



## THE EUROPEAN UNION IN THE WORLD

(2015, source: FAO and Eurostat)

The EU is the 3<sup>rd</sup> largest producer for fisheries and the 9<sup>th</sup> for aquaculture products in the world.

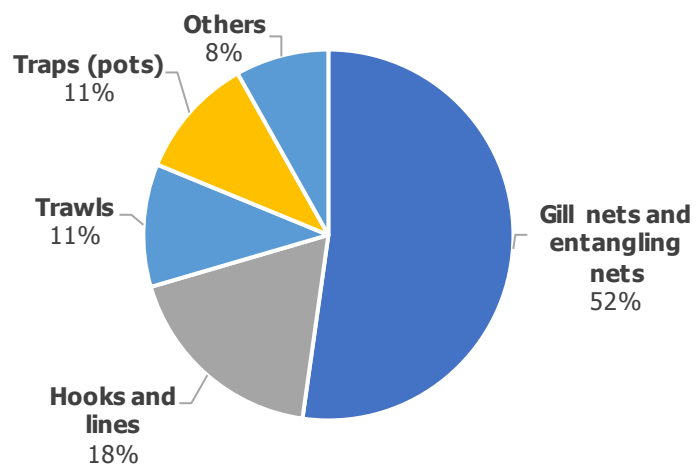
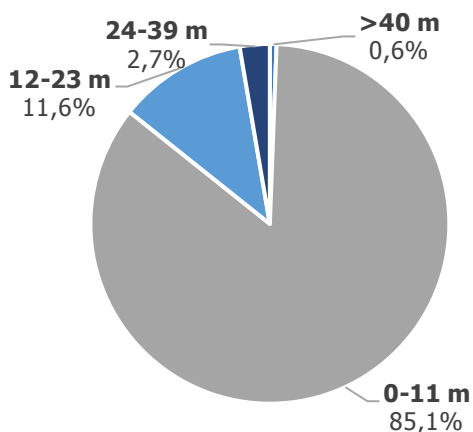
| (1.000 tonnes) | World   | EU-28 | % EU / world |
|----------------|---------|-------|--------------|
| Catches        | 104.635 | 5.144 | 4,9%         |
| Aquaculture    | 106.094 | 1.307 | 1,2%         |
| Total          | 211.511 | 6.451 | 3,1%         |

## FISHING FLEET

(fleet - 2017, source: EU fishing fleet register; employment - 2015, source: JRC)

| Vessels                   | Capacity               | Power                  |                       |
|---------------------------|------------------------|------------------------|-----------------------|
| Number: <b>82.780</b>     | GT: <b>1.571.654</b>   | KW: <b>6.239.550</b>   |                       |
| TOTAL FTE: <b>115.889</b> |                        |                        |                       |
| 0-11 m                    | 12-23 m                | 24-39 m                | >40 m                 |
| Jobs (FTE): <b>46%</b>    | Jobs (FTE): <b>31%</b> | Jobs (FTE): <b>17%</b> | Jobs (FTE): <b>6%</b> |

The EU **fishing fleet** and **gear composition**:

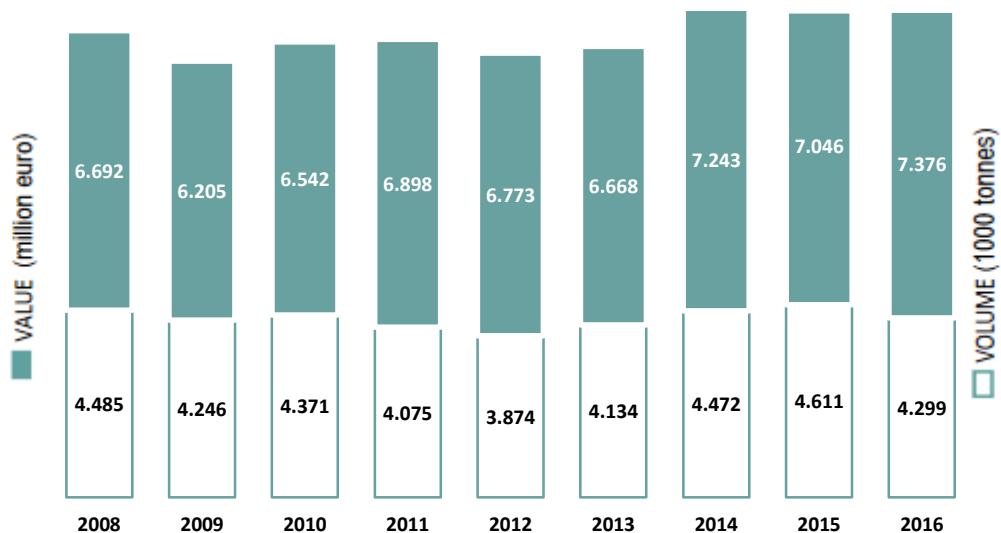




# LANDINGS

Landings represent the initial unloading of any quantity of fisheries products, including aquatic plants, from on board a fishing vessel to land in a given country, regardless of the nationality of the vessel making the landings. Landings are reported in net weight.

In the EU, 88% of landings are destined to human consumption. Species are mainly landed fresh (79% of the total), while frozen landings represent 18% of the total. There are 3.330 fishing ports in the EU (source: EU Master Data Register).



## Main commercial species landed and % of total (2016, million euro and 1.000 tonnes)



|                |       |     |       |     |                  |
|----------------|-------|-----|-------|-----|------------------|
| HAKE           | 500   | 7%  | 702   | 16% | HERRING          |
| YELLOWFIN TUNA | 452   | 6%  | 462   | 11% | SPRAT(=BRISLING) |
| HERRING        | 369   | 5%  | 373   | 9%  | MACKEREL         |
| NORWAY LOBSTER | 353   | 5%  | 313   | 7%  | BLUE WHITING     |
| MACKEREL       | 332   | 5%  | 216   | 5%  | SARDINE          |
| COMMON SOLE    | 277   | 4%  | 167   | 4%  | SKIPJACK TUNA    |
| OTHERS         | 5.093 | 68% | 2.065 | 48% | OTHERS           |

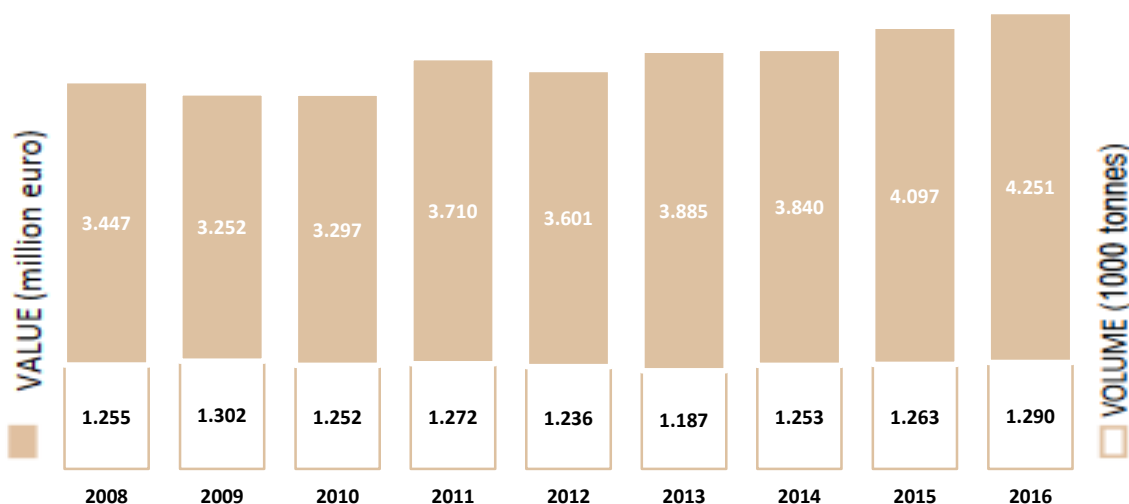
(source: Eurostat)



# AQUACULTURE

Aquaculture refers to the farming of aquatic (freshwater or saltwater) organisms, such as fish, molluscs, crustaceans and aquatic plants. Data are reported in live weight equivalent and value. In the EU, 82% of fish is farmed in sea and brackish waters and 18% in freshwater. The most important aquaculture methods are:

- 36% in cages, almost entirely farmed in sea and brackish waters
- 34% off bottom, entirely farmed in sea and brackish waters
- 10% on bottom, entirely farmed in sea and brackish waters



Main commercial species farmed and % of total  
(2016, million euro and 1.000 tonnes)



|                    |       |     |     |     |                     |
|--------------------|-------|-----|-----|-----|---------------------|
| SALMON             | 1.049 | 25% | 462 | 36% | MUSSEL MYTILUS SPP. |
| TROUT              | 622   | 15% | 188 | 15% | TROUT               |
| EUROPEAN SEABASS   | 499   | 12% | 181 | 14% | SALMON              |
| GILT-HEAD SEABREAM | 441   | 10% | 83  | 6%  | GILT-HEAD SEABREAM  |
| OYSTER             | 480   | 9%  | 82  | 6%  | EUROPEAN SEABASS    |
| OTHERS             | 1.260 | 20% | 293 | 23% | OTHERS              |

(source: Eurostat)

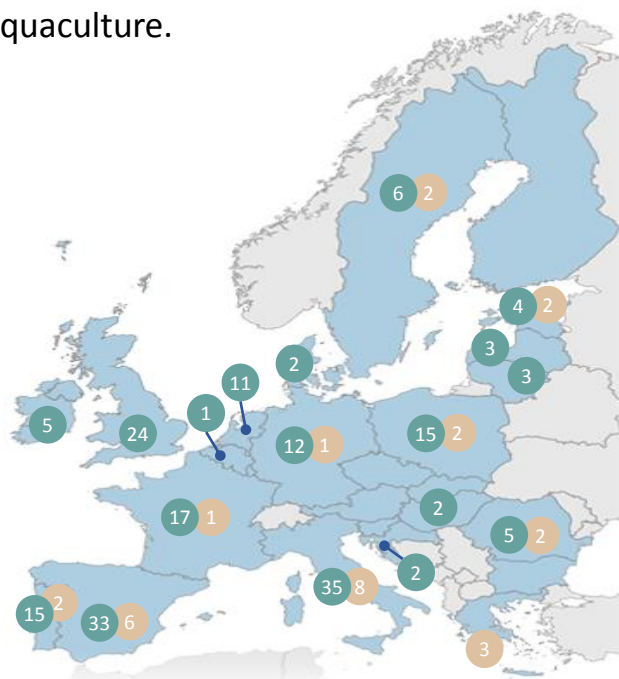


# PRODUCER ORGANISATIONS

(January 2019, source: DG MARE, [link](#))

**220 producer organisations (POs) and associations of POs** are recognised in the EU. They bring together operators from both fisheries and aquaculture. 193 POs operate in fisheries and 27 in aquaculture.

- Fisheries
- Aquaculture



## FIRST SALES (2017, source: EUMOFA)

First sale concerns the fish that is sold or registered at an auction center or to registered buyers, or to producer organisations (PO).

In terms of value, top-5 EU places of sale available in EUMOFA are Ijmuiden/Velsen (NL), Peterhead (UK), Vigo (ES), Pasajes (ES) and Hanstholm (DK).

They cover together 15% and 18% of the total, respectively in terms of value and volume.

| Top-5 places of sale | Value (million EUR) | Volume (1.000 tonnes) | Top-3 main commercial species (in value) |
|----------------------|---------------------|-----------------------|--|
| NL - Ijmuiden/Velsen | 161                 | 123                   | Herring, Blue whiting, Common sole       |
| UK - Peterhead       | 138                 | 112                   | Mackerel, Haddock, Cod                   |
| ES - Vigo            | 115                 | 43                    | Monk, Megrim, Hake                       |
| ES - Pasajes         | 87                  | 23                    | Hake, Monk, Mackerel                     |
| DK - Hanstholm       | 83                  | 32                    | Cod, Saithe(=Coalfish), Hake             |



## WHOLESALE

Wholesale is an intermediary stage in the distribution channel that buys in bulk and sells to resellers (e.g. retailers) rather than to consumers.

In the European Union, the wholesale stage is highly diversified.

In some countries (e.g. France, Italy, Spain and the UK), fisheries and aquaculture products might be sold at wholesale market places, whereas in some others (e.g. Finland, Ireland and Sweden) there are mainly companies operating as wholesalers.

In most EU countries, fisheries and aquaculture products are sold wholesale at cash & carry shops.

## PROCESSING (source: Eurostat-SBS)

In 2015, 113.467 employees were recorded in the EU fish processing industry. In the same year, the sector registered a value added of EUR 4.561 million, covering 2% of the value added of total manufacture of food products.

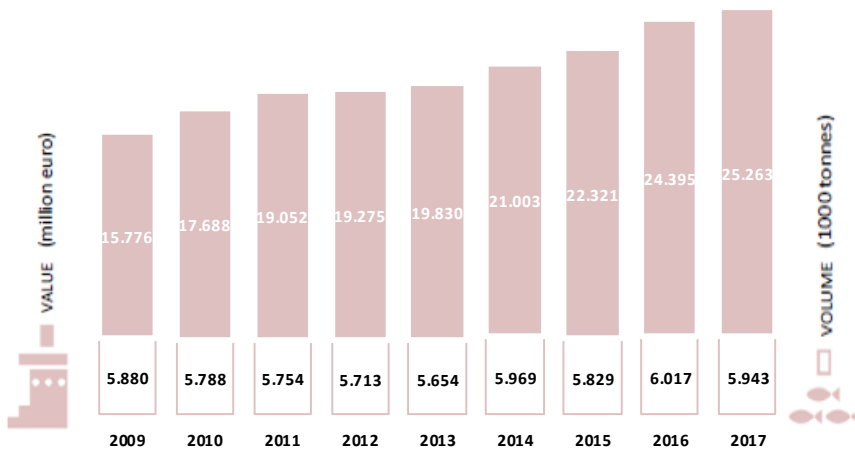
The main products sold were fresh fillets, smoked salmon and prepared or preserved tuna.

**3.640 companies**  
**Sales: EUR 27,7 billion**  
(2015, source: Eurostat - SBS)



# TRADE (source: Eurostat)

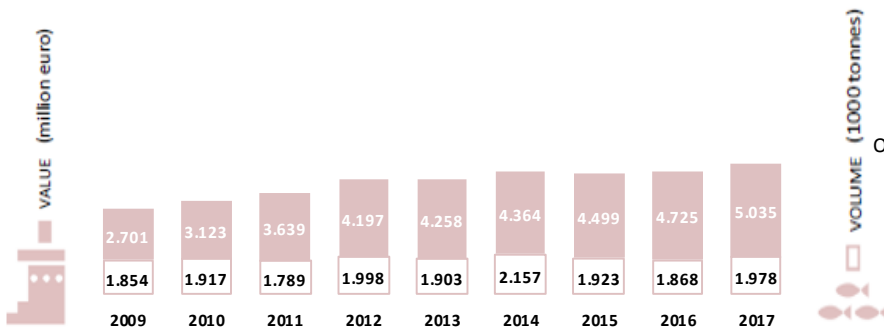
## Import



MAIN COMMERCIAL SPECIES IMPORTED AND % OF TOTAL IMPORTS (2017, million euro)

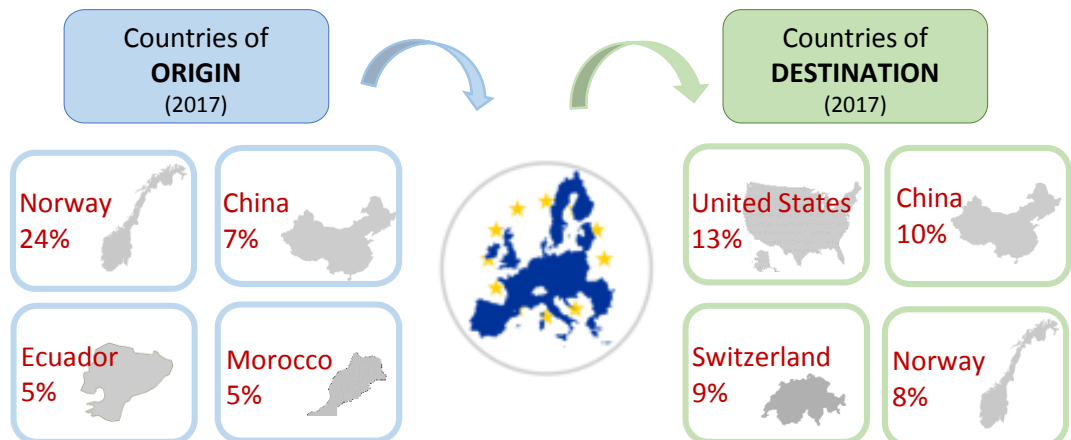
|                      |        |     |
|----------------------|--------|-----|
| SALMON               | 5.538  | 22% |
| COD                  | 2.398  | 9%  |
| WARMWATER SHRIMP     | 2.289  | 9%  |
| MISCELLANEOUS SHRIMP | 1.793  | 7%  |
| SKIPJACK TUNA        | 1.523  | 6%  |
| SQUID                | 1.008  | 4%  |
| OTHERS               | 10.718 | 43% |

## Export



MAIN COMMERCIAL SPECIES EXPORTED AND % OF TOTAL EXPORTS (2017, million euro)

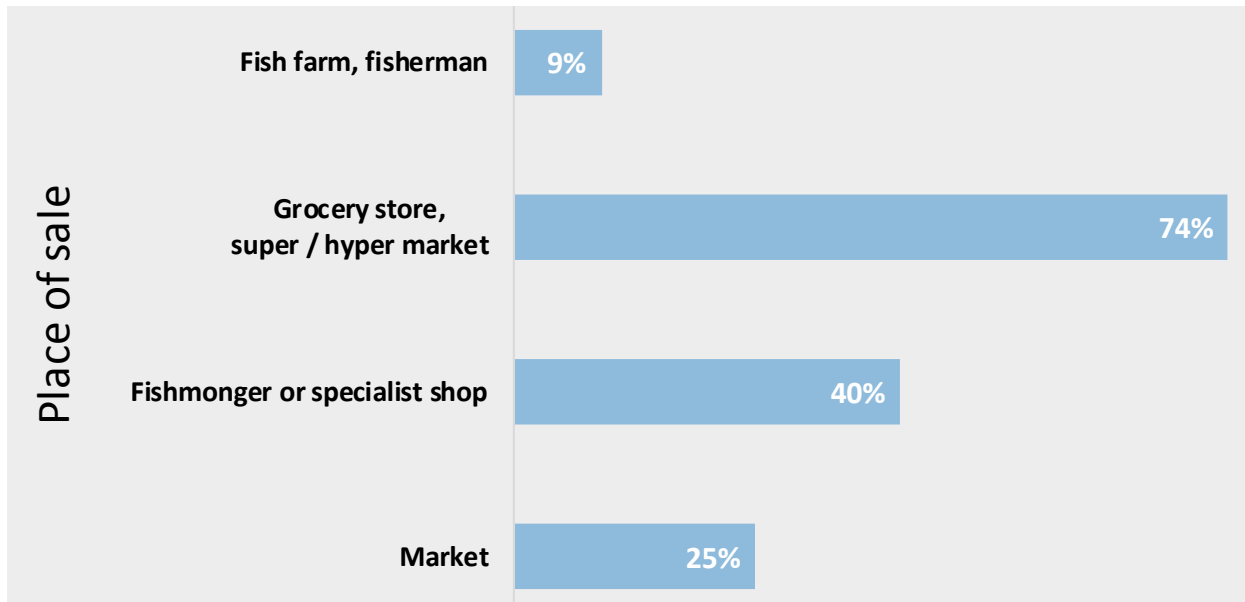
|                   |       |     |
|-------------------|-------|-----|
| SALMON            | 712   | 14% |
| OTHER MARINE FISH | 327   | 7%  |
| SKIPJACK TUNA     | 261   | 5%  |
| OTHER PRODUCTS    | 242   | 5%  |
| MACKEREL          | 241   | 5%  |
| FISHMEAL          | 216   | 4%  |
| OTHERS            | 3.036 | 60% |



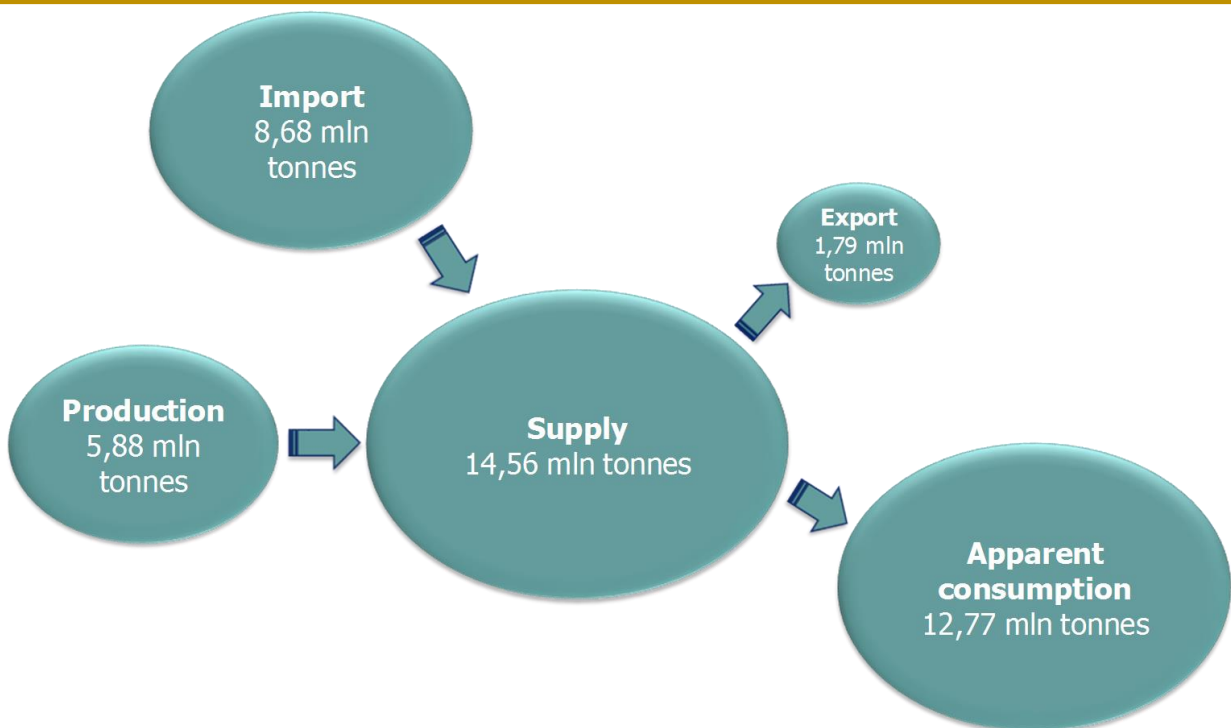


## DISTRIBUTION (source: EUROBAROMETER)

### Consumers preferences on purchasing channels



## SUPPLY BALANCE (2015, source: EUMOFA)





# CONSUMPTION

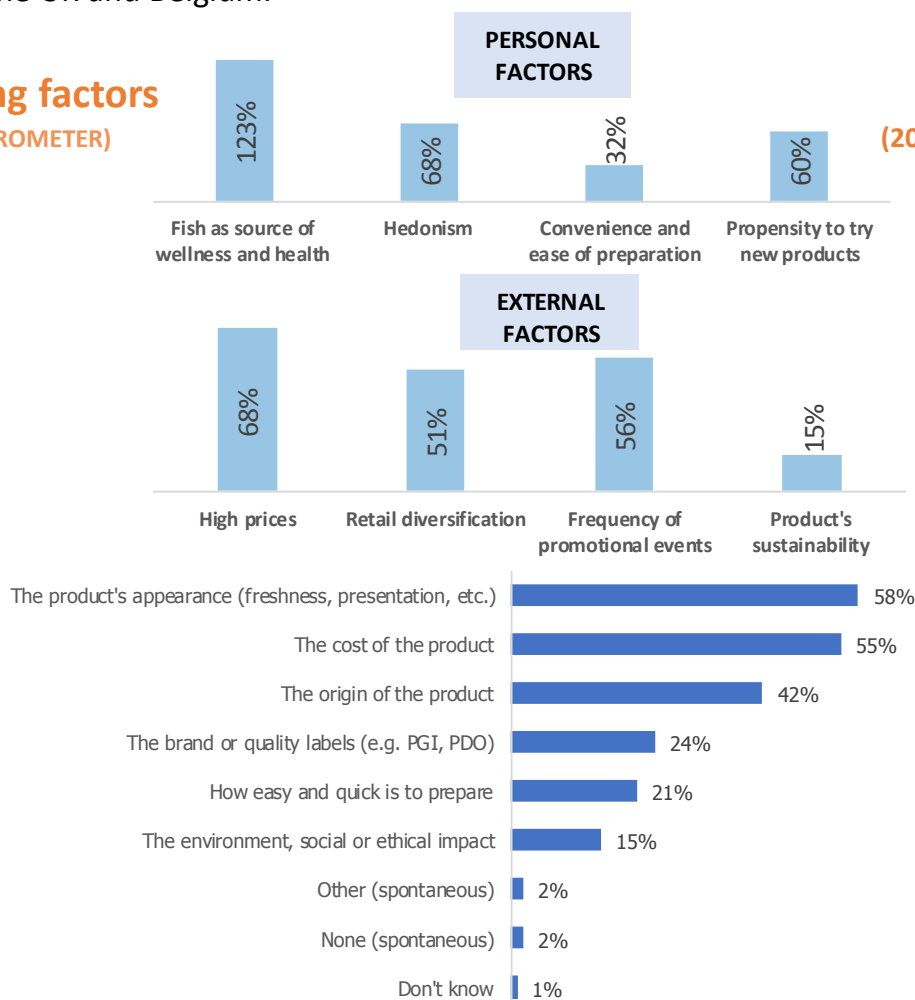
Apparent consumption of fisheries and aquaculture products in the EU amounted to 25,1 kg per capita in 2015, slightly decreasing compared to 2014 (-2%). The most widely eaten species are tuna (mostly canned), cod, salmon, Alaska pollock, herring, mussel, hake, squid and tropical shrimp. The consumption frequency is positively correlated with age (i.e. elderlies show the highest frequency). On the other hand, young people (15-24) are the group with the highest percentage of non-consumers.

One third of consumers buys fresh fish often. The frequency of purchase of frozen and tinned products is also quite high (one out of 4 consumers buys frozen products often and one out of 5 buys tinned products often). Smoked, salted, dried or in brine products are purchased less frequently, with huge variations across countries due to traditional products and eating habits. While breaded products and ready-meals are bought seldom, they are popular among young consumers thanks to their convenience and ease of preparation. Proximity of the sea plays an important role. Loose products are preferred in southern EU countries and other countries with long coastlines (except the UK) while pre-packed products prevail in landlocked (or with short coastlines), central EU countries as well as in the UK and Belgium.

## Purchasing factors

(source: EUROBAROMETER)

**25,1 Kg  
per capita**  
(2015, source: EUMOFA)







# THE EUROPEAN UNION IN EUMOFA

updated on 15-02-19



## LANDINGS

Volumes and values are collected by EUMOFA from **Eurostat – Fishery**. Data concern all species landed in the European Union by vessels of all nationalities. Data are available on a yearly basis, accessible through simple and advanced tables.

## FIRST SALES

Volumes and values are collected from national sources (i.e. national authorities and private information providers).

**Weekly data** are collected and disseminated for selected species and selected places of sale for each country involved. Click [here](#) for the list of species and places of sale.

**Monthly data** are collected and disseminated for all species sold in a given month from all places of sale within 20 km from the coastline. Click [here](#) for the list of places of sale involved.

Both types of data are accessible through simple and advanced tables.

## TRADE

Volumes and values are collected from **Eurostat – COMEXT**. Data concern trade of all fisheries and aquaculture products as recorded by national customs, available on a monthly and yearly basis. Data are accessible through simple and advanced tables.

## AQUACULTURE

Volumes and values are collected by EUMOFA from **Eurostat – Fishery**. Data are available on a yearly basis, accessible through simple and advanced tables.

## WHOLESALE

For details on wholesale in the EU countries, please consult the related country profiles.

## PROCESSING

Volumes and values are collected from **Eurostat – PRODCOM**. Data concern 34 processed products as recorded through the PRODCOM nomenclature. Data are available on a yearly basis and are accessible through simple tables.

## CONSUMPTION

Household consumption of fresh fisheries and aquaculture products is collected from a **private provider** by EUMOFA on a monthly basis for 12 EU countries, based on panel reporting. Click [here](#) for the products per each Member State. Data (volumes and values) are accessible through simple queries on a monthly and yearly basis.