

SEAFOOD EUROPE
Established as AIPCE-CEP in 1959

EU Market For Seafood

Overview Key Developments

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Today's Agenda

1. **Seafood Europe**
2. **EU Trade Flows**
3. **EU Regulatory Environment**
4. **Challenges/Outlook**
5. **For Reflection**

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represents EU national associations of fish processors and traders

The association represents 15 National Associations from 9 Member States and 2 Third countries (UK, Norway), accounts for:

- approx. €**35 bn** turnover
- approx. **4.000** companies
- approx. **130.000** direct employees



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SUSTAINABILITY MANIFESTO

A Fish and Seafood Industry Perspective



Publication

The Manifesto’s Pillars

CHAPTER ONE

The role of Fish and Seafood in healthy and sustainable diets



CHAPTER TWO

Responsible Fisheries & Healthy Oceans



CHAPTER THREE

Responsible Aquaculture





CHAPTER FOUR

Responsible Manufacturing & Processing



CHAPTER FIVE

Protecting human rights & promoting community development



CHAPTER SIX

Responsible Communication



Publication

Main conclusions

2025

EU Seafood Supply:	12.88 Mt	(+2.3%)
- Domestic supply:	3.49 Mt	(-7.8%)
- Imports from non-EU:	9.39 Mt	(+6.7%)
- Export to non-EU:	2.12 Mt	(+2.8%)
EU Consumption:	10.76 Mt	(+2.2%)
Per capita consumption:	23.8 kg	(+1.7%)



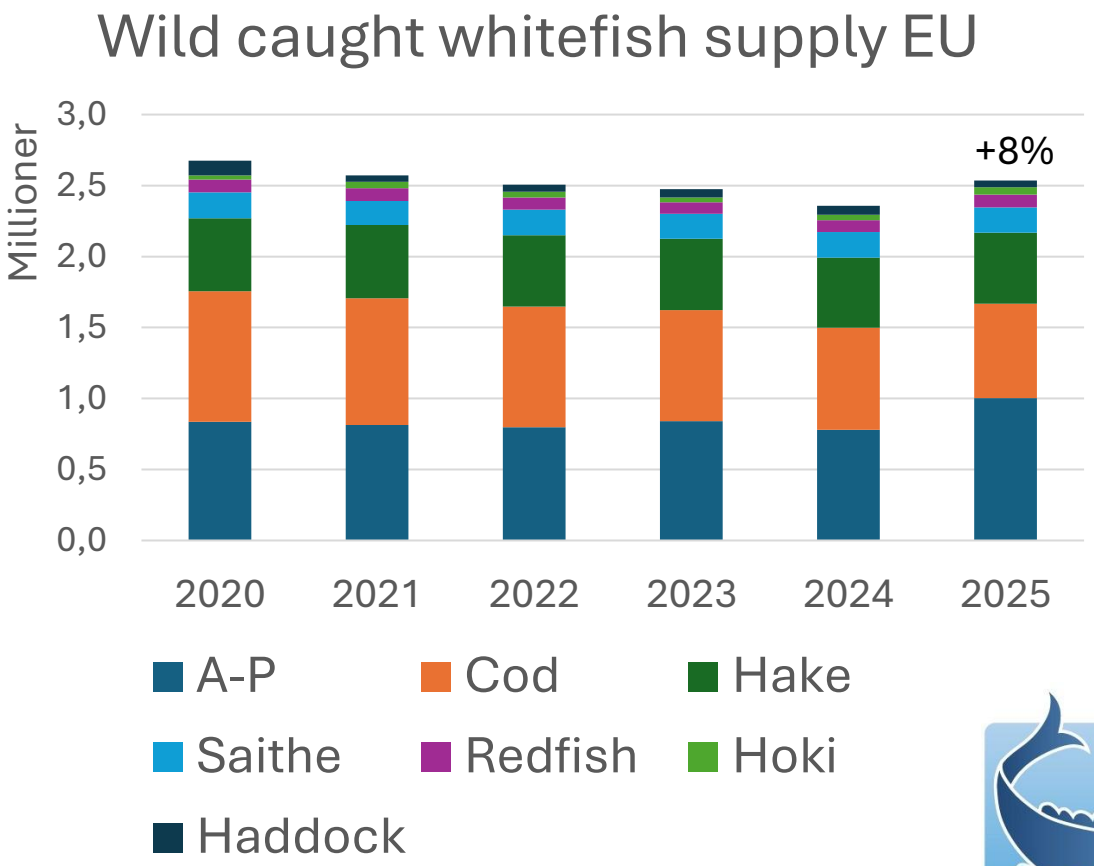
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Source: EU Seafood Supply Synopsis 20

WHITEFISH SUPPLY

2025

Total whitefish supply:	2,535 Kt	(+7.5%)
- Increase in A-P	1,002 Kt	(+28.6%)
- Hoki and Redfish up		
Strong decrease in Cod and Haddock volumes	666 Kt	(-7.5%)



Strong demand pushes Alaska pollock prices higher

Record-high Alaska pollock prices are resurfacing, driven by firm demand, tight inventories and mounting supply concerns in Europe.

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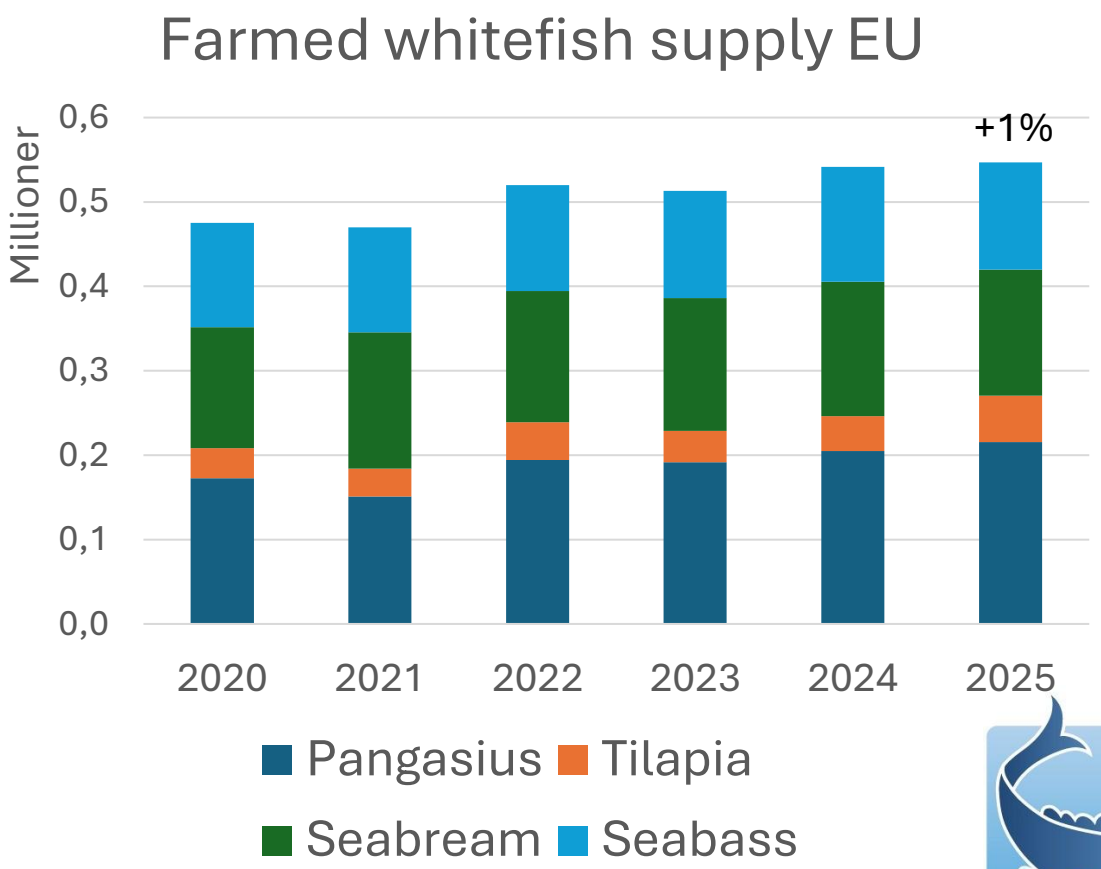
Source: EU Seafood Supply Synopsis 20

FARMED WHITEFISH

2025

Total farmed WF supply:	547 Kt	(+1.0%)
- Pangasius	215 Kt	
- Tilapia	55 Kt	
- Seabream	149 Kt	
- Seabass	127 Kt	

>100 Kt growth in 5 years



Source: Groundfish forum 2025

Source: EU Seafood Supply Synopsis 20

SHRIMP AND PRAWNS

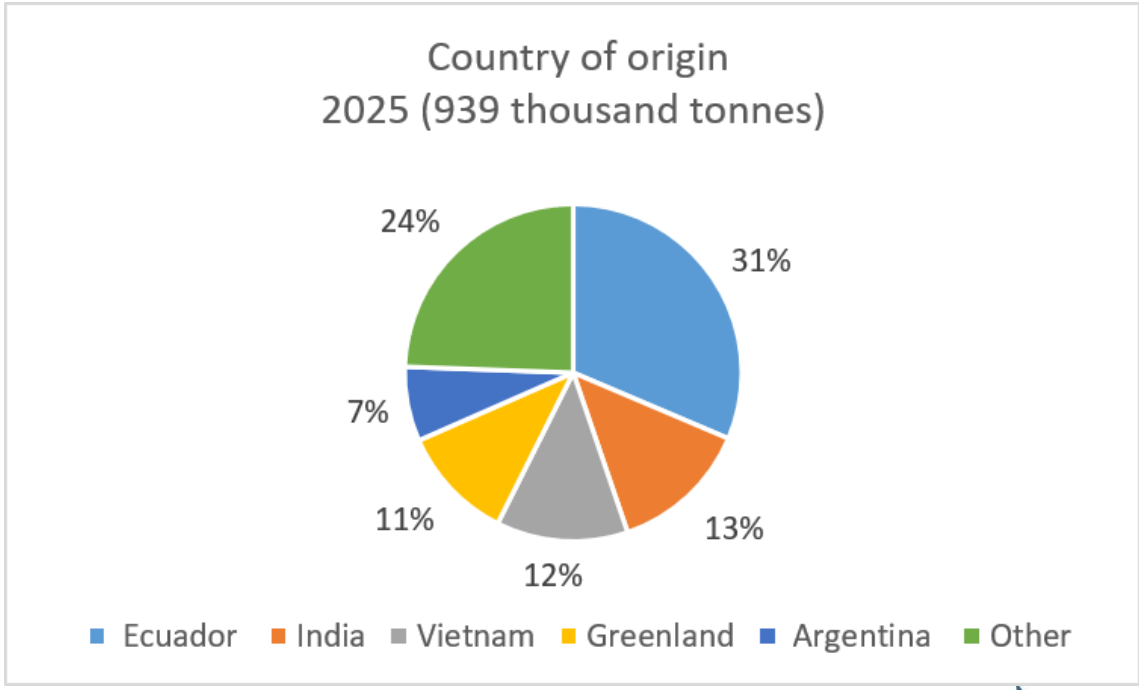
2025

Wild and Farmed 939 Kt

Ecuador #1: growing

India #2, Vietnam #3

Pandalus 63 Kt
imported into EU



NEW TRADE AGREEMENTS

India
Indonesia

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Source: EU Seafood Supply Synopsis 20



A SNAPSHOT OF EU REGULATIONS

Traceability/labelling:

- **CR (124/2009), IUU (1005/2008), CMO (1379/2013), FIC (1169/2001), TR (16/2001)**

Sustainability:

- **CSDDD (2024/1760), CSRD (2022/2464), FLR (2024/3015), PPWR (2025/40),EUDR (2023/1115)**

Trade:

- **ATQ (2026/2446), UCC (2026/2108), FTA's, EEA**

Sanitary/Veterinary Regulations (DG Sante)

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Global barriers and risks for the sector

1. Resource scarcity and sustainability

- Only 62.4% of stocks are sustainable (FAO)
- Less raw material and more volatile prices
- Restrictive quotas

No sector is competitive if its main resource is degrading.

2. Climate change and environmental pressure

- Exploitable biomass could fall by >10% in several regions
- Geographic shift in species
- Water temperature and falls in productivity

Competitiveness begins with the ability to adapt.

3. Energy dependence

- Energy-intensive sector exposed to fossil fuels
- Energy costs: from ~13% to ~35% of revenue (2022)
- Margins under pressure and fleets awaiting renewal

The energy transition is a competitiveness agenda.

4. Investment and productivity deficit

- Investment, innovation and technology determine growth (FAO)
- Small companies, lacking scale and capital
- Low automation, digitalisation and R&D

The limit to growth is not demand, it is productivity.

5. Human capital and generational renewal

- Ageing workforce and few young people
- Shortage of technical profiles and digital skills
- Shortage of specialised managers in Europe

We need to attract talent to the ocean economy.

6. Regulation and European fragmentation

- Environmental requirements, compliance and traceability
- Many national and European rules
- Unpredictability and slowness

Rules yes, but predictable and stable.

Sources: The State of World Fisheries and Aquaculture 2026 (FAO), Q&A on the energy transition in EU fisheries and aquaculture sectors (European Commission, 2023)



For Reflection (1)

The EU's heavy regulatory framework imposes a high compliance burden on companies and high enforcement costs on authorities. Where does it place Europe in terms of Level Playing Field and in terms of Competitiveness?

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For Reflection (2 and 3)

Geopolitical developments affect trade, and seafood is traded globally. However, harvest of cold water prawns takes place in a limited number of fishing areas/countries.
Are cold water prawns part of a safe haven?

EU policy is aimed at a transition from terrestrial animal-proteins to alternatives.
Can cold water prawns be winners?

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