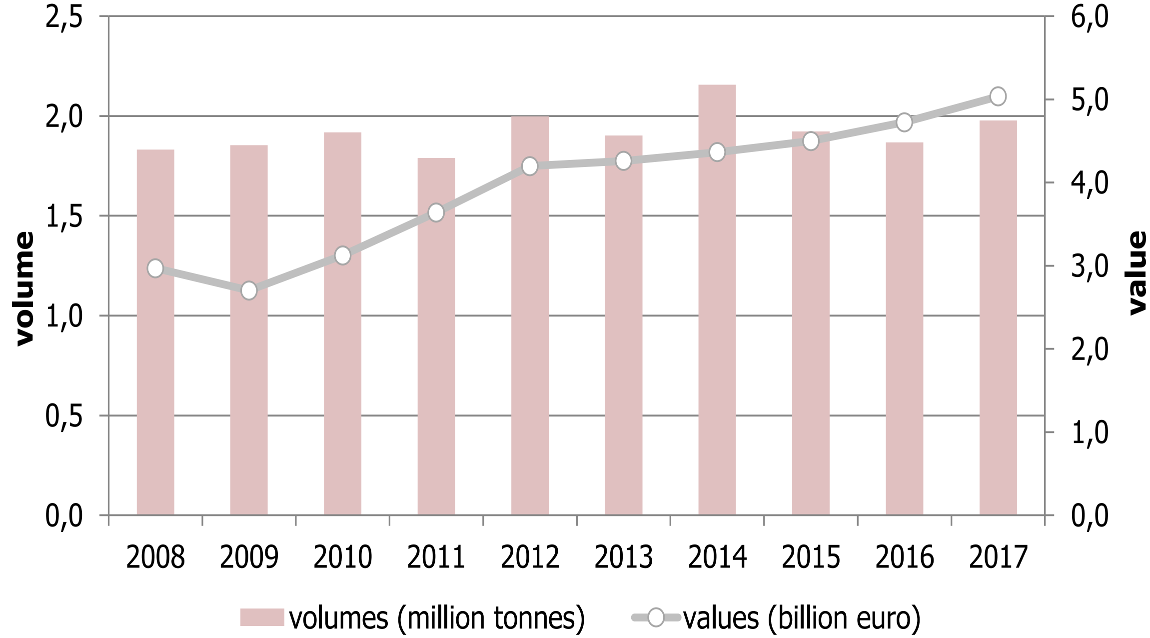


In 2017, extra-EU imports of FAPs declined a slight 1% from the peak reached the previous year and totalled 5,9 million tonnes. However, they were 106.000 tonnes above their 10-year average.

The **3 main importing countries** are **Sweden, Denmark** and **Spain**.

More than one quarter of EU imports originates from Norway, followed at distance by China.

Extra-EU exports of fisheries and aquaculture products



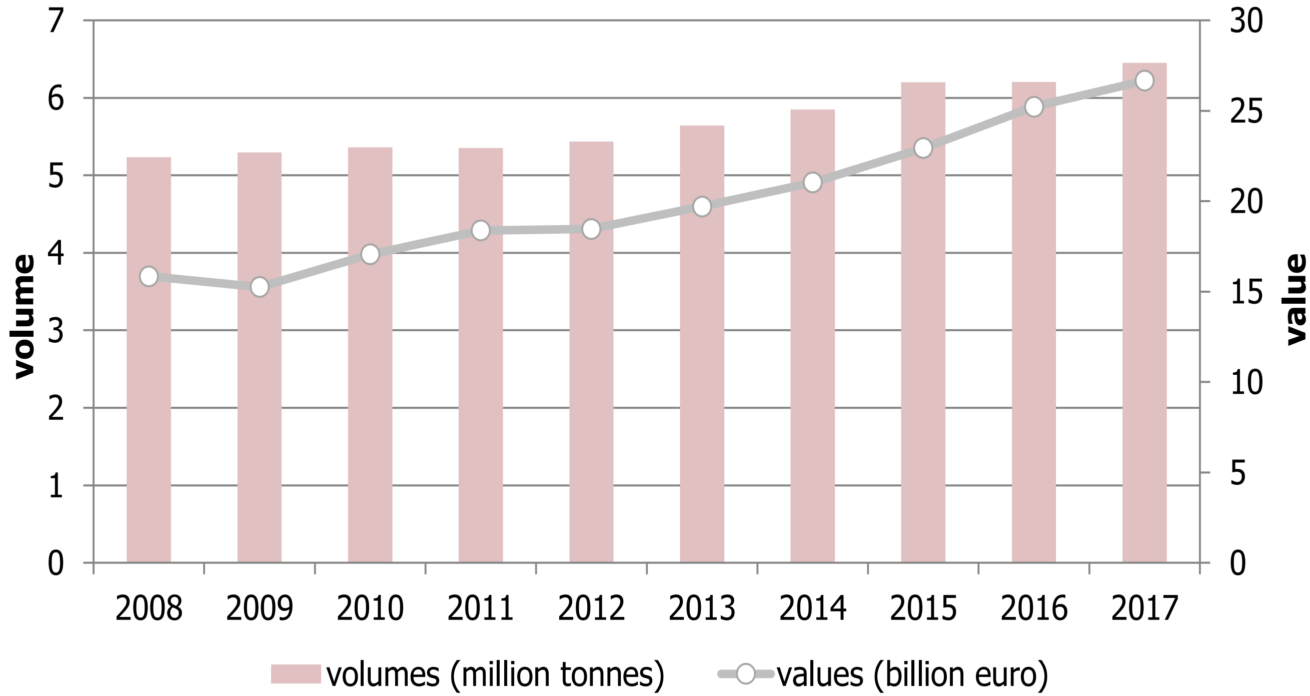
In 2017, the total **value** of fisheries and aquaculture products exported by the EU to third countries reached a 10-year peak at over EUR 5 billion.

In terms of **volume**, a recovery was observed with a 6% grow over 2016 (but still 178.190 tonnes less than the 10-year peak of in 2014).

Salmon remains **the most valued** "main commercial species" exported by the EU. Exports grew by 11% over 1 year and 64% over 5 years.

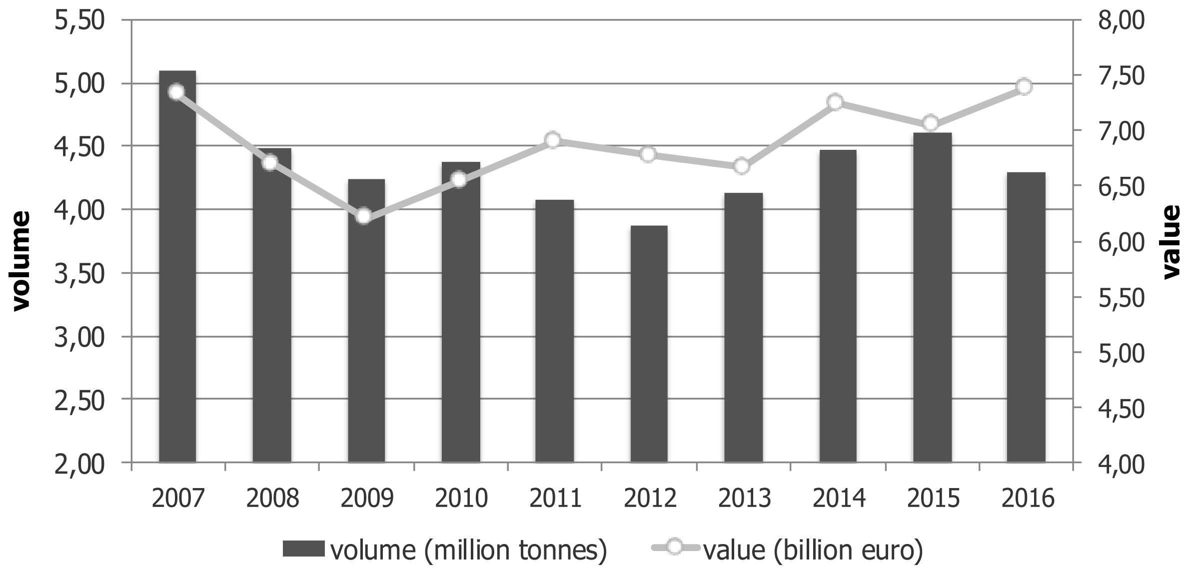
EU exports are mainly destined to **Nigeria and Norway** in volumes and to the **US and China markets** in value.

Intra-EU trade of fisheries and aquaculture products



Almost **half of fish products traded** consists of exchanges between Member States. Intra-EU trade has been growing since 2009, at average annual growth rates of 3% in volume and 7% in value. In 2017, they reached 6,5 million tonnes and EUR 26,7 billion. **All MCS are exchanged within the EU**. After salmonids, groundfish are the second most valued commodity group traded, with cod as the main commercial species.

Total landings in the EU



In 2016, volumes of fish landed in the EU (including species not destined for human consumption and seaweed) reached **4,3 mln tonnes**. This represented a decrease of 7% from 2015. Conversely, a 5% increase was recorded in **values**, reaching EUR 7,38 billion.

Almost all landings in the EU were made by EU vessels (97% of volume, 99% in value).

The most landed species (80% in volume) in the EU belong to four commodity groups: small pelagics, groundfish, tuna and tuna-like species, and the grouping “other marine fish.” Only landings of tuna and tuna-like species increased in 2016.

The **three main countries** are Spain, France and the UK in value and Denmark, Spain and the UK in volume.

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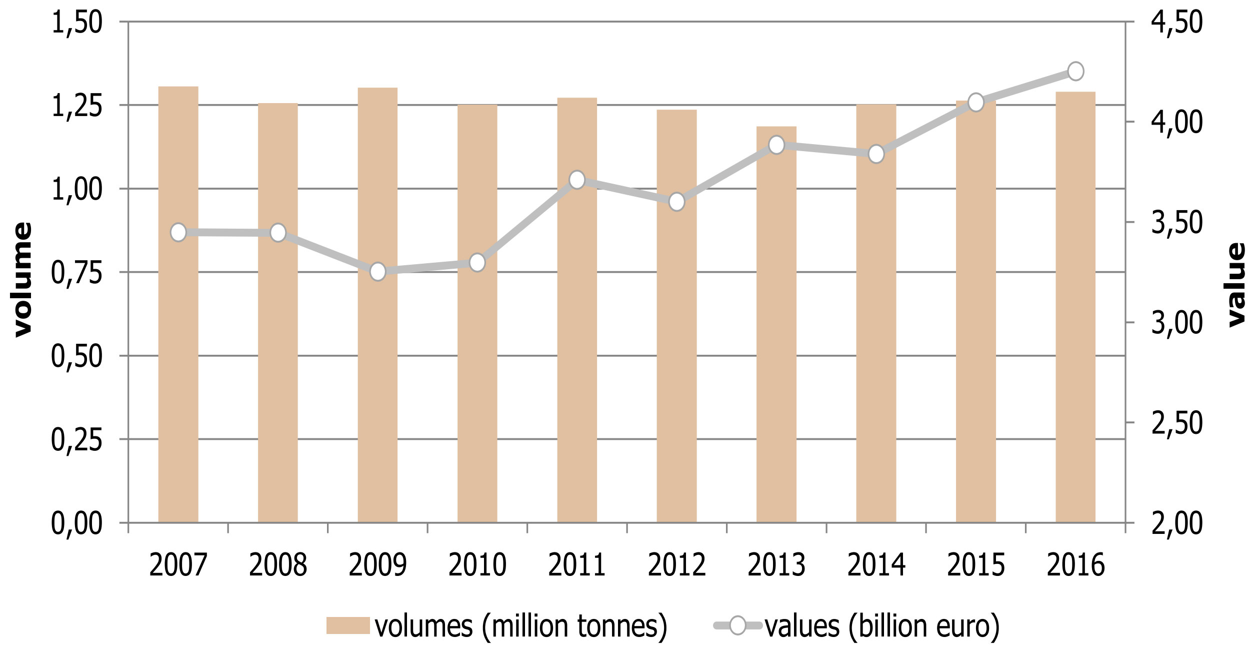
Total aquaculture production in the EU



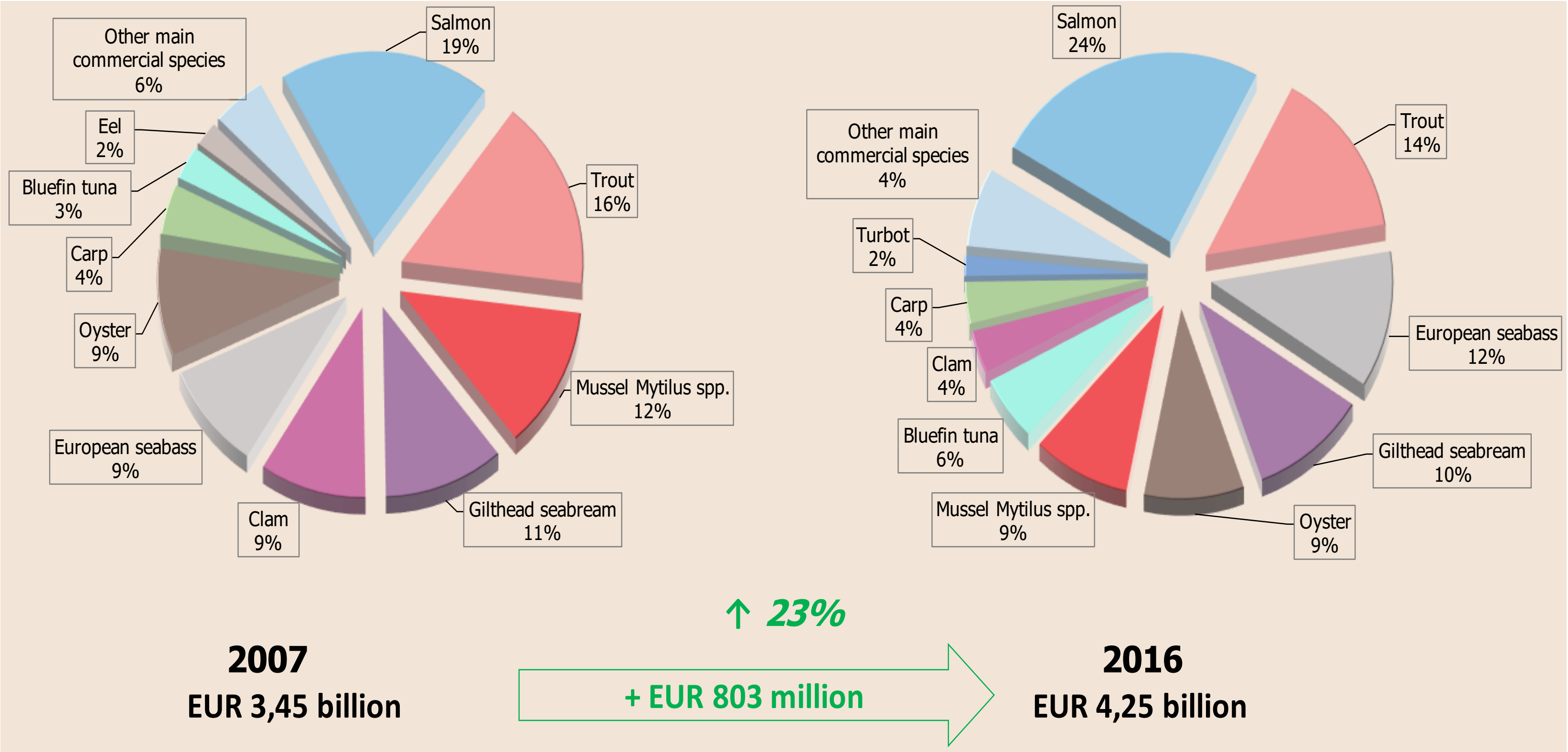
In 2016, fish products farmed in the EU reached the highest values ever registered. The total value of **EUR 4,25 bln** representing a 4% increase from 2015.

Volumes also reached an all-time peak, totalling **1,29 mln tonnes (+2%)**.

The **three main countries are Spain, UK and France.**

Composition of farmed species in the EU

(in value)



Around **95%** of total EU aquaculture production is represented by **10 species**. Compared to 2007, the most significant changes recorded in value terms. Volumes are pretty comparable. The increased production of salmon and European seabass offset the declining trend registered for oyster, clam, trout and mussels.

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In this report …

- ✓ Slight increase in consumption of seafood in the EU and contraction of self-sufficiency
- ✓ Importance of wild seafood supply
- ✓ Higher prices and increasing expenditure of the EU households for purchasing fish
- ✓ Expenditure for fish compared with meat
- ✓ Pivotal role of the EU in the global fish and seafood trade
- ✓ Increasing value of landings and aquaculture production in the EU
- ✓ Macroeconomic trends: inter alia evolution of marine fuel prices

Importance of contributions from MS

- ✓ An obligation
- ✓ But more importantly a cooperation to our mutual benefit

THANK YOU FOR YOUR ATTENTION

http://www.eumofa.eu/the-eu-fish-market