SEAFOOD EUROPE
Established as AIPCE-CEP in 1959

EU SEAFOOD SUPPLY SYNOPSIS 2026

The importance of international trade for seafood security in the EU







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Designed by: Md. Hamza

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List of Abbreviations

AIPCE	EU Fish Processors and Traders Association
ASC	Aquaculture Stewardship Council
ATQ	Autonomous Tariff Quota
CEP	European Federation of National Organizations of Importers and Exporters of Fish
CEA	Comprehensive Economic Partnership Agreement
CFP	Common Fisheries Policy
ECOWAS	Economic Community of West African States
EEA	European Economic Area
EFTA	European Free Trade Association
EPA	Economic Partnership Agreement
ESA	Economic Partnership Agreement with Eastern & Southern Africa
EU	European Union
EUMOFA	EU Market Observatory
EVFTA	EU-Vietnam Free Trade Agreement
FTA	Free Trade Agreement
GSP	Generalised System of Preferences
H&G	Headed and gutted
HS code	Harmonized system code
ICES	International Council for the Exploration of the Sea
IUU	Illegal, Unreported and Unregulated Fishing
MFN	Most Favored Nation
MPA	Marine Protected Area
MSC	Marine Stewardship Council
SPS	Sanitary and phytosanitary
TAC	Total Allowable Catch
TCA	Trace and Co-operation Agreement
WFE	Whole Fish Equivalent

Foreword

It is with great pleasure that we present the 2026 edition of the EU Seafood Supply Synopsis, which provides an annual overview of seafood supply, consumption and trade in the European Union.

The 2026 edition comes at a time of increasing uncertainty for the European seafood sector. Geopolitical tensions, changing trade relations, pressure on important fish stocks and continued disruption to international supply chains are all affecting the availability and cost of raw materials. At the same time, the processing and trading sector must respond to an increasingly complex regulatory environment while remaining competitive in a global market.

The figures in this year's Synopsis underline the scale of this challenge. EU domestic supply for food use declined in 2025, while imports from third countries increased to 9.4 million tonnes. Imported seafood now represents around 73% of the total seafood available on the EU market, while EU self-sufficiency remains at around one third. This dependence is particularly visible for key wild-caught whitefish species, around 95% of which are sourced from outside the EU.

These figures demonstrate that strengthening EU fisheries and aquaculture and securing international supply are not competing objectives. Both are essential. A resilient European seafood sector requires sustainable domestic production alongside reliable access to global raw materials, supported by well-functioning trade agreements, Autonomous Tariff Quotas and proportionate regulatory requirements.

Despite these challenges, seafood continues to play an important role in Europe's food system. While consumption has remained broadly stable in recent years, ensuring the continued availability and affordability of seafood will require policies that recognise the close interdependence of European fisheries, aquaculture, processing and international trade.



Guus Pastoor

President of Seafood Europe



INTRODUCTION

INTRODUCTION

1.1. Aim of the EU Seafood Supply Synopsis

The European fish and seafood processing industry relies on a consistent and sustainable supply of raw materials to satisfy consumer demand for fish and seafood products, both for domestic and export markets. While traditional species dominate consumption in most member states, a considerable expansion of species mix and presentation forms has been seen in recent years as logistics and access to materials have improved. As access to information and travel experiences expand, consumers have become more aware of the broad spectrum of species and presentation forms available globally.

As in other sectors, raw materials sourced from outside the European Union (EU) have been the lifeblood of the industry for many years and fulfil an essential role. Complete reliance on domestic supply would leave a much smaller industry and limit the scope for both growth and innovation. Using all the varieties and combining domestic and imported supply has allowed the sector to maintain and increase its relevance across all Member States.

This EU Seafood Supply Synopsis–prepared by Seafood Europe and its members – emphasises the importance of both EU-produced and imported seafood in creating value-added products within the EU.

The ability to rely on a continuous, sustainable supply of raw materials is a key factor in maintaining and fostering expansion of employment and trade opportunities generated by the fish and seafood processing industry in Europe.

The data presented in the EU Seafood Supply Synopsis focus on trade volumes rather than value. This reflects Seafood Europe's interest in the scale of EU activity in relation to the availability of resources both within and outside the EU. Seafood Europe recognises that prices and relative values are important dimensions of trade. However, variations in product formats, specifications and market conditions across the 27 EU Member States make direct price comparisons difficult.

Global competition for seafood has grown. The sector represents one of the largest in the international food trade, certainly outstripping other proteins. The need to conduct the trade responsibly has never been greater and within Seafood Europe we have been engaged in several initiatives to ensure our role in this respect is both properly fulfilled and understood.

Who is Seafood Europe?

Seafood Europe were established in 1959 as AIPCE (EU Fish Processors and Traders Association) and CEP (European Federation of National Organizations of Importers and Exporters of Fish). Seafood Europe comprises 13 EU National Associations and 2 associations from third countries. The sectors Seafood Europe represent account for more than 3,300 enterprises and 115,000 jobs.



[1] Source: AER fish processing 2025, edited by Seafood Europe

[2] Source: Eurostat (EU27), year 2025 edited by Seafood Europe (WFE)

The value of the output of the industry represented amounts to around EUR 37 billion, about 5 times the turnover of the EU catching sector.

Seafood Europe represents EU fish processors and traders, providing a framework within which companies can grow and continue to offer healthy, sustainable and responsibly sourced fish and seafood products. The organisation monitors and analyses developments in fish and seafood trade and provides policymakers and other stakeholders with evidence-based feedback and pragmatic advice.

Seafood Europe takes an active role in regulatory dialogue, supporting measures that achieve their intended objectives while remaining practical, proportionate and effective in implementation. Its engagement supports both compliance with existing requirements and the development of future legislation that enables a competitive and responsible EU seafood industry. Where appropriate, Seafood Europe and its members have also supported voluntary action within supply chains ahead of regulatory requirements.

Since its establishment, the provision of safe, nutritious and affordable seafood has been a central objective for Seafood Europe's members. This entails a responsibility to contribute to the responsible use of resources and to address the environmental, social and economic dimensions of seafood production and trade. Progress in fisheries management, resource allocation and sustainability is evident in many parts of the world, while continued efforts remain necessary to support the long-term resilience of seafood resources and value chains.

Building on this commitment, Seafood Europe has developed a Sustainability Manifesto setting out the principles that guide the sector's approach to responsible sourcing, resource use and sustainable value creation. The Manifesto is conceived as a dynamic framework, intended to evolve in line with developments in the industry, scientific knowledge, regulatory expectations and wider sustainability priorities.

1.2 Data used

The report is mainly based on statistics taken from Eurostat 2026 data and refers to the EU 27. Any other data is ascribed to source.

Eurostat provides information by fishery product, species and/or category. To ensure consistency and to make a common comparison possible all information in the study has been converted to whole fish equivalent (WFE).

Prior to 2009 the study used the official conversion factors of the German government as the basis of calculations. Using official data ensures consistency. However, Seafood Europe believes that growing differences in regional processing practices and product formats, which are not yet sufficiently recognised, have become important factors shaping both EU and global seafood markets.

Seafood Europe's methodology adopts our own set of conversion factors based on expressed processing yields based on the practical experience of our members. Seafood Europe believes this approach more accurately reflects the differences between major processing methodologies now being employed as a result of both technical innovation as well as regional shifts around the world. Importantly, this allows us to assess more realistically how much of global fishery resources are used in the EU market.

The EU Market Observatory (EUMOFA) regularly publishes trade data and has itself established conversion factors for all CN codes through its own research. In the majority of cases these are the same or very closely match those used by Seafood Europe, which has helped improve the accuracy of official reporting.

There will always be gaps and anomalies in the official statistics when they are first published, and there is a long-established process for correcting these retrospectively. Consequently, historical numbers are adjusted in the EU seafood supply synopsis as later versions become available: normally, however, these changes are minor. The EU Seafood Supply Synopsis draws on the best available official statistics at the time of publication and complements these data with market knowledge and operational insight provided by Seafood Europe and its members.

The overall EU seafood supply figures cover both quota and non-quota species. The species-specific analyses of EU production are based on available catch data for stocks subject to fishing quotas and operational insight as comprehensive and comparable catch data for non-quota species are not available for all species for the reference year at the time of publication.



CONSUMPTION AND SUPPLY

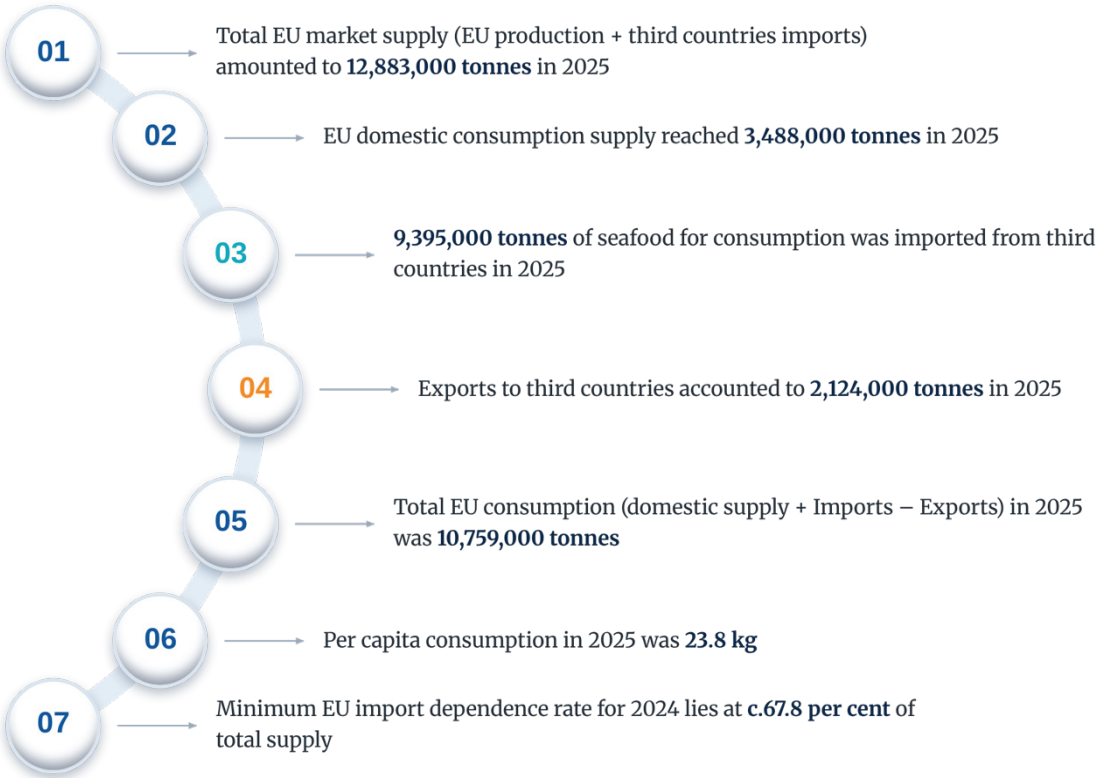






2. CONSUMPTION AND SUPPLY

2.1 Key findings



2.2 Food balance

The EU market is dependent on seafood from a combination of domestic production and seafood from sources outside the EU (EU imports). Domestic supply cannot by itself fulfil consumer demands, either in volume or species diversity. Table 2.1 shows the EU food balance for fish and seafood products.

2.2.1 EU domestic supply

EU domestic supply consists of catches and aquaculture production. In 2025, 71 per cent of this supply came from EU catches (2,471,000 tonnes) whereas aquaculture production amounted to 1,017,000 tonnes. Part of EU catches are intended for non-food uses (fishmeal, fish oil; 800,000 tonnes), which make the total domestic supply for food uses 3,488,000 tonnes in 2025, a decrease of 8 per cent compared with 2024.

2.2.2 Supply from sources outside the EU

Fish and seafood sourced from outside the EU are essential to increasing both available fish volumes and fish diversity within the EU and guaranteeing seafood security for consumers. Sourcing from outside the EU is high and at 9,395,000 tonnes, over 2.5 times as high as EU domestic supply in 2025. Import volume increased by 7 per cent, compared to 2024 (8,807,000 tonnes).

2.2.3 Total supply

Total supply for consumption in the EU is based on a combination of available fish and seafood products (food use) sourced from domestic supply and countries outside the EU. Total supply reached 12,883,000 tonnes in 2025.



2.2.4 Export to third countries

Export activity reached 2,124,000 tonnes in 2025, +3 per cent compared to 2024 (2,066,000 tonnes). Exports represent around 61 per cent of the total EU domestic supply (food use).

2.2.5 Total consumption

The net result of domestic supply, EU import and EU export gives a calculated consumption of total 10,759,000 tonnes in 2025. This number is 2 per cent higher compared to 2024 and 2020-2025 average.

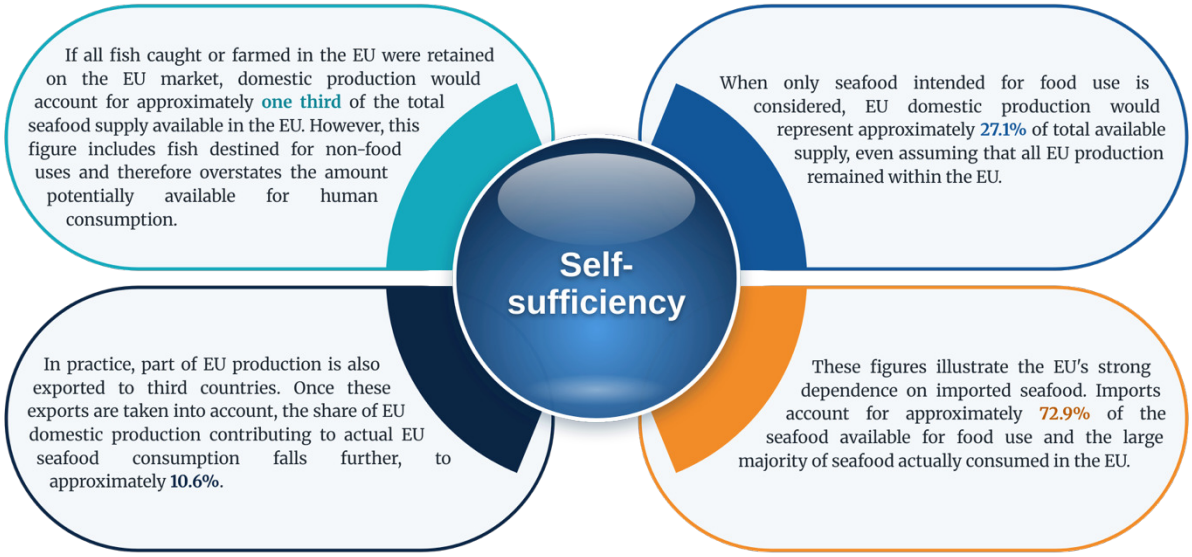


2.2.6 Total consumption per capita

When taken at per capita level the total available supply is 28.5 kg, which fits within a 10-year bandwidth of 28.0 kg +- 1.0kg. After adjusting for export activity, per capita consumption increased from 23.4 kg in 2024 to 23.8 kg in 2025.

2.2.7 Self-sufficiency

The purpose of this study is to highlight both the scale of the seafood industry and its dependence on extra-EU sources. As mentioned above, in 2025 the total EU supply was 12,883,000 tonnes for food use products. After adjusting for exports, potential net consumption is estimated at 10,759,000 tonnes. When translated into import reliance and self-sufficiency, the figures are as follows:



Overall, EU market dependence on fish and seafood materials from outside the EU has been extremely high. In 2025, it reached an all-time high of 67.8%, equivalent to more than two thirds, mainly due to lower EU fisheries production and increased imports from third countries.





TABLE 2.1 FOOD BALANCE FOR FISH AND FISHERY PRODUCTS

	2020	2021	2022	2023	2024	2025*	2026**
	EU (27)						
	1,000 tonnes live weight						
				a)	a)	b)	c)
Catches	3,869	3,591	3,466	3,555	3,448	3,271	3,238
+ Aquaculture production d)	1,088	1,129	1,088	1,051	1,007	1,017	1,027
- Non-food uses	906	671	627	694	673	800	792
= Supply for consumption	**4,051**	**4,049**	**3,927**	**3,912**	**3,782**	**3,488**	**3,473**
+ Imports (Third countries) e)	*8,913*	*8,968*	8,856	8,568	8,807	9,395	9,207
= Total supply	**12,964**	**13,017**	**12,783**	**12,480**	**12,589**	**12,883**	**12,680**
- Exports (Third countries) e)	*2,494*	*2,338*	2,238	2,147	2,066	2,124	2,103
= Total consumption	**10,470**	**10,679**	**10,545**	**10,333**	**10,523**	**10,759**	**10,577**
Total supply per capita (kg) f)	**29.0**	**29.2**	**28.7**	**27.9**	**28.0**	**28.5**	**28.1**
by EU catches in %	23	22	22	23	22	19	19
by EU aquaculture in %	8	9	9	8	8	8	8
by third countries imports in %	69	69	69	69	70	73	73
Consumption per capita (kg) g)	**23.4**	**23.9**	**23.6**	**23.1**	**23.4**	**23.8**	**23.4**
Self-sufficiency (%) h)	**39**	**38**	**37**	**38**	**36**	**32**	**33**

Notes: *a) Corrected figures.- b) Preliminary figures.- c) Forecast.- d) Estimation for 2024-2026.- e) Without fishmeal (feed) and fishoil, product weight converted into live weight.- f) Total supply / EU-population * 1000 = kg/caput/year.- g) Total consumption / EU population × 1,000 = kg/capita/year.- h) Supply for consumption / Total consumption * 100 = Rate of self-sufficiency in %.-*

Source: Eurostat, Eurostat-Comext, EU catch report, EUMOFA, FEAP, SEAFOOD EUROPE-Estimations and forecasts

Published by: SEAFOOD EUROPE 2026

2.2.8 Current trends

As Seafood Europe, we continue to observe high diversity in species, frequency and presentation, as innovation in packaging and logistics creates opportunities for consumers to eat more fish, more often and in alternative ways. At the same time, increasing geopolitical tensions are shaping the seafood trade and its availability within the EU. Mounting EU sanctions on Russia, higher fuel and transport costs linked to instability in the Middle East, and ongoing tariff tensions with the United States are contributing to shifts in global trade flows and significant market uncertainty. These developments underline the importance of securing stable and diversified seafood supply, both by optimising EU production from fisheries and aquaculture and by strengthening and safeguarding reliable import channels.

The supply of wild-caught whitefish is under particular pressure, partly due to the geopolitical tensions noted above, which are also placing additional stress on fish stocks. At the same time, farmed whitefish supply continues to increase and this trend is expected to continue in the coming years.

Relations with coastal states such as Norway, Iceland, the Faroe Islands and the UK remain strained due to disputes over fisheries management of certain pelagic stocks. Since Norway is currently the EU's most important seafood supplier, it is vital that these tensions do not negatively affect seafood imports.

At the same time, maintaining access to markets requires avoiding unnecessary tariff and non-tariff barriers to trade. Ensuring the industry's raw material needs through a duty-free and duty-reduced autonomous tariff quotas (ATQs) system is crucial. Higher duties would increase costs and consumer prices, weaken demand and, ultimately, risk shifting seafood processing and value creation from the EU to third countries.





REGULATORY REVIEW

3 REGULATORY REVIEW

3.1 Autonomous Tariff Quotas (ATQs)

A key message from the EU seafood supply synopsis has repeatedly been the industry's dependence on external sourcing. The ATQs are specifically designed to permit the EU industry access to raw material in a way that stimulates growth, employment and investment. EU Free Trade Agreements do not cover sourcing from all important third countries, and the ATQs allow operators to switch between supplying countries without losing access to preferential tariff rates.

The 2024–2026 ATQ regime established by Council Regulation (EU) 2023/2720 excluded Russia and Belarus from its scope for the first time,significantly affecting the sourcing of Alaska pollock. Excluding Russia from the ATQ regime made it necessary to submit documentation proving non-Russian origin when applying for end use. However, the application of non-preferential rules of origin has left room for different interpretations by Member States, creating legal insecurity for individual importers. Accordingly, the EU fish industry called for the application of clear, consistent and operational criteria.

Looking ahead to 2027 and the next ATQ regime, it is important that the instrument continues to fulfil its core purpose of securing access to raw material for the EU seafood value chain. Quota volumes and product coverage should reflect actual market needs, sourcing conditions and processing requirements. The EU fish industry therefore calls for a structured, technical dialogue with the sector before the next ATQ approach is finalized, to ensure that the instrument remains a targeted and effective tariff tool supporting production, employment and value-added activity within the Union.

The EU Commission is also looking into the scope for defining sustainability criteria in the ATQ regime after 2026. The EU fish industry is of the view that any sustainability-related criteria should be clearly defined, auditable and transparent, with workable compliance conditions and sufficient time for implementation. Sustainability criteria should support a level playing field and, where applied, be aligned with criteria both for EU fisheries and aquaculture and broader requirements applicable to seafood placed on the EU market.

Current imports of seafood into the EU already meet sustainability standards to a high extent. Among other, this includes Marine Stewardship Council (MSC) certification for wild-caught fisheries and Aquaculture Stewardship Council (ASC) certification for aquaculture.

3.2 Trade agreements

3.2.1 Trade relations with the US

With effect from 1 July 2026, the EU opened zero-duty tariff quotas for a number of fish and fishery products originating in the United States, including Alaska pollock, squid, unprocessed and processed salmon, prepared shrimps, hake and dogfish. Access is

subject to defined quota volumes, allocated by a first-come-first served criteria (and a direct-transport rule).

These measures implement the EU-US political agreement reached on 27 July 2025 and subsequently reflected in the Joint Statement of 21 August 2025.

The EU also reinstated the zero-duty treatment for lobster products, extending its scope to processed lobster, with retroactive effect from 1 August 2025. The measure applies on an erga omnes basis.

On the US side, EU goods were generally subject to a 15% tariff framework from August 2025. From 24 February to 24 July 2026, this was superseded by a temporary 10% import surcharge under Section 122. Following its expiry, a new Section 301 regime entered into force on 24 July 2026. For most EU products covered by that regime, the combined MFN and Section 301 duty is capped at 10%, subject to specified product exemptions.

3.2.2 TCA Agreement UK

The EU–UK Trade and Cooperation Agreement (TCA) has been in force since 1 May 2021. It allows seafood originating in the EU or the UK to be traded tariff-free between the two markets, provided the applicable rules of origin are met.

Following a first post-Brexit UK-EU Summit held in London in May 2025, talks were held to reach definitive agreement on a number of headings covered by the Common Understanding which resulted from those discussions. These included the negotiation of new aligned sanitary and phyto-sanitary (SPS) controls to ease border frictions and facilitate trade in both directions, including in relation to seafood. Such arrangements would also apply to UK imports from third countries. Although they would not directly impact on respective existing IUU regimes (which are subject to separate legislation) it is envisaged that the UK will adopt its own digital systems compatible with those now operating in the EU under CATCH.

A second summit was due to have been held in July 2026 to finalise this process. But this has been postponed following the change of UK Prime Minister and is now expected to take place in the second half of the Irish Presidency. However, the extension of access and catching opportunities for EU vessels in UK waters agreed in the context of the first summit is already fully in force.

3.2.3 EVFTA Vietnam

The EU-Vietnam Free Trade Agreement (EVFTA) entered into force on 1 August 2020. The EVFTA is described as the most ambitious trade agreement the EU has ever concluded with a developing country, eliminating customs duties on 99% of tariff lines.

3.2.4 EPA Japan

An Economic Partnership Agreement (EPA) between the EU and Japan entered into force on the 1 February 2019. Under the Agreement, all fish products have been or will be liberalised over time.

3.2.5 FTA EU New Zealand

The EU-New Zealand Free Trade Agreement entered into force on 1 May 2024, opening the EU market to zero duty for most fish and fishery products while bringing tariffs on other products down to zero in stages. Tariff barriers to the import of hoki, both fillets and whole fish, to the EU market and industry will therefore be eased. The agreement also provides for simplified, modern rules of origin and cooperation on sanitary and phytosanitary matters, including trade in fishery products.

3.2.6 EU – Mercosur Free Trade Agreement

The EU and the four founding Mercosur countries, Argentina, Brazil, Paraguay and Uruguay, reached a political agreement on the EU-Mercosur Partnership Agreement in December 2024. Following further legal and institutional procedures, the EU and Mercosur signed the Partnership Agreement and an Interim Trade Agreement in January 2026. The Interim Trade Agreement is provisionally applied from May 1st 2026.

The agreement provides for significant tariff liberalisation for trade in fish and seafood products. The agreement will eliminate tariffs on a large share of fresh and frozen fish and shellfish products, including shrimp, lobster and frozen bonito fillets. For other products, such as prepared bonito and sardines, tariff elimination will take place gradually over transitional periods. The agreement thus provides additional opportunities for sourcing seafood from the Mercosur region under preferential tariff conditions.

3.2.7 EU – Peru, Ecuador, Colombia

The Free Trade Agreement between the European Union and Colombia and Peru entered into force provisionally in 2013. Ecuador joined the agreement through a Protocol of Accession which entered into force in 2017.

Under the EU-Colombia-Peru-Ecuador Trade Agreement, the EU has eliminated customs duties on virtually all fish and seafood products originating in Ecuador, Colombia and Peru, provided that the products comply with the applicable rules of origin and origin documentation requirements. This includes a wide range of products such as shrimp, tuna, squid, cuttlefish, molluscs and processed fishery products.

3.2.8 EU – Indonesia free trade agreements

The EU and Indonesia concluded negotiations on a Comprehensive Economic Partnership Agreement (CEPA) in September 2025. In June 2026 the European Commission presented proposals to the Council for the signature and conclusion of the agreement.

The agreement is therefore moving towards the signature and ratification stage. The CEPA is expected to further liberalise trade between the EU and Indonesia and provide improved market access and more predictable trade conditions. For the EU seafood industry, the agreement may thus provide additional opportunities for sourcing from Indonesia, subject to the final tariff schedules, rules of origin and completion of the necessary procedures for entry into force. This is particularly significant now that GSP status for Indonesia will be removed as of 1 January 2027.

3.2.9 Other trade agreements

Beside the abovementioned agreements more EU trade deals are being negotiated. However, the related negotiations have been concluded less recently and are in any case of variable importance for the EU fish processing industry, as its resources are constantly moving and changing.

Overall, concluding new trade agreements will help improve bilateral relations, increase trade and remove unnecessary trade barriers between the EU and partner third countries.

3.3 EEA Agreement and relations with Norway

Quotas within the so-called additional protocol between EU and Norway/Iceland opened 1 January 2025 in serious delay, while the former protocol expired 1 May 2021. The period without quotas provoked a supply bottleneck, especially for brined herring as an input into the EU fish industry. To compensate for the period between the expiry of the old and application of the new protocol, final quotas were more than doubled in amount compared with the original proposal. The new protocol provides for sufficient quantities of brined herring and shrimps free of duty. All other quotas cover the requested needs of the EU seafood industry.

The protocols expire on 30 April 2028. Quota volumes remaining unused at that date may continue to be available for up to a further two years, providing a degree of continuity should negotiations on the subsequent arrangements extend beyond the expiry date.

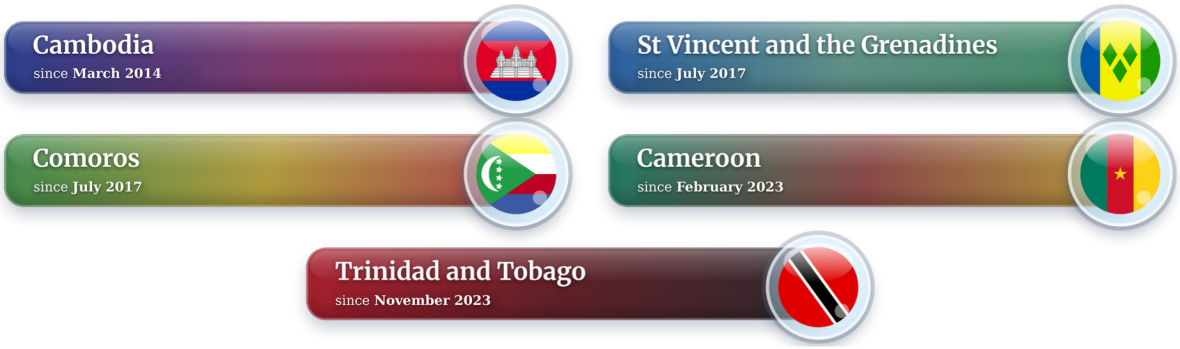
The Norwegian ban on export of whole salmon in lowest quality grade (production) has been ruled to be in conflict with international trade rules. Combined with a quota of 5.250 tons of smoked Norwegian salmon it effectively constitutes an unsustainable and significant distortion of the competitive position of Norwegian as compared with EU salmon production. The ban could, however, be lifted in 2027.

3.4 Illegal, Unreported and Unregulated (IUU) fishing and CATCH

3.4.1 IUU

With respect to the EU's IUU Regulation, the European Commission continues to use the system of 'yellow' and 'red' cards to deter and eliminate such fishing. The carding system remains an important instrument in the EU's international fisheries policy and is intended to encourage third countries to strengthen their flag, coastal and port state responsibilities. Imports of fishery products from countries formally identified by the EU as non-cooperating 'red carded' third countries are prohibited. The IUU Regulation also applies to EU operators irrespective of where they operate or under which flag they operate.

As of 2026, the EU list of non-cooperating third countries remains:



The Commission's current list continues to include these five countries as non-cooperating third countries.

The countries currently subject to a 'yellow card' remain:



No additional 'yellow-card' removals have occurred since Kiribati in December 2020. The current total therefore remains eight 'yellow-carded' countries.

3.4.2 CATCH

In May 2019, the European Commission launched CATCH, the IT system designed to digitalise the EU's paper-based catch certification scheme under Regulation (EC) No 1005/2008. Since 10 January 2026, the use of CATCH has been mandatory for EU operators and competent authorities handling imports of fishery products subject to the IUU catch certification scheme.

The introduction of mandatory CATCH is an important step towards a more harmonised, transparent and risk-based approach to IUU controls. However, the focus in 2026 is shifting from implementation to effective and proportionate use of the system. Key challenges include reducing administrative burdens, improving data quality and ensuring consistent application of controls across Member States.

A particular priority is interoperability with third-country systems. Where exporting countries use their own digital or paper-based certification systems, EU operators may still need to manually transfer information into CATCH. Greater system-to-system connectivity and standardisation would significantly reduce this burden.

Going forward, CATCH should increasingly be used to support risk-based controls, allowing authorities to focus resources on higher-risk consignments while avoiding unnecessary administrative requirements for compliant, low-risk trade. At the same time, further harmonisation between Member States is needed to ensure a genuinely level playing field for operators across the EU.

The key challenge for the coming years is thus to ensure that CATCH delivers on its intended benefits: effective IUU control, reduced administrative burden, greater interoperability and a consistent approach across the EU.



GEOPOLITICAL CONFLICTS

4 GEOPOLITICAL CONFLICTS

4.1 The Russian war in Ukraine

By mid-2026, the EU fish processing sector was continuing to operate in a market shaped by Russia's war of aggression against Ukraine and the measures adopted by the EU in response. EU restrictive measures against Russia were first introduced following the illegal annexation of Crimea in 2014 and have been progressively expanded since Russia's full-scale invasion of Ukraine in February 2022.

On 20 May 2025, the Council listed two major Russian whitefish suppliers, Norebo JSC and Murman Sea Food, under the EU restrictive measures framework addressing Russia's destabilising activities. The companies consequently became subject to the applicable EU restrictive measures.

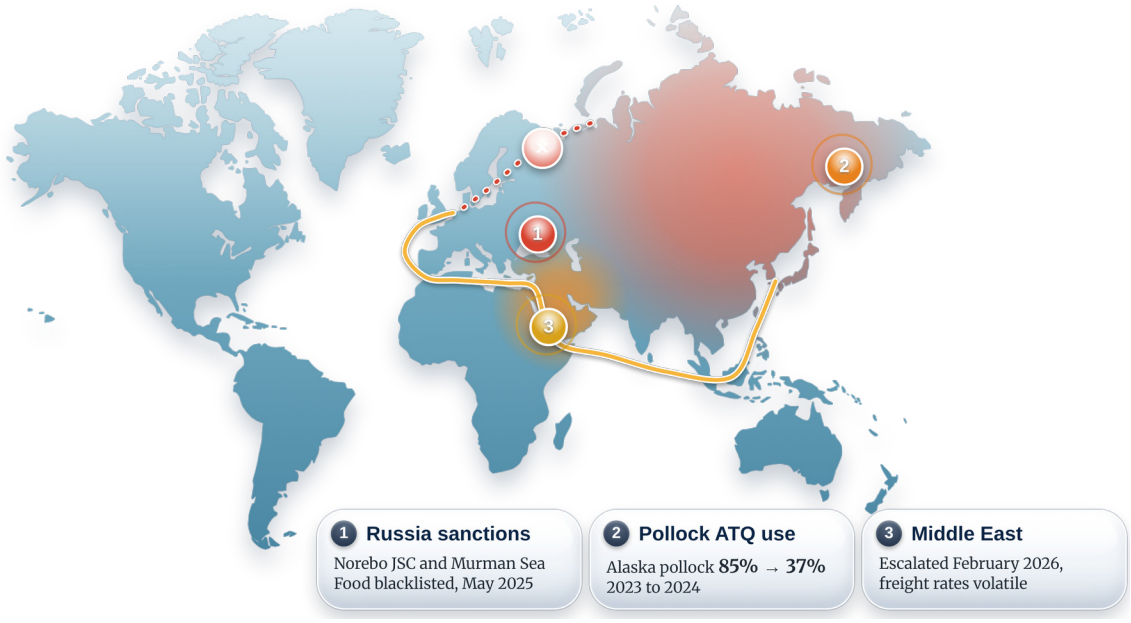
From 1 January 2024, fishery products originating in Russia and Belarus were also excluded from the EU Autonomous Tariff Quota (ATQ) regime. Russian-origin Alaska pollock and cod therefore no longer benefit from the reduced tariff treatment available under the relevant ATQs. The largest ATQ for Alaska pollock was utilised at 37% in 2024, compared with 85% in 2023.

Separately, no new Russian fishing vessels have been approved for export to the EU.

The 21st EU sanctions package, adopted on 23 July 2026, did not introduce a general prohibition on imports of Russian fishery products.

4.2 Middle East conflict

Escalating conflict in the Middle East during 2025 contributed to continued high freight rates, although these remained below 2024 levels. It also increased uncertainty across global supply chains, resulting in longer transport routes and extended transit times for products and cargo. A further escalation of the conflict in February 2026 added to supply chain uncertainty and freight-rate volatility.



PRODUCT CATEGORY



5 PRODUCT CATEGORY

5.1 General

Since 1992, the EU Seafood Supply Synopsis has focused on analysing trade in the seven key wild whitefish species (cod, Alaska pollock, hake, haddock, saithe, redfish & hoki) and providing insights into market developments.

This category will be analysed in the first section of this chapter. Over time, the EU Seafood Supply Synopsis has expanded to cover an increasingly diverse range of species, including plaice, salmon, shrimp and tuna. These species are analysed individually and presented in the following sections.

For the purposes of this Synopsis, EU seafood supply is assessed on the basis of three main components: imports, aquaculture production and fisheries catches. The data sources are as follows:

- **EU imports:** Eurostat/Comext trade statistics.
- **Aquaculture production:** Data provided by the Federation of European Aquaculture Producers (FEAP), supplemented by estimates from Seafood Europe.
- **Fisheries catches:** Data on catches of species subject to EU quotas, as reported in the EU Catch Report.

Fish volumes are converted to whole fish equivalents (WFE).

Whitefish

General

The apparent demand for whitefish in the 27 EU member states is high, with 2,535,000 tonnes of wild capture species in 2025 (+8 per cent; +178,000 tonnes). These species represent cod, Alaska pollock, hake, haddock, saithe, redfish & hoki. Increased global competition for access to raw materials, geopolitical complexities and reductions in quotas for certain key whitefish species are expected to place further pressure on the availability of whitefish for EU processors.

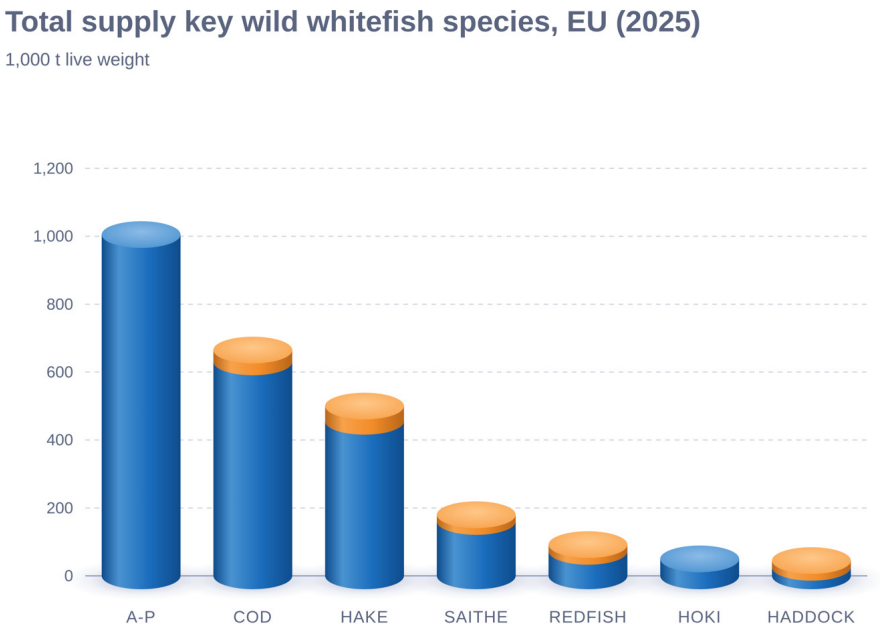


Figure 5.1: Total volumes of EU utilized key wild captured whitefish species in 2025; Source: Eurostat/Comext

Whitefish species are of great importance in the supply of the EU market, due to the scale of the tonnages involved, and also the high added value provided by the processing of these species by the EU processing industry. Most of the whitefish is imported from outside the EU, around 95 per cent in 2025 (2,398,000 tonnes). Alaska pollock and cod are the most important whitefish species consumed within the EU, accounting to 1,002,000 tonnes and 666,000 tonnes in 2025 respectively. Species such as Alaska pollock and hoki are fully dependent on imports (figure 5.2).

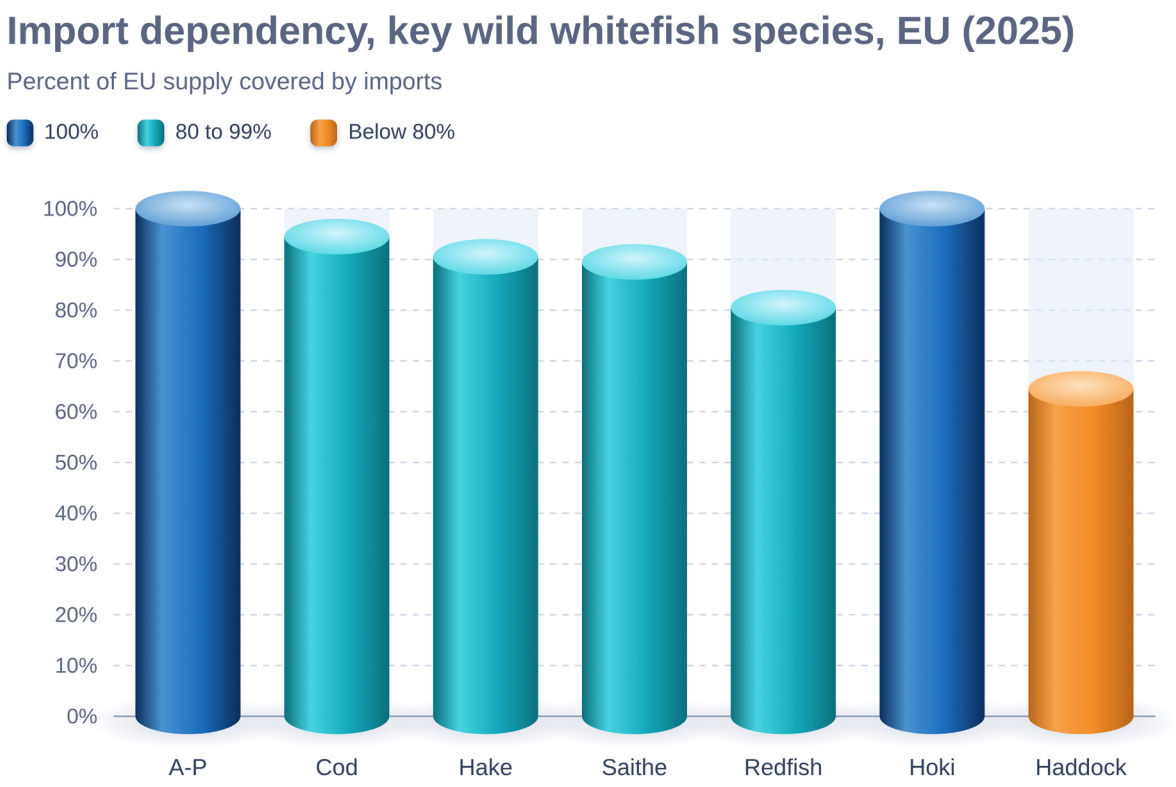


Figure 5.2: Import dependency EU for key wild captured whitefish species in 2025; Source: Eurostat/Comext

For many years, supply from EU catches of species under quota management has been decreasing. The total landings volume of whitefish decreased by 48 per cent between 2020 (beginning of EU27 following Brexit) and 2025. In 2025 the total landing volume of whitefish amounted to 137,000 tonnes, an increase of 2 per cent compared to 2024 (+3,000 tonnes). Redfish (+6,000 tonnes; +54 per cent) in particular was caught in higher quantities, haddock (-2,000 tonnes; -10 per cent) in lower amounts.

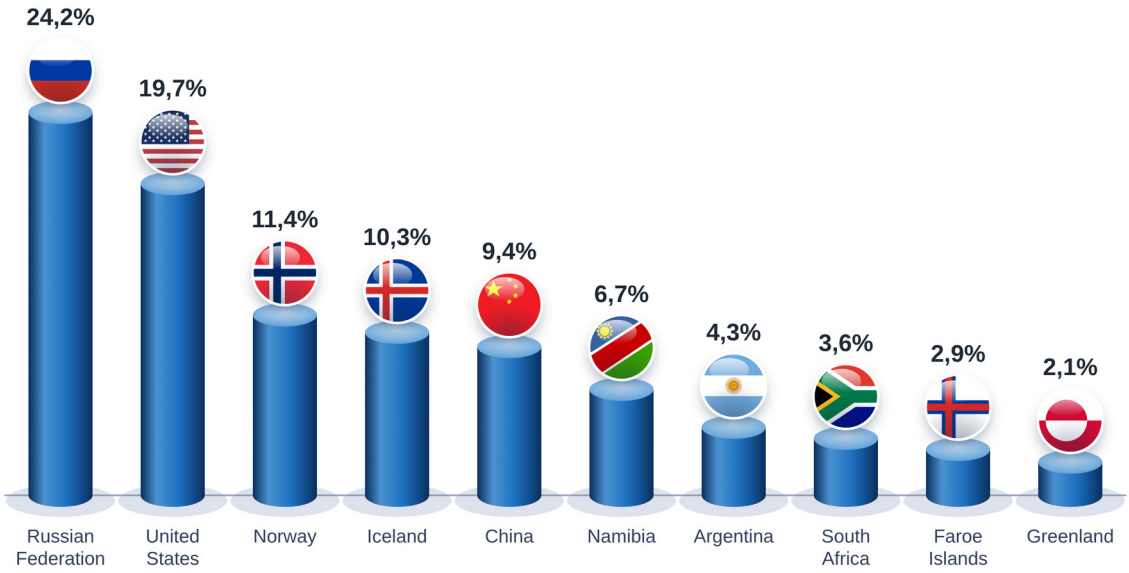


Figure 5.3: External sourcing countries for key wild captured whitefish species in 2025 in percentage of total import (2,398,000 tonnes); Source: Eurostat/Comext

The most important non-EU suppliers in 2025 were Russia (579,000 tonnes; +19 per cent), USA (471,000 tonnes; +26 per cent), Norway (273,000 tonnes; -13 per cent), Iceland (246,000 tonnes; -2 per cent) and China (226,000 tonnes; -9 per cent) (figure 5.3). The shares of USA and Russia in EU whitefish imports increased to 26 and 19 per cent respectively due to the increased import of Alaska pollock in 2025 (+223,000 tonnes). Almost all whitefish imports from China and the USA are frozen fillets (especially Alaska pollock). The sourcing from China also cover fish from other origins reprocessed and dispatched from China to the EU.

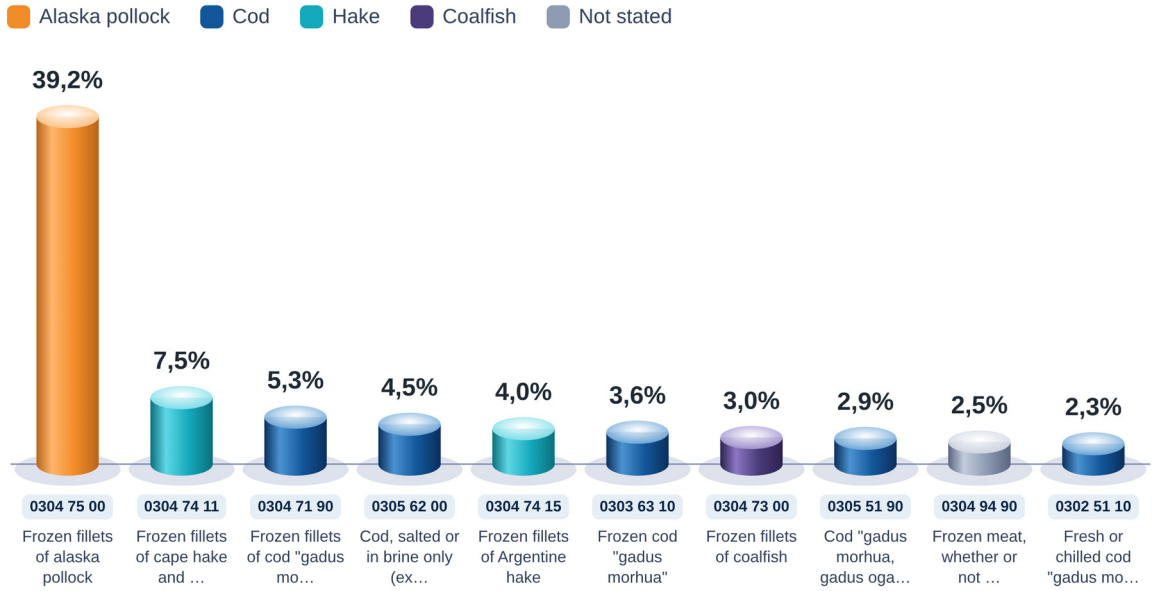


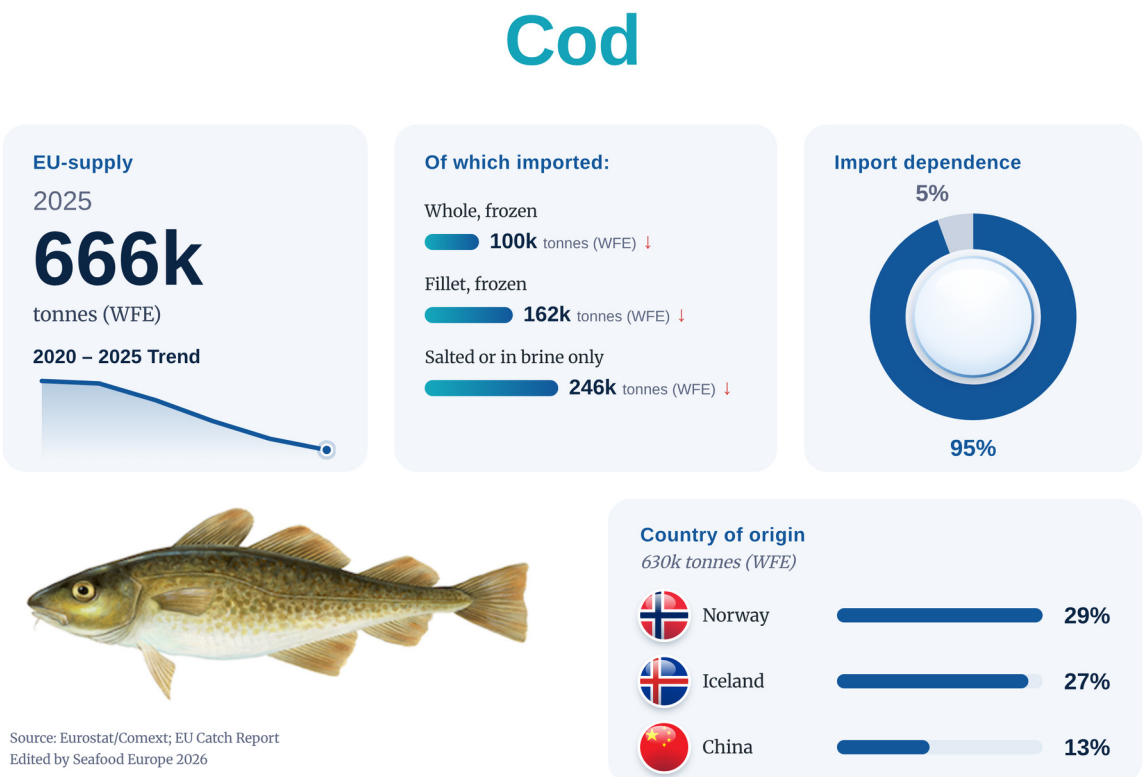
Figure 5.4: Main imported products of wild captured whitefish species in 2025 in percentage of total import (2,398,000 tonnes); Source: Eurostat/Comext

Out of all imported wild captured whitefish species in 2025, 39.2 per cent (940,000 tonnes) consisted of frozen Alaska pollock fillets from Russia (49.7 per cent; 467,000 tonnes), the USA (40.2 per cent; 378,000 tonnes) and China (10.1 per cent; 95,000 tonnes) (figure 5.4). 7.5 per cent (180,000 tonnes) of total whitefish imports were frozen cape hake fillets from Namibia (65.8 per cent; 119,000 tonnes) and South Africa (34.0 per cent; 61,000 tonnes). Comprising 5.3 per cent of total imports, frozen cod fillets (*Gadus morhua and Gadus ogac*) were the third most important whitefish product imported from Iceland (33.1 per cent; 42,000 tonnes), China (30.4 per cent; 38,000 tonnes) and Russia (20.5 per cent; 26,000 tonnes).

"Whitefish species are of great importance to supply to the EU market, due to both the scale of tonnages involved, and the high level of added value provided by the EU industry's processing of these species "

Whitefish species are well established in the EU market and widely recognised by consumers. Continued access to global whitefish resources, under predictable and proportionate trade conditions, is essential to the long-term viability and competitiveness of the EU processing industry. A strong and competitive processing industry, in turn, supports the EU fisheries sector by providing stable demand, processing capacity and opportunities for value creation

Cod



Most of the landed Atlantic cod worldwide comes from the Barents Sea. Fishing quotas in the region reduced by 20 per cent year by year from 2021 to 2024. In 2025 the Northeast

Atlantic cod quota for the Barents Sea was further reduced by 25 per cent to 340,000 tonnes. In 2026 the quota reduction will be lower, down -16 per cent to 285,000 tonnes. Decreased availability of Northeast Atlantic cod has already had a huge impact on species price and availability on the EU market. EU restrictive measures affecting trade with Russia have added to the challenges surrounding whitefish supply to the EU market. The Barents Sea quota is divided between Norway and Russia to roughly an equal share, with each country receiving around 50 per cent of the Total Allowable Catch (TAC). Portions of the quota may also be allocated to third countries under international agreements. For 2027, scientists recommend an increase of the quota by 10 per cent.

The mid-Atlantic region around Iceland is another important source for Atlantic cod. Cod quotas in this area were increased by 2 per cent in 2024-2025 to 213,000 tonnes, but exhibited a decrease in 2025-2026 (-4 per cent; 204,000 tonnes) and 2026-2027 (-1 per cent; 202,000 tonnes).

Pacific cod is mainly caught by the USA/Canada, Russia, Japan and Korea. Total Bering Sea Aleutian Island cod initial TAC reached 127,000 tonnes in 2025, -9 per cent compared to 2024 (137,000 tonnes). For 2026 the quota decreased to 118,000 tonnes (-7 per cent). It is expected that the initial TAC for 2027 will be comparable with the initial TAC for 2026.

In 2025 the total EU-27 cod supply decreased by 8 per cent to 666,000 tonnes (-54,000 tonnes). Compared to 2020 cod supply reduced over 27 per cent. EU cod fisheries represent 5 per cent of this supply in 2025, 35,000 tonnes (-1,000 tonnes). The other 631,000 tonnes of cod products were imported from third countries, especially from Norway (29 per cent), Iceland (27 per cent) and China (13 per cent). Where the biggest share (>65 per cent) from Norway consists of salted/dried cod (123,000 tonnes), Icelandic cod is mainly imported fresh (25 per cent; 42,000 tonnes) or in frozen fillets/blocks (25 per cent; 42,000 tonnes), and Chinese cod mainly consists of frozen raw, filets (80 per cent; 64,000 tonnes). A significant portion of Chinese imported cod in fact comes from Russian fisheries.

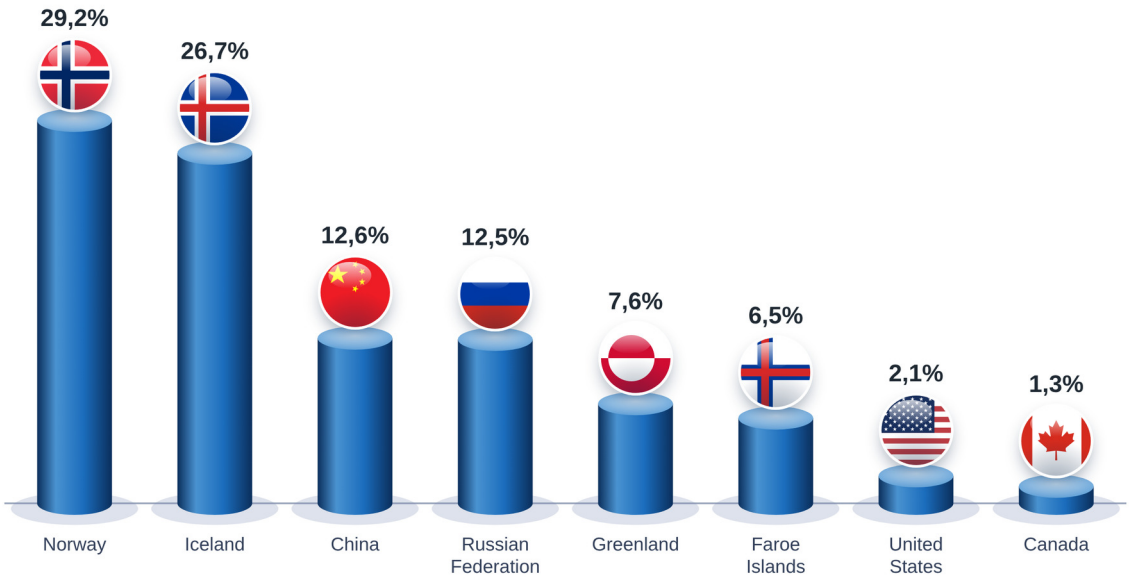


Figure 5.2.2.1: External sourcing countries for key wild captured cod in 2025 in percentage (>1 per cent) of total import (631,000 tonnes); Source: Eurostat/Comext

Cod enters the EU mainly via the Netherlands, Denmark and Sweden. Most of the cod imports in 2025 consisted of frozen fillets of *Gadus morhua* or *Gadus ogac* (20 per cent), salted/brined cod (no fillets) (17 per cent) and frozen whole *Gadus morhua* (14 per cent). Cod is re-exported within the EU - either processed or not – especially to France, Portugal and Spain. A total overview of imports as per HS-code are mentioned in the figure below.

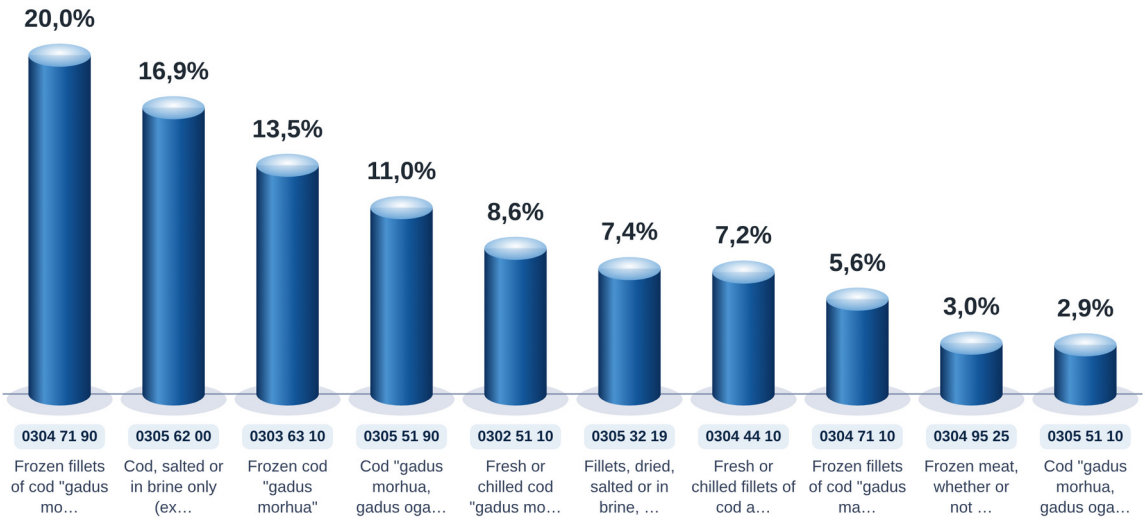


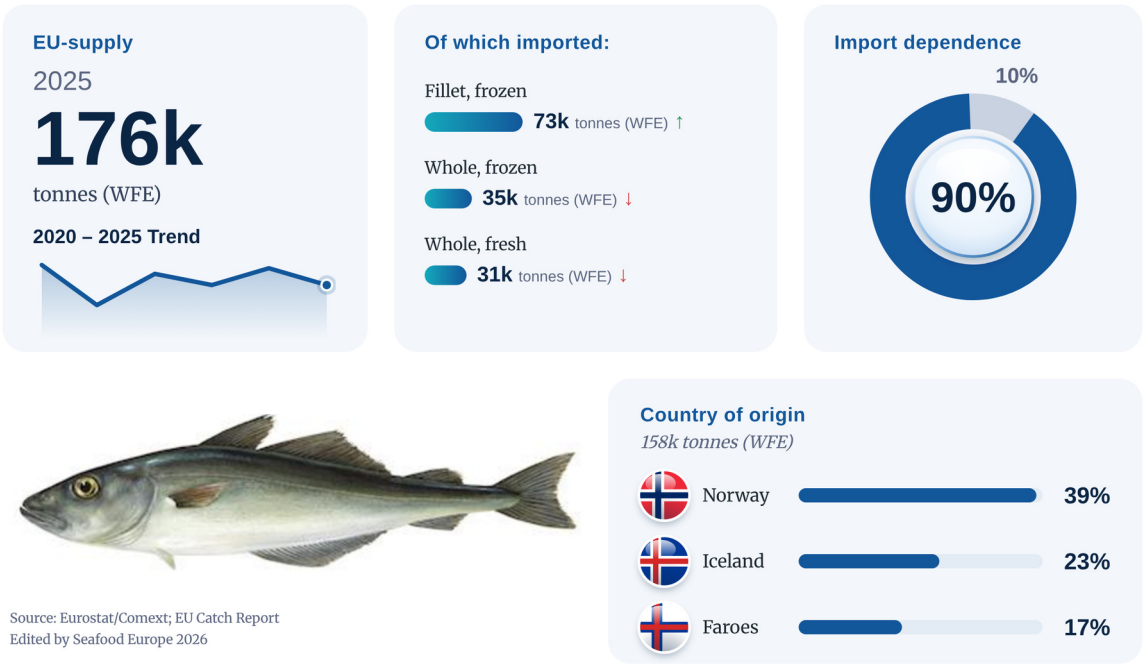
Figure 5.2.2.2: Main imported products of wild captured cod in 2025 represented as percentage of total import (631,000 tonnes); Source: Eurostat/Comext

The industry benefits from three significant ATQ allowances for cod, which are the basis for raw materials in the EU fish processing industry. H&G cod (09.2759) has a limit of 110,000 tonnes and cod fillets (09.2776) have a 45,000 tonnes duty free import allowance in 2026. Another applicable ATQ is salted cod for processing (09.2765) with a 2,000 tonnes duty free import allowance in 2026. All quotas are there to stimulate growth, employment and investment in EU fish processing industry.

Cod raw materials are of high importance for the EU fish processing industry. Restrictions on ATQs for this product category will have a negative impact on its potential added value within the EU.

Imports from third countries will remain essential to ensuring sufficient supplies of cod for the EU market. At the same time, EU fisheries should be able to make full and sustainable use of available fishing opportunities, in line with scientific advice and the objective of maximum sustainable yield (MSY). Against the backdrop of reduced fishing quotas for several important cod stocks and increasing complexities in international trade, it is essential that the European Commission facilitates stable, predictable and efficient access to imported raw materials, while maintaining compliance with EU requirements.

Saithe



Most of the wild caught saithe comes from the Barents Sea. The Northeast Atlantic region (FAO27) around EU, Iceland, Faroes and Norway is another important area. Hence, both EU catches and imports contribute importantly to saithe supply within the EU. Total Atlantic saithe supply in 2025 decreased to around 176,000 tonnes (-3 per cent; 182,000 tonnes in 2024). 10 per cent of the supply came from EU fisheries (18,000 tonnes in 2025). The volumes delivered by EU fisheries stabilized after a huge drop in 2021 (-46 per cent). The other 158,000 tonnes are imported from third countries (90 per cent of total supply). Saithe quota show a decreasing trend with a 15 per cent reduction for 2026 (164,000 tonnes) and a 22 per cent projected one for 2027. This fact will impact the availability of supply for the coming years.

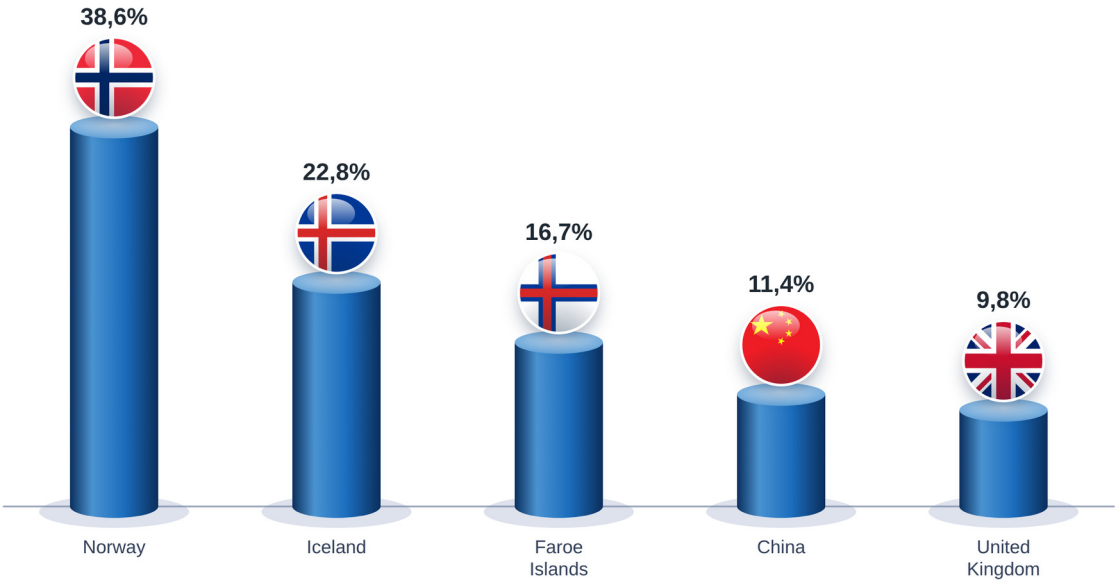


Figure 5.2.3.1: External sourcing countries for key wild captured saithe in 2025 in percentage (>1 per cent) of total import (158,000 tonnes); Source: Eurostat/Comext

The most important sourcing countries for saithe in 2025 were Norway (39 per cent), Iceland (23 per cent) and Faroe Islands (17 per cent). 46 per cent of EU saithe imports consisted of frozen fillets, followed by whole frozen (22 per cent) and fresh whole saithe (22 per cent). The products enter the EU mainly via the Netherlands, Sweden, Denmark and France, while the main processing and consumption markets are France, Poland, Germany and Denmark.

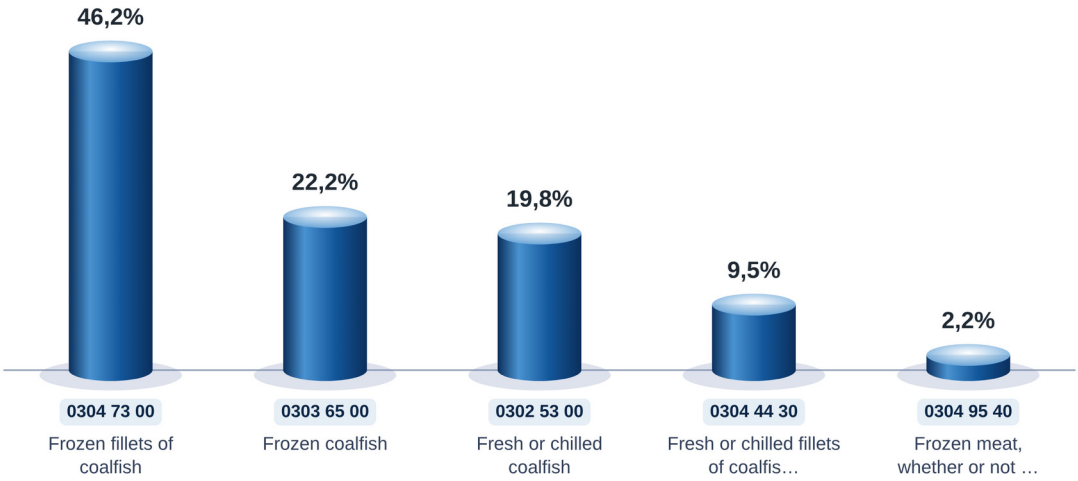
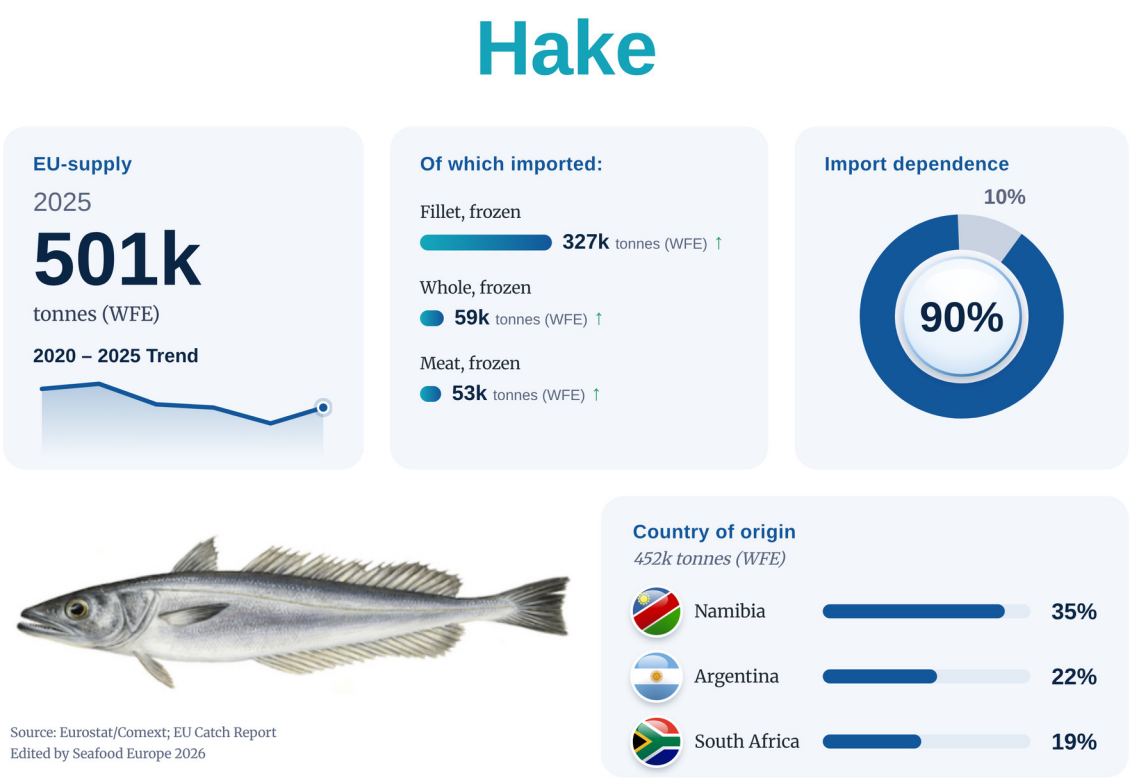


Figure 5.2.3.2: Main imported products of wild captured saithe in 2025 in percentage of total import (158,000 tonnes); Source: Eurostat/Comext

A small quantity of saithe is exported outside the EU, especially to China (re-export), Norway and Brazil (total of 13,000 tonnes in 2025).

There are no ATQ allowances in saithe as the supply comes from countries in the European Free Trade Association (EFTA) region or the UK.

Hake



After three decreasing years EU hake supply increased from 492,000 tonnes in 2024 to 501,000 tonnes in 2025 (+2 per cent). 90 per cent of this supply is from third countries, chiefly Namibia (35 per cent), Argentina (22 per cent) and South Africa (19 per cent) for the 452,000 tonnes of imported hake (see graph below).

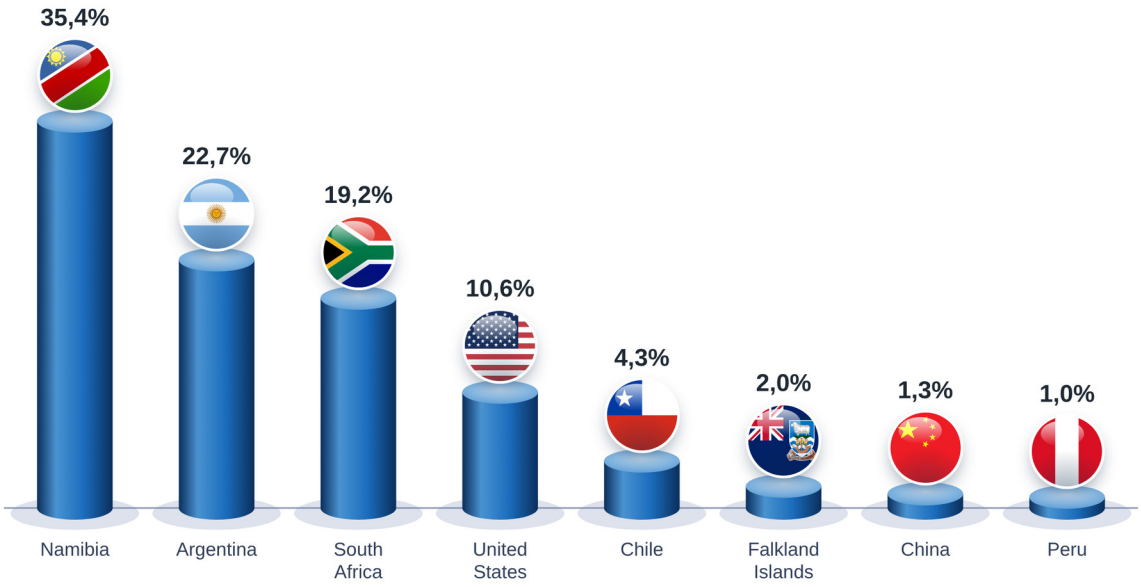


Figure 5.2.4.1: External sourcing countries for key wild captured hake in 2025 in percentage (>1 per cent) of total import (452,000 tonnes); Source: Eurostat/Comext

EU catches accounted for 49,000 tonnes in 2025, comparable with 2024, and corresponding to a utilisation of 61 per cent of the available quota.

Two ATQ allowances are available for hake. Frozen hake for processing (09.2760) has a limit of 10,000 tonnes and frozen fillets and other meat from North Pacific hake and Argentine hake (09.2774) a 40,000 tonnes duty-free import allowance. The base limit for frozen hake fillets and other meat (09.2774) had been 95 per cent used by the end of 2025).

40 per cent of 2025 imports consisted of frozen cape or deep-water hake fillets, followed by frozen Argentine fillets (21 per cent) and frozen hake meat (12 per cent).

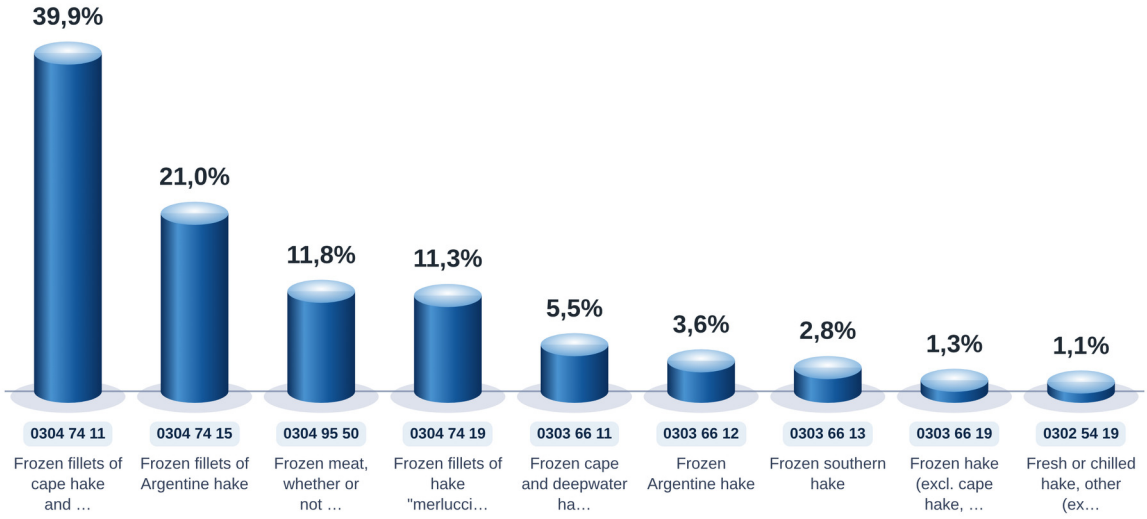
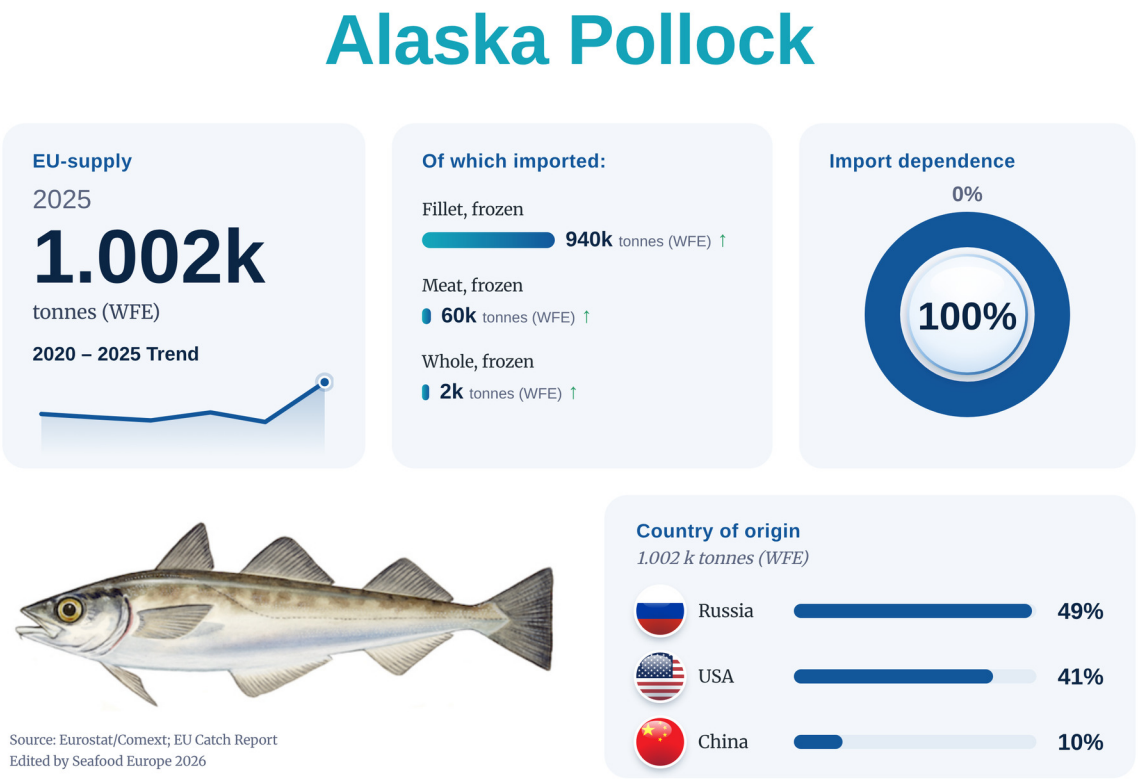


Figure 5.2.4.2: Main imported products of wild captured hake in 2025 in percentage of total import (452,000 tonnes); Source: Eurostat/Comext

Hake imports into the EU are concentrated in Southern European Member States, particularly Spain. Spain also plays an important role in intra-EU trade, supplying hake to other Member States, notably Italy and Portugal. The main destinations for EU hake exports to third countries include Ukraine, Moldova, Serbia and Morocco, with exports consisting predominantly of whole frozen hake.

Alaska pollock



The total Alaska pollock fishing quota for 2026 was comparable with 2025, amounting to 3.79 million tonnes, of which 2.42 million tonnes were allocated to the Russian Federation and 1.38 million tonnes to the USA.

The EU is fully dependent on third country imports of Alaska pollock: self-sufficiency is 0 per cent. The total supply – meaning third country imports – accounted to 1,002,000 tonnes in 2025, a significant increase compared to 2024 (+223,000 tonnes). Since 2024 Russia and Belarus are excluded from the ATQ preferential system, and import duties have to be paid on raw materials from these countries.

Since May 2025, Russian fishing vessels from Norebo have been placed on the EU sanctions list. Combined with the suspension of new EU registrations for Russian fishing vessels, this has a major impact on both the current and future supply of Alaska pollock into the EU.

The EU is a key market for Alaska pollock from both the USA and Russia. In 2025, the main sourcing countries were Russia (49 per cent), the USA (41 per cent), and China (10 per cent). It is important to note that over 95 per cent of Alaska pollock imported from China is of Russian origin. The USA's import share again grew significantly in 2025 (+34

per cent to 409,000 tonnes), and an increasing number of EU markets are showing a preference for US over Russian origin Alaska pollock.

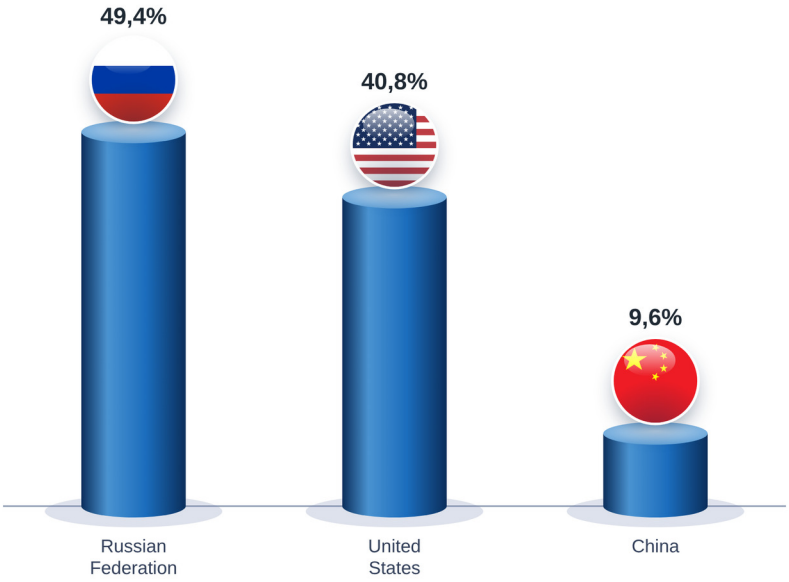


Figure 5.2.5.1: External sourcing countries for key wild captured Alaska pollock in 2025 in percentage (>1 per cent) of total import (1,002,000 tonnes); Source: Eurostat/Comext

The industry benefits from a significant ATQ for Alaska pollock (09.2777), the largest single such allocation. The total quota amounts to 340,000 tonnes, of which only 20 per cent were used by early August 2026 (compared to 36 per cent utilisation in all of 2025). This underutilisation is mainly due to the exclusion of Russia and Belarus from the ATQ preferential system in 2024.

94 per cent of the Alaska pollock imports in 2025 consisted of frozen fillets, followed by frozen Alaska pollock meat (6 per cent).

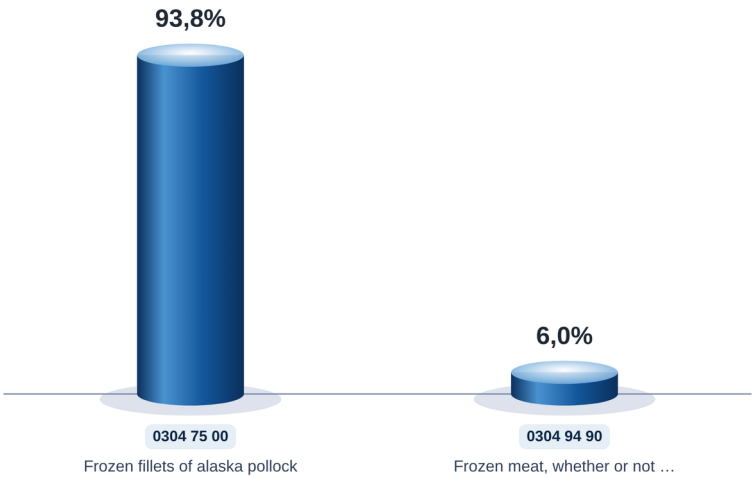


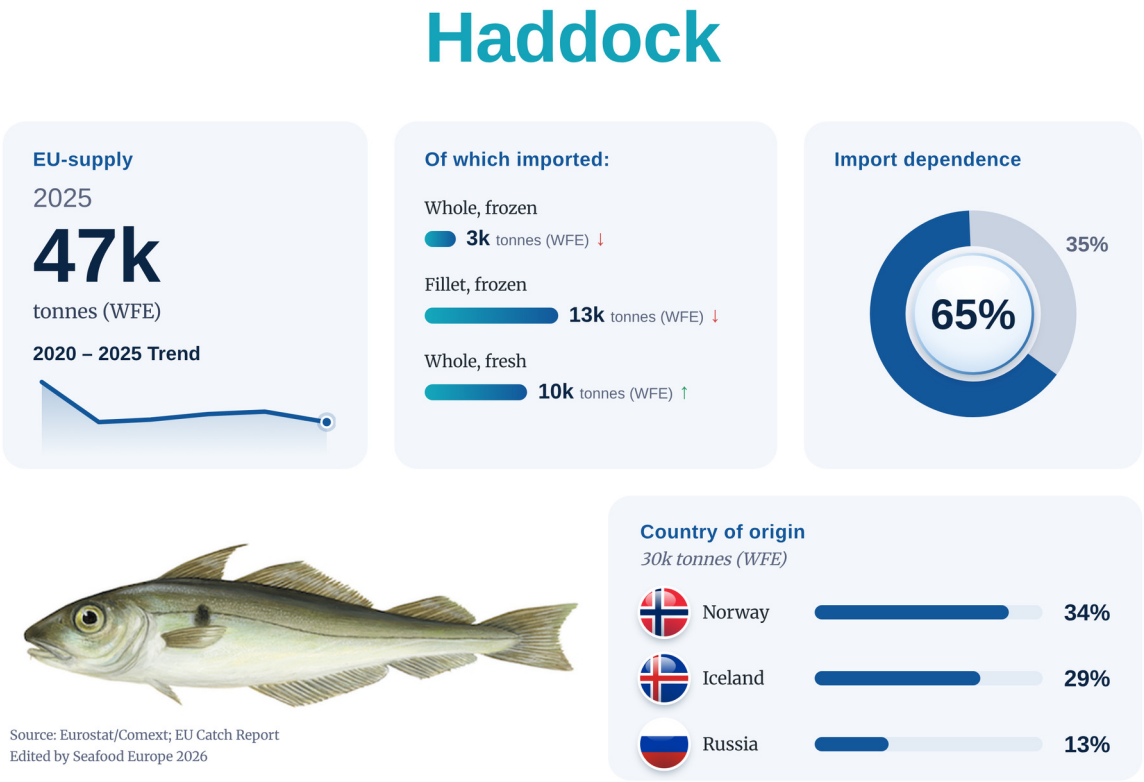
Figure 5.2.5.2: Main imported products of wild captured Alaska pollock in 2025 in percentage of total import (1,002,000 tonnes); Source: Eurostat/Comext

Germany (54 per cent) is the main importer of Alaska pollock, followed by France (15 per cent), the Netherlands (12 per cent) and Poland (7 per cent). Alaska pollock is also an

important source of frozen surimi. Import volumes of frozen surimi are not mentioned in this chapter and are studied separately.

Only a small amount of Alaska pollock is re-exported outside the EU, notably to neighbouring European countries such as Switzerland and the UK.

Haddock



Most of the EU haddock supply comes from the Barents Sea. In 2026 the Barents Sea fishing quota increased to 153,000 tonnes (+18 per cent). For 2027 scientists have recommended another 18 per cent quota increase to 180,000 tonnes.

The EU fleet landed 16,000 tonnes of haddock in 2025 (-9 per cent), 52 per cent of the available fishing quota, and self-sufficiency was 35 per cent. Haddock imports decreased to 30,000 tonnes, -14,000 tonnes compared to 2024 (-32 per cent). Haddock volumes, especially from Russia, dropped by 8,000 tonnes (-66 per cent).

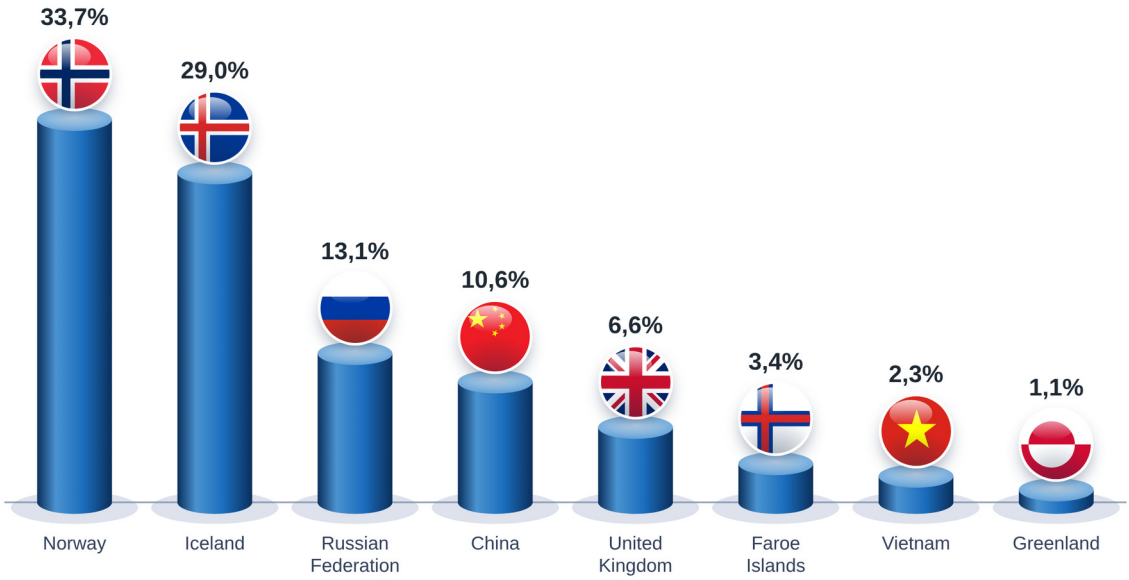


Figure 5.2.6.1: External sourcing countries for key wild captured haddock in 2025 as a percentage (>1 per cent) of total imports (30,000 tonnes); Source: Eurostat/Comext

The most important procurement countries for haddock in 2025 were Norway (34 per cent), Iceland (29 per cent) and Russia (13 per cent).

44 per cent of imports in 2025 consisted of frozen haddock fillets, followed by 33 per cent of whole fresh haddock and 12 per cent of frozen meat of haddock.

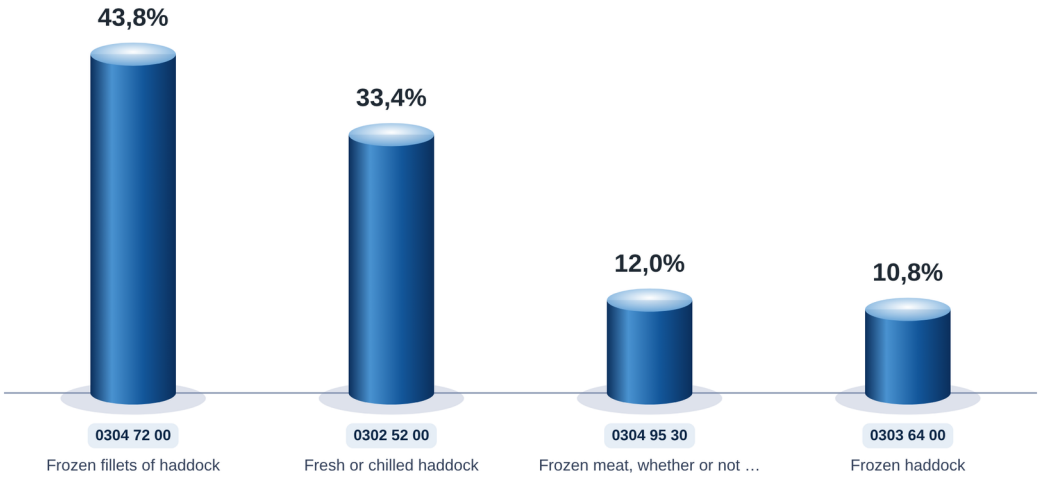
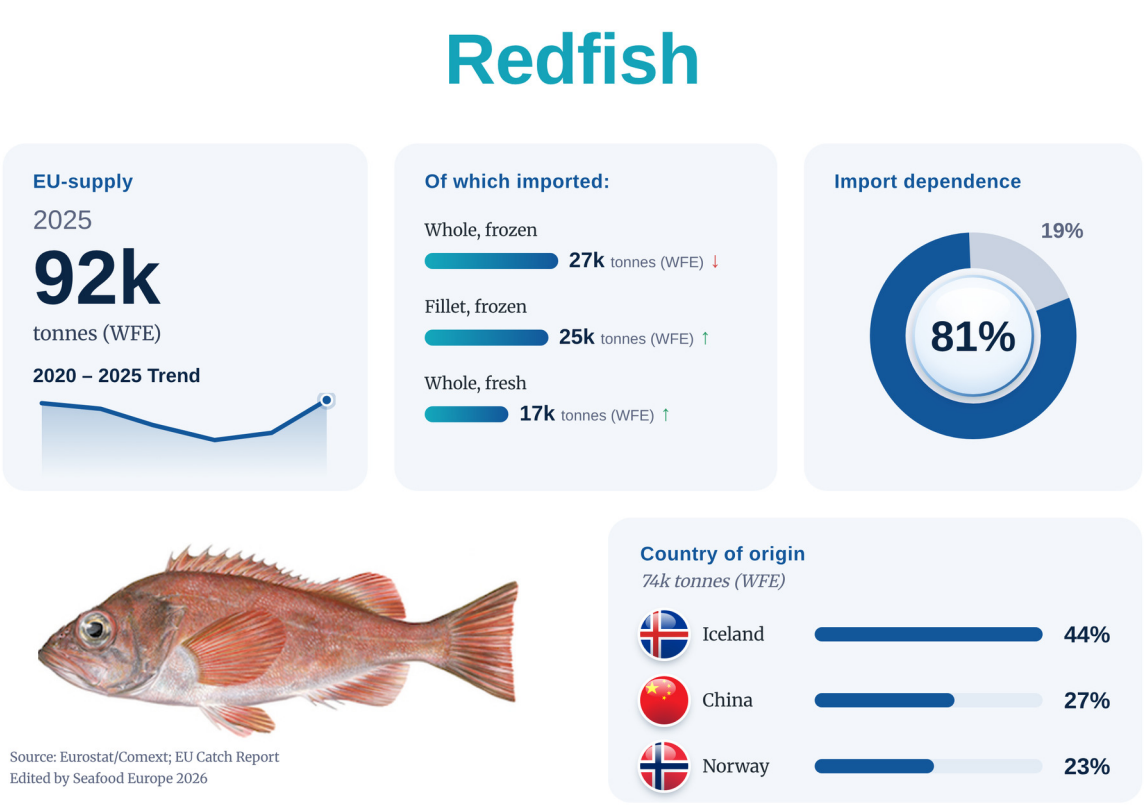


Figure 5.2.6.2: Main imported products of wild captured haddock in 2025 in percentage of total import (30,000 tonnes); Source: Eurostat/Comext

Most of the haddock involved is imported via the Netherlands, Denmark, Sweden or Poland.

There is a modest ATQ for haddock available for the EU processing industry: 3,500 tonnes of H&G haddock at 0 per cent duty (09.2824).



In 2025 EU supply of redfish was around 92,000 tonnes, an increase of 11 per cent over 2024 (83,000 tonnes). Around 19 per cent (18,000 tonnes) of this supply came from the EU fishing fleet (12,000 tonnes in 2024). The other 81 per cent (74,000 tonnes) were imported, mainly from Iceland (44 per cent), China (27 per cent) and Norway (23 per cent).

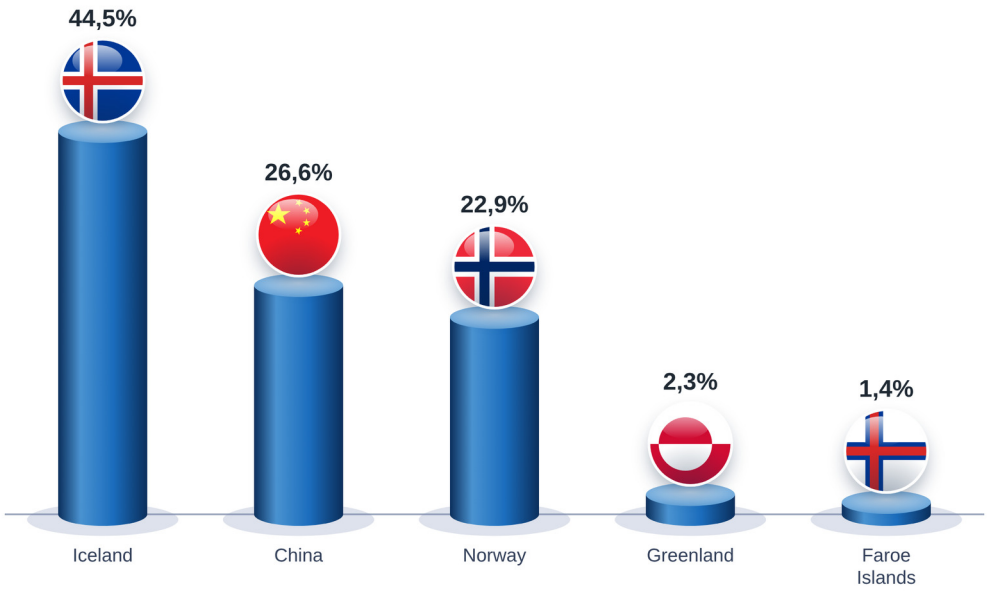


Figure 5.2.6.1: External sourcing countries for key wild captured redfish in 2025 in percentage (>1 per cent) of total import (74,000 tonnes); Source: Eurostat/Comext

Redfish imports into the EU are primarily channelled through the Netherlands, Denmark, Germany and Spain. In these Member States, redfish is either processed or redistributed to other EU markets, particularly Spain, Germany, France and Portugal.

In 2025, approximately 15,000 tonnes of redfish, predominantly in whole frozen form, were exported from the EU to third countries, including South Korea, China, Canada and Georgia. These exports comprised both redfish originating from EU production and previously imported products.

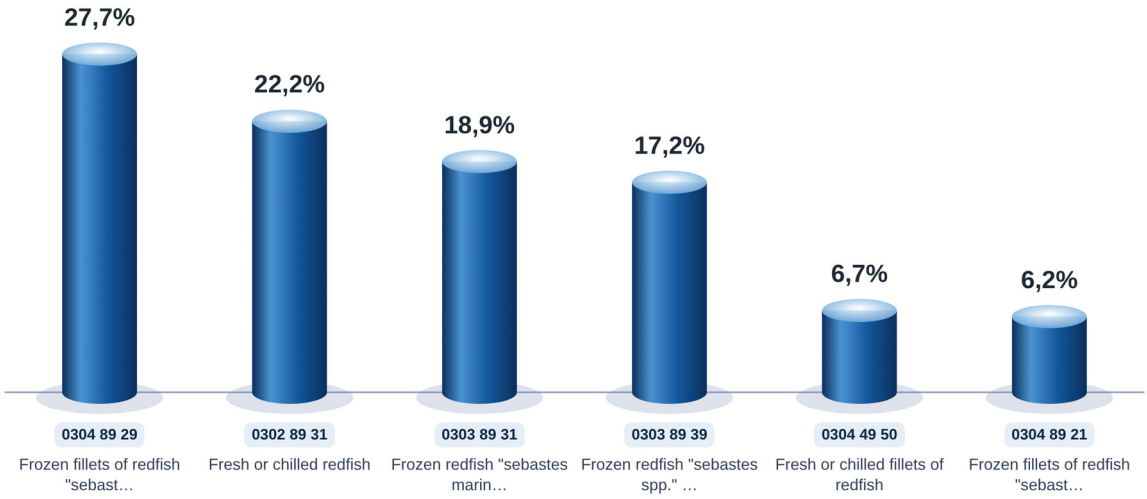
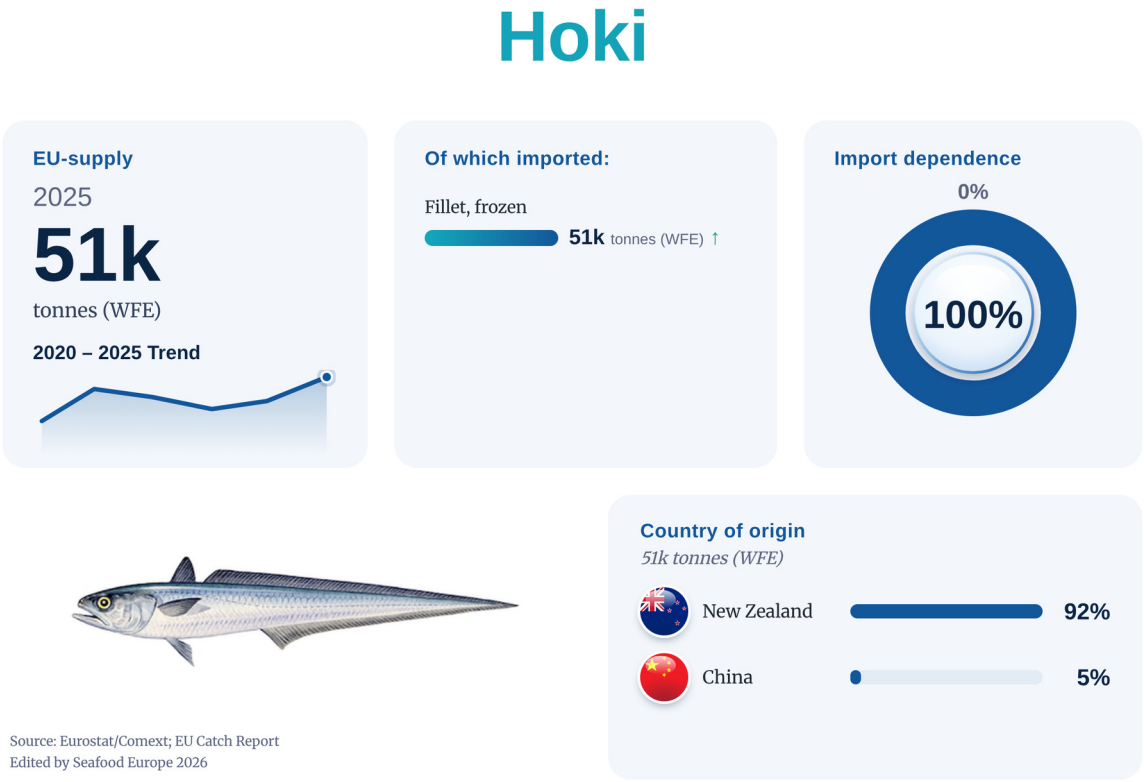


Figure 5.2.6.2: Main imported products of wild captured redfish in 2025 in percentage of total import (74,000 tonnes); Source: Eurostat/Comext

Frozen '*Sebastes marinus*' fillets are responsible for 28 per cent of imports, followed by fresh whole redfish (22 per cent) and frozen whole '*Sebastes marinus*' (19 per cent of imports).



In 2025 hoki (*Macruronus novaezelandiae*) EU supply increased to 51,000 tonnes, +12,000 tonnes compared to 2024 (+31 per cent). There is no EU catch for hoki so the EU is 100 per cent import dependent for supplies of this fish.

The most important supply country for hoki is New Zealand. In 2025 92 per cent of all EU imports came from this country, while imports from China accounted for 5 per cent of the total.

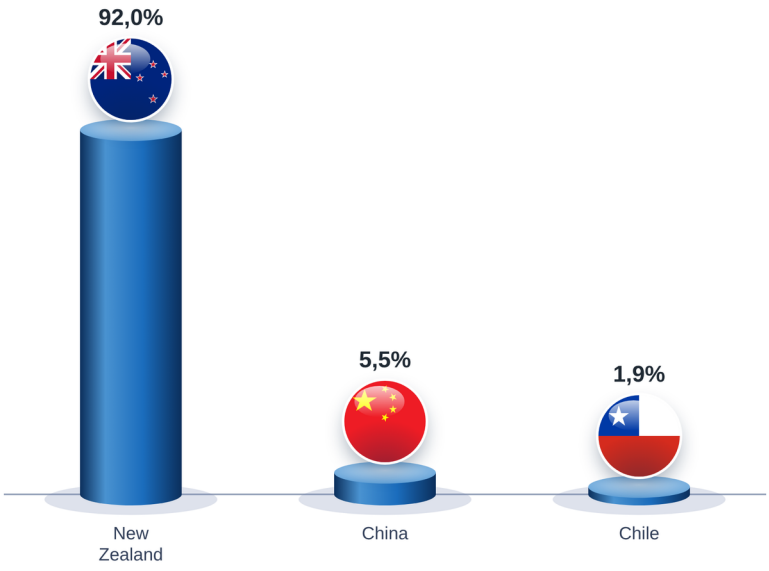
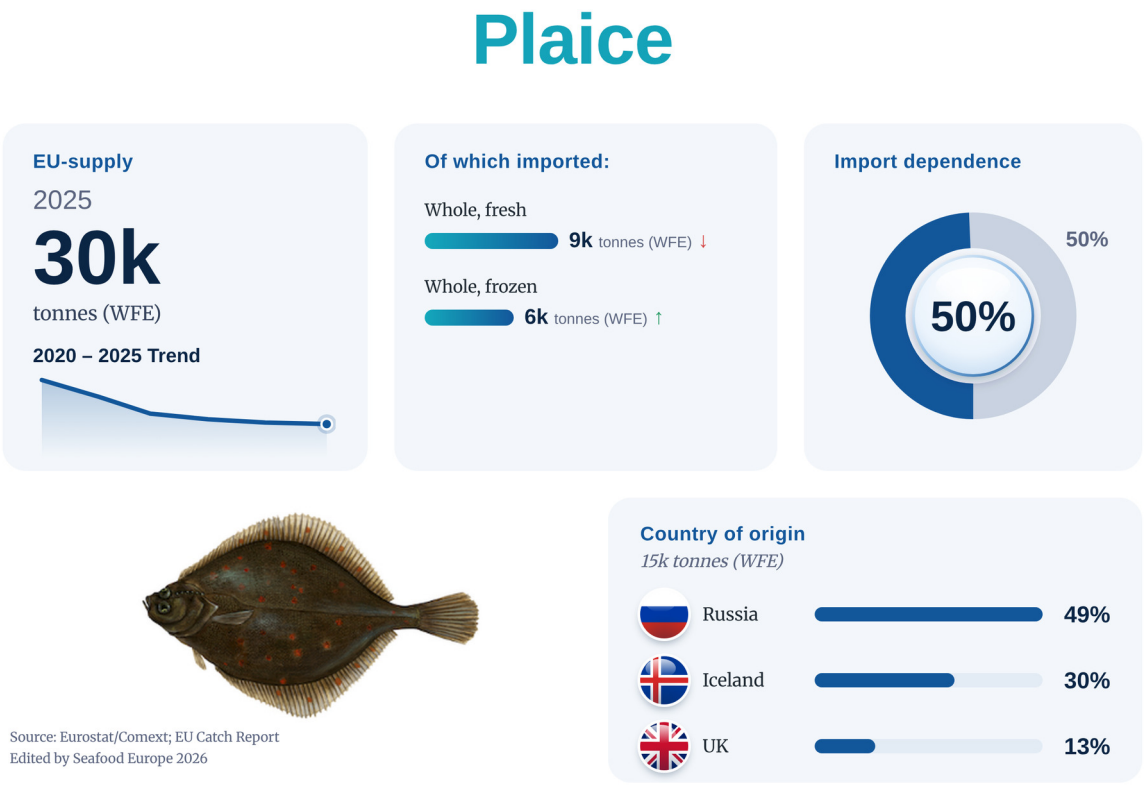


Figure 5.2.6.1: External sourcing countries for key wild captured hoki in 2025 in percentage (>1 per cent) of total import (51,000 tonnes); Source: Eurostat/Comext

There is an ATQ allowance available for hoki in the form of frozen fillets and meat for processing (09.2761), with a 17,500 tonnes limit on duty-free import allowances.

Most hoki imports into the EU enter through Poland, France and Germany. Frozen fillets account for more than 99% of total import volumes, with virtually all imported hoki remaining within the EU market. The EU–New Zealand Free Trade Agreement, which entered into force on 1 May 2024, provides for the elimination of import duties on New Zealand-origin hoki, improving market access and facilitating supply to the EU processing industry.

Plaice



European plaice (*Pleuronectes platessa)* is an important species in European waters that has been exploited for centuries. Most European plaice is caught in the greater North Sea area (ICES area III^{ab}, IV^{abc}, VII^{de}).

European plaice processing is concentrated in Northern Europe, with Urk in the Netherlands serving as a major hub for flatfish processing. However, declining landings are placing increasing pressure on the industry. Diversifying the range of flatfish species available for processing is therefore important to maintain sufficient production volumes, preserve specialised processing expertise and support the long-term viability and competitiveness of the sector.

EU plaice supply has shown a decreasing trend for many years. Despite a very high fishing quota, utilisation is low. EU plaice catches decreased by 7 per cent in 2025 compared to 2024, to 15,000 tonnes. Compared to 2020 EU production decreased by 68 per cent.

EU policies need to better reconcile marine conservation and renewable energy objectives with the need to safeguard EU fisheries and domestic seafood production. The

expansion of Marine Protected Areas (MPAs) and offshore wind developments can reduce access to traditional fishing grounds, placing additional pressure on the EU fishing fleet and potentially limiting the effective utilisation of available fishing quotas. Greater consideration of the cumulative impacts of these developments is therefore essential to ensure that environmental and energy objectives are pursued alongside the long-term viability of EU fisheries and the security of EU seafood supply.

Increased fuel prices due to the Middle East conflict negatively impacted the fishing effort for plaice in 2026. It is expected that plaice volumes will be at an all-time low in 2026. This in turn means that flatfish industry will be more dependent on plaice and other imports from outside the EU.

To fulfil consumer demand and maintain the sustainability of the flatfish market, efforts need to be redoubled to provide the EU processing sector with the necessary raw materials. Two separate approaches are needed. Efforts should be concentrated both on optimising the fishing quota utilisation for European plaice and on stimulating third country imports. It falls to both the Commission and industry to determine how best to ensure that European plaice and flatfish remain available as healthy products in the EU seafood market, thereby strengthening the Union's food security.

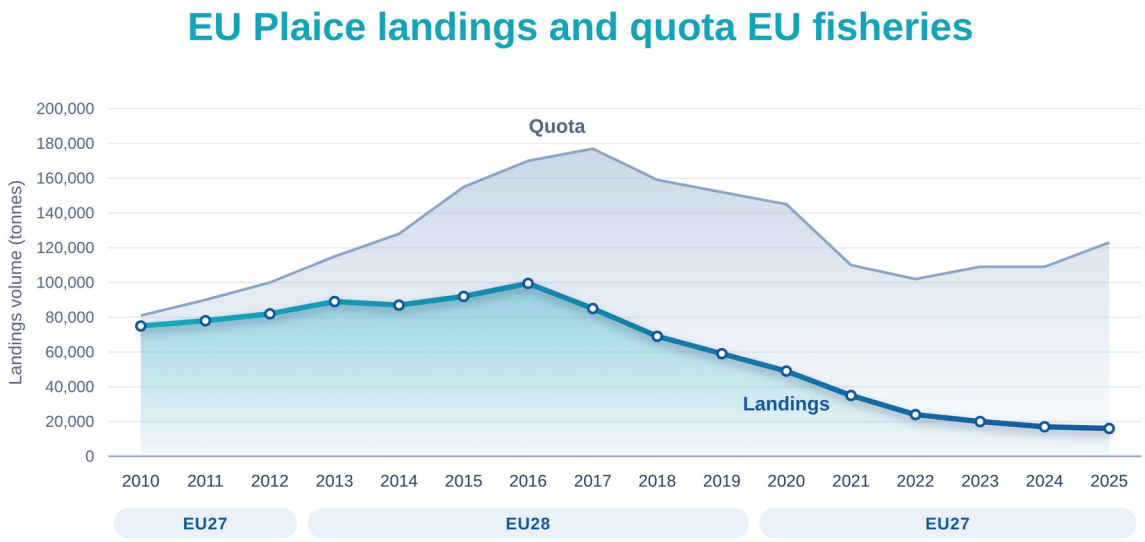


Figure 5.2.9.1: EU European plaice landings (blue line) and quota (grey area), year 2010-2025

EU self-sufficiency in plaice is still high, but decreasing. In 2025 half of all plaice came from EU fisheries: 54 per cent in 2024, 60 per cent in 2023 and 65 per cent in 2022. Import dependency has, however, increased compared with previous years. Import volume increased to 15,000 tonnes in 2025 (14,000 tonnes in 2024). Russia is the main source of European plaice imports with 7,000 tonnes in 2025 (49 per cent of total), followed by Iceland (30 per cent of total) and the UK (13 per cent of total).

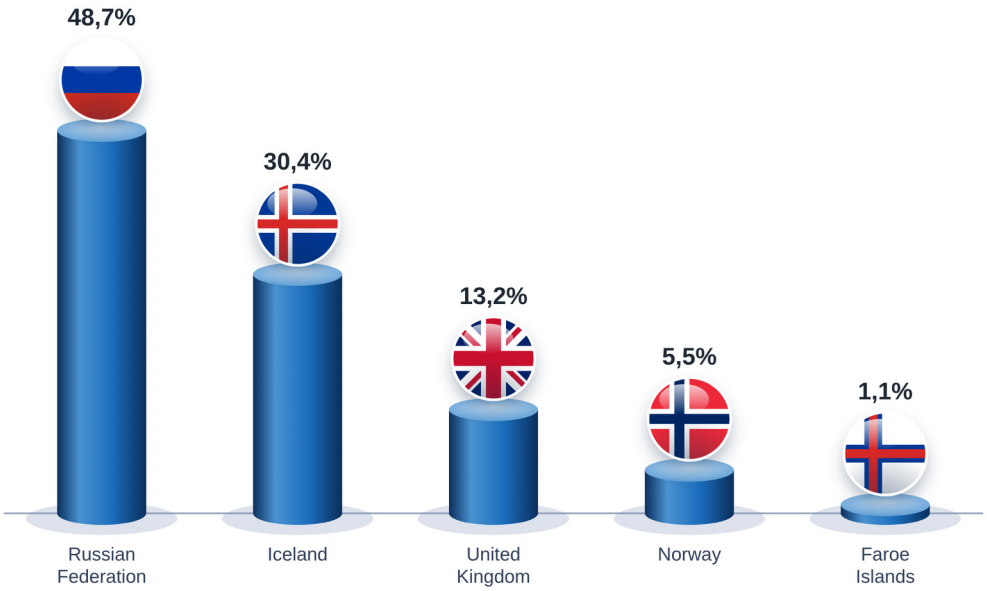


Figure 5.2.9.2: External sourcing countries for plaice in 2025 in percentage (>1 per cent) of total import (15,000 tonnes); Source: Eurostat/Comext

There are ATQ allowances for flatfish fillets (09.2778) and whole flatfish (09.2503) available for EU industry. The flatfish imported via these ATQs are not European plaice but additional or complementary flatfish species. The ATQ allowance for flatfish fillets was 97 per cent utilised in 2025.

The ATQ for whole frozen flatfish (7,500 tonnes) was 75 per cent utilized in 2025, demonstrating a growing utilisation trend. Although relatively recently introduced, this ATQ has become increasingly important for processors, particularly in Urk (Netherlands), by providing alternative raw materials to compensate for declining European plaice landings. As demand for these alternative supplies continues to grow, the current quota volume may become insufficient in the coming years, particularly if EU plaice landings remain at low levels.

Fresh whole plaice are responsible for 60 per cent of European imports, followed by frozen whole plaice (39 per cent).

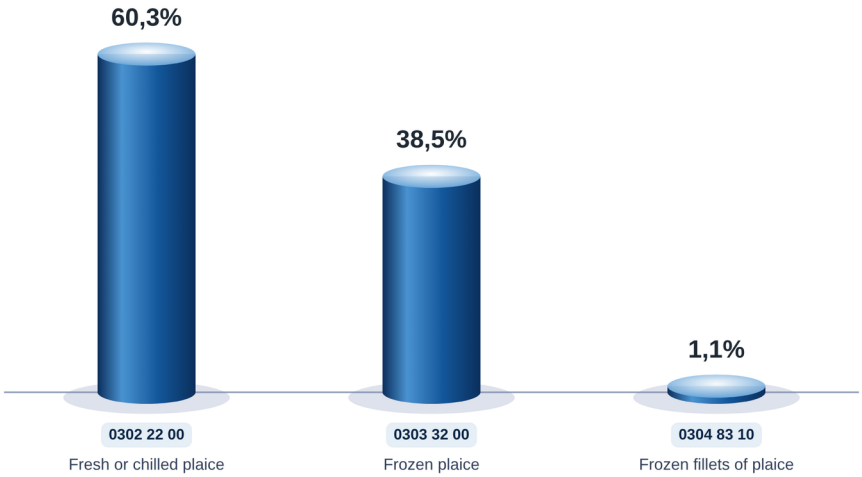
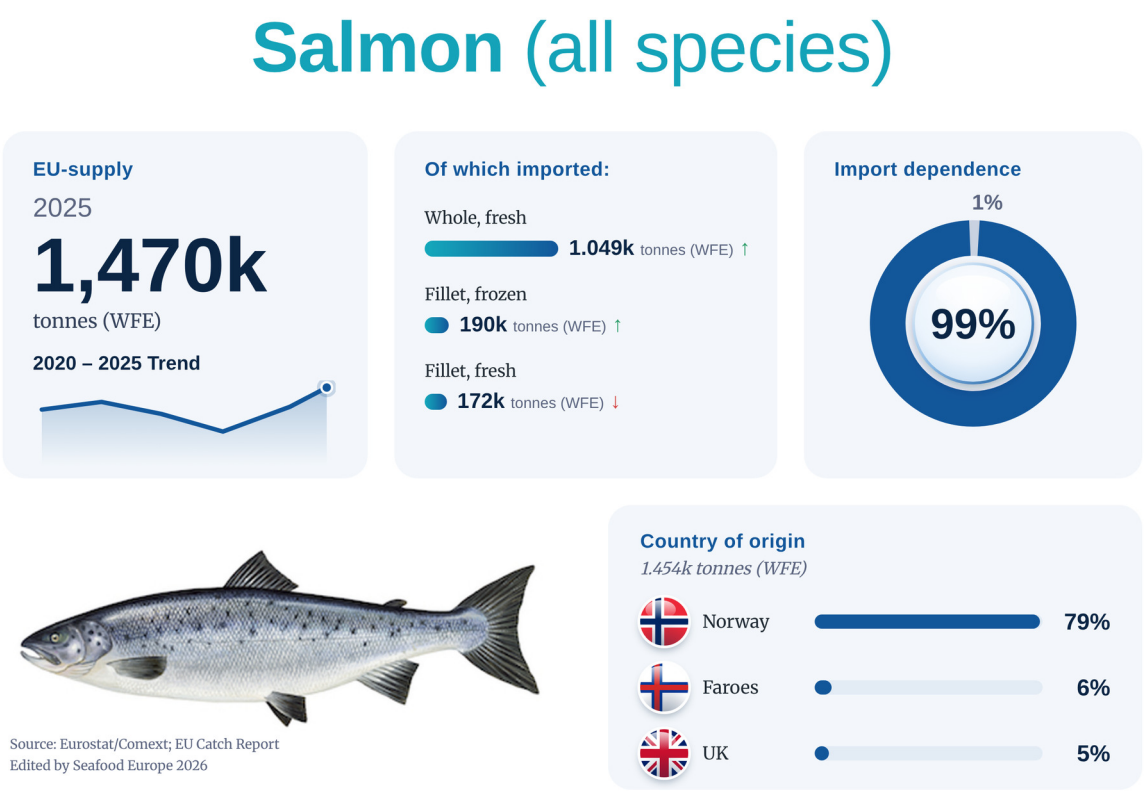


Figure 5.2.9.3: Main imported products of plaice in 2025 in percentage of total import (15,000 tonnes); Source: Eurostat/ Comext

Other fish species

Salmon



In 2025, salmon species, predominantly Atlantic salmon, were the second most consumed seafood in the EU. Total EU salmon supply increased to 1,470,000 tonnes in 2025, 5 per cent higher than in the previous year (2024: 1,400,000 tonnes). Almost all the salmon involved is imported into the Union from neighbouring countries.

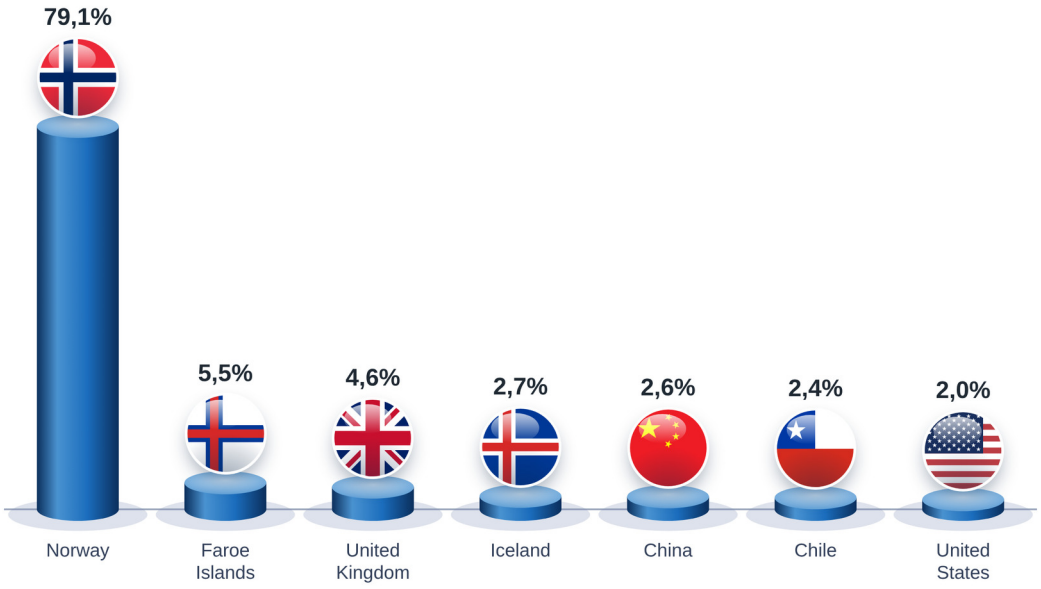


Figure 5.3.1.1: External sourcing countries for salmon in 2025 in percentage (>1 per cent) of total import (1,454,000 tonnes); Source: Eurostat/Comext

Most of the raw materials come from Norway, Faroe Islands and Iceland. Imports from Norway are of particularly high importance, accounting for 79 per cent of total salmon supply in 2025 (and 84 per cent of the total whole fresh Atlantic salmon supply in the same year). Norwegian salmon creates more jobs in the EU than it does in Norway. The import of 1,151,000 tonnes of Norwegian salmon to the EU-27 directly generates thousands of jobs for the EU seafood processing industry.

Fresh whole salmon is responsible for 72 per cent of total imports, followed by frozen (13 per cent) and fresh salmon fillets (12 per cent).

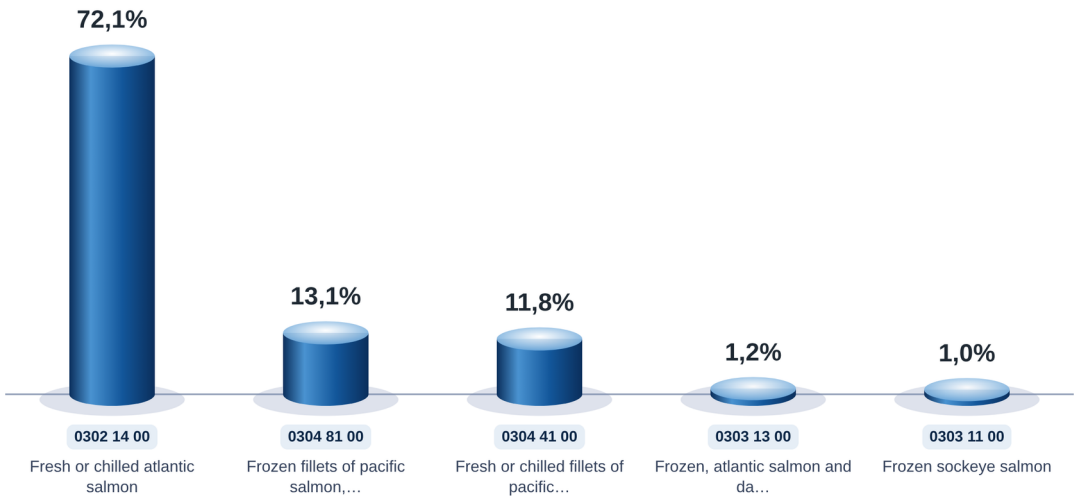


Figure 5.3.1.2: Main imported products of salmon in 2025 in percentage of total import (1,454,000 tonnes); Source: Eurostat/Comext

Salmon from Norway enters the EU-27 mainly by road via Sweden, Denmark and Poland, where the fish are processed and/or further distributed throughout the EU-27. Processing salmon in the EU-27 offers several advantages for Norway, including lower labour costs in some Member States, potentially lower import duties on unprocessed salmon compared with processed products, and better preservation of product quality when salmon is transported whole with the skin on. Traditional EU processing plants specialising in wild-caught fish are increasingly diversifying the range of species they process to compensate for declining domestic supplies and maintain their economic viability. Salmon has become an essential processing species for these plants notably in Poland, Netherlands, Belgium, Denmark and France. Filleting and cold/warm smoking are the most important processing steps.

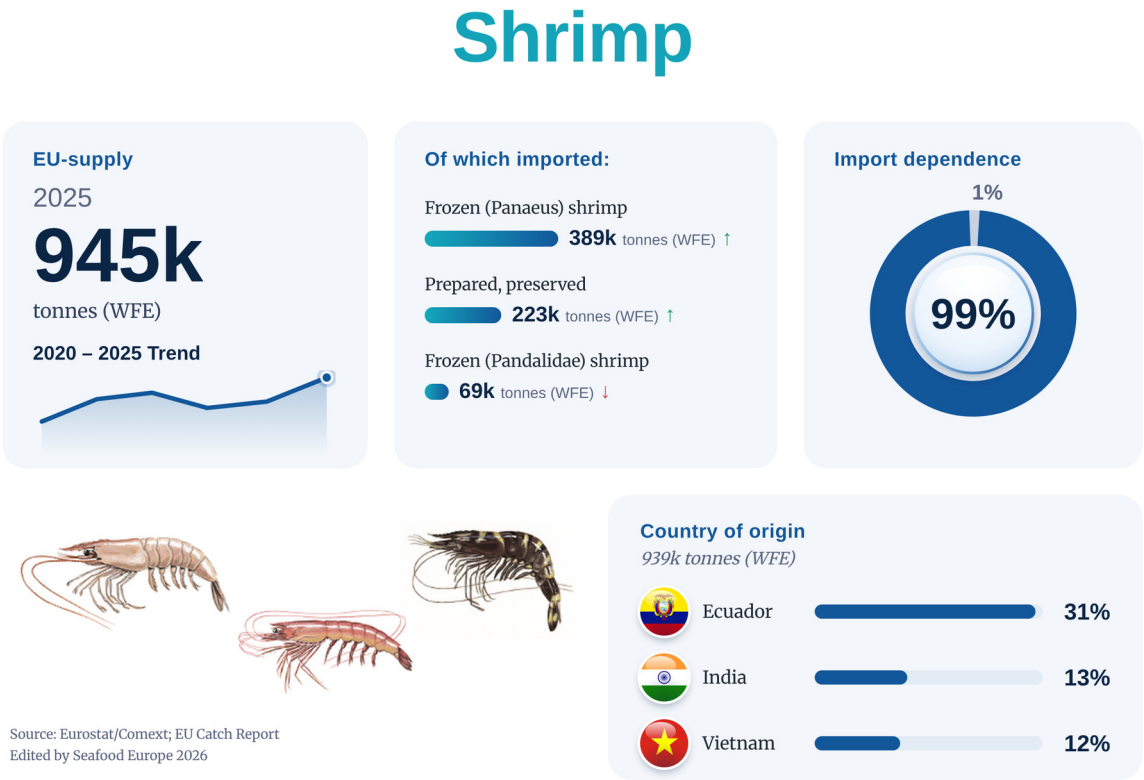
Norwegian farmed salmon is classified into three quality grades: “superior”, “ordinary” and “production”. Salmon are placed in the lowest category ('production') when they have wounds, deformities, processing errors or similar minor defects, and they are forbidden by Norwegian law to be exported before they are corrected for defects at Norwegian processing facilities. The correction is made by fileting the fish, which can legally be exported at cost prices around 30 per cent below those of fillets from EU-based companies, who have access to the more expensive 'superior' or 'ordinary' salmon from Norway. The cost price of filets made from superior quality salmon is multiple euros higher than filets in the production category.

The EU salmon processing industry faces a significant competitive disadvantage as a result of Norway’s restrictions on exports of production-grade salmon. These restrictions provide Norwegian processors with access to lower-cost raw materials that are not equally available to EU operators. In March 2024, the European Commission

formally registered the Norwegian export ban as a trade barrier, which remains in place. The 2% EU import duty on whole fresh salmon, combined with preferential duty-free access for Norwegian smoked salmon, further contributes to unequal competitive conditions between Norwegian and EU processors.

There is 10,000 tonnes of ATQ available for wild caught Pacific salmon species for the period of 2024-2026 in order to provide alternative products for the fish smoking industry. 31 per cent of the ATQ was utilised in 2025.

Shrimp



**excluding EU non-quota species*

The total EU shrimp supply amounted to 945,000 tonnes in 2025 (+10 per cent; +84,000 tonnes from 2024). This excludes non-quota species such as brown shrimp (*Crangon crangon)*. Out of this supply, 939,000 tonnes of shrimp were imported from third countries and 6,000 tonnes came from shrimp fisheries under fishing quota management in the EU. Taken together, the evidence shows that the EU is heavily dependent on imports for shrimp.

Most shrimp were imported from Ecuador (31 per cent; farmed white shrimp *Penaeus vannamei*), India (13 per cent; farmed Pacific white & black tiger shrimp), Vietnam (11 per cent; farmed Pacific white & black tiger shrimp), Greenland (11 per cent; wild Borealis shrimp) and Argentina (7 per cent; wild Argentine red shrimp *Pleoticus muelleri*).

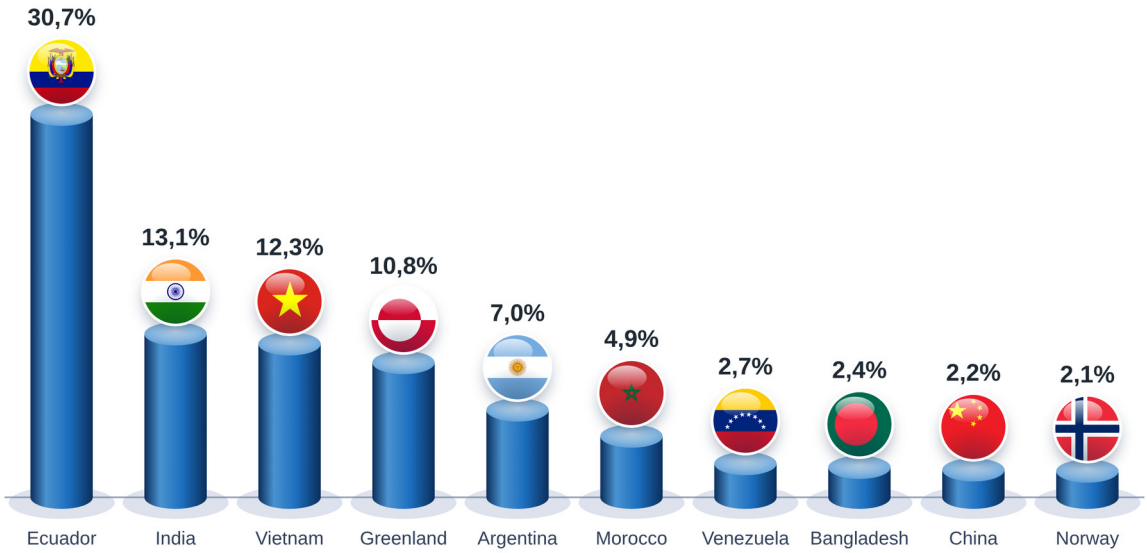


Figure 5.3.2.1: External sourcing countries for shrimp in 2025 in percentage (>2 per cent) of total import (939,000 tonnes); Source: Eurostat/Comext

Many of the main shrimp-producing countries supplying the EU benefit from preferential trade arrangements, either under the EU's Generalised Scheme of Preferences (GSP), including India and Indonesia, or through free trade agreements (FTAs), including Ecuador, Vietnam and Canada. Bangladesh benefits from the Everything But Arms (EBA) arrangement. These preferential arrangements allow eligible shrimp products to enter the EU at reduced or zero import duties, subject to the applicable conditions.

Indonesia however, will lose their GSP status in 2027 and thereby their reduced import tariffs. The new free trade agreement with Indonesia will reinstate preferential tariffs. However, their introduction will be staged for certain HS-codes and the preferential tariffs may not apply to all relevant HS-codes.

For cold water shrimp there are three ATQs available for the key *Pandalus* species *borealis*, *montagui* and *jordani* species in 2025 (09.2794, 09.2798, 09.2800). Total allowance for these ATQs is 10,500 tonnes.

Shrimps and prawns of the species *Pleoticus muelleri* have a separate ATQ (09.2826) and an annual quota of 16,000 tonnes This, however, was already fully utilised at the end of May and is insufficient to fulfil EU processing industry demand. After the ATQ is exceeded the import duty is 12 per cent. High import duty and the complexity of non-tariff measures will in all probability shift processing of the Argentinian *Pleoticus muelleri* shrimp to Asia.

Warm water prawns have a separate ATQ (09.2802) with a quota allowance of 48,000 tonnes. The quota was 95.98 per cent utilised in 2025.

Frozen Penaeus shrimp was responsible for 50 per cent of total import in 2025, followed by prepared and preserved (cooked) shrimp (13 per cent).

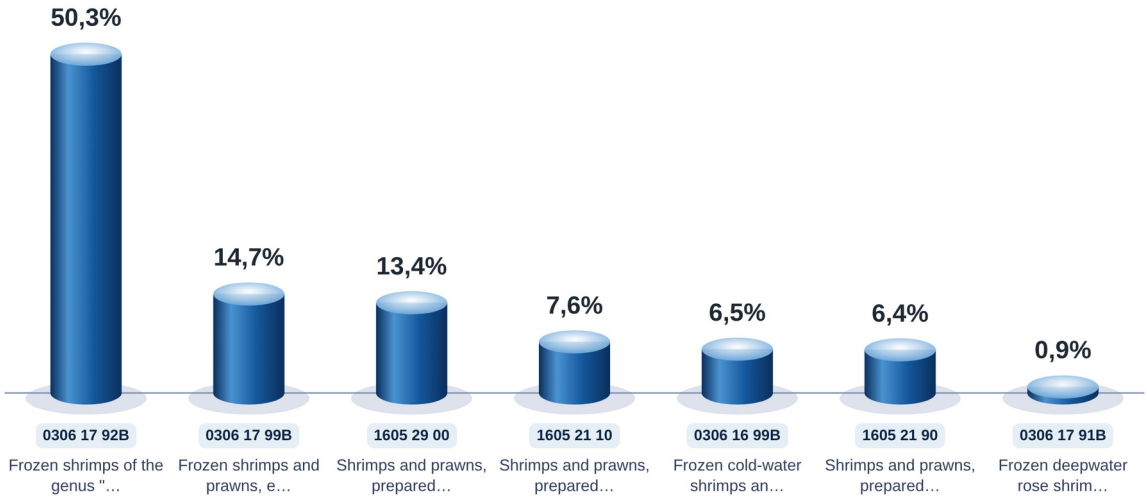


Figure 5.3.2.2: Main imported products of shrimp in 2025 in percentage of total import (939,000 tonnes); Source: Eurostat/ Comext

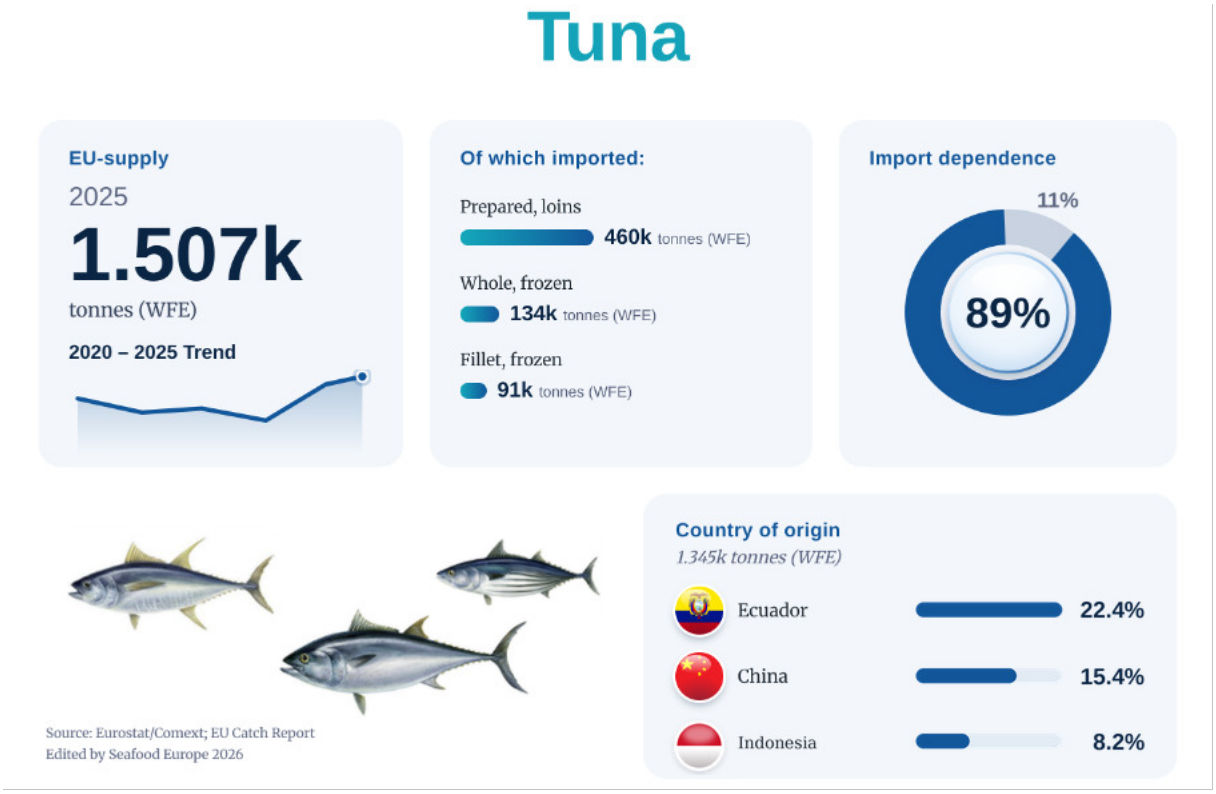
Shrimp products from India and Vietnam are imported to Southern and Northern Europe as both prepared and whole products. Shrimp from Ecuador are imported particularly to Southern Europe as either whole raw and unpeeled, but there is a growing export for value added (peeled) shrimp from this country. Ecuadorian shrimp are increasingly sent to other third countries for processing activities, whereafter they are sent to the EU, which makes them more favourable for the Northern Europe market.

Argentine red shrimp are imported mainly by Spain and Italy for the Southern European market.

Borealis shrimp from Greenland and Canada are mainly imported via Denmark and (re-) exported into the rest of the EU.

A part of the EU fishing fleet targets brown shrimp (*Crangon crangon*). This species is not covered by fishing quota management under the Common Fisheries Policy. Around 30,000 tonnes of brown shrimps are landed annually, chiefly by the Dutch and German fleets, but also by the Danish and Belgian. Because brown shrimp is a non-quota species it is not mentioned in the import dependence graph, resulting in an under-estimation of actual self-sufficiency.

Tuna



**excluding EU non-quota species and aquaculture*

Tuna ranks among the top three most consumed species in the EU. In terms of volume, skipjack and yellowfin are the main species, followed by bigeye, albacore and bluefin.

With an average annual output of over 370,000 tonnes, the EU canned tuna industry covers only 46 per cent of EU market demand. The main producers are Spain, Italy, Portugal and France. The sector generates around 20,140 direct jobs within the EU and a further 60,660 indirect jobs in related activities. Concentrated mainly in coastal regions with few economic alternatives, the industry plays a key socio-economic role.

The tuna import figures presented in this section include both tuna loins intended for further processing and finished canned tuna products, without distinguishing between the two categories.

This output, however, is entirely dependent on access to imported raw material, in particular tuna loins supplied under Autonomous Tariff Quotas (ATQs) and preferential trade agreements. Without these imports, EU canneries could not sustain their current level of production. The availability of tuna loins has been critical for keeping EU canneries competitive and preventing production from shifting to factories located closer to fishing grounds in Ecuador, West Africa or Asia. The risk of delocalization is therefore not hypothetical but immediate if ATQ flexibility were to be removed, placing thousands of EU jobs directly at risk. As highlighted in a recent EUMOFA report, stable raw material access is the anchor for maintaining both production and employment in Europe.

In 2025, the total supply of tuna products amounted to 1,507,000 tonnes in WFE. Of this volume, EU fisheries landed 134,000 tonnes of quota-covered tuna, while EU aquaculture produced around 28,000 tonnes. This translates into a low self-sufficiency rate of 11 per cent, well below the already modest average EU seafood self-sufficiency in 2025. It should be noted, however, that this figure does not include non-quota tuna fisheries.

The EU tuna fishing fleet lands considerably more tuna than the quota volumes previously mentioned, with total catches exceeding 500 thousand tonnes. However, the vast majority of these landings take place outside the EU. Spain is the leading producer, followed by France and Italy. Most of the tuna caught by the EU fleet is landed in ports close to the main tropical fishing grounds in West Africa (Ivory Coast, Ghana) and the Indian Ocean (Seychelles, Mauritius, Madagascar), or exported towards countries like Ecuador. There, it is processed into canned tuna, or semi-processed in tuna loins, and subsequently re-exported to the EU under preferential trade regimes stemming from the Cotonou Agreement, in particular the Economic Partnership Agreements with Eastern and Southern Africa (ESA) and West Africa (ECOWAS), or with Free Trade Agreements like Ecuador.

In 2025, Ecuador was the most important supplier of tuna to the EU, accounting for 22.4 per cent of imports, followed by China (15.4 per cent) and Indonesia (8.2 per cent). Ecuadorian tuna in particular benefits from the EU–Ecuador Free Trade Agreement, while imports from Papua New Guinea and other countries are largely enabled by preferential trade agreements such as FTAs and EPAs. These regimes complement the ATQs, which provide the necessary flexibility for EU processors to source raw material. Without ATQ flexibility, preferential imports alone would not be sufficient to meet EU tuna processing demand.

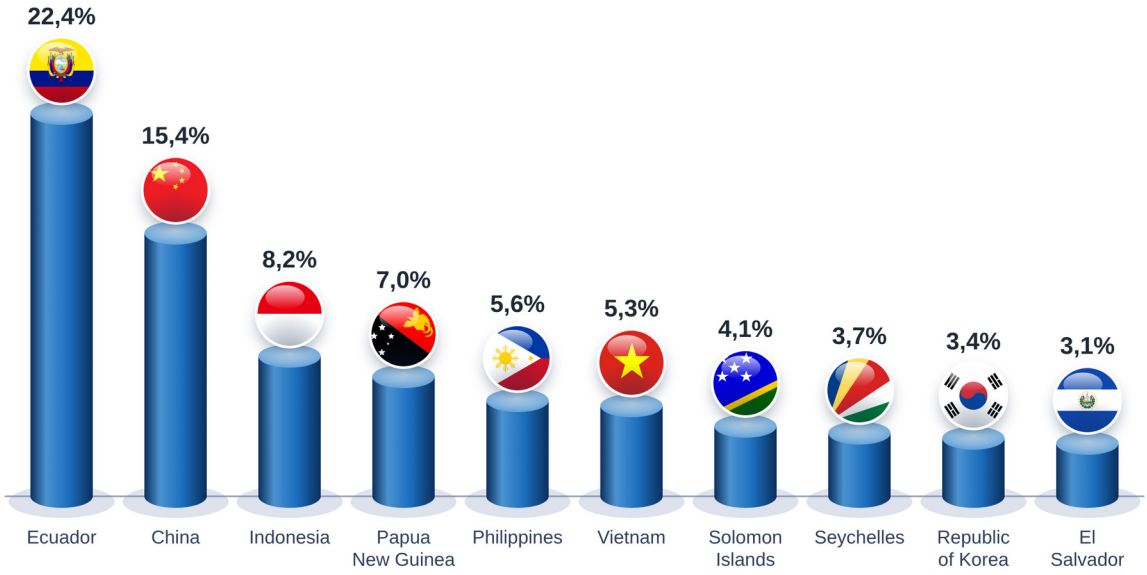


Figure 5.3.3.1: External sourcing countries for tuna in 2025 in percentage (>3 per cent) of total import (1,507,000 tonnes); Source: Eurostat/Comext

However, the supply of large pelagics such as tuna is governed by complex relationships between the EU and the location of catch. EU flagged vessels operating under licence in many distant water fisheries, which in itself provides substantial employment and

fishing activity for EU vessels and processors, as well as employment in local developing counties.

The ATQ (09.2790) for tuna loins, set at 35,000 tonnes for further processing, is fully exhausted within days of opening. While this volume represents only a small fraction of total trade, rapid ATQ exhaustion clearly demonstrates structural under-capacity in the EU supply chain. The ATQ is therefore not a marginal instrument but a structural necessity. It should be maintained at least at current levels, with consideration given to upward revision to ensure that the EU industry can reliably access the raw material it needs.

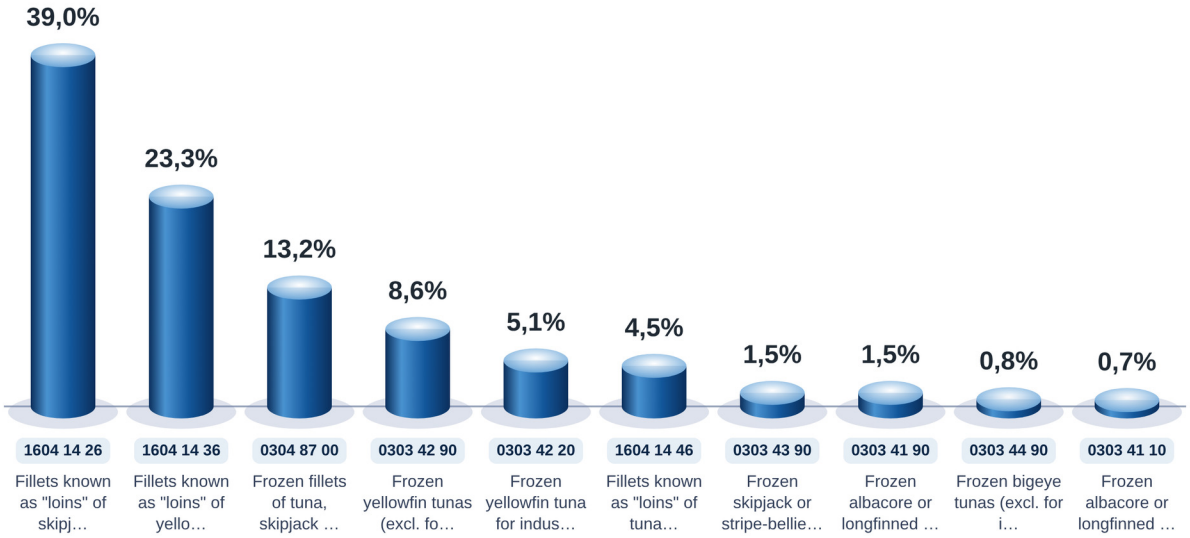
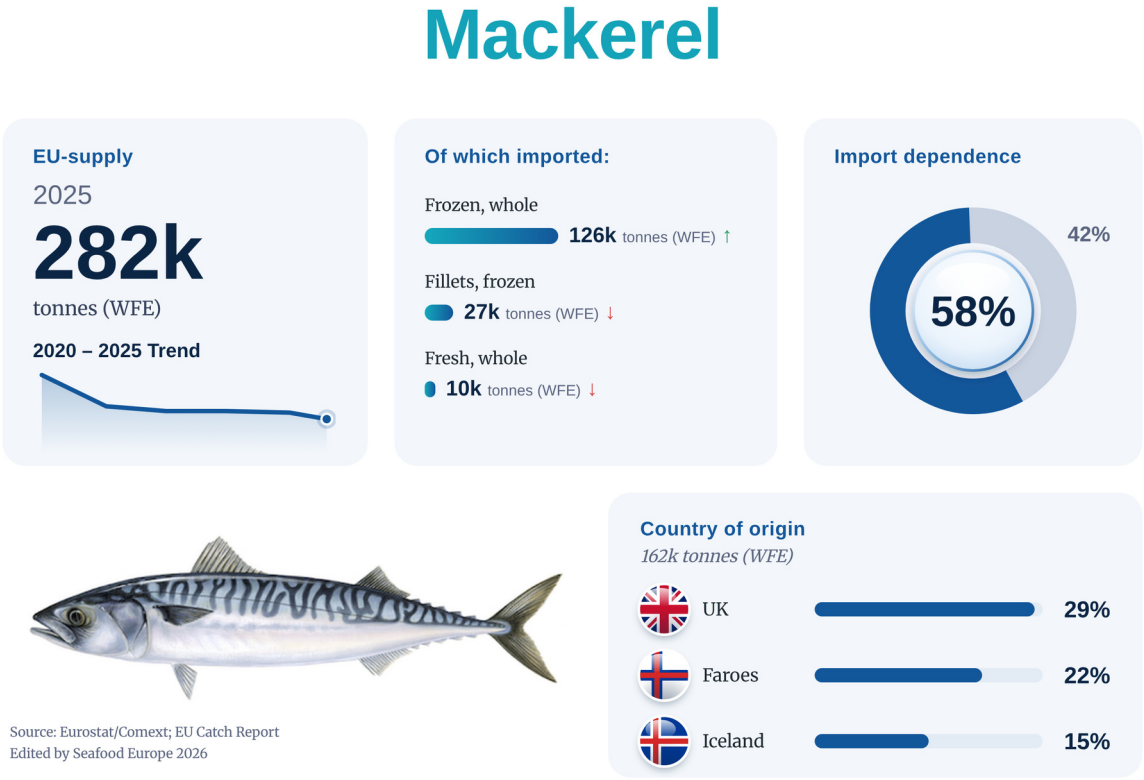


Figure 5.3.3.2: Main imported products of tuna in 2025 in percentage of total import (1,507,000 tonnes); Source: Eurostat/ Comext

Import supply data both include tuna loins for further processing and prepared format. Most tuna is imported in the form of canned products.



Mackerel is one of the most important small pelagic commercial species in the world. Global annual catches of mackerel have totalled around one million tonnes in recent years, with the main catching nations and regions being the EU, UK, Faroe Islands, Greenland, Iceland, Norway and Russia. However, in recent years Northeast Atlantic mackerel stocks have been overfished in recent years, resulting in a decreasing quota.

Small pelagics such as mackerel are important species in the EU fishery complex and comprise the largest proportion of tonnages taken in EU waters from quota-covered species. EU countries landed a total 119,000 tonnes of mackerel in 2025 (-23 per cent).ICES has recommended a near doubling of mackerel catches for 2027, reflecting strong recruitment as large numbers of young fish enter the spawning stock. At 42 per cent, the EU's self-sufficiency rate is relatively high. The 162,000 tonnes of mackerel that is imported into the EU comes from the UK (29 per cent; 47,000 tonnes in 2025), Faroe Islands (22 per cent; 35,000 tonnes in 2025) and Iceland (15 per cent; 24,000 tonnes in 2025).

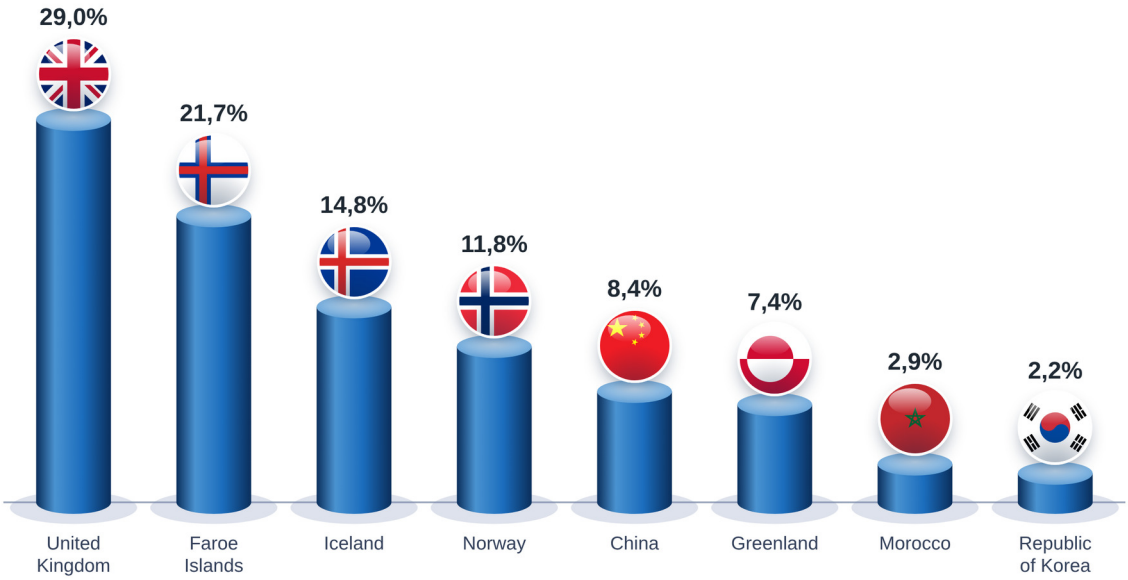


Figure 5.3.4.1: External sourcing countries for mackerel in 2025 in percentage (>1 per cent) of total import (162,000 tonnes); Source: Eurostat/Comext

Mackerel from the Northeast Atlantic is of high importance for the EU seafood market. For years coastal states have been unable to reach agreement on how to share the catch quotas. For 2026, ICES recommended a total allowable catch (TAC) of 174,357 tonnes, representing a 70 per cent reduction compared with its 2025 advice. However, the continued failure of coastal states to reach a comprehensive quota-sharing agreement has resulted in unilateral quota allocations that collectively exceed scientific recommendations. Overfishing has contributed to the suspension of MSC certification for Northeast Atlantic mackerel fisheries since 2019. Reaching an agreement on quota allocations is therefore essential to ensure the long-term sustainability of the stock and prevent further disruptions throughout the seafood supply chain.

There is an ATQ of 5,000 tonnes (under 5 per cent import tariff) available for chub mackerel (whole, fillets and flaps).

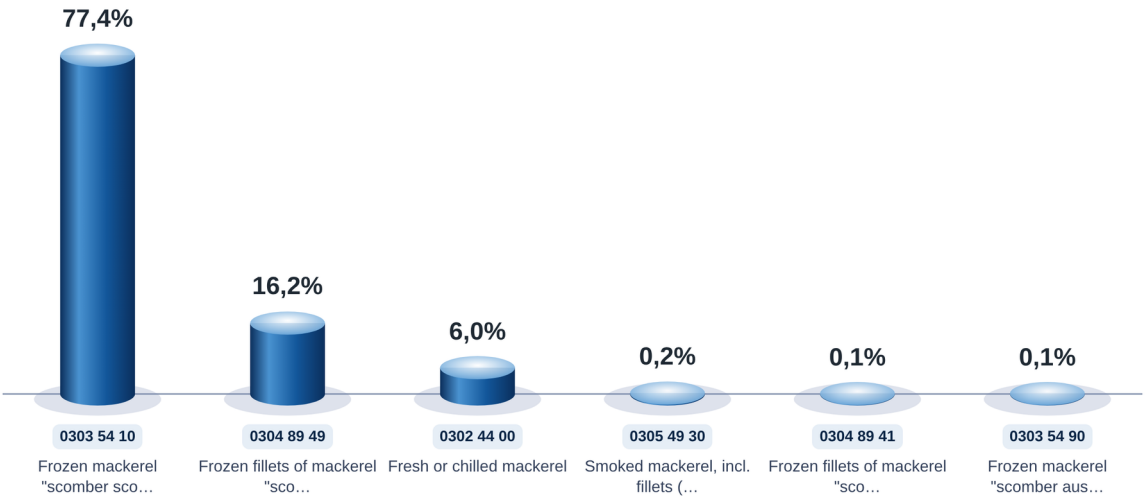
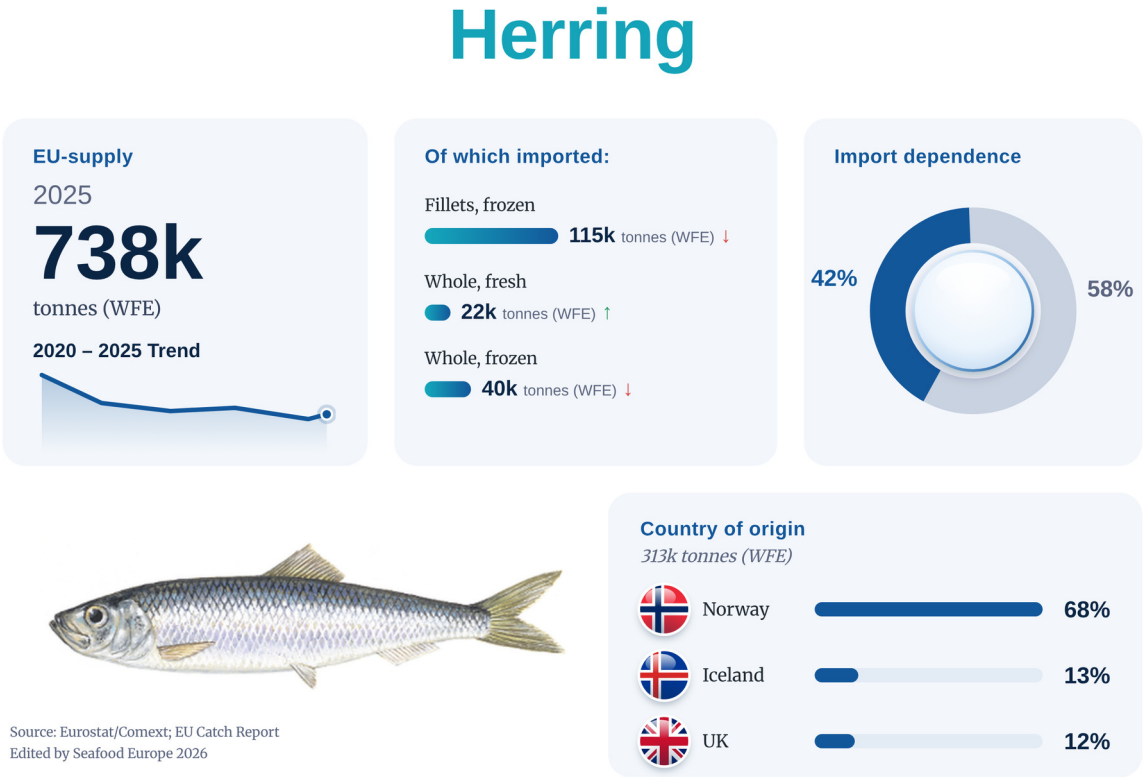


Figure 5.3.4.2: Main imported products of mackerel in 2025 in percentage of total import (162,000 tonnes); Source: Eurostat/ Comext

Frozen whole mackerel accounts for 77 per cent of imports, followed by frozen mackerel fillets (16 per cent).

Herring



Small pelagics such as herring are important species in the EU fishery complex and comprise the largest proportion of the tonnages taken in EU waters for quota species. The total EU herring supply reached 738,000 tonnes in 2025.

With a total allowable catch (TAC) of approximately 389,000 tonnes in 2025, North Sea autumn-spawning herring represents one of the largest individual fish stocks jointly managed by the EU, Norway and the United Kingdom. The EU's share amounted to approximately 195,000 tonnes, accounting for over half of the total TAC. EU self-sufficiency in herring is high, with a percentage of 58 per cent in 2025. Based on scientific advice from ICES a 15 per cent TAC reduction to 328,566 tonnes was recommended for 2026.

Frozen fillets were responsible for 37 per cent of herring imports in 2025, followed by frozen meat (29 per cent).

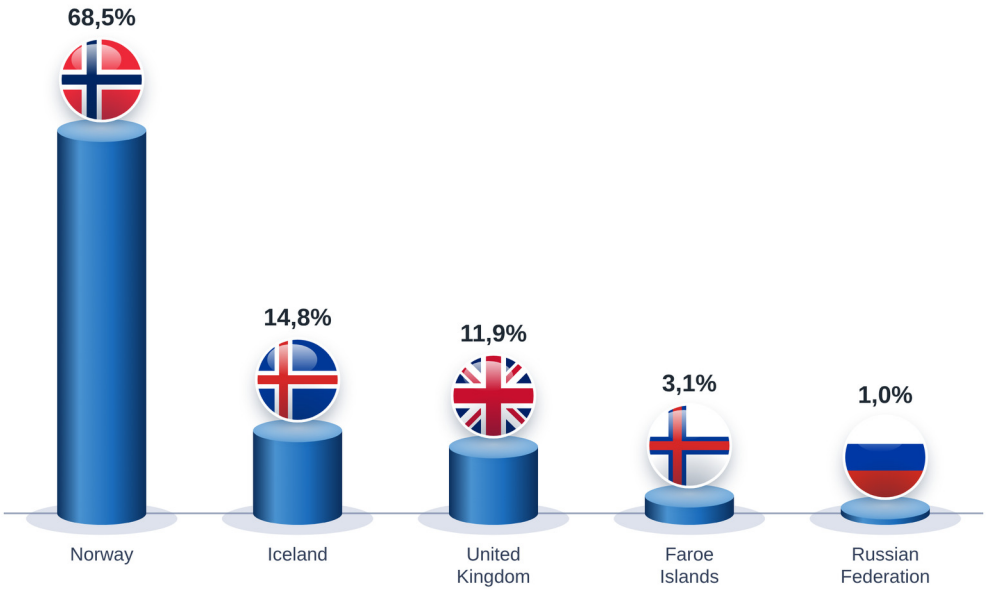


Figure 5.3.5.1: External sourcing countries for herring in 2025 in percentage (>1 per cent) of total import (313,000 tonnes); Source: Eurostat/Comext

Norway is the most important third country for herring imports (69 per cent: 215,000 tonnes in 2025), followed by Iceland (15 per cent; 46,000 tonnes) and UK (12 per cent; 37,000 tonnes).

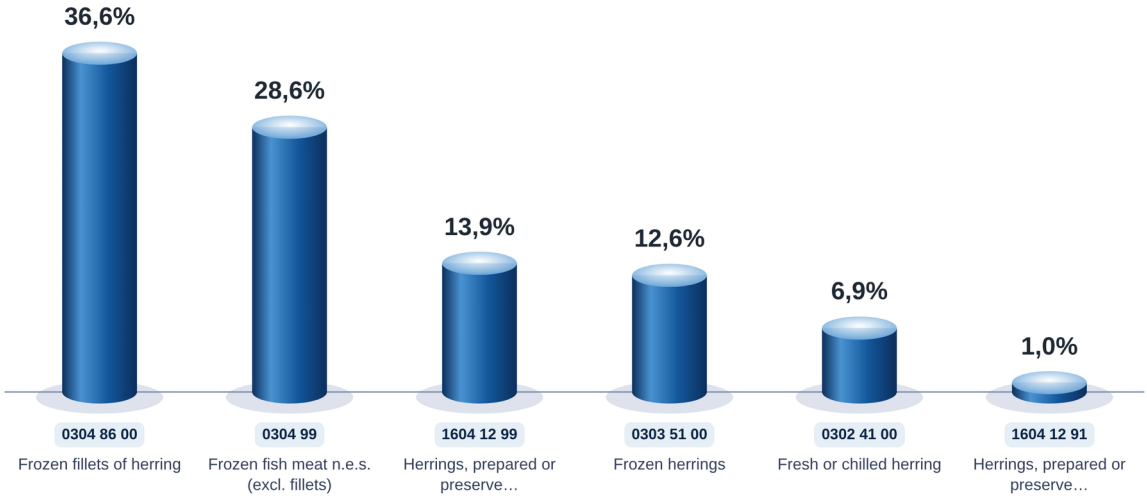
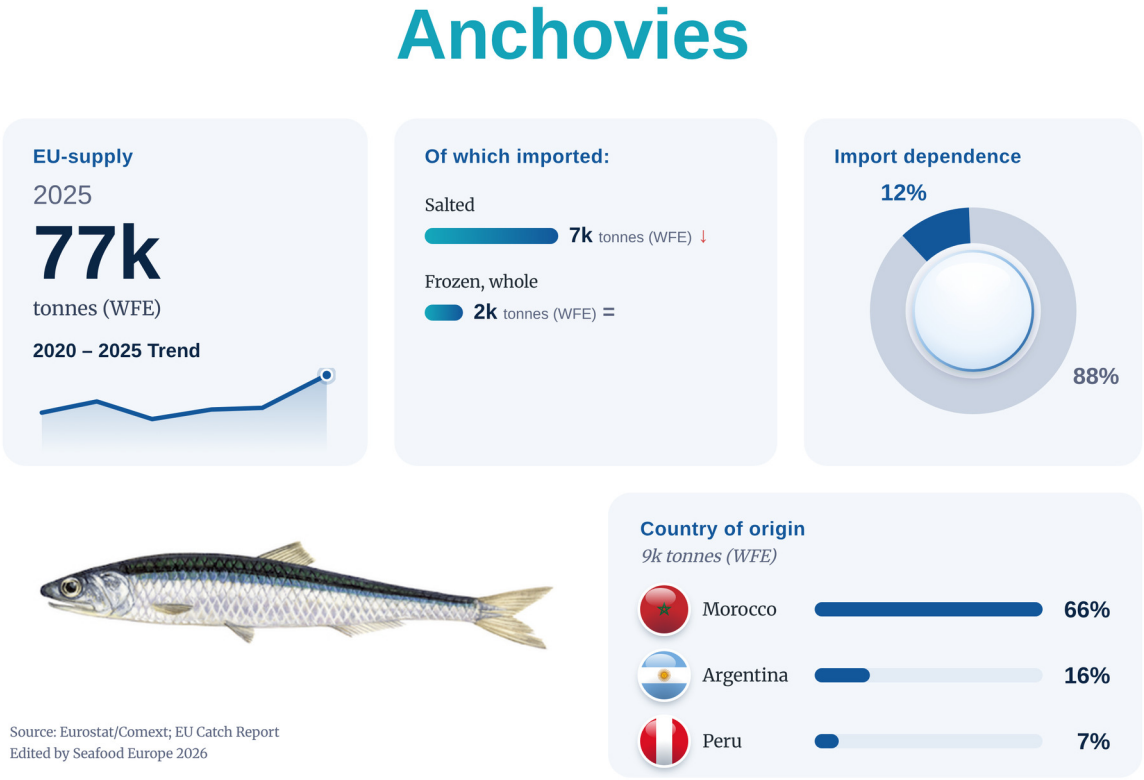


Figure 5.3.5.2: Main imported products of herring in 2025 in percentage of total import (313,000 tonnes); Source: Eurostat/ Comext

The raw material used in the production of *Maatjes herring* is primarily sourced from Norwegian and Danish fishing vessels. Frozen and salted semi-finished herring products are imported into the EU, where they undergo further processing and preparation to produce the traditional herring delicacies that are widely appreciated by European consumers.

A significant proportion of frozen herring landed by the EU fleet is exported to African countries in particular, where they are sold by the piece. In this way healthy nutrients are provided to countries with less purchasing power.



The EU supply of anchovies reached 77,000 tonnes in 2025, 25,000 tonnes more than the previous year, constituting a 49 per cent increase. The Union`s self-sufficiency in anchovies thus remained high, 88 per cent coming from domestic supply.

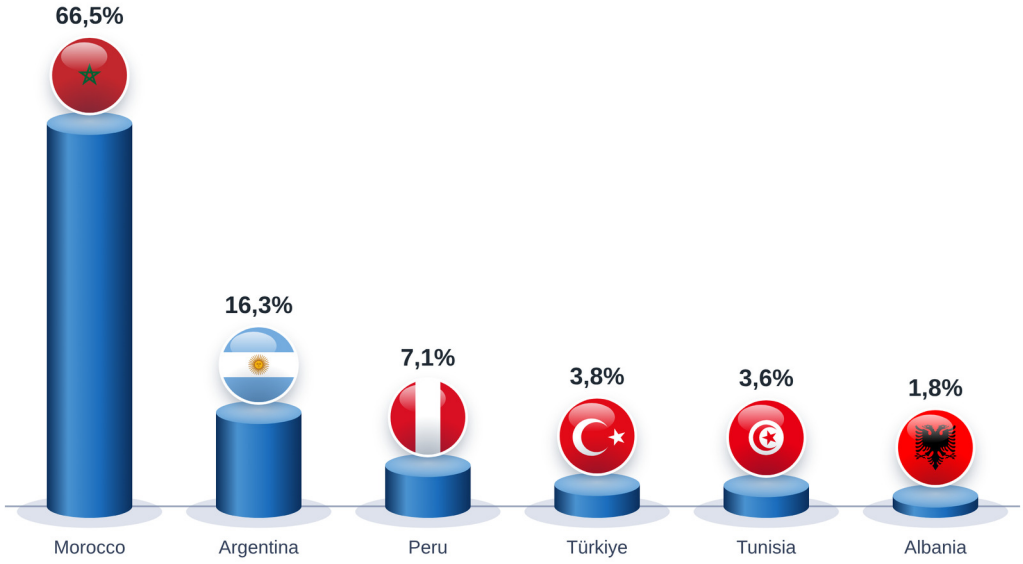


Figure 5.3.6.1: External sourcing countries for anchovies in 2025 in percentage (>1 per cent) of total import (9,000 tonnes); Source: Eurostat/Comext

Morocco has become the largest anchovy exporter to the EU, responsible for 67 per cent of a total 9,000 tonnes of imports. Argentina is the second largest with 16 per cent of the total import, followed by Peru with a 7 per cent share.

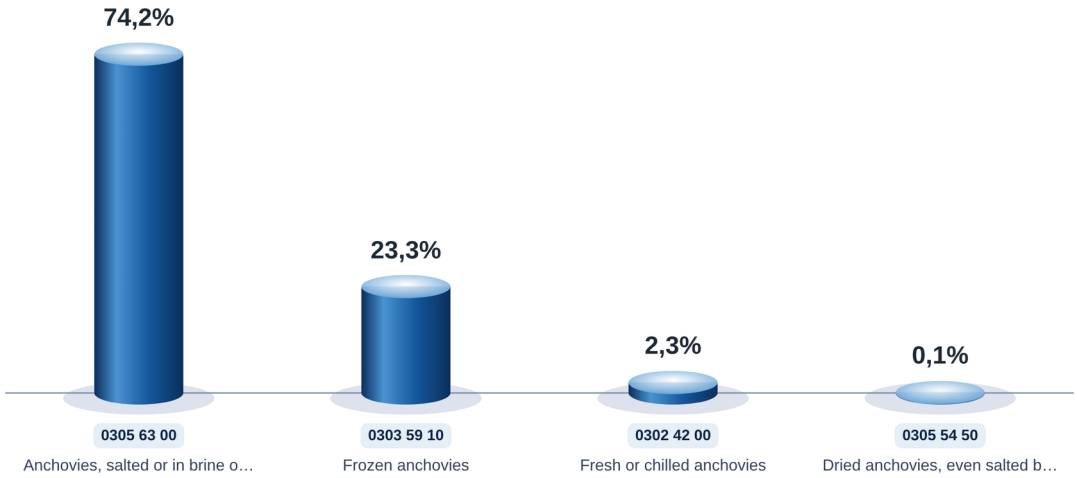
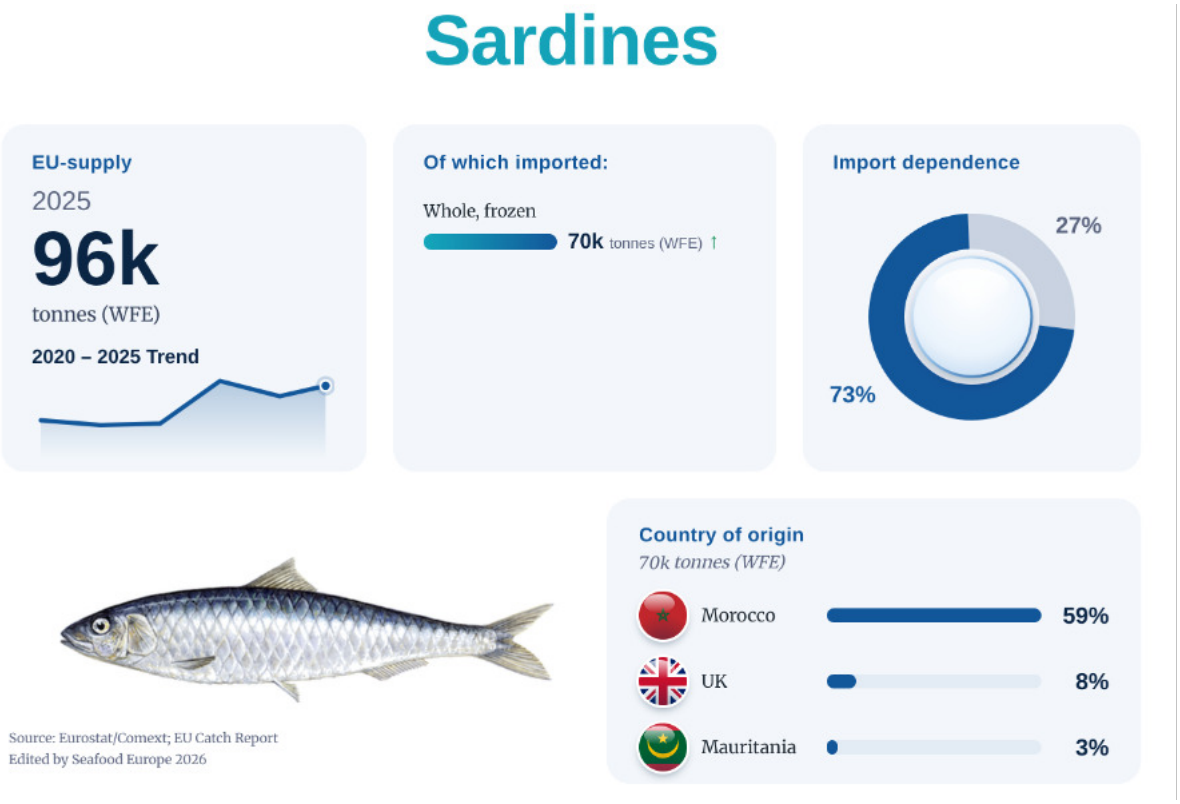


Figure 5.3.6.2: Main imported products of anchovies in 2025 in percentage of total import (9,000 tonnes); Source: Eurostat/ Comext

There is an available ATQ for anchovies (09.2770), 1,500 tonnes of salted or brined anchovies can enjoy duty-free access to the EU market. This is the most common product form,: 74 per cent of the import arrives as salted or brined, 23 per cent comes as whole frozen fish.

Most anchovies are processed into especially semi-preserved product in Spain, France and Italy.



The EU supply of sardines showed a slight increase in 2025, growing from 85,000 to 96,000 tonnes - an almost 13 per cent increase.

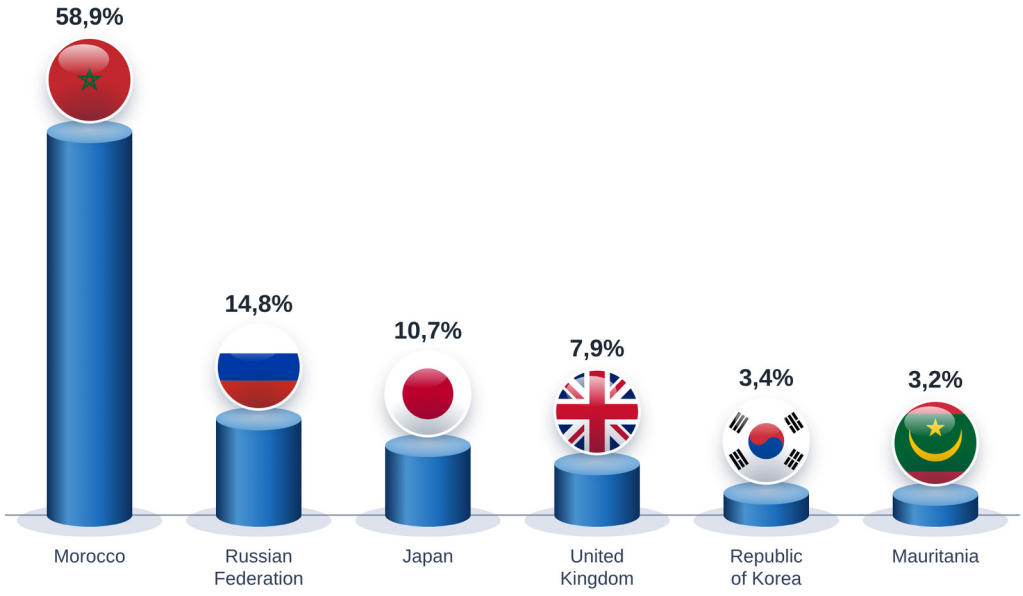


Figure 5.3.7.1: External sourcing countries for sardines in 2025 in percentage (>1 per cent) of total import (70,000 tonnes); Source: Eurostat/Comext

73 per cent of EU supply originated from import, Morocco being the largest supplier with 59 per cent of the total 70,000 tonnes of import supply. The Russian Federation is the second largest supplier with a share of 15 per cent, followed by Japan with 11 per cent.

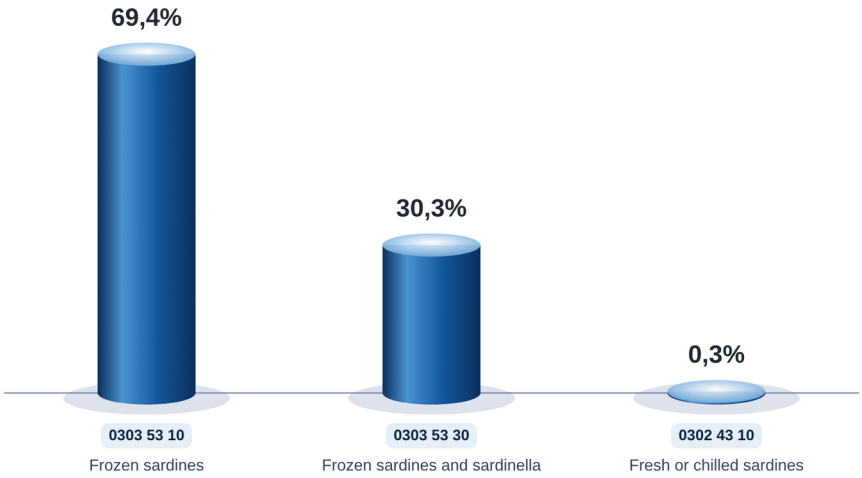
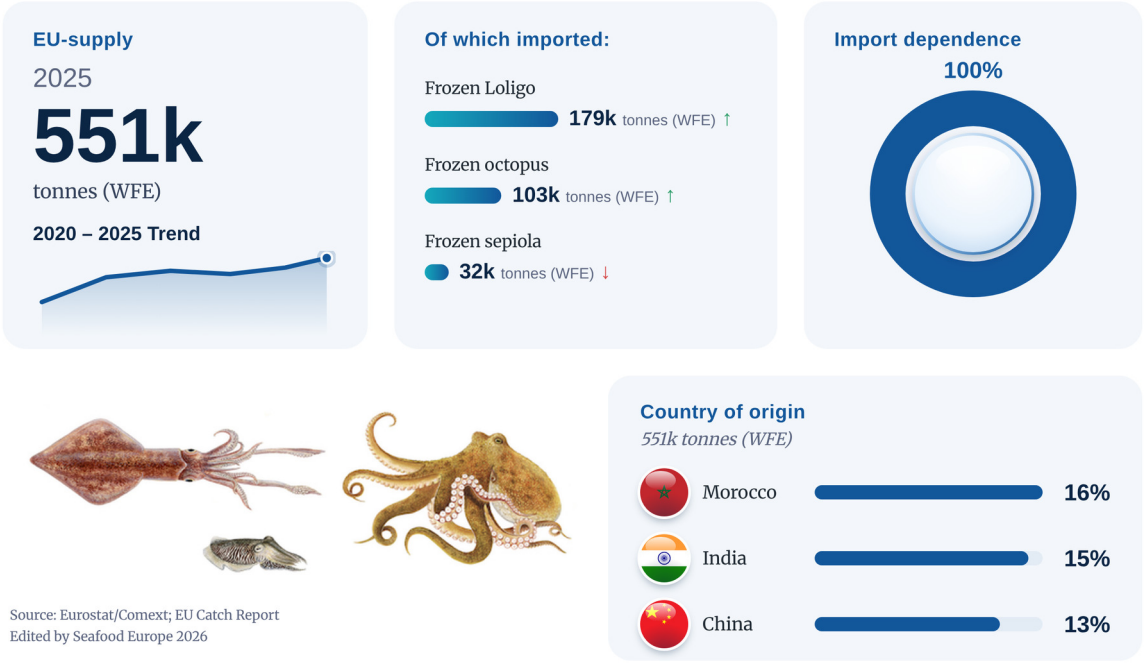


Figure 5.3.7.2: Main imported products of sardines in 2025 in percentage of total import (70,000 tonnes); Source: Eurostat/ Comext

While EU fisheries continue to catch sardines, this species is not fully covered by fishing quota management under the CFP. Over 150,000 tonnes of sardines are caught by the Croatian, French, Portuguese, Italian, Spanish and Dutch fleets. Taking this number into account self-sufficiency in sardines is high for the EU.

Whole frozen sardines are by far the most common product in import: almost 99 per cent of it enters the EU in this form.

There is no ATQ allowance available for sardines.



**excluding non-quota EU fisheries*

The cephalopod category mainly includes squid (*Loligo spp., Ilex spp., Nototodarus spp., Todarodes spp., Dosidicus spp.*), cuttlefish (*Sepia spp.*), and octopus (*Octopus spp.*). In 2025, the EU's total cephalopod supply reached 551,000 tonnes.

The sourcing countries for cephalopods differ according to species, with key suppliers for the main species highlighted below.

Frozen squid (Loligo spp.)

Frozen *Loligo* squid represented 32 per cent of the total cephalopod supply for 2025, around 177,000 tonnes (-1 per cent; -2,000 tonnes). An important share of the frozen *Loligo* squid comes from the Falklands (UK), India and Morocco.

Frozen Octopus (Octopus spp.)

Frozen Octopus represented 21% of the total cephalopod supply in 2025, around 114,000 tonnes (+10 per cent; +10,000 tonnes). An important share of the frozen octopus comes from Morocco, Mauritania and Indonesia.

Frozen flying squid (Illex spp.)

Frozen flying squid represented 7% of the total cephalopod supply in 2025, around 37,000 tonnes (-10 per cent; -4,000 tonnes). The most important share of the frozen illex spp. comes from Argentina.

Cephalopods caught in the EU do not fall under a quota system (and thereby not included in the info-graphic above). However, there is a significant fishery on cephalopods in the

EU (squid, cuttlefish and octopus), catching around 200,000 tonnes of cephalopods yearly.

Although there are European catches, these catches are not sufficient to supply the processing industry in Europe. Availability of raw material for the industry is highly dependent on imports, specially, when talking about *Loligo spp.*, *Ilex ssp.*, *Nototodarus spp.*, *Todadores ssp.* and *Sepia spp.* and even fully dependent for *Dosidicus spp*.

Most of the cephalopods are consumed and processed in the Southern European countries. These countries are familiarized with cephalopods.

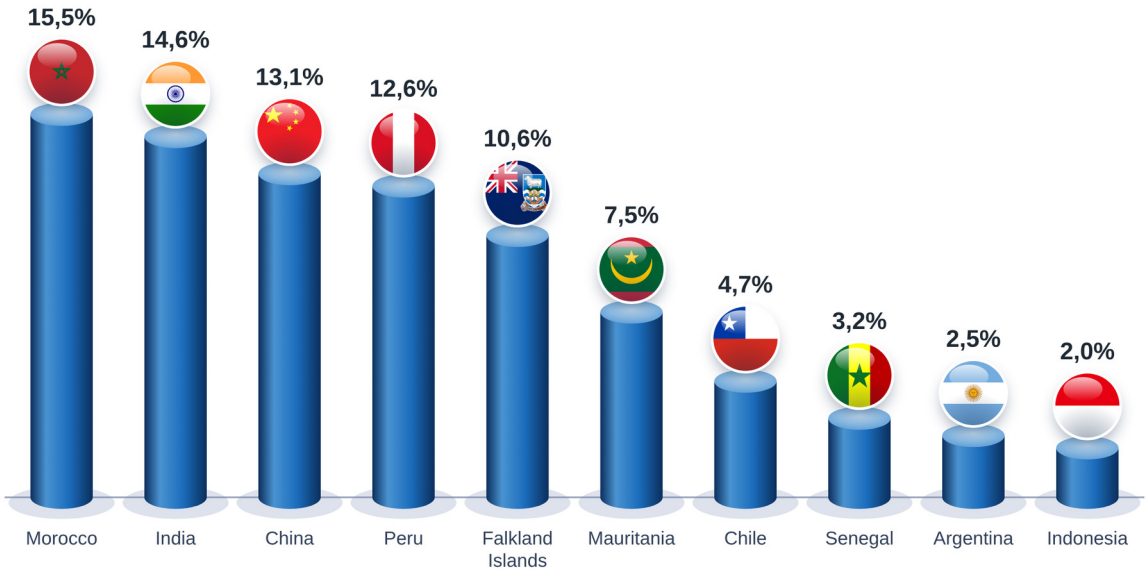


Figure 5.3.8.1: External sourcing countries for cephalopods in 2025 in percentage (>1 per cent) of total import (551,000 tonnes); Source: Eurostat/Comext

The main procurement countries in 2025 for the EU were Morocco (16 per cent), India (14,5 per cent) and China (13 per cent).

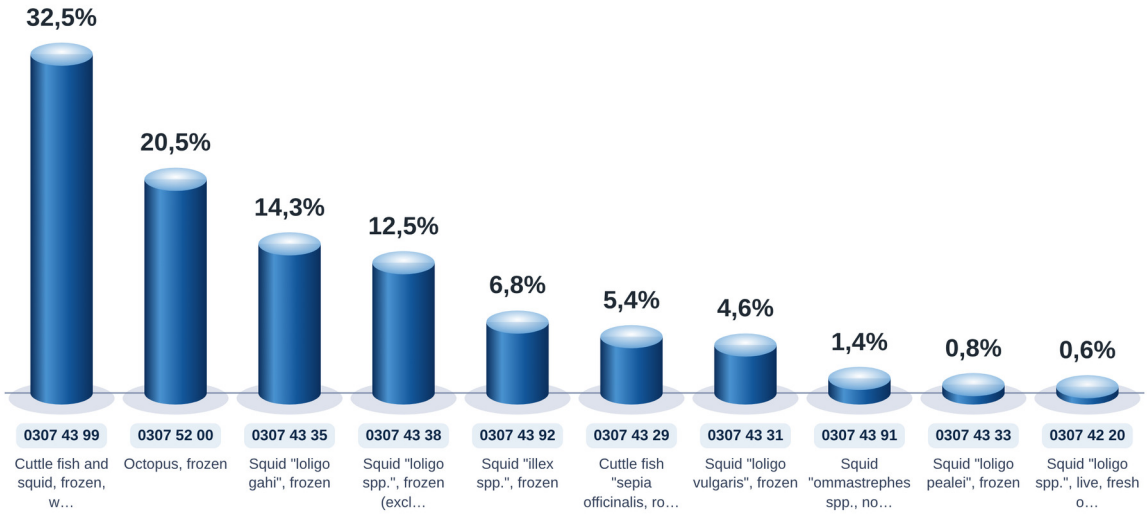
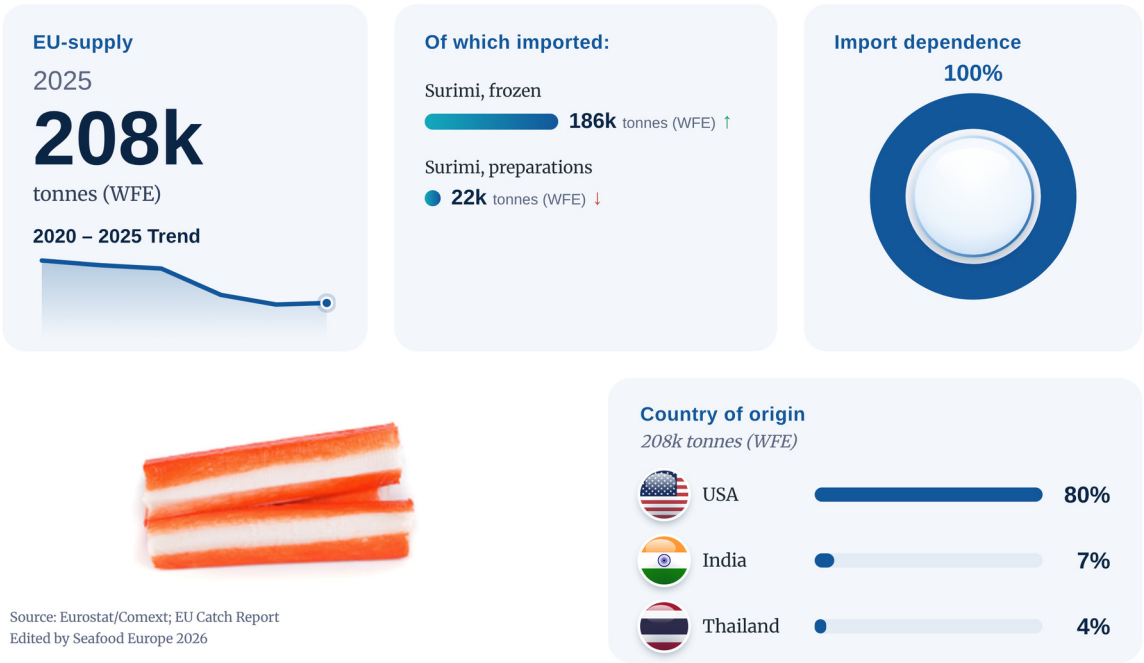


Figure 5.3.8.2: Main imported cephalopods products in 2025 in percentage of total import (551,000 tonnes); Source: Eurostat/Comext

Surimi



Source: Eurostat/Comext; EU Catch Report
Edited by Seafood Europe 2026

**excluding EU fisheries for surimi*

Surimi is a fish-based paste primarily produced from whitefish. In its frozen form, surimi is a concentrated product commonly made from species such as Alaska pollock, blue whiting, blue grenadier and Pacific hake. Usually processed into blocks, frozen surimi is supplied to food manufacturers, who combine it with other ingredients to achieve the desired texture, flavour and appearance.

In the EU market the most widely consumed surimi product is imitation crab sticks, although other items have also been developed, including baby eel substitutes and imitation calamari rings, typically sold as ready-to-eat products.

The import volume of surimi (both frozen surimi paste and seafood) was 208,000 tonnes WFE in 2025 (+1 per cent; 1,000 tonnes). The most important country for surimi import in 2025 was the USA (80 per cent), followed by India (7 per cent) and Thailand (4 per cent).

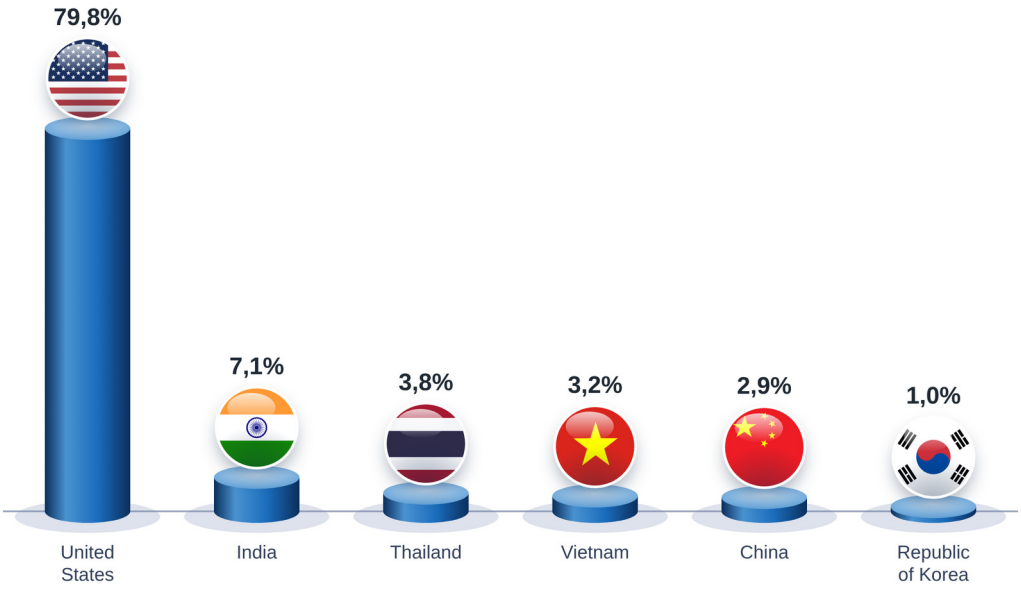


Figure 5.3.9.1: External sourcing countries for surimi in 2025 in percentage (>1 per cent) of total import (208,000 tonnes); Source: Eurostat/Comext

The EU has a single fishery making surimi paste from blue whiting under statistical secret. The main surimi processors are France, Spain and Lithuania. In 2025 frozen surimi of Alaska pollock was responsible for 59 per cent of imports. 89 per cent of all surimi imports were frozen surimi. The other 11 per cent of imports consisted of frozen surimi presentation - in other words finished products.

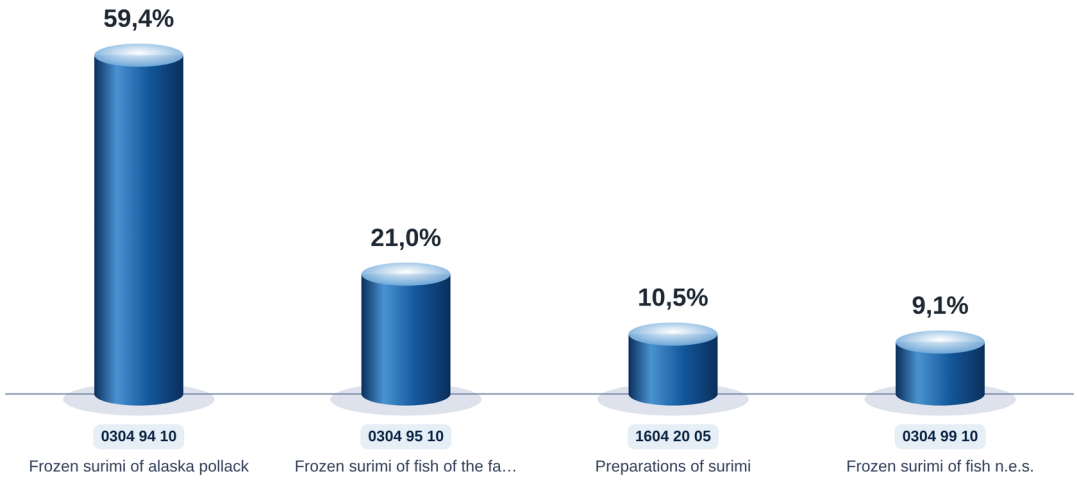


Figure 5.3.9.2: Main imported products of surimi in 2025 in percentage of total import (208,000 tonnes); Source: Eurostat/Comext

An ATQ is available for surimi as a raw material intended for further processing (09.2772). In 2025, approximately 76 per cent of the total allocated volume of 60,000 tonnes was utilised.

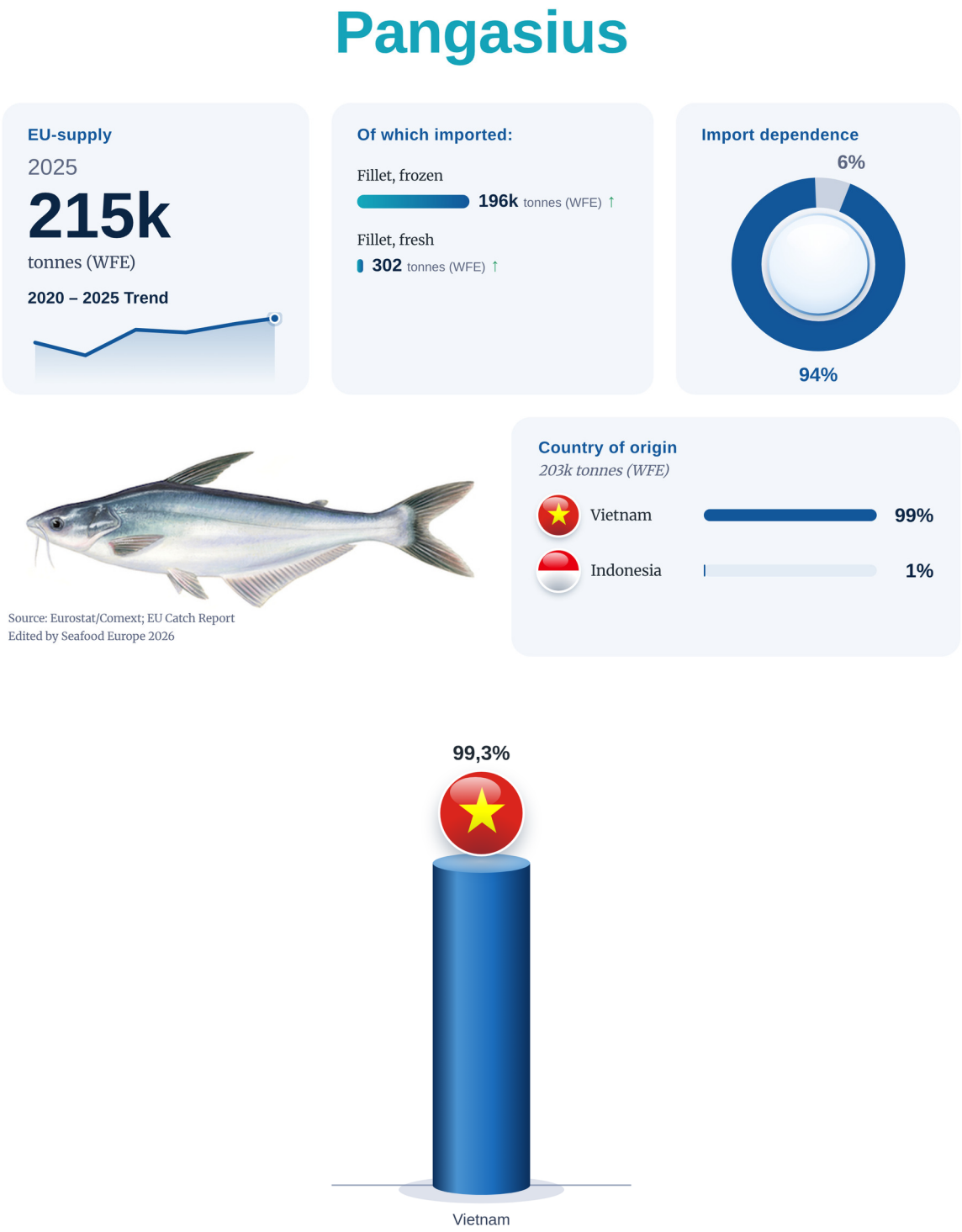


Figure 5.3.10.1: External sourcing countries for pangasius in 2025 in percentage (>1 per cent) of total import (203,000 tonnes); Source: Eurostat/Comext

Pangasius supply to the EU reached 215,000 tonnes in 2025, a ~ 5 per cent increase from 2024. Vietnam is responsible for the entire pangasius import to the Union, and almost entirely imported in the form of frozen fillets.

Pangasius import from Vietnam enjoys duty-free benefit since August 2023 due to EVFTA. EVFTA came into force in 1 August 2020. Pangasius imports must have both a Certificate of Origin – according to EVFTA rules of origin, pangasius must be produced in Vietnam – and compliance with EU sanitary and sustainability standards.

Vietnam is the only country producing ASC-certified pangasius products. The country currently has 58 certified farms with a total production of over 210,000 tonnes, exporting mainly to countries with higher environmental and food safety standards.

There were 13,000 tonnes of catfish production in the EU in 2025, mainly of the *Clarias* and *Silurus* species.

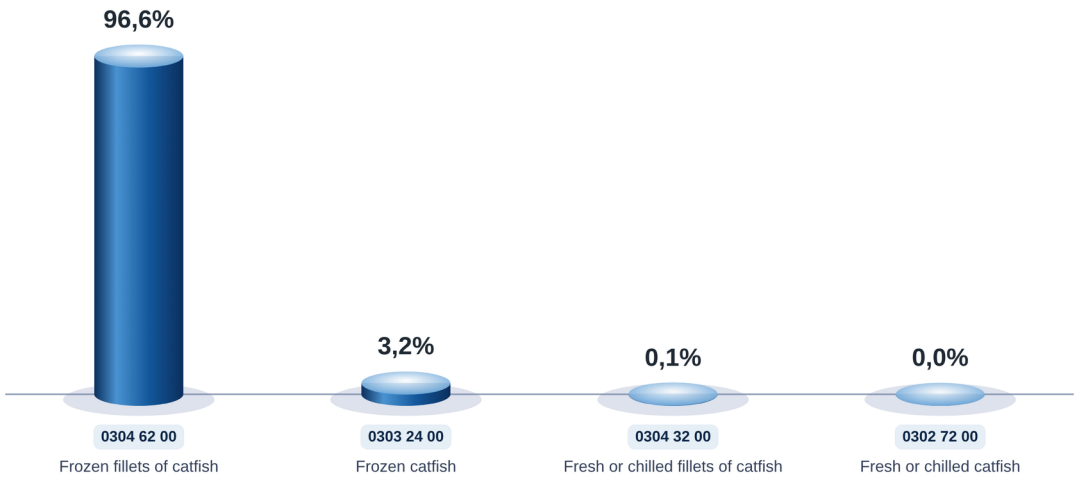
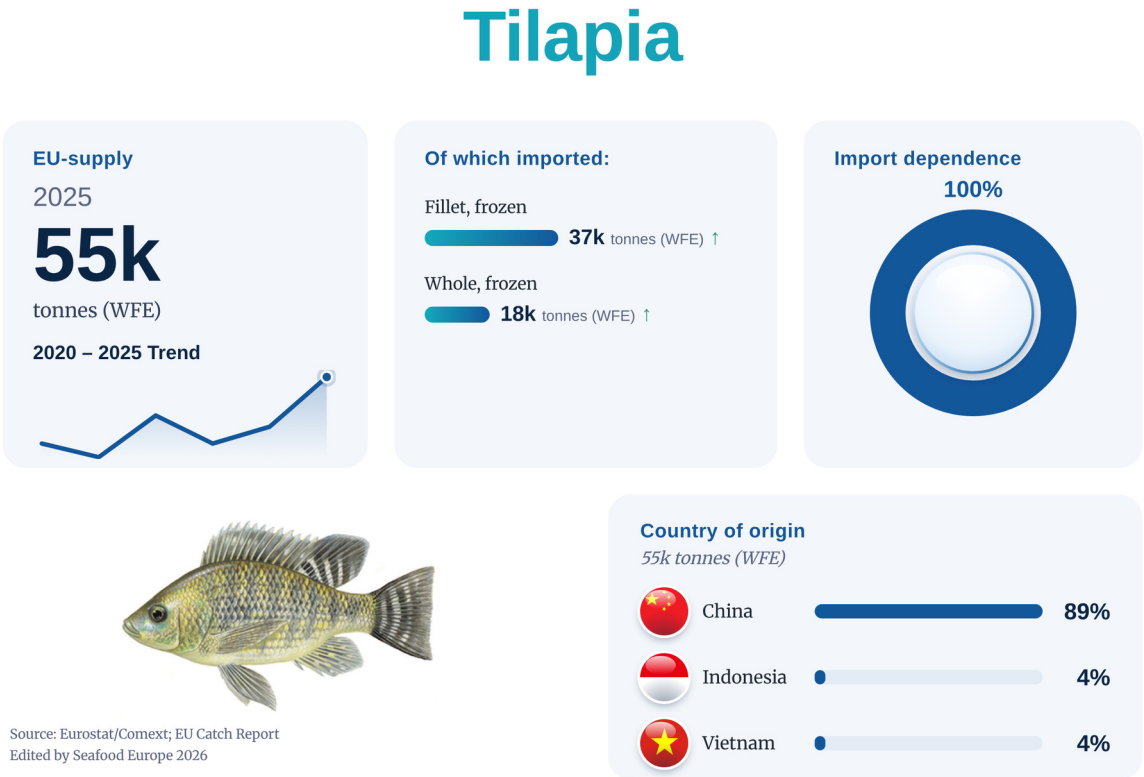


Figure 5.3.10.2: Main imported products of pangasius in 2025 in percentage of total import (203 thousand tonnes); Source: Eurostat/Comext



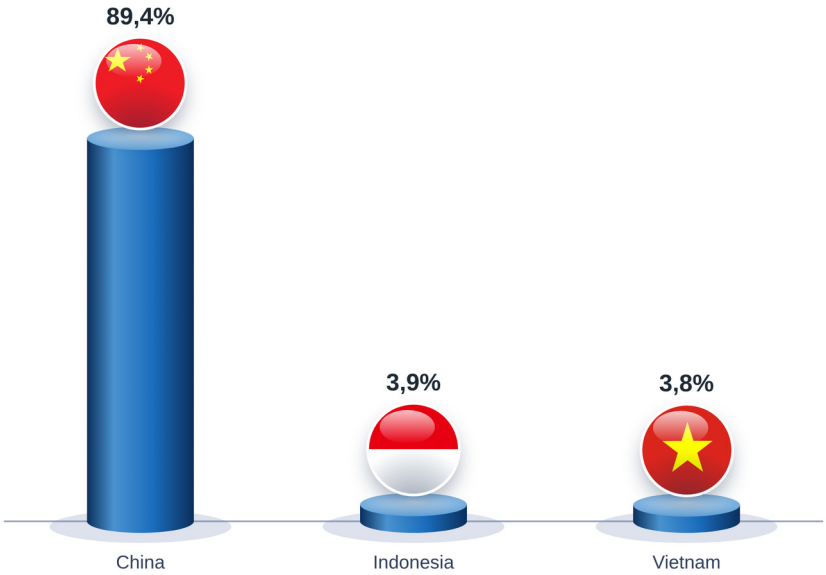


Figure 5.3.11.1: External sourcing countries for tilapia in 2025 in percentage (>1 per cent) of total import (55,000 tonnes); Source: Eurostat/Comext

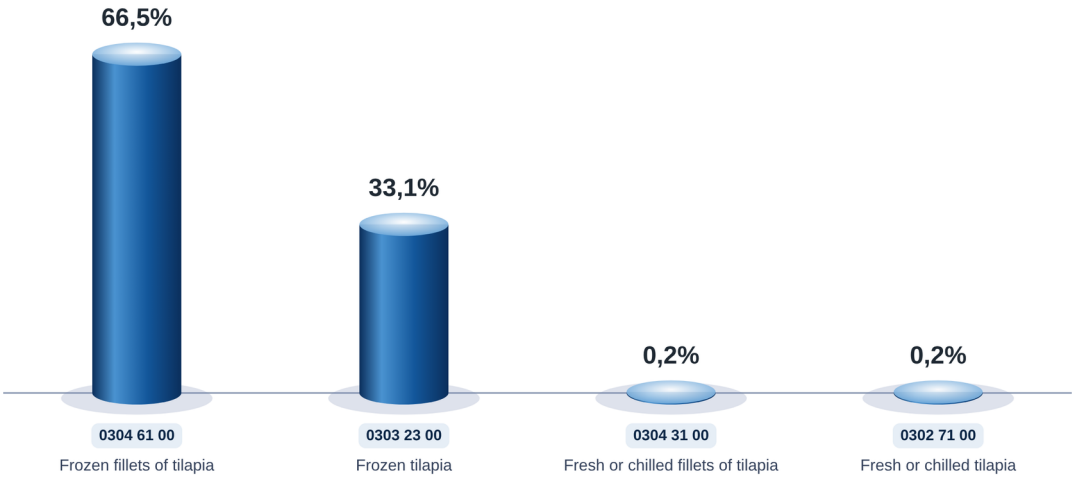


Figure 5.3.11.2: Main imported products of tilapia in 2025 in percentage of total import (55 thousand tonnes); Source: Eurostat/Comext

Tilapia is one of the most widely farmed freshwater finfish. In aquaculture it is commonly ranked third after carp and salmon. EU tilapia supply reached 55,000 tonnes in 2025, a ~33 per cent increase from 2024. The EU r almost exclusively relies on import, as there is only a negligible amount of domestic production resulting in a few tonnes annually.

China remained the largest tilapia exporter to the EU, contributing 89 per cent of the total supply. Indonesia is the second largest with 4 per cent of the total supply, followed by Vietnam with 4 per cent.

Frozen fillets are the most common imported products (66.5 per cent), followed by frozen whole tilapia (33.1 per cent). There is an available ATQ allowance for tilapia fillets of 10,000 tonnes.

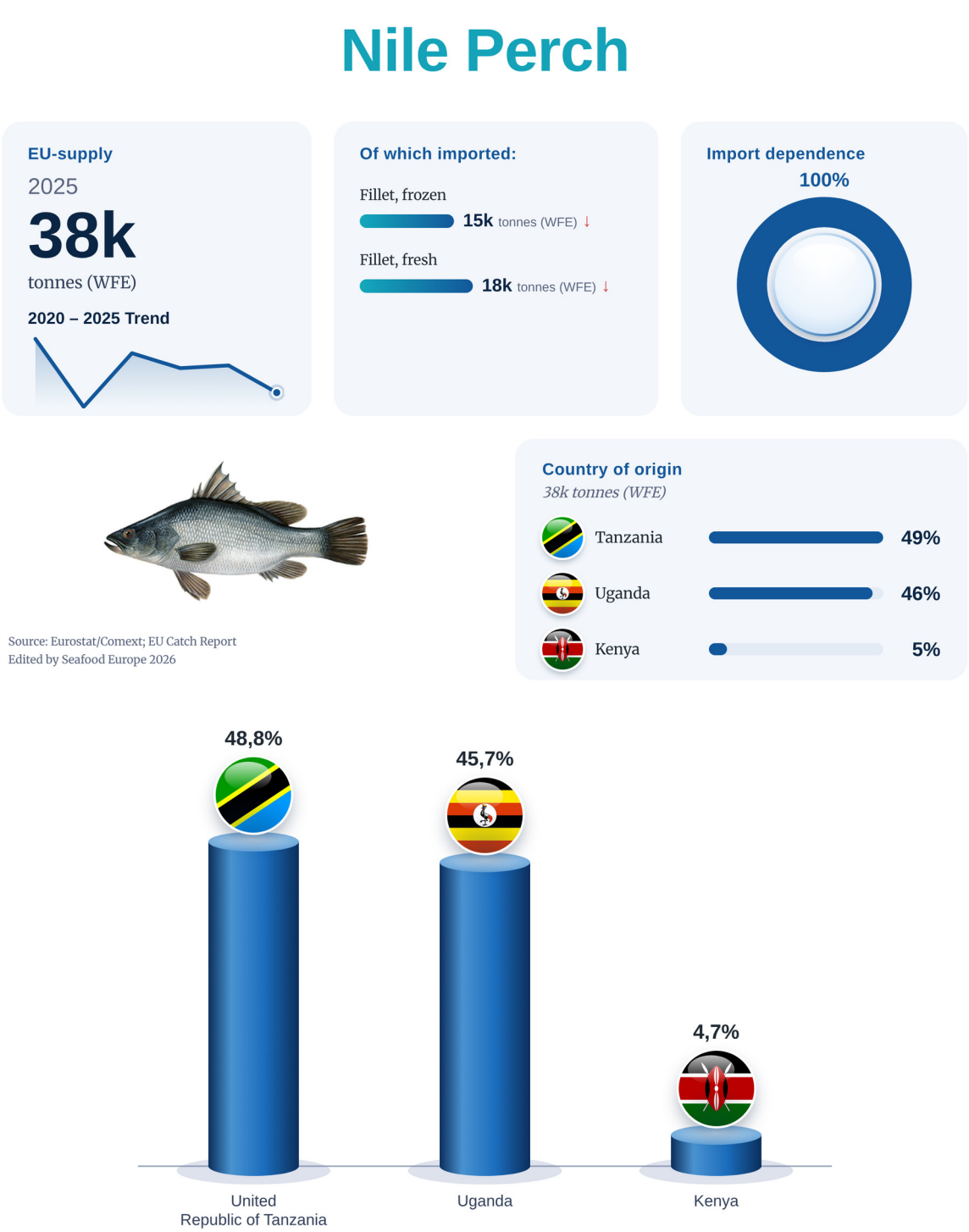


Figure 5.3.12.1: External sourcing countries for Nile perch in 2025 in percentage (>1 per cent) of total import (38,000 tonnes); Source: Eurostat/Comext

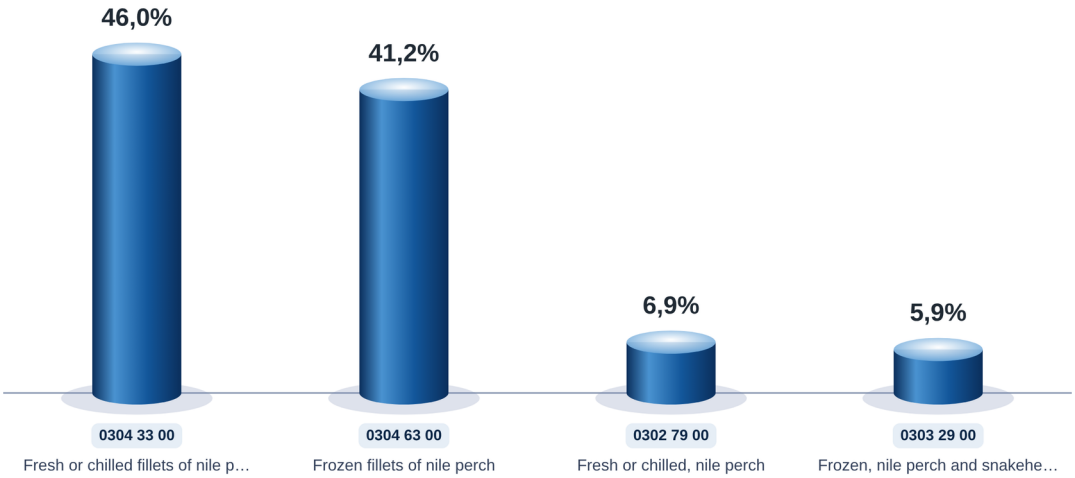
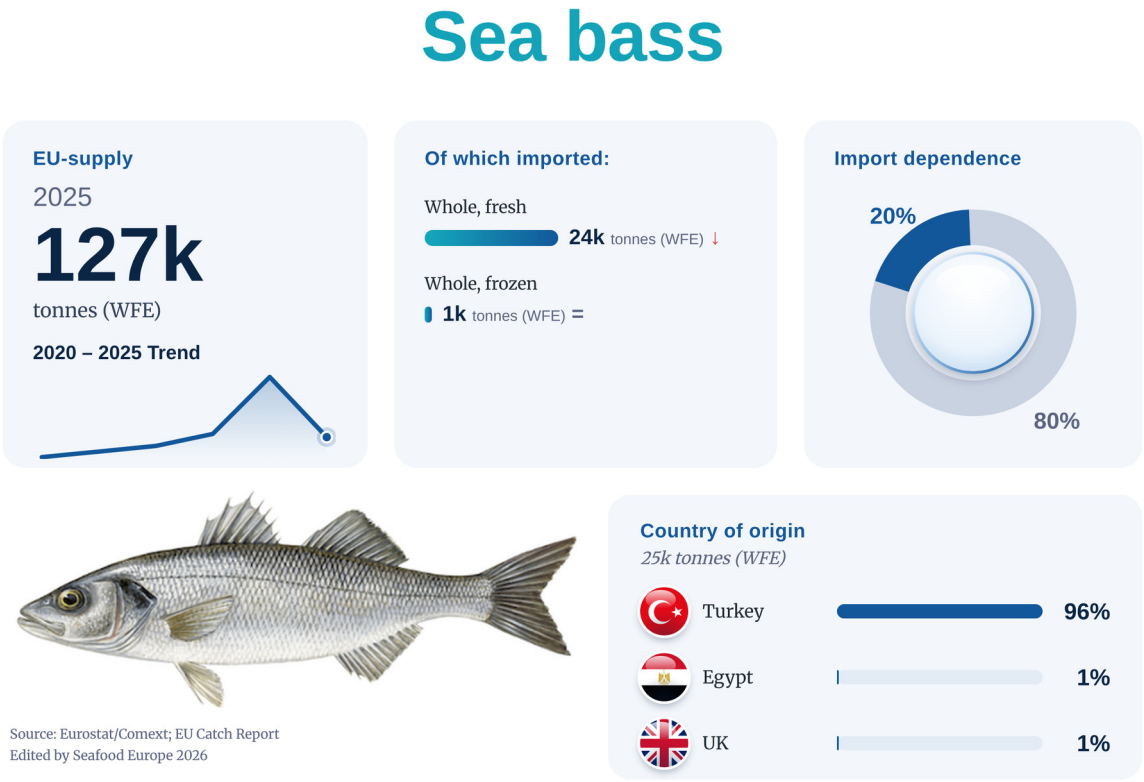


Figure 5.3.12.2: Main imported products of Nile perch in 2025 in percentage of total import (38,000 tonnes); Source: Eurostat/Comext

All Nile perch imports to the EU come from the riparian countries of Lake Victoria such as Tanzania, Uganda and Kenya. The species was intentionally introduced into the lake during the 1950s to boost fisheries production and contribute to economic growth.

EU supply relies solely on import from the three Eastern African countries since there is no domestic production of the species. The import volume decreased by 4,000 tonnes, to 38,000 tonnes in 2025, where Tanzania continued to be the largest supplier with almost 49 per cent of the total share, followed by Uganda with 46 per cent and Kenya with 5 per cent.

46 per cent comes as fresh or chilled fillets, while 41 per cent enters the EU in frozen fillet forms. The fresh fillets are imported into the EU using the super-chilling technique - *a technique that reduces the temperature of fish uniformly to a point slightly below that which is obtained in melting ice.*



**excluding EU fisheries for seabass*

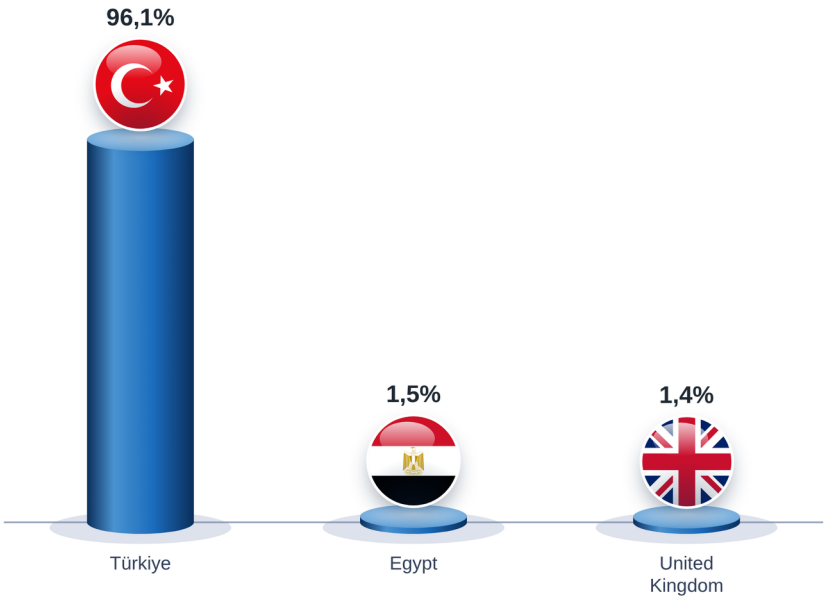


Figure 5.3.13.1: External sourcing countries for sea bass in 2025 in percentage (>1 per cent) of total import (25,000 tonnes); Source: Eurostat/Comext

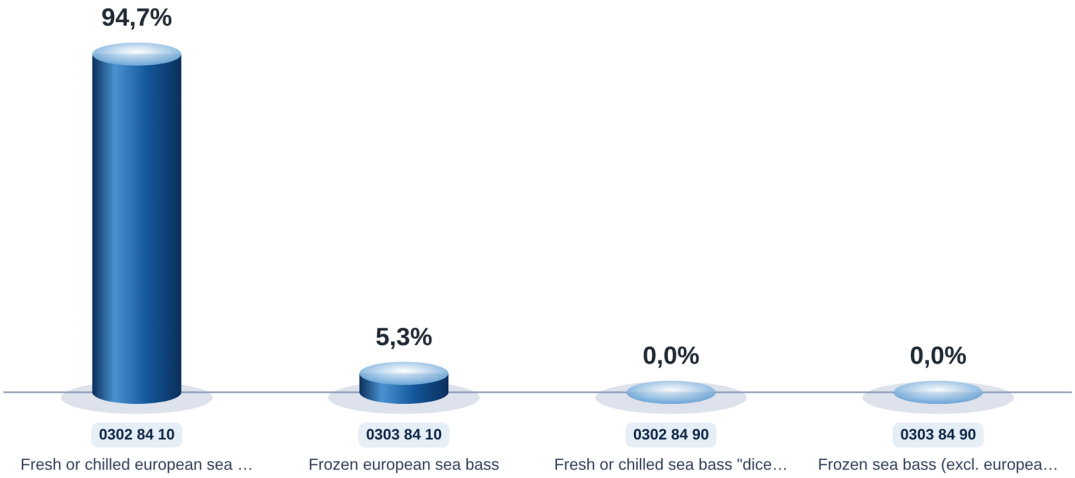
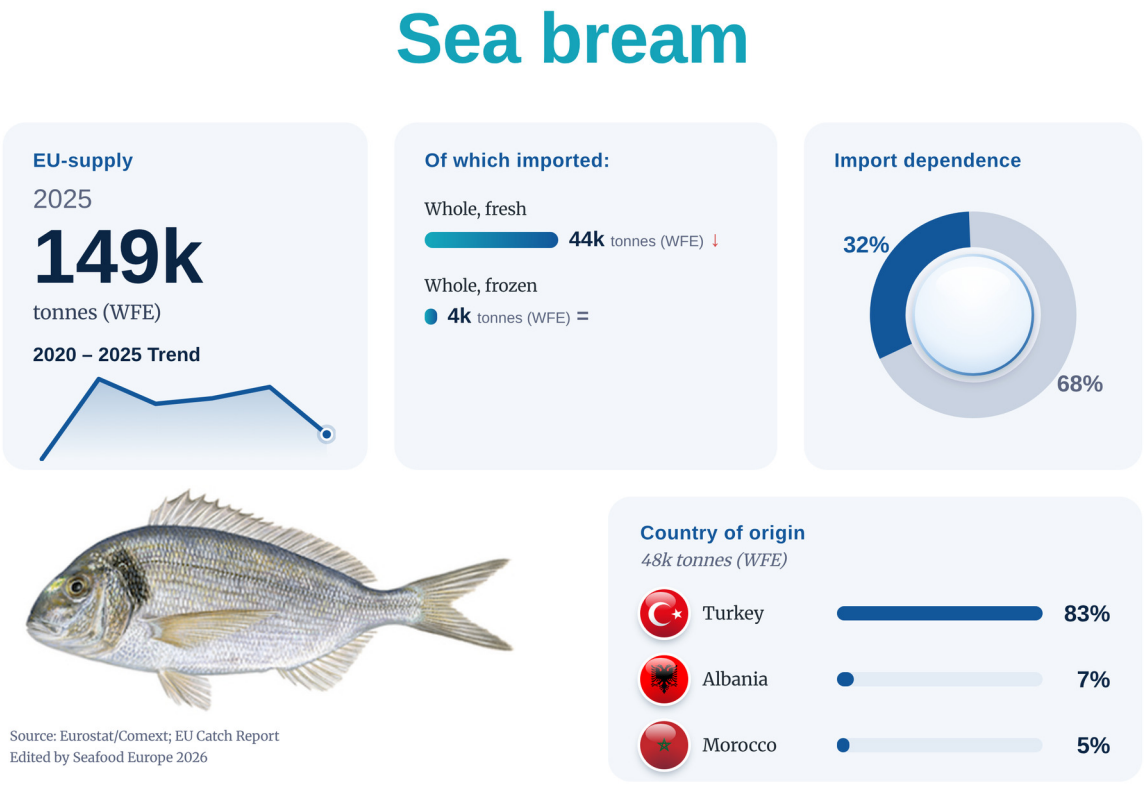


Figure 5.3.13.2: Main imported products of sea bass in 2025 in percentage of total import (25 thousand tonnes); Source: Eurostat/Comext

Sea bass together with sea bream are the most successful aquaculture species in the European Union, produced in Mediterranean countries, predominantly in Greece, Italy and Spain. The EU`s self-sufficiency of sea bass was 80 per cent in 2025, increased from 73 per cent in 2024. Sea bass is mainly consumed in the EU as a whole fish with the portion size of 300-600g.

Türkiye remained the largest exporter of sea bass, accounted for 96 per cent of the total import volume. Sea bass was among the first species started being regulated by Türkiye`s new aquaculture production planning. The regulation entered into force in 1 January 2024 and it specifies minimum and maximum production levels for aquaculture companies. The weak Turkish lira also helps exporters to sell sea bass in more competitive prices on the EU market.

The large majority (95 per cent) of the sea bass import arrives to the EU in the form of fresh or chilled product.



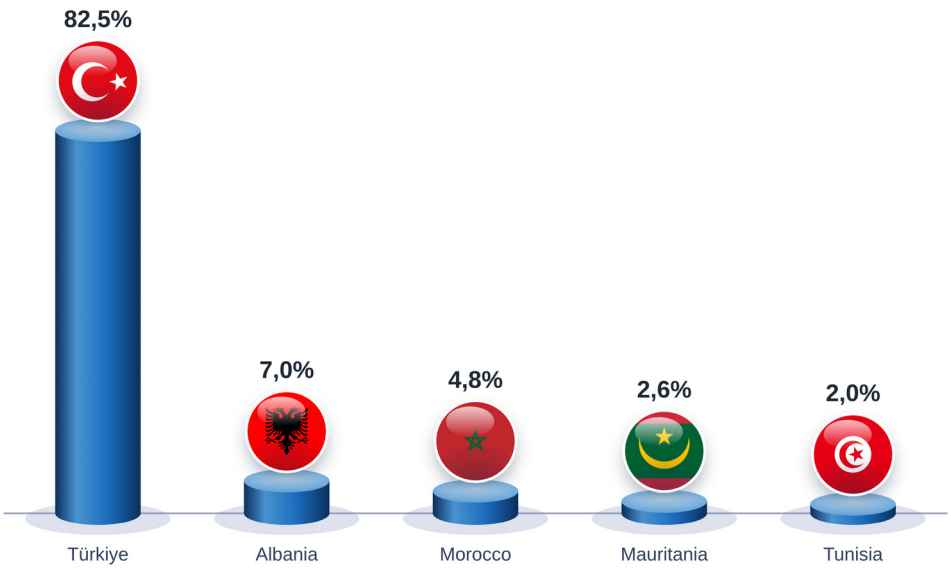


Figure 5.3.14.1: External sourcing countries for sea bream in 2025 in percentage (>1 per cent) of total import (48,000 tonnes); Source: Eurostat/Comext

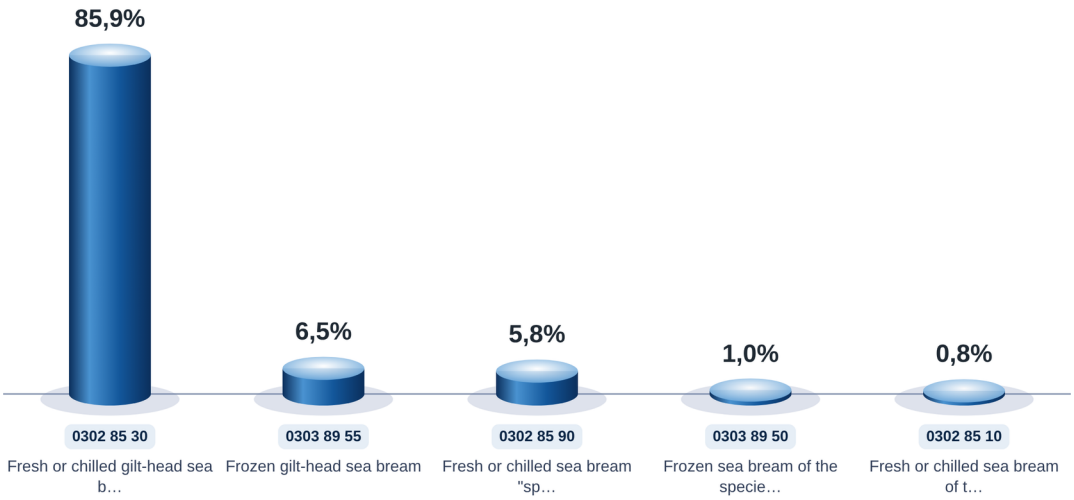


Figure 5.3.14.2: Main imported products of sea bream in 2025 in percentage of total import (48,000 tonnes); Source: Eurostat/Comext

Sea bream aquaculture shares similarities with sea bass and production methods and volumes are closely matched in the EU. The overall EU supply was 149,000 tonnes in 2025, a decrease of 6 per cent compared to 2024. The sea bream supply almost entirely comes from aquaculture (99 per cent), although there is a small amount of wild capture. The sea bream aquaculture industry dominated entirely by gilthead sea bream (*Sparus aurata*), although Greece produces a few tonnes of Japanese sea bream (*Pagrus major*) as a premium product. Efforts have been made to diversify the sea bream production in Greece during the last decades with little success. Researches were conducted for commercial production of sharpsnout sea bream, black sea bream, common dentex, white sea bream and pandora but reproductive failures, feeding challenges or slow growth rates put their developments on hold.

Sea bream in the EU is preferably consumed as a whole fish with the average size of 400g.

EU`s self-sufficiency of sea bream was 68 per cent in 2025, and as in the case of sea bass, the major sea bream exporter country to the EU market was Türkiye. The country`s export accounted for 83 per cent of the total imported volume of sea bream to the EU.

Most of the imported sea bream (92 per cent) to the EU arrives as fresh or chilled product.



2026

CONCLUSION

EU SEAFOOD SUPPLY SYNOPSIS

6. Conclusion

This study aims to provide valuable insights into the EU seafood sector for Seafood Europe members and the wider stakeholder community, while enhancing understanding of the organisation's activities. While Seafood Europe strives to ensure that the information and data presented in this report are accurate and reliable, minor discrepancies or inaccuracies may occur due to differences in data sources, methodologies and reporting practices.

The study has been published since 1992 and provides insight into the changes that have occurred to the seafood market during that time. Seafood Europe remains confident that the fish and seafood market across the EU can support a successful and vibrant industry. Imports remain the more prominent part of supply but the opportunity for EU fisheries is substantial. Seafood Europe members will continue to work on developing the use of resources from around the globe that are safe, sustainable and properly regulated.

Seafood Europe would welcome comments and suggestions about additional topics the reader wishes to see covered in further detail (info@seafoodeurope.eu). There are also further publications and commentaries available at our website: https://seafoodeurope.eu/.

