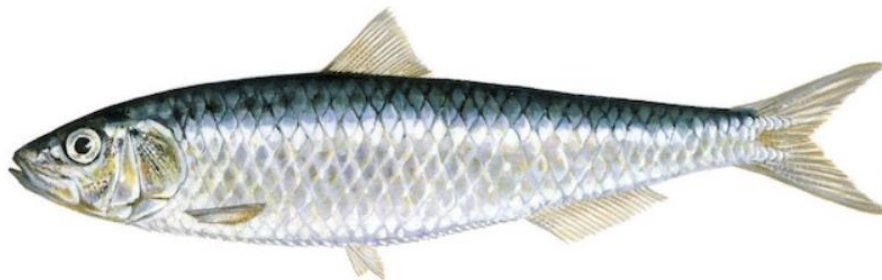




## SARDINE (*SARDINA PILCHARDUS*)



© Scandinavian Fishing Year Book

### BIOLOGY AND HABITAT

- **Species description** ([Read more](#))

The Sardine belongs to the family of *Clupeidae*.

- **Geographical distribution and habitat** ([Read more](#))

The European sardine (*Sardina pilchardus*) is broadly distributed in the NE Atlantic and the Mediterranean Sea, representing an important fishery resource for several countries.

### RESOURCE, EXPLOITATION AND MANAGEMENT

- **Stock and resource status/conservation measures** ([Read more](#))

Minimum conservation size is set at 11 cm of total length in all the fishing areas.

- **Production methods and fishing gears** ([Read more](#))

The main fishing gears used are gillnets and similar nets, pots and traps, seines, and trawls.

Source: [Information system on commercial designations](#)

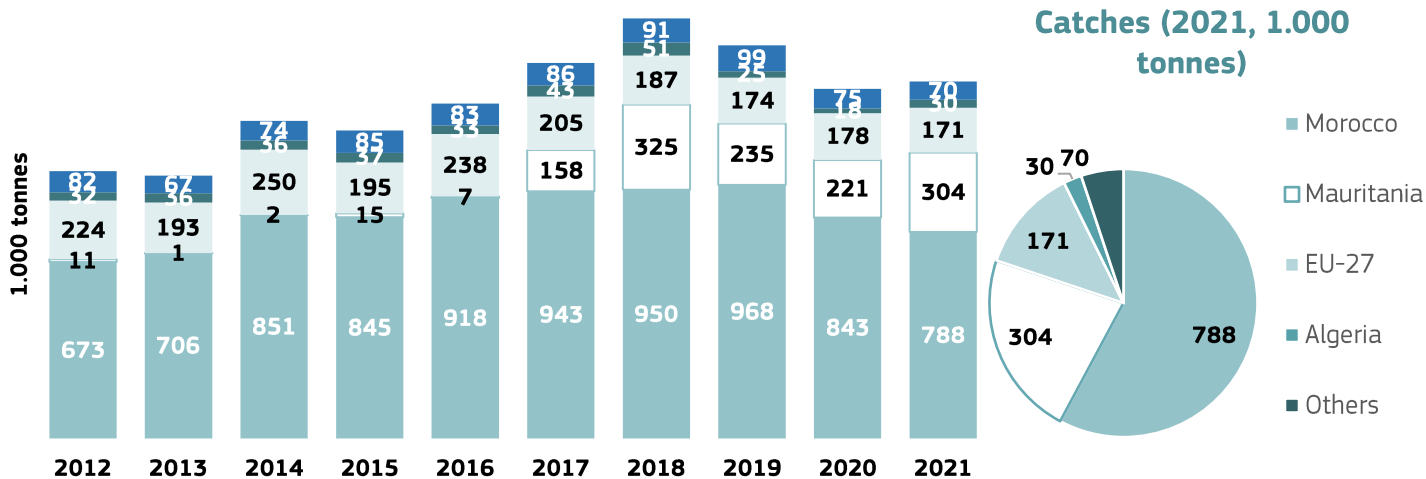


# CATCHES

## Evolution of world catches

- Sardine catches reached over 1.360.000 tonnes in 2021, i.e. **1,40%** of the global catches. The majority of this is caught by the Moroccan fleet (59% of the global catches), as well as by the Mauritanian (22%) and the EU fleet (13%). During the last decade (2012-2021), sardine catches have increased by 33% at global level in relation to the increase of the Moroccan and Mauritanian captures (+17% and +2.576% respectively).

■ Others ■ Algeria ■ EU-27 ■ Mauritania ■ Morocco

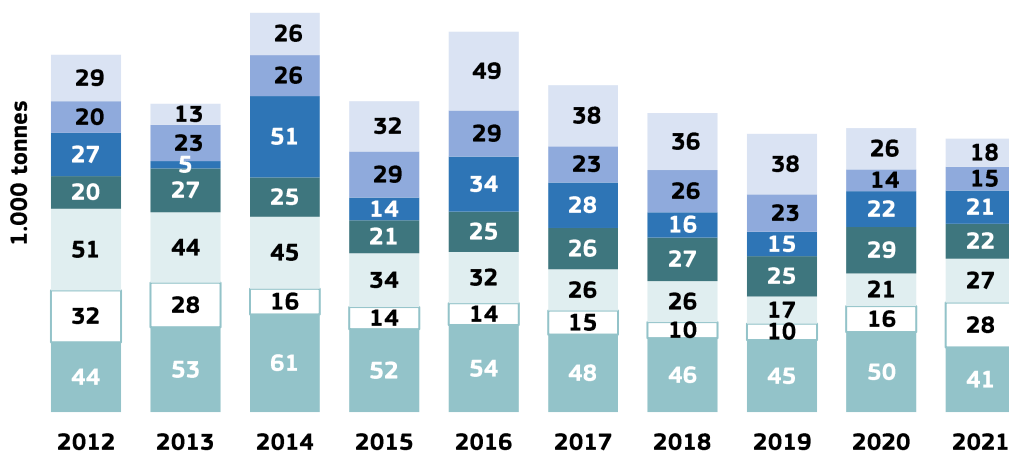


Source: FAO

## Evolution of EU catches

- In 2021, the EU catches of sardine reached almost 171.000 tonnes. The EU catches have decreased by 24% during the last decades. Croatia was the main EU producer reaching 40.509 tonnes in 2022 (24% of EU volume), followed by Portugal and Spain (16% of the EU catches each), and to a lesser extent France and the Netherlands (respectively 13% and 12% of the EU catches).

■ Others ■ Italy ■ Netherlands ■ France ■ Spain ■ Portugal ■ Croatia



Source: FAO



## AQUACULTURE PRODUCTION

- There are no farming activities of sardine (related to low prices of the fish).

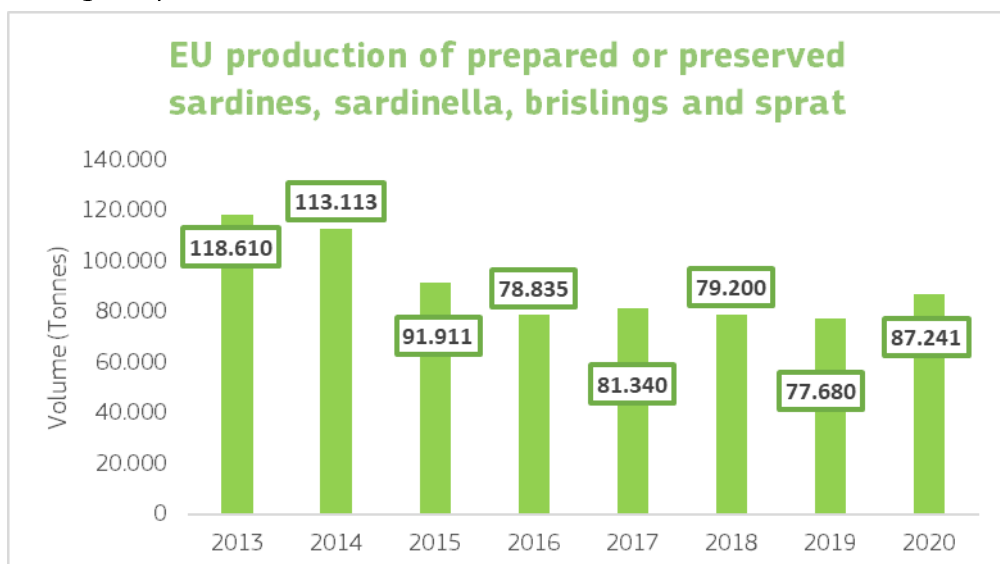
## PROCESSING

Canned sardine products are among the most consumed preserved fish products in EU. These products can actually include several different species other than the European sardine (*Sardina pilchardus*), which are still marketed as 'sardines' under specific conditions.

- In Eurostat-Prodcom data, canned products of sardine, sprat and sardinella are aggregated together in one single category. The corresponding [PRODCOM](#) code is the following:
  - 10202530: prepared or preserved sardines, sardinella, brisling and sprat
- **Prepared/preserved sardine, sardinella, brisling and sprat**

The EU production of canned sprat, sardines and sardinellas totaled 87.241 tonnes in 2020 (most recent data available for the whole EU). The EU production has decreased by 26% over the period between 2013 and 2020.

If we assume that the main product of the processing activities in Poland and Latvia is sprat, the main producing countries of canned sardine are Spain, Portugal and France. Sardine production has increase in Spain and France since 2013 (by 13% and 20% respectively) but has decreased in Portugal (by -25%).





## TRADE

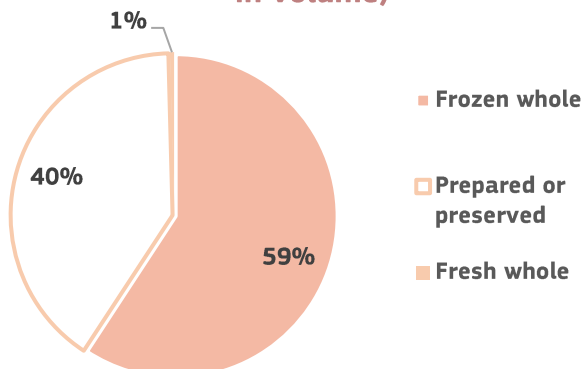
- [Combined nomenclature](#)

### EU trade of sardine products (tonnes – 2022)

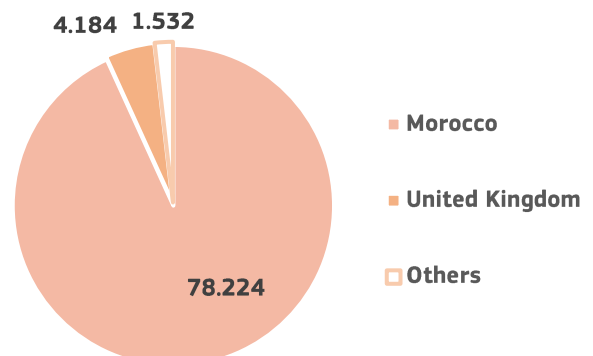
CN code	Product	EU imports	EU exports
03024310	Fresh or chilled sardines "Sardina pilchardus"	346	1.003
03024330	Fresh or chilled sardines "Sardinops spp." and sardinella "Sardinella spp."	1	375
03035310	Frozen sardines "Sardina pilchardus"	49.595	23.745
03035330	Frozen sardines "Sardinops spp." and sardinella "Sardinella spp."	131	132
16041311	Sardines, prepared or preserved, whole or in pieces, in olive oil (excl. minced sardines)	6.456	3.318
16041319	Sardines, prepared or preserved, whole or in pieces (excl. minced sardines and sardines in olive oil)	27.411	12.364
<b>Total</b>		<b>83.940</b>	<b>40.938</b>

- Extra-EU imports** reached almost 84.000 tonnes in 2022, of which 59% were frozen and 40% were prepared or preserved sardine. In 2022, EU imports originated mostly from Morocco (93% of the volume imported) and to a lesser extent from the United Kingdom (5% of the volume imported). The main importing countries within the EU in 2022 were Spain, France, and Malta, which together imported 60% of the imported volumes. Other importers were the Netherlands (8% of the imported volumes), Portugal (7%), Croatia (7%), and Germany (6%).

Imports by product type (2022, % in volume)



Main EU suppliers (2022, tonnes)



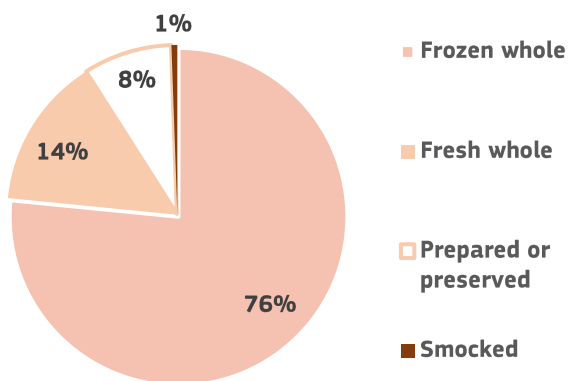


# TRADE

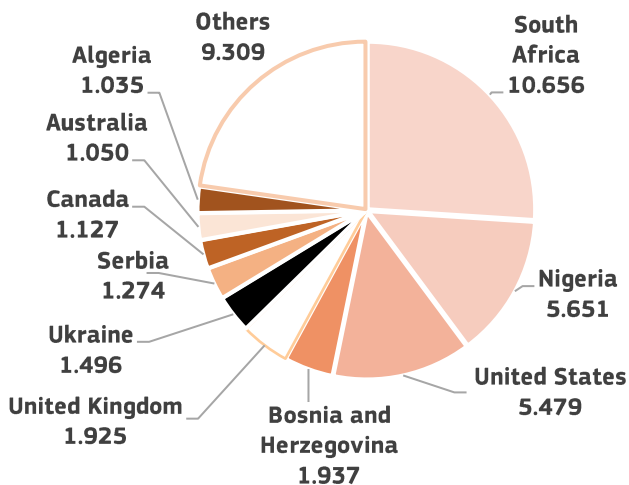
- Extra-EU exports:**

In 2022, export volumes of sardines totaled over 40.900 tonnes. The majority of sardines (58%) were exported frozen and 38% of the sardines were exported prepared or preserved. Spain was the first EU exporter, representing 18% of the exported volume, followed by the Netherlands (8%), and to a lesser extent Portugal and Poland representing 6% each. In 2022, South Africa, Nigeria and the United States were the main destination markets, representing 53% of EU exports.

Exports by product type (2022, % in volume)



Main destinations (2022, tonnes)

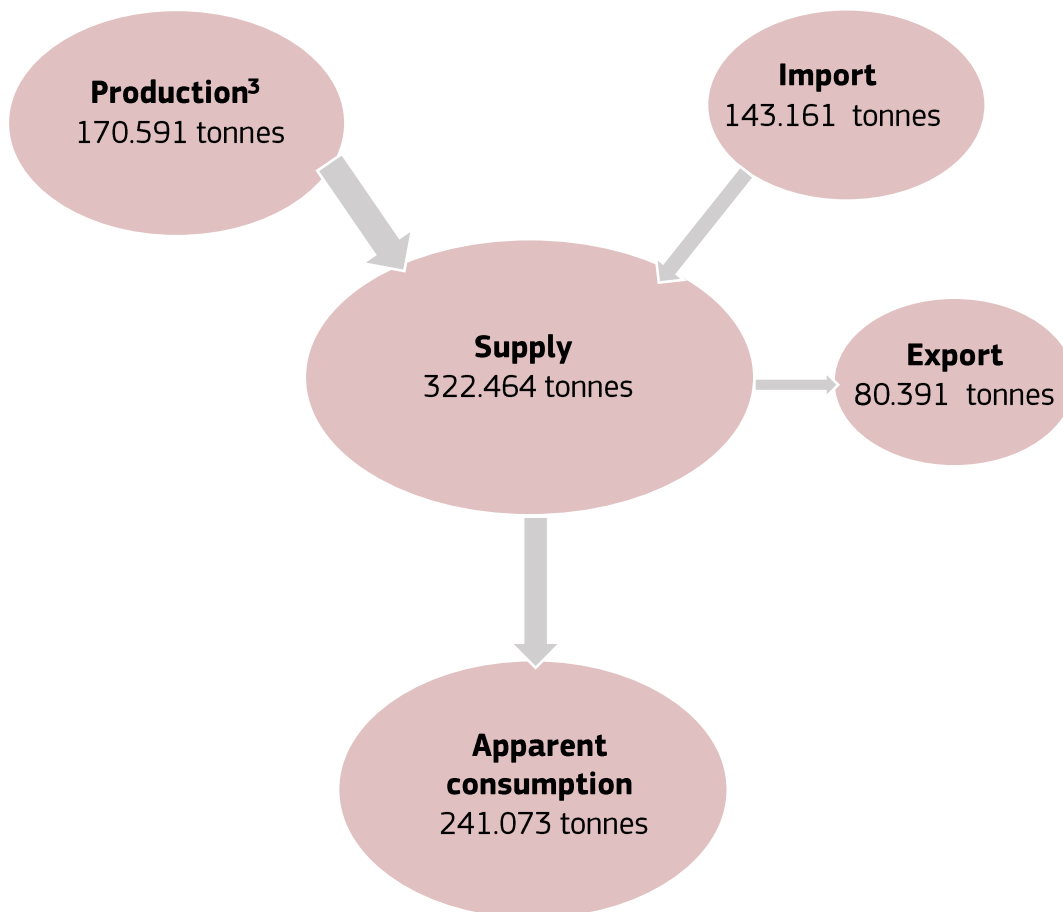


Source: EUROSTAT-COMEXT



## Supply balance

### EU supply balance (2021<sup>1</sup>) – Tonnes of live weight equivalent<sup>2</sup> – Sardine:



Source: FAO/ EUROSTAT-COMEXT

<sup>1</sup> Supply balance is provided for the year 2021 (trade data for 2021 were taken into account). Detailed trade data provided in the slides 4 and 5 concern the year 2022.

<sup>2</sup> The [conversion factors](#) were used to convert net weight of imports and exports of fishery and aquaculture products into live weight equivalents.



## PRICES ALONG THE SUPPLY CHAIN (EUR/kg)

### First-sale (fresh whole)

First-sale prices are provided for the main EU producers (Portugal and Spain).

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*	Source
<b>Portugal</b>	2,00	2,19	2,06	1,64	2,26	1,96	1,52	1,13	1,17	1,15	EUMOFA
<b>Spain</b>	n.a.	1,35	1,23	1,29	1,44	1,56	1,20	1,13	1,25	1,14	EUMOFA

(\*) From January to November 2023

### Wholesale (fresh)

Wholesale prices are reported for Mercamadrid (Madrid, Spain) and Rungis (France).

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*	Source
<b>Spain</b>	3,38	3,28	3,09	3,10	3,36	3,28	3,07	3,04	2,87	2,67	Mercamadrid
<b>France - fresh, Origin Brittany</b>	2,37	2,53	2,88	2,96	2,58	2,28	2,57	2,75	2,91	2,98	Rungis (RNM)
<b>France - fresh, Mediterranean</b>	2,41	2,56	2,90	3,06	2,93	2,64	2,61	2,73	3,20	3,07	Rungis (RNM)

(\*) From January to November 2023

### Retail/Consumption

Retail prices are reported for Spain, Poland, Greece, and France.

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*	Source
<b>Spain</b>	5,04	5,23	5,17	5,45	6,02	n.a.	n.a.	n.a.	n.a.	n.a.	EUMOFA
<b>Spain - fresh</b>	4,49	4,29	4,23	4,49	4,69	4,98	5,07	6,02	5,47	n.a.	MAPA
<b>Spain - canned</b>	7,82	7,80	7,81	7,83	7,83	7,93	8,28	8,18	9,21	n.a.	
<b>France - fresh</b>	n.a.	n.a.	6,50	6,70	6,40	6,00	6,30	6,20	n.a.	n.a.	FranceAgriMer
<b>France - canned</b>	n.a.	n.a.	10,00	10,40	10,70	10,90	10,80	11,00	n.a.	n.a.	FranceAgriMer

(\*) From January to November 2023

## Sardine



## PRICES ALONG THE SUPPLY CHAIN (EUR/kg)

### Import (frozen whole)

EU imports from third countries concern mainly frozen whole sardine and prepared or preserved sardine. Main importers were Spain, Malta, and France in 2022.

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*	Source
<b>Spain, frozen whole</b>	0,84	0,88	0,80	0,82	0,87	0,78	0,74	0,75	0,80	0,79	EUMOFA
<b>Spain, prepared/preserved</b>	2,93	2,96	3,27	3,84	3,87	3,73	3,69	4,30	4,82	5,71	EUMOFA
<b>France, frozen whole</b>	0,88	0,95	0,85	0,93	0,89	0,83	1,02	1,08	1,13	1,13	EUMOFA
<b>France, prepared/preserved</b>	3,40	3,37	3,42	3,46	3,66	3,64	3,59	3,42	4,24	4,51	EUMOFA
<b>Malta, frozen whole</b>	0,52	0,51	0,58	0,60	0,63	0,68	0,68	0,70	0,78	0,73	EUMOFA
<b>Malta, prepared/preserved</b>	n.a.	n.a.	n.a.	2,75	n.a.	n.a.	3,09	13,62	8,37	2,83	EUMOFA

(\* ) From January to August 2023

### Export (frozen whole)

Spain and the Netherlands were the main EU exporter of sardines. EU exports are mainly composed of frozen whole sardines and prepared or preserved sardines.

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*	Source
<b>Spain, frozen whole</b>	0,58	0,61	0,73	0,66	1,82	0,66	0,63	0,61	0,71	0,69	EUMOFA
<b>Spain, canned</b>	6,20	6,82	6,64	6,36	6,64	6,91	7,02	6,88	8,12	8,22	EUMOFA
<b>Netherlands, frozen whole</b>	0,53	0,57	0,75	0,62	0,57	0,91	0,88	0,67	1,36	1,16	EUMOFA
<b>Netherlands, canned</b>	5,63	5,59	5,70	4,09	3,96	3,91	3,51	2,63	3,85	5,39	EUMOFA

(\* ) From January to August 2023



## Sardines



## MARKETING

- National lists of commercial designations ([Read more](#))
- Information system on commercial designations and scientific names in all EU languages ([Read more](#))
- Applicable marketing standard ([Read more](#))
- There is one name protected under **Protected Geographical Indication** (PGI) and for sardine:
  - PGI “**Cornish Sardines**” in the United Kingdom.

## CONSUMPTION

- 11<sup>th</sup> most consumed species in the EU (source: [The EU Fish Market – 2023 edition](#), EUMOFA)
- Apparent consumption per capita in 2019: **0,54 kg** live weight equivalent (source: [The EU Fish Market – 2023 edition](#), EUMOFA)
- Nutritional value (Sardine, nutrition values per serving 100g) ([Read more](#))

Nutrition values	Sardine
Energy (kcal)	236
Total fat (g)	15,50
Saturates (g)	3,90
Carbohydrate (g)	0
Sugars (g)	0
Protein (g)	23,30
Salt (mg)	-