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SUMMARY

The EU market for fishery and aquaculture products experienced an overall decline in consumption over the 2014–2023 period, with both total and per capita consumption reaching their lowest levels in 2023 (10,25 million tonnes and 22,9 kg per capita respectively)[1]. However, consumption trends differed significantly across Member States. While countries such as Lithuania, France and Spain recorded declines, consumption increased in Italy, Poland, Romania and Slovakia. Portugal and Spain remained the highest per capita consumers throughout the period. Consumption patterns also evolved in terms of species diversity, with declining consumption of some traditional species such as cod, while tuna and shrimp species recorded strong growth. Economic, cultural and geographical factors continue to strongly influence consumption patterns, with coastal countries generally maintaining higher and more diversified levels of consumption. In particular, the strong tradition of FAP consumption in Italy contributed both to consumption growth over the decade and to the resilience of demand during the sanitary crisis.

The analysis of four editions of the Eurobarometer survey (2016, 2018, 2021 and 2024) highlights changes in FAP consumption habits, consumer preferences and consumer profiles across the EU. Results show a gradual shift from frequent to more occasional consumption patterns, with declining weekly at-home consumption and increasing out-of-home consumption. Supermarkets and hypermarkets further strengthened their role as the main distribution channels, while traditional markets declined. Price and product appearance remain the main factors influencing purchasing decisions, but other aspects such as origin, convenience and sustainability are gaining importance. Product origin is particularly valued in several Member States and among older consumers, while convenience-related aspects (e.g. ready-to-cook and ready-to-eat products) are increasingly important, especially for middle-aged consumers (aged between 35-44) with time constraints. Environmental, social and ethical considerations remain secondary overall but are becoming more relevant among younger consumers.

The study also suggests that consumption trends are influenced not only by consumer preferences but also by the structure of the supply and the offer, which can in turn shape demand. The EU FAP market is shaped by a structural reliance on imports, declining domestic production, and retail strategies that prioritise species offering greater stability and predictability, both in terms of price and volume. This contributes to the growing dominance of a limited number of species capable of meeting market requirements in terms of year-round availability and supply reliability. Price remains an important determinant of consumption patterns, and its influence has strengthened during the inflationary context, leading some consumers to downgrade purchases or shift towards substitutes. However, the study also suggests that purchasing decisions cannot be explained by price alone and should be understood more broadly, taking into account factors such as product image, perceived value and utility for consumers.

The study specifically analysed the consumption in six Member States, namely Spain, France, Italy, the Netherlands, Austria and Poland. Findings from this analysis showed that while all countries exhibit a shift toward convenience, increased price sensitivity, and changing consumption habits,

[1] Apparent consumption (total and per capita): amount of fishery and aquaculture products estimated to be consumed in the EU. Per capita consumption indicates the amount by each individual person in the EU. Further explanation about the calculation methodology is provided in section 2.

they differ in terms of the intensity of decline, the resilience of demand, and the relative importance of cultural, economic, and structural drivers.

LIST OF ACRONYMS

B2B	Business to Business
EU	European Union (EU-27)
FAO	Food and Agriculture Organisation of the United Nations
FAP	Fisheries and Aquaculture Product
HICP	Harmonised Indices of Consumer Prices
HORECA	Hotels, restaurants and cafés/catering
ISMEA	Instituto di Servizi per il mercato agricolo alimentare
ISTAT	Istituto nazionale di statistica
LSR	Large Scale Retailers
LWE	Live weight equivalent
MAPA	Ministry of Agriculture, Food and Fisheries
MS	Member States
MSC	Marine Stewardship Council
N.C.	Not communicated
PO	Producer's Organisation
STECF	Scientific, Technical and Economic Committee for Fisheries
TAC	Total Allowable Catches
VAT	Value added tax

1 MAIN FINDINGS

Food consumption behaviour is a multifactorial and dynamic process, shaped by the interaction of product characteristics, individual factors and the broader environment. In the case of fishery and aquaculture products (FAPs), several characteristics further influence consumption patterns. These include high variability in supply, which affects product availability, strong cultural aspects, particularly in coastal regions, and product-specific barriers (e.g. perceived difficulty of preparation, presence of bones, etc).

This study aims to provide a comprehensive assessment of the consumption of FAPs in the EU over the 2015-2024 period, by analysing the evolution of consumption patterns over time, assessing changes in consumer behaviour and preferences, and identifying the key drivers of demand and the main challenges affecting consumption across Member States.

Main findings and challenges from this study are summarised below.

A DECLINE IN CONSUMPTION DRIVEN BY CHANGING HABITS

Analysis across the EU markets points to a shift in consumption patterns rather than a simple decline in demand. While overall consumption volumes have declined since 2019, the most consistent trend is a decline in consumption frequency, especially at home. Findings consistently show a shift from regular weekly consumption towards more occasional patterns.

This shift is particularly pronounced among younger consumers, who display lower familiarity with fish, weaker cooking skills, and stronger expectations in terms of convenience. By contrast, older consumers maintain more stable consumption habits, reflecting stronger cultural and familiarity with FAPs.

CONVENIENCE, A KEY DRIVER FOR CONSUMPTION BUT A VECTOR OF STANDARDISATION

Across all the studied markets, stakeholders emphasised the increasing demand for products that are easy to prepare, portioned, prepacked, ready-to-cook and ready-to-eat. This trend benefits species that offer supply predictability and stable prices, such as salmon, tuna, shrimps, etc. However, this shift also contributes to the standardisation of the offer around a small number of species, which may reduce consumer awareness of the diversity of FAPs in the EU, in particular in Southern European countries.

PRICE AS A KEY BUT INSUFFICIENT DRIVER OF FAP CONSUMPTION

Across the studied markets, price emerges as a central but complex determinant of FAP consumption. While it is consistently identified as a key factor in purchasing decisions, particularly in inflationary context, its role is not linear and does not fully explain consumer behaviour. FAPs are perceived as expensive products, and inflation has further reinforced this perception. Even though FAPs encompass a wide range of species, corresponding to different price levels, including very affordable options, consumers often continue to associate fish with premium consumption.

However, the continued strong consumption of some expensive species, such as salmon, demonstrates that other factors such as convenience, availability and product image can outweigh price considerations. This also demonstrates that consumption patterns are shaped by a combination of factors, and not only price.

POLARISATION OF CONSUMERS AND FRAGMENTATION OF THE DEMAND

Findings from the study highlight that consumption patterns of FAPs are increasingly fragmented and "polarised"[2], as interviews across the Member States identified different consumption patterns:

- Price-sensitive consumers increasingly shift towards more affordable options within FAPs and, in some cases, to cheaper protein sources such as chicken. The latter trend is indicated by stakeholder consultations but is less clearly supported in literature.
- Higher income consumers maintain consumption, particularly of convenient or premium products associated with specific occasions.
- Younger generations tend to show lower levels of engagement with FAP consumption, reflected in lower frequency, limited familiarity and skills, and stronger expectations in terms of convenience.

AVAILABILITY AND RETAIL STRUCTURE SHAPE THE CONSUMPTION OF FAPS

Findings from the study underline the strong role of supply structure and retail organisation in shaping demand for FAPs. In many markets, large retail chains play a dominant role and increasingly structure the offer around species that combine predictable supply, stable prices, which makes them attractive for retailers. These species typically correspond to imported or farmed products such as salmon, shrimps, tuna, etc.

At the same time, traditional distribution channels, such as fishmongers, open markets and fresh fish counters, have gradually lost ground. This decline was driven by difficulties in recruiting qualified staff, changing consumer habits favouring convenience and one-stop shopping. There are some concerns especially from the operators involved in the primary production that this shift limits consumer familiarity with less known FAPs, weakens awareness of seasonality and reduces knowledge of how to prepare fresh fish. This may, in turn, influence their consumption behaviour and preferences.

EMERGING BUT SECONDARY ROLE OF SUSTAINABILITY CONSIDERATION

Environmental, social and ethical aspects are gaining importance, as highlighted by both Eurobarometer results and stakeholder consultation. Findings suggest that younger consumers are more likely to pay greater attention to these aspects, although evidence from the literature is more nuanced. However, these aspects remain secondary to price, convenience and appearance. Their influence is more pronounced in business to business (B2B) relations than at the final purchasing decisions.

At the same time, stakeholders report that consumers are often overwhelmed by complex information, limiting their ability to use it effectively in purchasing decisions.

[2] According to literature, « polarisation » refers to growing divergence of consumer profiles, preferences and purchasing behaviours between distinct groups of consumers.

2 OBJECTIVES AND METHODOLOGY OF THE STUDY

This study aims to provide an overview of the consumption of fishery and aquaculture products in the EU. Specifically, it seeks to:

- analyse the evolution of consumption patterns;
- assess the evolution of consumer behaviours;
- identify the key trends and drivers shaping consumption;
- highlight the main challenges affecting FAP consumption.

The report is based on a combination of methods and sources, including:

- **Quantitative analysis of the consumption of FAPs**: the objective is to provide an overview of the consumption of FAPs in the EU, and its evolution over the last decade. This quantitative analysis allows to provide an overview of the diversity of consumption habits and trends in the different EU Member States. It also allows to identify the possible shifts in terms of species and preservation type. In this report, apparent consumption refers to estimates of the amount of FAPs to be consumed in the EU and in the Member States, following the EUMOFA methodology (Apparent consumption = (catches + aquaculture production + imports) – exports. It is expressed in Live Weight Equivalent. The full methodology underlying these estimates is provided in the methodological background of the EU fish Market[3].
- **Quantitative analysis of the market trends** (e.g. production, supply, prices, etc.): the study also analyses market trends to contextualise FAP consumption, which often evolves in response to factors such as production levels, economic conditions (e.g. input costs), and the availability of FAPs on the market, which itself is related to some factors such as the evolutions of TACs and quotas in the EU. The report also provides an analysis of FAP price developments, using both normal and real prices, as they provide complementary insights for the purpose of this study. While the real prices, adjusted for inflation, allow for more accurate assessment of underlying price trends within the sector, nominal prices reflect the prices faced by consumers and are therefore relevant for understanding consumption behaviour and substitution effects. The full list of sources used is provided in Annex 1.
- **Analysis of consumption behaviour**: the analyses provided in this study is based on the results of four waves of the special Eurobarometer on FAP consumption (2016, 2018, 2021 and 2024). In addition of providing key insights to understand EU consumer habits, preferences, and perceptions regarding FAPs, as well as seaweed and algae products, the analyses allow to assess the evolution of these factors over time. Further explanation about the methodology is provided under section 4 of this report.
- **Desk research and literature review**: the study also analyses a range of studies and academic papers on the topic, both at EU and national levels. The full list of references consulted is provided in Annex 1.
- **Interviews with stakeholders in the FAP sector:** To cover a range of contexts in terms of sector size, consumption patterns, geographical location, and diversity of species consumed, interviews were conducted in the six following Member States: Spain, France,

[3] The EU fish Market, available on: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/eu-fish-market-reports/the-eu-fish-market-2025

Italy, the Netherlands, Austria and Poland. These Member States were selected based on criteria aimed at ensuring a diversity of situations, including apparent consumption, per capita consumption, species diversity, and geographical distribution. In total, 28 interviews were carried out with stakeholders, including professional organisations, retailers, wholesalers, research institutes, and certification bodies. The list of stakeholders interviewed is provided in Annex 2.

Detailed case study reports in the six Member States, providing the detailed assessment of Eurobarometer survey results at Member State level, consumption statistics, desk research, and feedback from stakeholders, are provided in the country profiles annex.

3 LITERATURE REVIEW

Food consumption behaviour is widely recognised as a multidimensional, situational, dynamic and complex phenomenon, and can be defined as "*the result of response reactions to internal or external stimuli that call for food intake or food cessation*"[4]. Food consumption behaviour is not limited to satisfying nutritional needs, but is also shaped by a wide range of personal, cultural and social factors. Generally, it is influenced by three broad categories of variables: (i) food-related characteristics, such as physiological effects and sensory perception; (ii) individual factors, including biological, psychological and socio-demographic aspects; and (iii) environmental factor, such as economic and cultural conditions[5].

In terms of economic factors, consumer income and food price are considered determinants for food consumption and consumption behaviour[6]. Although in most cases the price elasticity of demand is negative for food (demand decreases when prices increase), some exception can be considered. The extent to which prices could influence purchasing decisions should be analysed in a broader perspective, by considering the interaction with the other factors, such as quality. Duralia (2023) highlighted that even though some economic theories suggest that consumers are willing to pay for high quality products, the concept of quality in food products is difficult to assess and that the degree of satisfaction experienced by consumers are related to the experience rather than the product itself[7]. One of the structural features of FAPs is the supply variability which also appears to be one of the factors driving consumption. According to Duralia (2023), a limited availability in distribution channels reduces the "consideration set" for consumers. If their preferred species or form is not available, the available alternative fish products may appear to be weak substitutes and thus consumers may decide not to buy any fish products[8]. Han et al. (2022) analysed the relationship between fish consumption, production and income growth and demonstrated that the drivers for fish consumption vary according to the maturity stage of fish markets. The paper distinguishes different market growth phases (i.e. introduction, growth, maturity and decline) and classify the studied EU Member States in different growth phases, reflecting different levels of maturity of seafood markets in the different EU Member States. It shows that factors such as income growth and domestic production do not influence consumption in the same way across the different maturity phases. It concluded that policy makers should identify fish consumption market growth phase before designing fish consumption management strategies[9].

Various studies identified **culture** as a coercive factor that determines an individual's food choices. Some reviews highlighted that habits and personal experience strongly drive FAP consumption, even overtaking 'objective' knowledge such as factual information on FAPs, certifications and

[4] Employed parents' satisfaction with food-choice coping strategies. Influence of gender and structure (2009). https://pubmed.ncbi.nlm.nih.gov/19501770/

[5] Food consumption behaviour-influencing factors and trends (2023). https://www.researchgate.net/publication/374071880_Food_Consumption_Behaviour-Influencing_Factors_and_Trends

[6] Ibidem

[7] Ibidem

[8] Consumer purchasing behaviour towards fish and seafood products. Patterns and insights from a sample of international studies (2014). http://dx.doi.org/10.1016/j.appet.2014.10.008

[9] What drives a country's fish consumption? Market growth phase and the causal relations among fish consumption, production and income growth (2022). https://doi.org/10.1016/j.fishres.2022.106435

labels[1011]. Another paper revealed that familiarity with FAPs, exposure and consumption during childhood, significantly influence consumption[12].

FAPs quality is considered by consumers as a result of the experience and the **intrinsic characteristics of the product**[13]. In general, product characteristics such as appearance, colour, taste, macronutrient content of the food can encourage or halt food consumption. FAPs benefit from consumer perception as healthy food sources, offering high protein contents and high levels of omega-3 fatty acids. While the FAPs characteristics are unique, some of these characteristics could also been seen as barriers to consumption, specifically unpleasant smells and the presence of bones[14]. Household habits and composition can also hinder FAP consumption. For example, the presence of children or adolescents who dislike the taste or smell of fish can prevent the person responsible for shopping from preparing seafood for the whole family[15].

In the **category of personal factors**, in particular socio-demographical factors, age can be considered the factor with the greatest impact on food consumption behaviour for FAPs. Evidence from Eurobarometer surveys[16] and papers consistently shows that older consumers tend to consume more than younger consumers, largely due to stronger health motivations, established dietary habits, and greater familiarity with preparation[17]. These factors are analysed more in details in section 4 of the present report.

Over time, research on consumer behaviours has identified a multitude of variables that can influence purchasing decisions. More recent papers suggest that these factors should be analysed in terms of their interaction and interconnectivity. As a result of this combination, the factors indicated above can be grouped into five categories, provided in table below.

While literature on this topic is extensive, with many studies examining one or several of the factors mentioned above, only a few articles analyse how these factors have evolved over time.

[10] Consumer perspectives on coastal fisheries and product labelling in France and Italy (2022). https://doi.org/10.1016/j.fishres.2021.106168

[11] Assessment of consumer preferences in the context of multiple labels: the case of fishery and aquaculture products (2024): https://doi.org/10.1007/s41130-024-00216-x

[12] Consumer purchasing behaviour towards fish and seafood products. Patterns and insights from a sample of international studies (2014). http://dx.doi.org/10.1016/j.appet.2014.10.008

[13] Food consumption behaviour-influencing factors and trends (2023). https://www.researchgate.net/publication/374071880_Food_Consumption_Behaviour-Influencing_Factors_and_Trends

[14] A systematic review of the determinants of seafood consumption (2021). doi:10.1017/S0007114520003773

[15] Consumer purchasing behaviour towards fish and seafood products. Patterns and insights from a sample of international studies (2014). http://dx.doi.org/10.1016/j.appet.2014.10.008

[16] EU Consumer habits regarding fishery and aquaculture product. https://europa.eu/eurobarometer/surveys/detail/3213

[17] Determinants of fishery and aquaculture products consumption at home in the EU28 (2021). https://doi.org/10.1016/j.foodqual.2020.104085

Table 1: Factors influencing individual food choice

Five main factors in three categories		Sub-factors under five main factors
Food-related features	**Food-internal factor**	Sensory features (flavor, taste, smell, and texture) and perceptual features (color, portion size, nutrition and health value, and quality)
	Food-external factor	Information (nutritional labels, health claims, packaging, aesthetics, and ethics of production history, brand, advertisement)
		Social environment (intrapersonal factor and social norms from family, peers, and media including ethical concern, social context when food choice is made).
		Physical environment (availability and accessibility of food products, food retail environments, time).
Individual differences	**Personal-state factor**	Biological features (genetic factors, personal dietary patterns and metabolism, physical condition such as health).
		Physiological needs (hunger, appetite, and weight status)
		Psychological components (emotion, motivation, personality)
		Habits and experiences
	Cognitive factor	Knowledge and skills
		Attitude, liking and preference
		Anticipated consequences
		Personal identity (demographic features such as age, gender, ethnic identity, education, and personal value and belief)
Society-related features	**Sociocultural factors**	Culture (norms and values)
		Economic variables (income, price)
		Political elements (agricultural and food policy and regulations)

Source: Influential Factors Related to Foods, Individual Differences and Society[18]

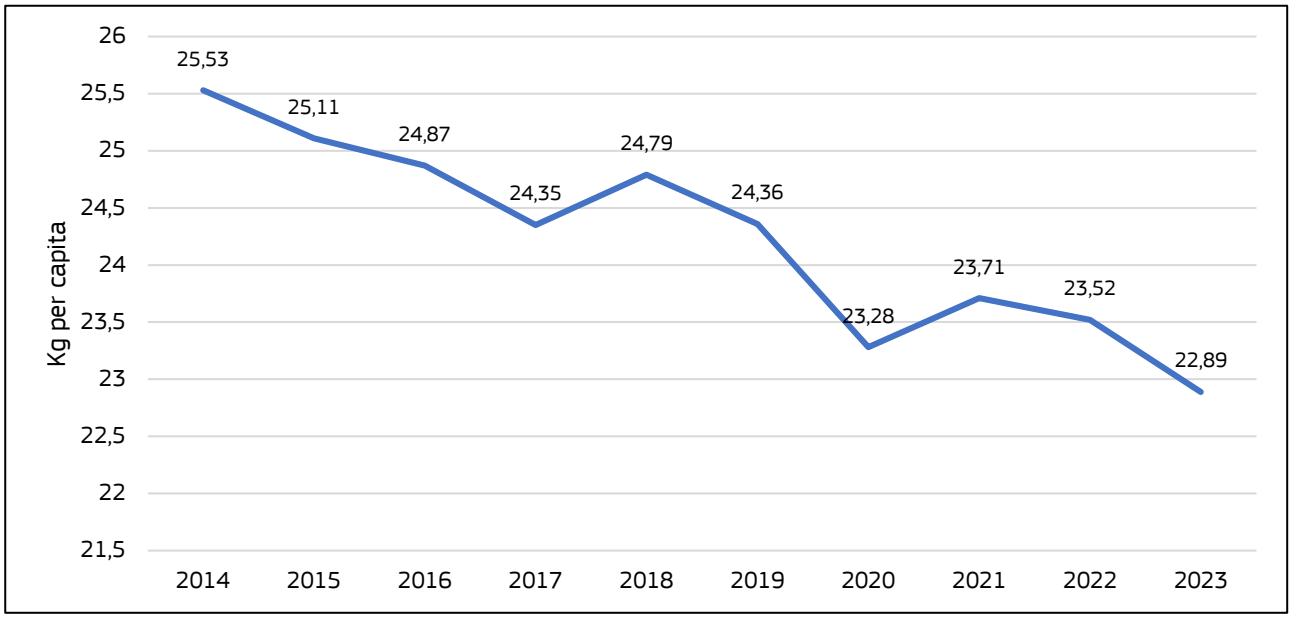
[18] Chen, P.J. & Antonelli, M., Conceptual Models of Food Choice: Influential Factors Related to Foods, Individual Differences and Society, Foods 2020, 9, https://www.mdpi.com/2304-8158/9/12/1898

4 CONSUMPTION OF FISHERY AND AQUACULTURE PRODUCTS IN THE EU

4.1 Evolution of per capita consumption

In 2023, apparent consumption of FAPs in the EU was estimated at 10,25 million tonnes LWE, corresponding to 22,89 kg LWE per capita, the lowest level of the past decade (Figure 1). Apparent consumption in the EU declined by 21%, from 12,94 million tonnes LWE in 2014 to 10,25 million tonnes LWE in 2023. A similar downward trend was recorded in per capita consumption, which decreased from 25,5 kg per capita in 2014 to 22,9 kg per capita in 2023. More specifically, apparent consumption of FAPs remained relatively stable between 2014 and 2019 around 12,6 million tonnes LWE, before declining by 13% between 2019 and 2023. This decline coincides with a period during which the EU fishery and aquaculture sectors were affected by a series of crises (sanitary, energy, political, etc.) that disrupted the economic sectors and altered consumers behaviour.

Figure 1: Per capita apparent consumption of FAPs (LWE)



Source: EUMOFA[19] estimates

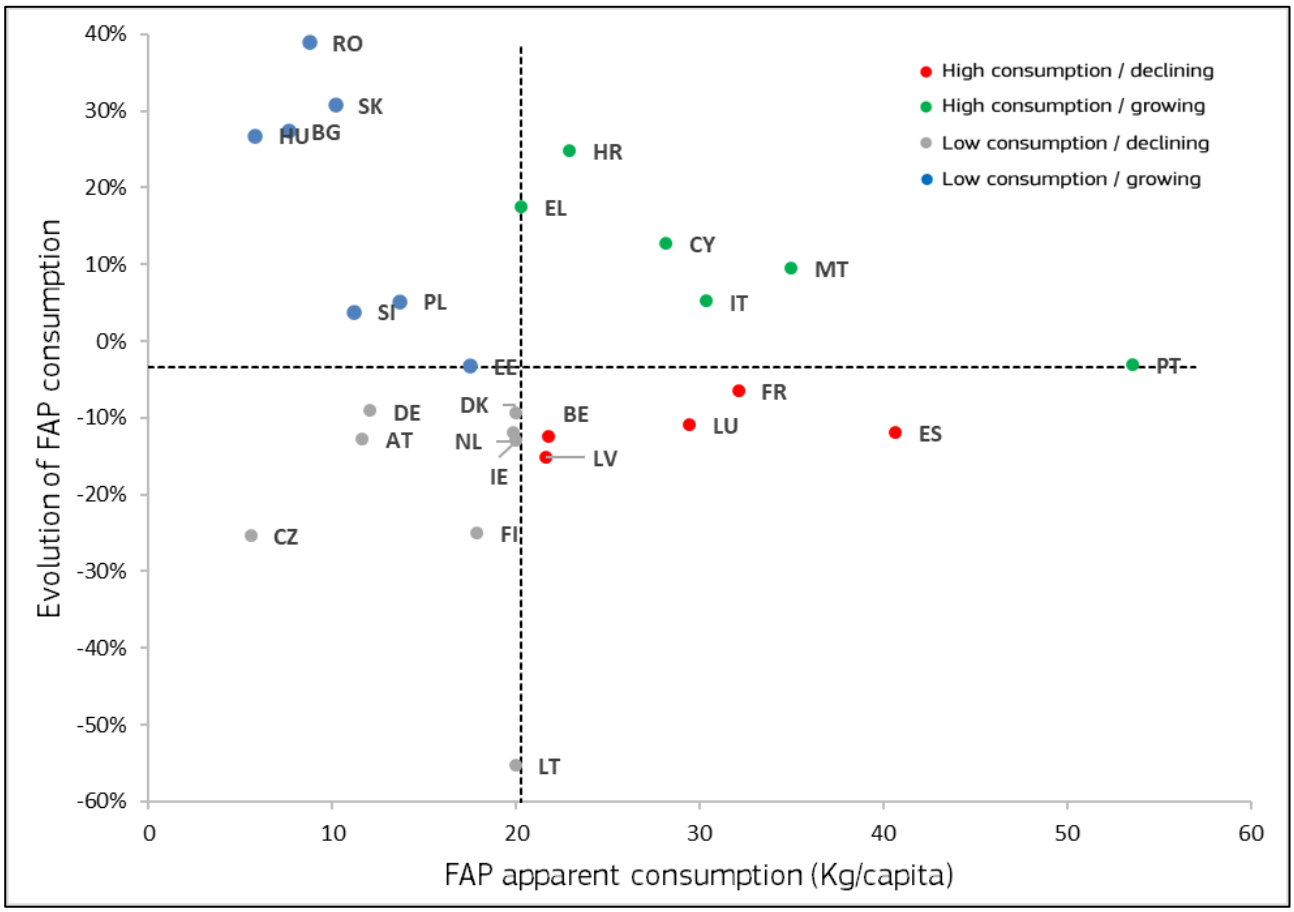
Over the same period, most Member States recorded a decline in FAP consumption, suggesting similar reactions to the successive crises, although the scale of the decrease varied across countries. Annex 3 provides the evolution of per capita consumption between 2014 and 2023 for all Member States. Some Member States diverged from this overall trend, with consumption remaining relatively stable or even increasing. Lithuania (3rd MS in terms of per capita consumption in 2014) recorded the strongest decrease over the period. Lithuanian per capita consumption decreased by 55%, reaching 20,0 kg per capita (12th MS in 2023). Declines in per capita consumption were also recorded in several other Member States, including Austria (-14%; reaching 11,7 kg per capita in 2023), the Netherlands (-12%; 19,90 kg per capita), Spain (-12%; 40,60 kg per capita), and France (-7%; 32,14 kg per capita). By contrast, slight increases were observed in

Italy (+5%; reaching 30,30 kg per capita in 2023) and Poland (+5%; 13,67 kg per capita) (4th and 15th consumers of FAPs in the EU in 2023). The most significant rises were observed in Romania (+39%; reaching 8,8 kg per capita in 2023), Slovakia (+31%; 10,2 kg per capita), Bulgaria (+27%; 7,6 kg per capita), and Hungary (+27%; 5,8 kg per capita). Portugal and Spain remained the top MS in terms of per capita consumption over the 2014 and 2023 period.

In the figure below, Member States were grouped, according to two factors: their consumption level (i.e. per capita consumption) and its evolution over the last decade. Member States are positioned relative to the EU average for both indicators, creating the four following groups:

- high consumption/growing: PT; MT; IT; CY; HR; EL;
- high consumption/declining: ES; FR; LU; BE; LV;
- low consumption/growing: EE; PL; HU; SI; SK; RO; BG;
- low consumption/declining: SE; AT; DE; FI; DK; IE; LT; NL; CZ.

Figure 2: Typology of FAP markets in the EU



Source: EUMOFA estimates[20]

[20] Apparent consumption refers to estimates of the amount of FAPs to be consumed per capita, following the EUMOFA methodology (Apparent consumption = (catches + aquaculture production + imports) – exports. It is expressed in Live Weight Equivalent. The full methodology underlying these estimates is provided in the methodological background of the EU fish Market, available on: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/eu-fish-market-reports/the-eu-fish-market-2025

Consumption trends of FAPs are also reflected in strong shifts in terms of consumed species (see the most consumed species by MS in Annex 4). These shifts are closely linked to structural changes in consumption habits and are further shaped by economic context and related drivers, as illustrated in sections below.

Among the ten most consumed species in the EU (Table 2), which represent around 50% of FAP apparent consumption, six recorded a decline in consumption over the past decade (2014-2023). Additionally, since 2019, only two of these ten species recorded positive consumption trends. The main trends by species are as follows:

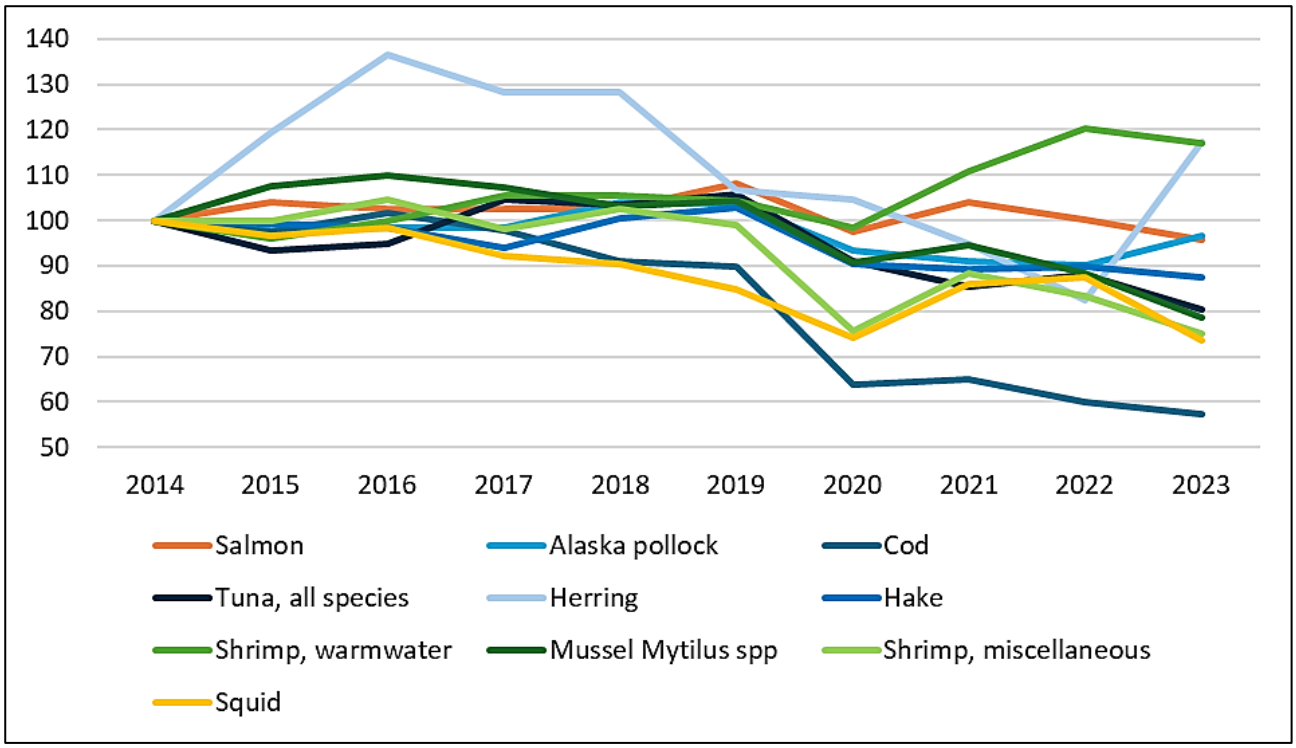
- **Salmon**, the most consumed species in the EU, with an apparent consumption of over one million tonnes, representing 10% of the EU apparent consumption of FAPs, recorded a slight decrease in consumption of 4% since 2014.
- **Alaska pollock**, the second most consumed species, representing 7% of the EU consumption of FAPs, recorded also a slight decrease of 3% over the period 2014-2023.
- Alaska pollock has often been used as a substitute for **cod**, the third most consumed species (6% of the EU consumption of FAPs), whose consumption decreased significantly by 43% over the same period.
- **Tuna species** are among the few species that recorded a strong increase in apparent consumption over the period (+500% between 2014 and 2023 for Skipjack tuna; +46% for Yellowfin tuna).
- **Other species** showing positive trends include herring (+17% since 2014), and warmwater shrimps (+17%).

Table 2: Most consumed species in the EU in 2023 (tonnes LWE)

Species	Apparent consumption in 2023 (tonnes LWE)	Share in the total apparent consumption	Evolution 2023/2019	Evolution 2023/2014
Salmon	1.070.792	10%	-12%	-4%
Alaska pollock	796.735	7%	-7%	-3%
Cod	690.648	6%	-36%	-43%
Tuna, skipjack	662.575	6%	-29%	+500%
Herring	553.946	5%	+10%	+17%
Hake	447.713	4%	-15%	-12%
Shrimp, warmwater	385.330	4%	+12%	+17%
Mussel Mytilus spp.	367.754	3%	-25%	-22%
Tuna, yellowfin	334.485	3%	-17%	+49%
Shrimp, miscellaneous	278.537	3%	-24%	-25%

Source: EUMOFA estimates[21]

Figure 3: Consumption trends for the ten most consumed species (2014 = 100)



Source: Based on EUMOFA estimates

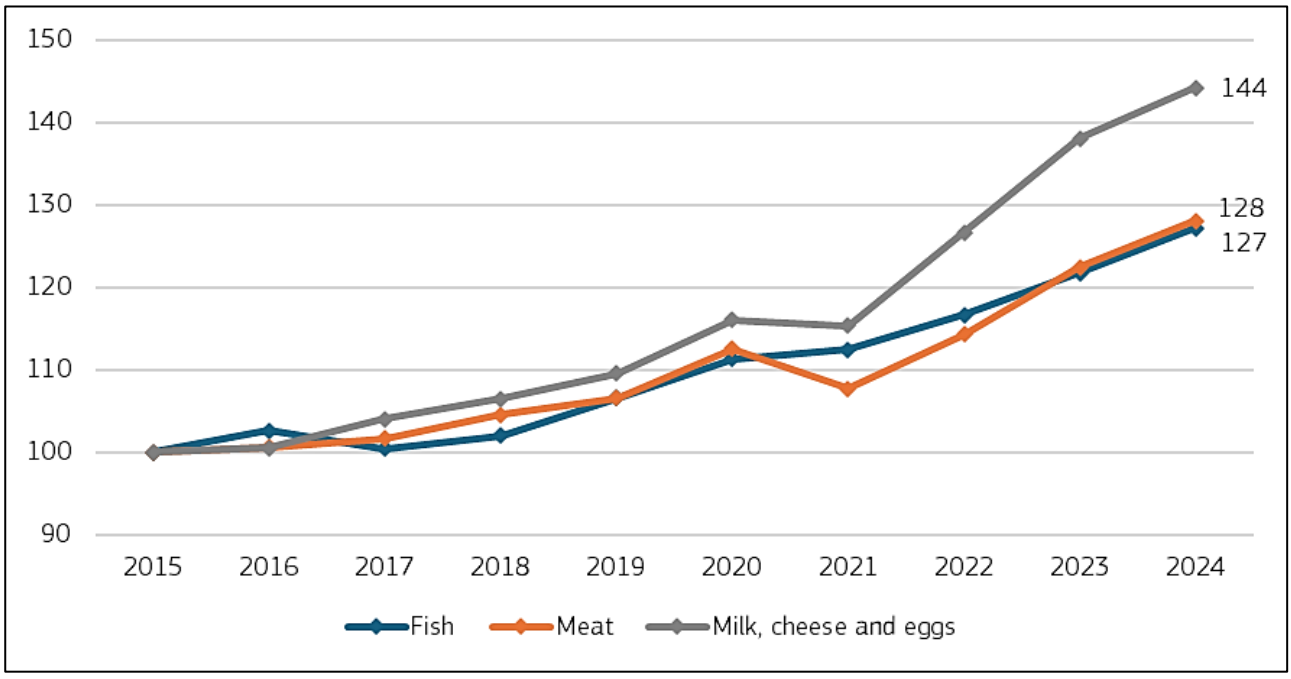
[21] Apparent consumption refers to estimates of the amount of FAPs to be consumed by species, following the EUMOFA methodology, which is provided in the EU fish Market.

4.2 Evolution of per capita expenditure

Household expenditure of FAPs at EU level reached EUR 62,8 billion in 2024, increasing by 4% in one year[22]. In the same year, EU households spent over EUR 246 billion on meat products and over EUR 170 billion on milk, cheese and eggs.

Overall, European households spent around four times more on meat products than on FAPs, and almost three times more on milk, cheese and eggs. Households' expenditure trends for all three protein sources followed similar patterns from 2015 to 2021. However, since 2021, expenditure on milk, cheese, and eggs has increased at a higher rate than expenditure on fish and meat products.

Figure 4: Nominal household expenditure trends for some animal protein sources (2015=100)



Source: Eurostat

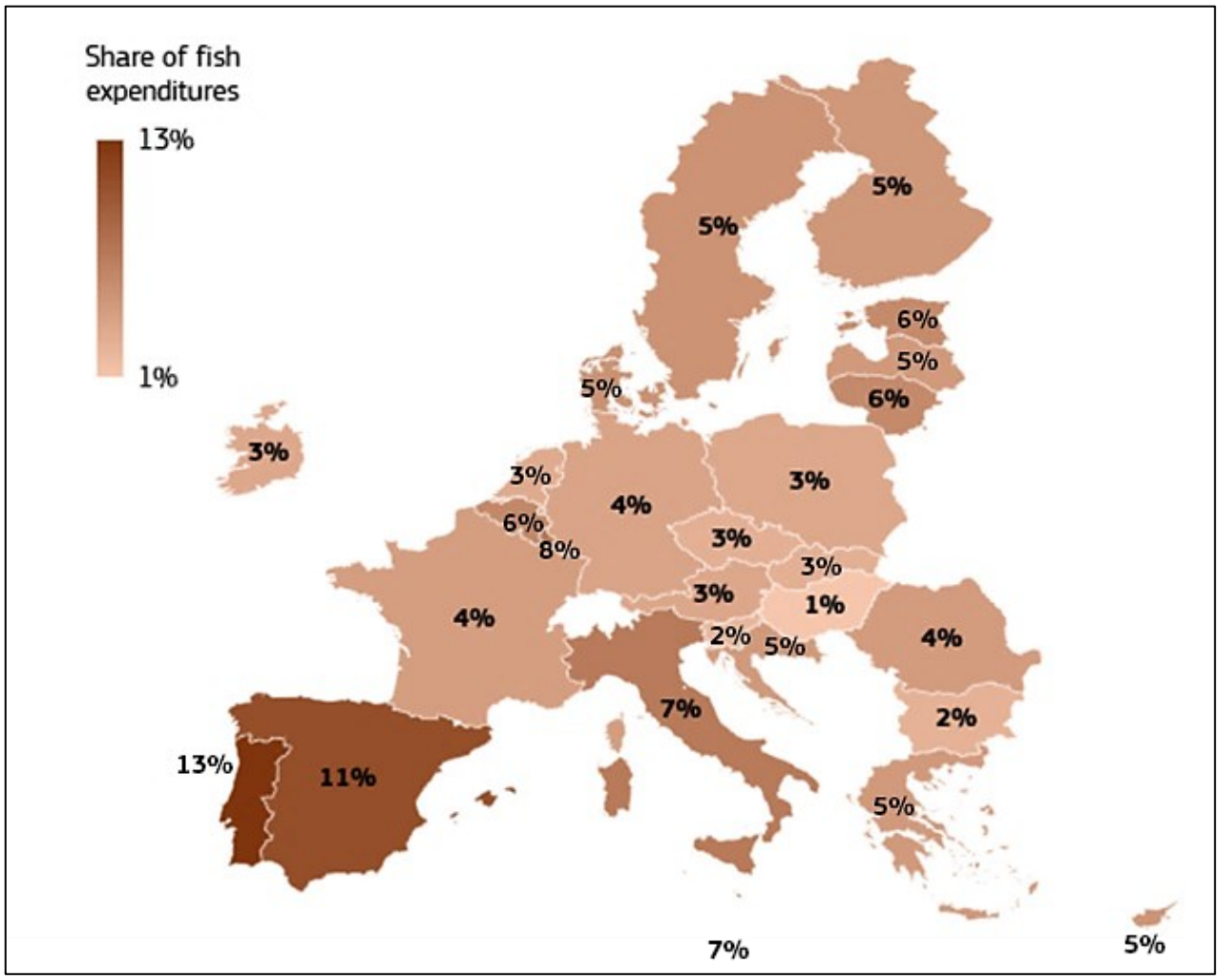
In 2024, per capita fish expenditure reached EUR 139[23] at EU level, accounting for 5% of the total food expenditure per capita. The same year, Portugal was the EU country with the highest nominal expenditure per inhabitant for FAPs, reaching EUR 416, followed by Luxembourg and Spain (respectively EUR 274 and EUR 260 per inhabitant). Portugal was the Member State with the highest share of expenditure on fish in total food expenditure (13%), followed by Spain (11%). In contrast, Hungary (1%), Bulgaria (2%), Slovenia (2%), Slovakia (3%), Austria (3%), and the Netherlands (3%) were Member States with the lowest shares of fish expenditure (Figure 5)[24].

[22] EUROSTAT (online data code: prc_ppp_ind) Purchasing Power Parities PPPs – nominal expenditure)

[23] EUROSTAT (online data code: prc_ppp_ind) Purchasing Power Parities PPPs – nominal expenditure)

[24] Eurostat Nominal Expenditure (in euro)

Figure 5: Share of nominal fish expenditure in total food expenditure by MS, in 2024



Source: own elaboration based on Eurostat data

4.3 Main characteristics of the consumption of FAPs in the EU

The share of the three most consumed species in total consumption provides an indication of the diversity of FAP consumption across EU Member States: a higher share reflects lower diversity with consumption focused on a limited number of species (Figure 6). Overall, this share declined at EU level between 2014 and 2023, with decreases observed in 16 MS, suggesting a growing diversity in FAP consumption.

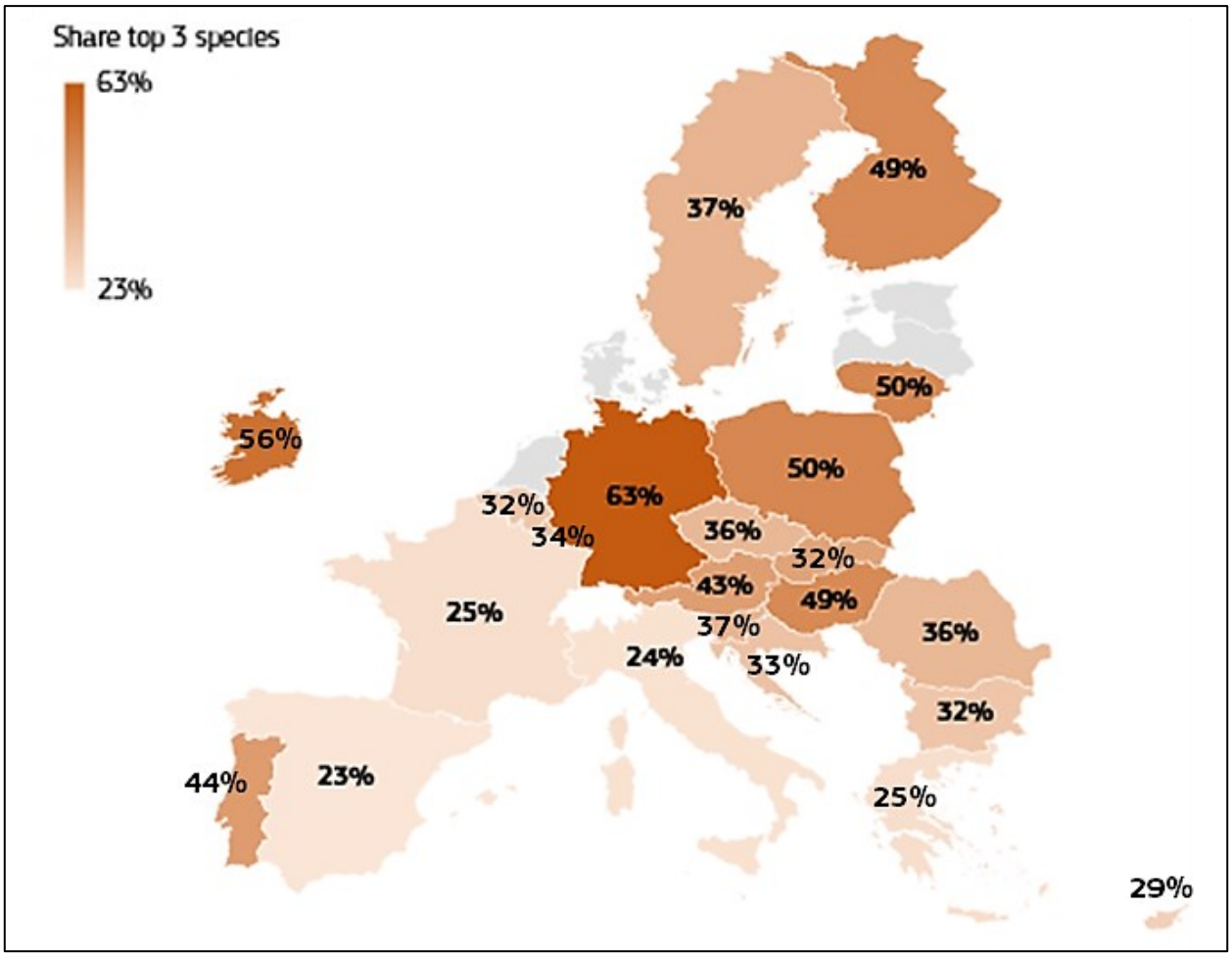
The strongest decreases in the share of the three most consumed species were recorded in Croatia and Ireland, with decreases of 22 and 18 percentage points respectively, indicating diversification of the species consumed. The shares of the three most consumed species remained broadly stable in Portugal, Austria, and Slovakia, while consumption became more concentrated in Lithuania (+30 points), Poland (+6 points) and Germany (+4 points).

In 2023, Germany recorded the lowest diversity of species consumed, with the three most consumed species (Alaska pollock, salmon, and skipjack tuna) accounting for 63% of total consumption, an increase of 4 points compared to 2014. Similarly, Ireland, Poland, Lithuania,

Hungary, or Finland also showed low consumption diversity with the top three species accounting for between 49% to 56% of total consumption.

In contrast, Spain, France, Italy, and Greece show a more diversified consumption pattern. The most consumed species in France included salmon, Alaska pollock, and skipjack tuna. Salmon and skipjack tuna were also among the most consumed species in Italy, along with squid. The most consumed species in Spain included hake, cod, and salmon.

Figure 6: Share of apparent consumption represented by the three most consumed species by Member State* (% of LWE), 2023



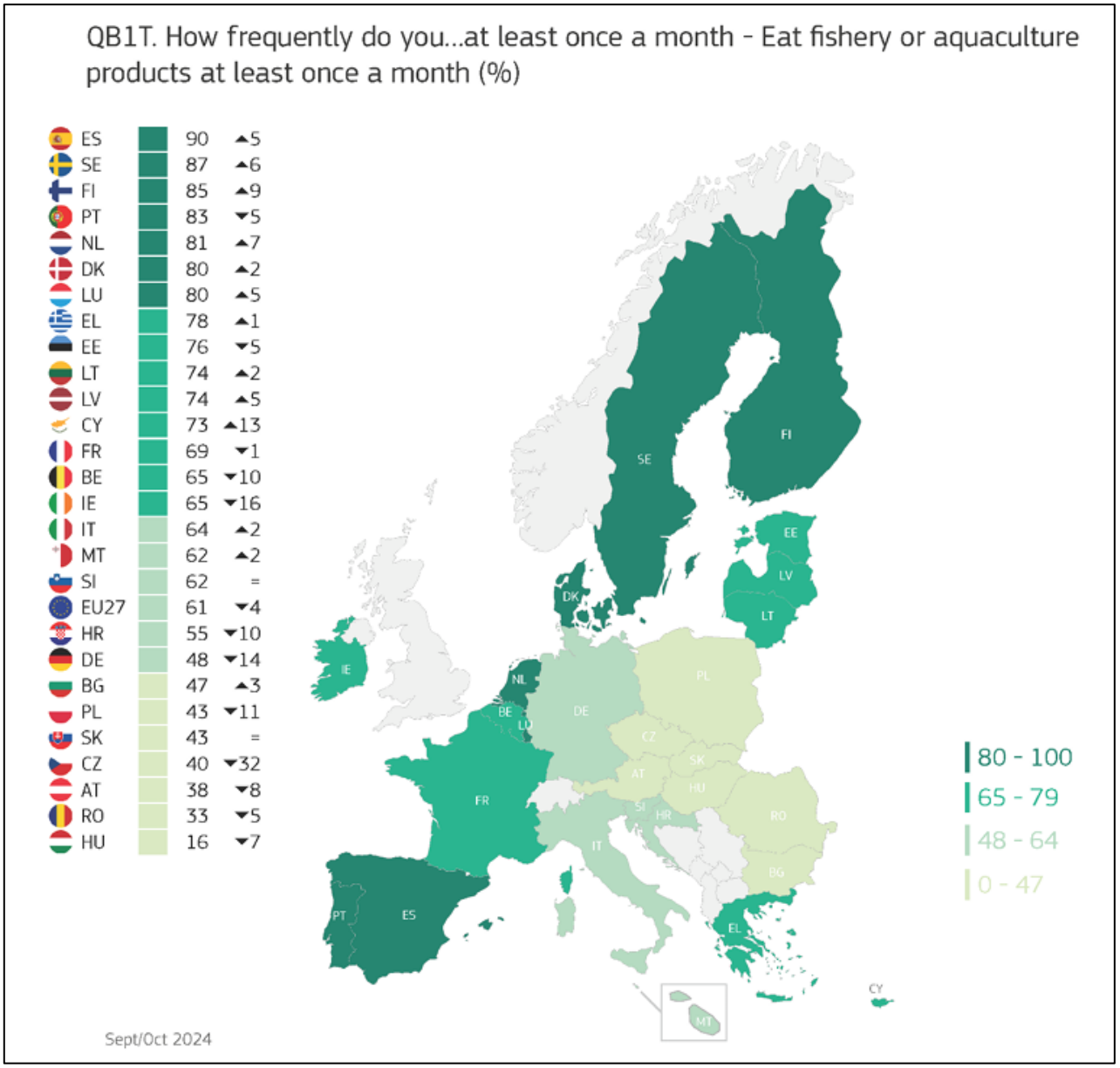
* Due to negative apparent consumption for some species, the share 3 most consumed species is not given for Latvia, the Netherlands, Estonia, Malta, and Denmark.

Source: own elaboration based on EUMOFA data

Geographical and socio-demographic factors further shape the consumption level in the Member States. Proximity to the coast emerges as a consistent determinant of higher consumption of FAPs. According to the 2024 Eurobarometer survey, 79% of individuals living within five kilometres of the coast report consuming fish at least monthly, compared to 49% among those living over 200 kilometres from the coast. Coastal Member States such as Spain and Portugal exhibit weekly consumption rates of respectively 64% and 59%, while landlocked Member States such as Austria and Hungary record only 9% and 2% (Figure 7). This proximity to production and landing areas,

together with greater knowledge and familiarity with FAPs, supports stronger consumption traditions in these regions.

Figure 7: Consumption of FAPs at least once a month



Source: Eurobarometer EU consumer habits regarding fishery and aquaculture products

5 CONSUMER BEHAVIOUR EMERGING FROM THE EUROBAROMETER SURVEY

This section provides an analysis of the results from four waves of the Eurobarometer survey (2016, 2018, 2021, 2024). This material provides a significant added value to the existing literature on the topic of FAP consumption, by offering insights into the following topics:

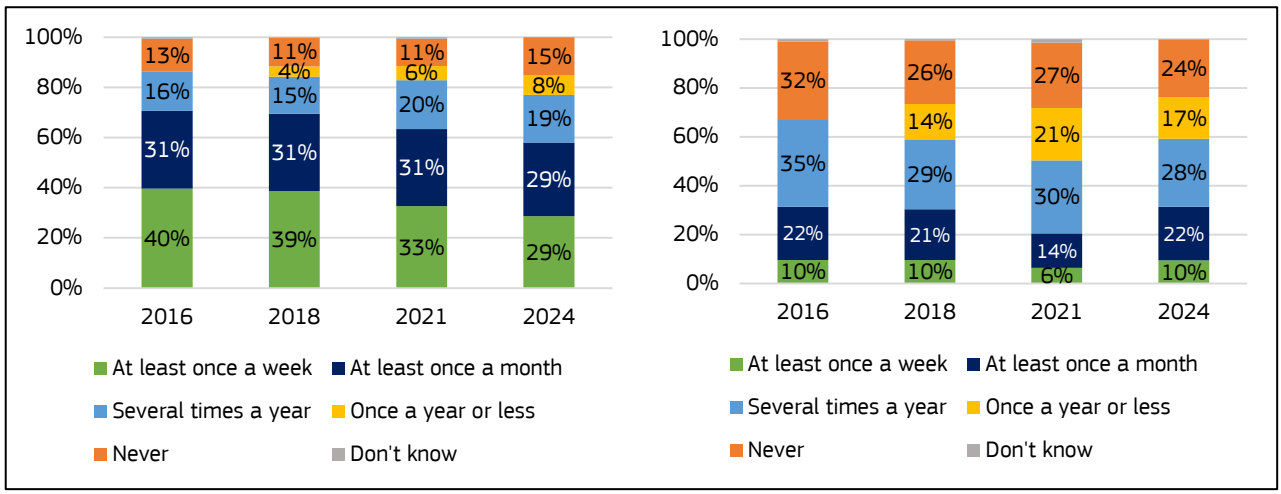
- consumption habits and perceptions regarding FAPs;
- consumer preferences and the most important aspects for consumers when buying FAPs;
- the profile of FAP consumers.

5.1 Changes in consumption habits

Results from the Eurobarometer survey suggest significant shifts in terms of consumption habits, marked by a **shift from frequent to more occasional consumption patterns**. Specifically, the weekly at-home consumption of FAPs decreased by 11 percentage between 2016 and 2024. At the same time, occasional consumption has increased, as illustrated by the growing share of respondents who reported consuming FAPs several times a year or once a year or less. The results of the survey revealed a small age-related gap in at-home consumption, with older generations consuming FAPs more frequently compared to younger consumers, as illustrated in section 5.3.

Interestingly, the share of consumers reporting that they never consume FAPs out-of-home decreased significantly, by 8,2 points.

Figure 8: Frequency of at-home (left) and out-of-home (right) consumption of FAPs



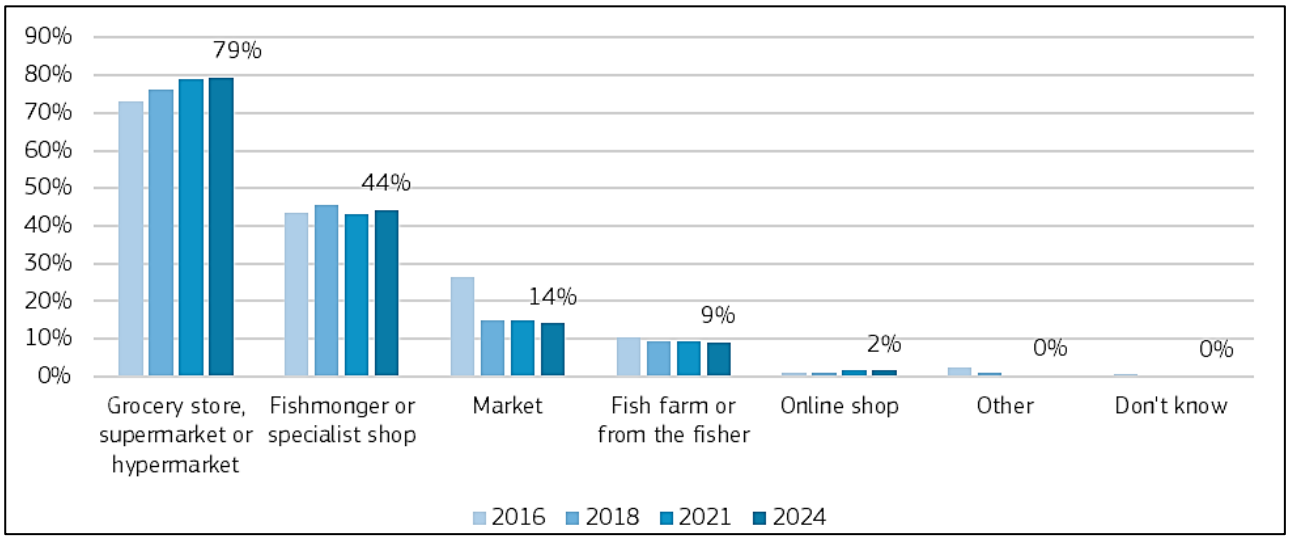
Source: Eurobarometer survey – Question: 'How frequently do you consumed FAPs at-home/ at restaurants and other food outlets (canteens, bars, market stands, etc.?' (n= 26.510, 2024)

Changes in distribution channels

Results regarding the distribution channels of FAPs indicate that both grocery stores, supermarkets or hypermarkets, and fishmongers or specialist shops are by far the main distribution channels for FAPs in the EU. While the number of consumers purchasing FAPs at fishmongers or specialist shops remained stable since 2016, the number of consumers declaring buying in large retailers

experienced a notable increase from 73% in 2016 to 79% in 2024. The penetration rate of other distribution channels is significantly lower: 14,2% for markets, which experienced a strong decline (-12,3 points since 2016); 9,0% for purchases directly at the farm or from the fisher. This could be explained by the decrease in the number of other distribution channels, such as fishmongers in some Member States, as highlighted in the analysis by Member State (section 7).

Figure 9: FAP purchase location in the EU

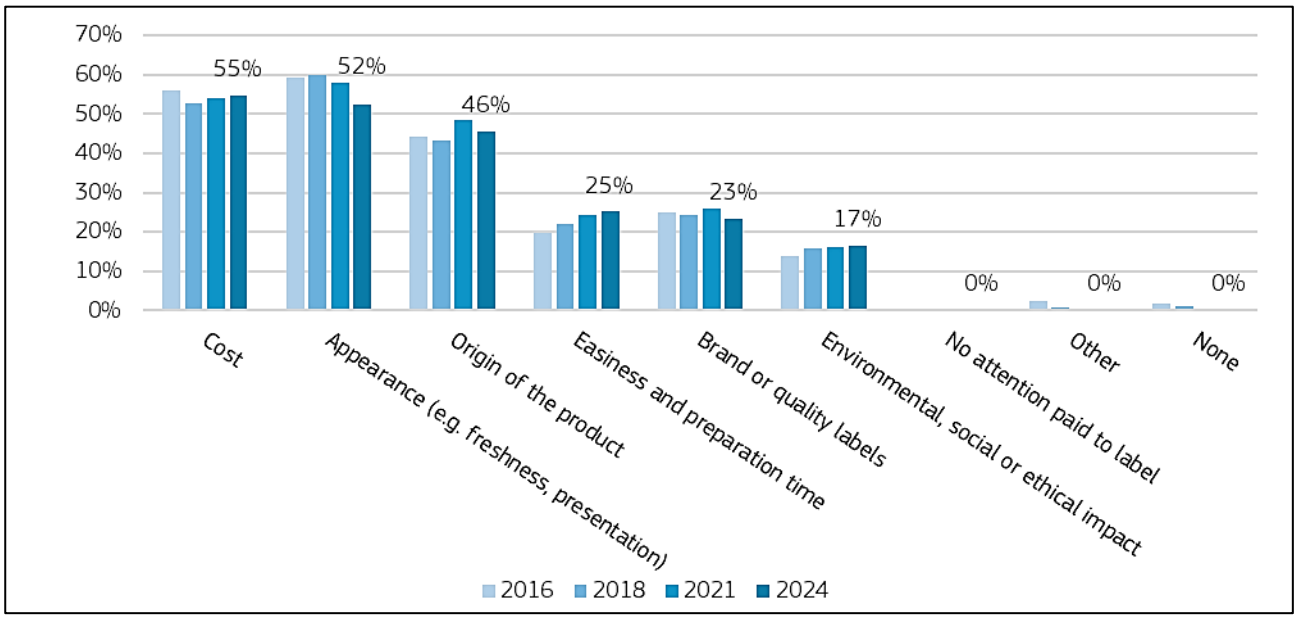


Source: Eurobarometer survey – Question: 'Where do you buy FAPs' (n= 26.510, 2024)

5.2 Changes in consumer preferences

The analysis of the most important aspects considered by consumes when purchasing FAPs shows that traditional criteria, such as **price and appearance**, remain key factors influencing purchasing decisions among EU consumers. At the same time, aspects related to **origin, convenience and sustainability** are gaining importance.

Figure 10: Most important aspects when buying FAPs



Source: Eurobarometer survey – Question: 'When you buy fishery and aquaculture products, which of the following aspects are the most important for you?' (n= 26.510, 2024)

Price has always been an important factor. In 2024, it became the first purchasing factor, overtaking appearance, with 55% of respondents citing it as the primary consideration when purchasing FAPs.

Product appearance (e.g. freshness and presentation) remained an important criterion, although its importance has slightly declined since 2016, falling from 60% to 52% in 2024.

Product origin also remained an important aspect, ranking as the third most important factor considered by consumers when purchasing FAPs, even though its importance has been fluctuating between 2016 and 2024.

However, significant differences can be noticed between Member States in the share of consumers who attach importance to this aspect. In 2024, respondents in France, Finland, Germany, Slovakia, Slovenia, Sweden and Luxembourg reported a higher level of attention to the origin than the EU average, with more than 45% of respondents in each country citing it as an important aspect.

Additionally, interest in origin of FAPs seems to increase with age: Seniors (65+) are the most interested in origin (49%), compared with younger generation (38% for consumers aged between 15 and 24), as further discussed in section 5.3. Preferences for European or local production are also motivated by concrete considerations such as shorter transport distances, greater freshness, and transparency, as well as a desire to support local economies and preserve traditional fishing practices[25].

Altogether, these findings reveal that the origin of fish, whether local, domestic, or European, is a powerful quality cue in the eyes of consumers. In Mediterranean countries such as France and Italy, the concept of "coastal fisheries" resonates particularly strongly with consumers. Around 70% of

[25] Consumers' Willingness to Pay for Sustainable Seafood Made in Europe (2017). https://www.tandfonline.com/doi/full/10.1080/08974438.2017.1413611#abstract

respondents in these markets expressed strong support for a coastal fisheries label, especially if it was associated with "domestic origin, high-quality products, eco-friendliness, support of local/coastal communities and artisanal fishing practices"[26].

By contrast, **easiness and preparation** time has become more relevant, increasing from around 20% in 2016 to 25% in 2024, which may reflect growing demand for convenience. The age class reporting the strongest interest in this category is the consumers aged between 35 and 44.

This trend is supported by the literature. A study on willingness to pay for fish products found that ready-to-cook formats are particularly appreciated, with consumers willing to pay an additional 0,50 EUR/kg for ready-to-cook seafood compared with whole products. Spain represented an exception, where consumers were willing to pay an additional 0,25 EUR/kg for whole fish species over ready-to-cook alternatives[27]. Additionally, this convenience trend aligns with the observed increase of large retailers offering ready-to-cook and ready-to-eat FAPs, at the expense of fishmongers offering fresh products.

Other aspects seem to have less relevance. **Brand and quality labels** have fluctuated over time but continue to be cited by around one quarter of consumers. In practice, these include a wide range of schemes, such as eco-labels, quality certifications, collective brands and commercial labels, which promote different characteristics and attributes of FAPs. Survey results suggest that consumers pay attention to these aspects, although their influence on purchasing decisions remains relatively moderate.

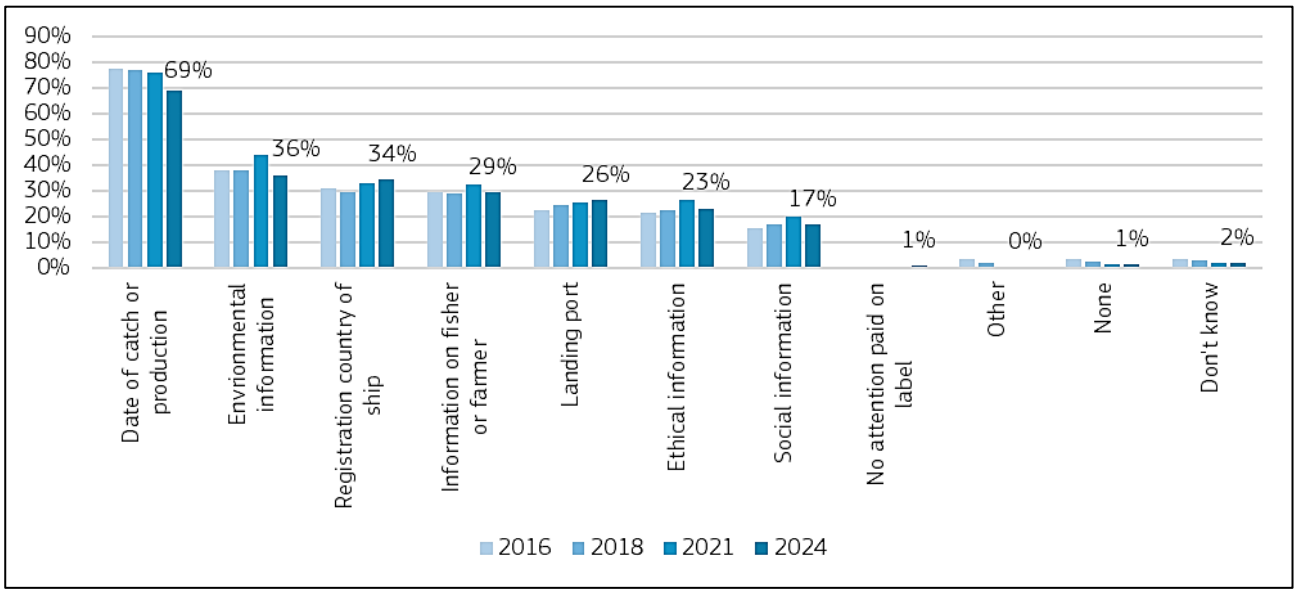
Environmental, social or ethical considerations, although mentioned by a smaller share of respondents (17% in 2024), show a gradual increase over time. However, this share hides significant differences across both Member States and consumer age groups. In particular, Austria, The Netherlands and Sweden stand out as the countries where consumers are the most interested in these aspects, with 30%, 33% and 43% of respondents reporting being interested. Interest in these aspects is also higher among younger consumers, with 27% of consumers under 24 citing them, compared to 15% among consumers aged 65 and over.

Results from the Eurobarometer survey on the information that should appear on FAPs' label are consistent with consumers preferences, discussed above. Information on the date of catch or production remains by far the most important type of information that consumers consider should appear on the label, even though decreasing in recent years (69% of respondents in 2024). This is consistent with the strong emphasise consideration of consumers of appearance and freshness as highlighted above. Environmental information is the second information expected by consumers, cited by around one third of respondents. This shows that even though it is not the main driver for purchasing FAPs (as ranking as the sixth most important aspect considered by consumers when buying FAPs), it is information that many consumers would like to see provided in the product labels.

[26] Consumer perspectives on coastal fisheries and product labelling in France and Italy - ScienceDirect

[27] Davide Menozzi, Thong Tien Nguyen, Giovanni Sogari, Dimitar Taskov, Sterenn Lucas, et al.. Consumers' Preferences and Willingness to Pay for Fish Products with Health and Environmental Labels: Evidence from Five European Countries. Nutrients, 2020, 12 (9), pp.2650. 10.3390/nu12092650. hal-02935812

Figure 11: Information that should be mentioned on the label of FAPs

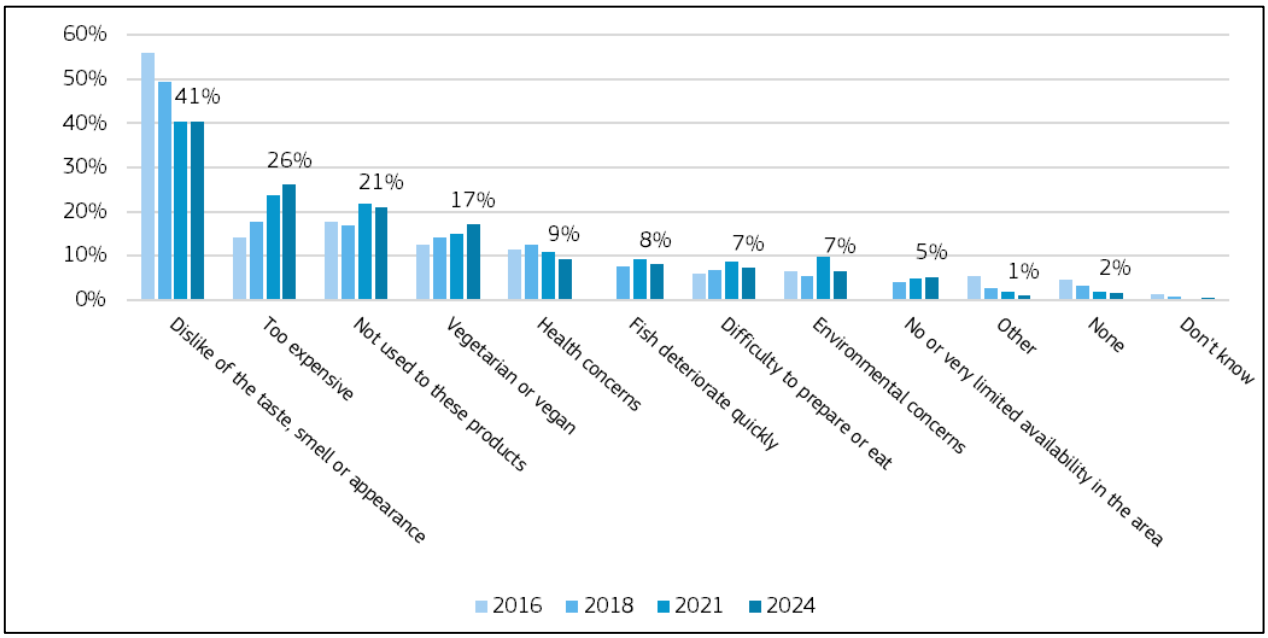


Source: Eurobarometer survey – Question: 'Which of the following information do you think should be mentioned on label of fresh, frozen, smoked and dried FAPs?' (n= 26.510, 2024)

Regarding **preferences of types of FAPs (wild versus farmed)**, wild products is the most commonly preferred option among EU consumers, but there is no strong preference, as nearly one third of consumers report no preference between wild and farmed products. In 2024, 36% of EU consumers declared preferring wild products in 2024, marking an increase of 1,3% since 2016. Meanwhile, 31% declared not having any preference between wild and farmed FAPs, and only 8% declared preferring farmed products. However, these declared preferences do not reflect the actual purchasing behaviour and may also depend on consumer awareness and understanding of the production type (fishery versus aquaculture). Eurobarometer data regarding preferences if the type of products show significant variations between Member States. While preference for wild products is stronger in coastal Member States such as Cyprus (52%), France (47%), Spain (44%) or Finland (42%), the share of consumers preferring farmed products is significantly greater than the average in Hungary (18%) and Croatia (13%), suggesting familiarity with certain production methods in the different MS.

Evidence above is overall consistent with insights from Figure 12 which shows the main reasons that consumers declared for not eating FAPs. Dislike of the taste, smell or appearance of FAPs remains by far the main reasons for not consuming these products, although its importance has declined over time. At the same time, economic barriers have become more significant, with the share of consumers considering FAPs "too expensive" increasing between 2016 and 2024. Other reasons, such as lack of familiarity with FAPs, vegetarian or vegan diets remain secondary but show a slight upward trend over the period.

Figure 12: Reasons for not eating FAPs



Source: Eurobarometer survey – Question: 'Which of the following are the main reasons why you never or almost never eat fishery and aquaculture products?' (n= 26.510, 2024)

5.3 Changes of consumer profiles

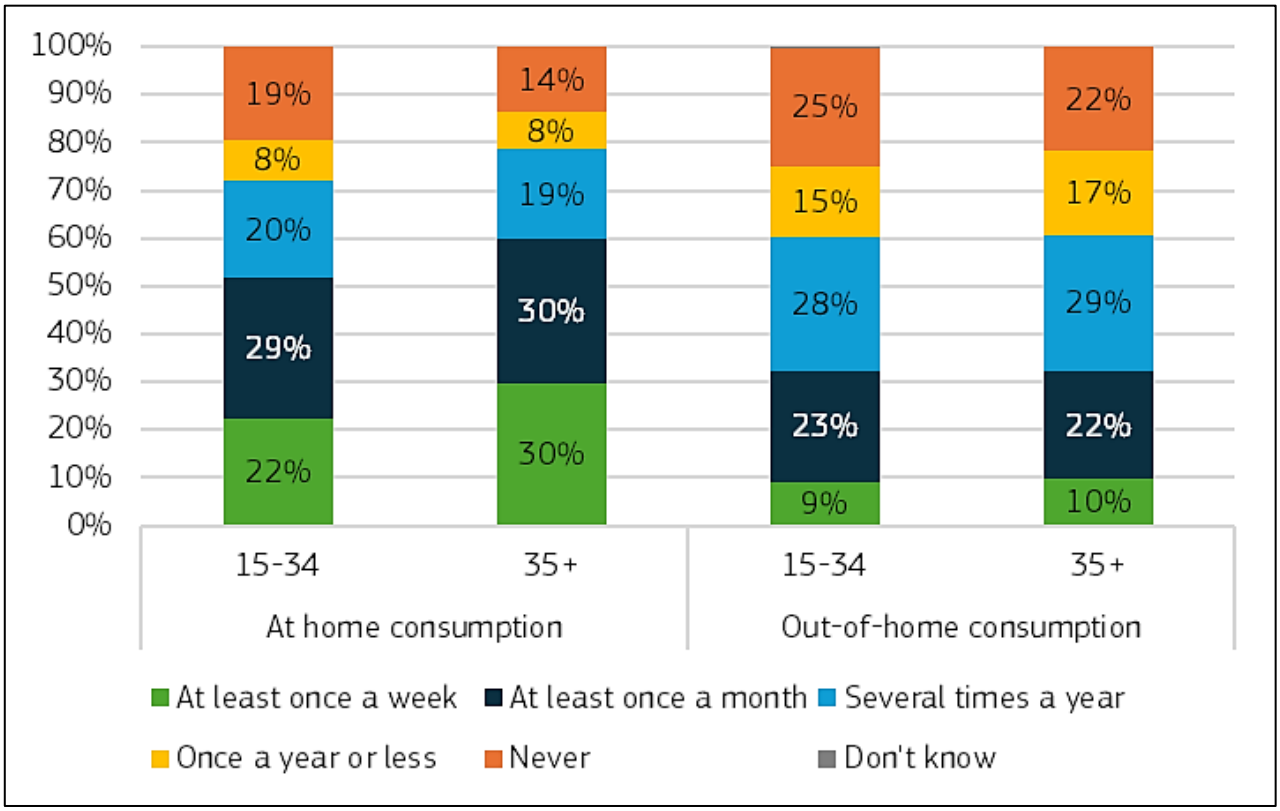
Findings above highlight that **consumption habits and preferences are strongly linked to consumer profiles** (e.g. age, country of origin, proximity to coastal areas, other socio-economic factors, etc.). Although certain behaviours are difficult to explain, several trends can still be observed.

- **Strong link between consumption frequency and consumer age**

Eurobarometer surveys indicate that older consumers (35+) consume FAPs at home more frequently than younger consumers (between 15 and 34). Respectively 30% of the respondents that are 35 years old or more declared consuming FAPs on a weekly and monthly basis, against 22% and 29% respectively for younger respondents (15-34). In addition, a higher share of young respondents tends to never consume FAPs at all (19% in 2024 against 14% for older consumers).

When looking at out-of-home consumption, the age gap pattern is less obvious, with relatively similar shares of respondents consuming FAPs in restaurants and other food outlets on a weekly or monthly basis, regardless of their age category.

Figure 13: FAP consumption frequency at-home and out-of-home by age category in 2024



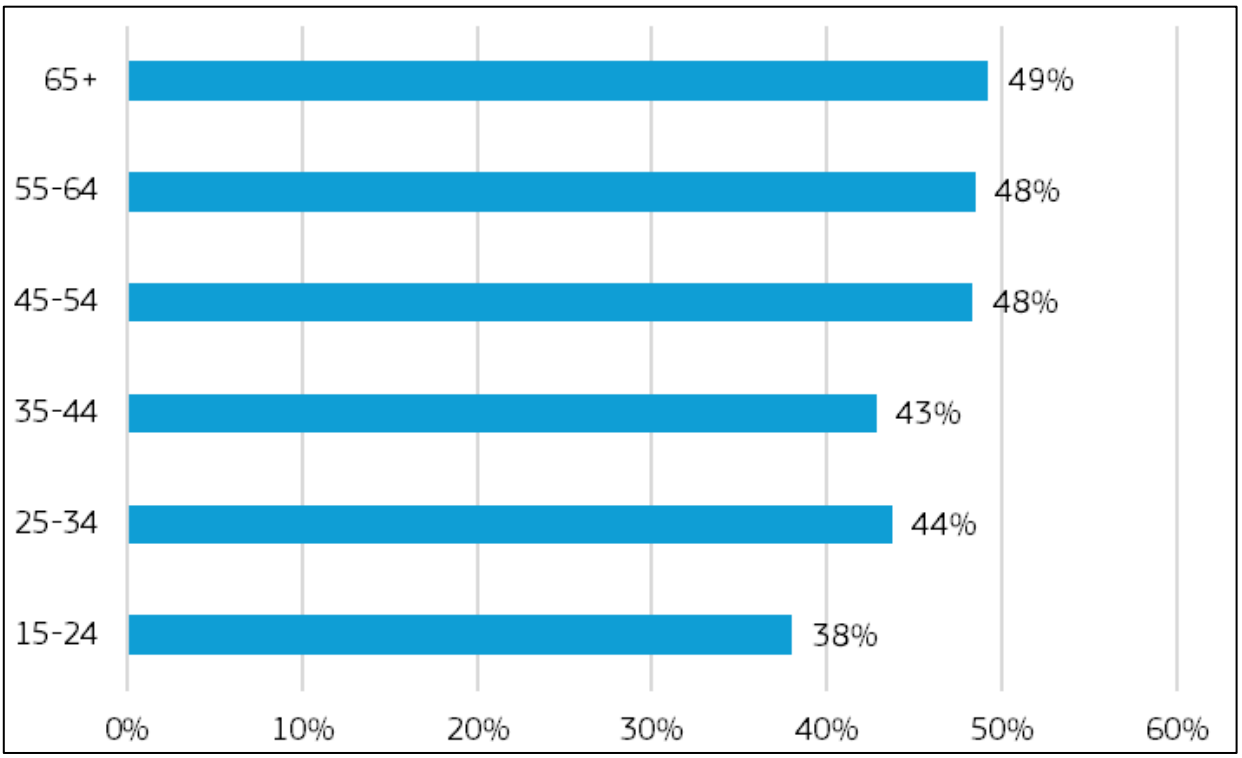
Source: Eurobarometer survey – Question: 'How frequently do you eat FAPs at home/ at restaurants and other food outlets (canteens, bars, market stands, etc.)?' (n= 26.510, 2024)

- **Variations in the factors considered by consumers when buying FAPs according to their profile**

Price is the main factor considered by consumers when buying FAPs, regardless of their age. However, the other factors explained in section 5.2 vary significantly according to consumers' age, country of origin, proximity to coastal areas and other socio-economic factors. Section below provides situations where these variations are the most visible and noticeable.

The **origin of FAPs is significantly more important for older generations** than for young consumers. Results from the Eurobarometer survey show that in 2024, the origin was considered a key driver by 49% of consumers aged 65 or more, by 48% of consumers between 55 and 64, and consumers between 45 and 54. In contrast, the youngest generation (15-24) showed the least interest for product origin (38%).

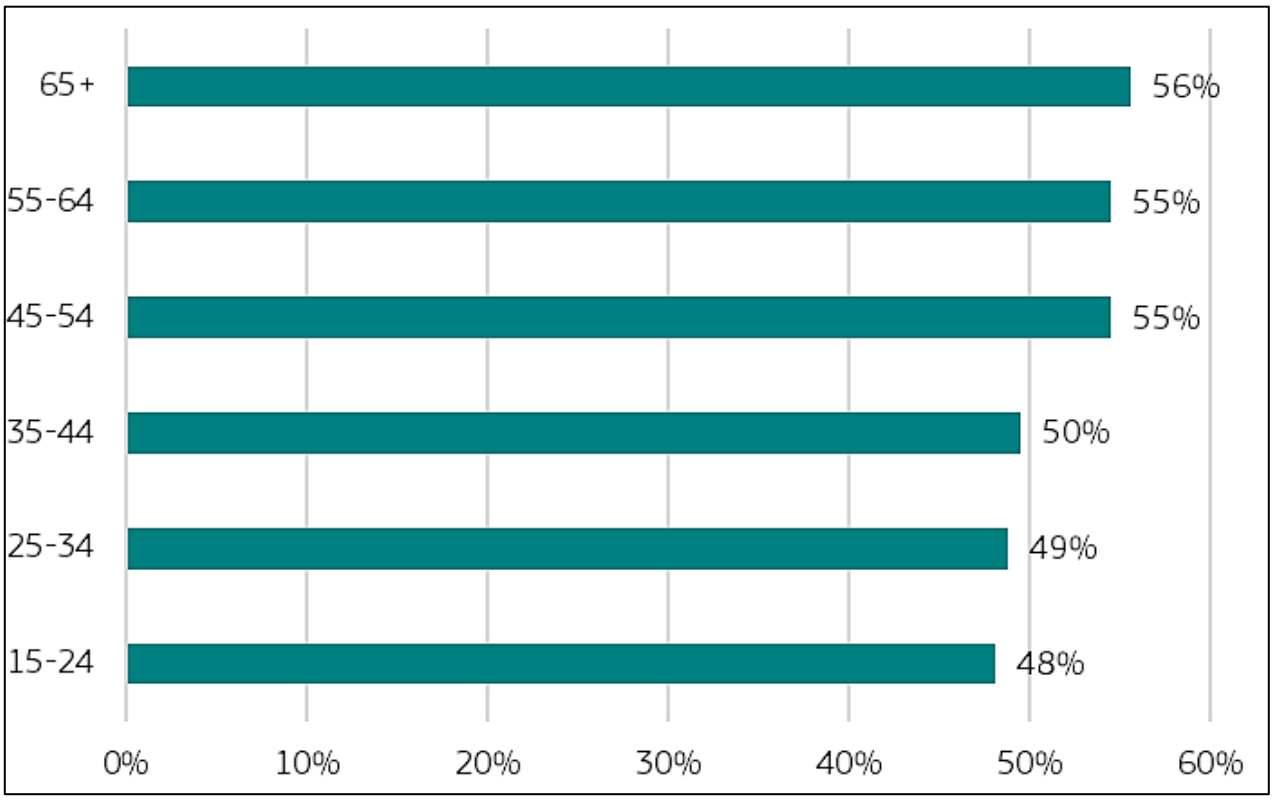
Figure 14: Importance of origin of FAPs by age category in 2024



Source: Eurobarometer survey – Question: 'When you buy FAPs, which of the following aspects are the most important for you? (n= 26.510, 2024)

Similarly, the **appearance of FAPs is more considered by older generations** when making purchasing decisions of FAPs. In 2024, it was considered as a key factor by 56% of the respondents aged 65 and more, 55% of those aged 55-64, and a similar share among those aged 45-54. By contrast, it was a key driver for less than 50% of the younger respondents.

Figure 15: Importance of product appearance by age category in 2024



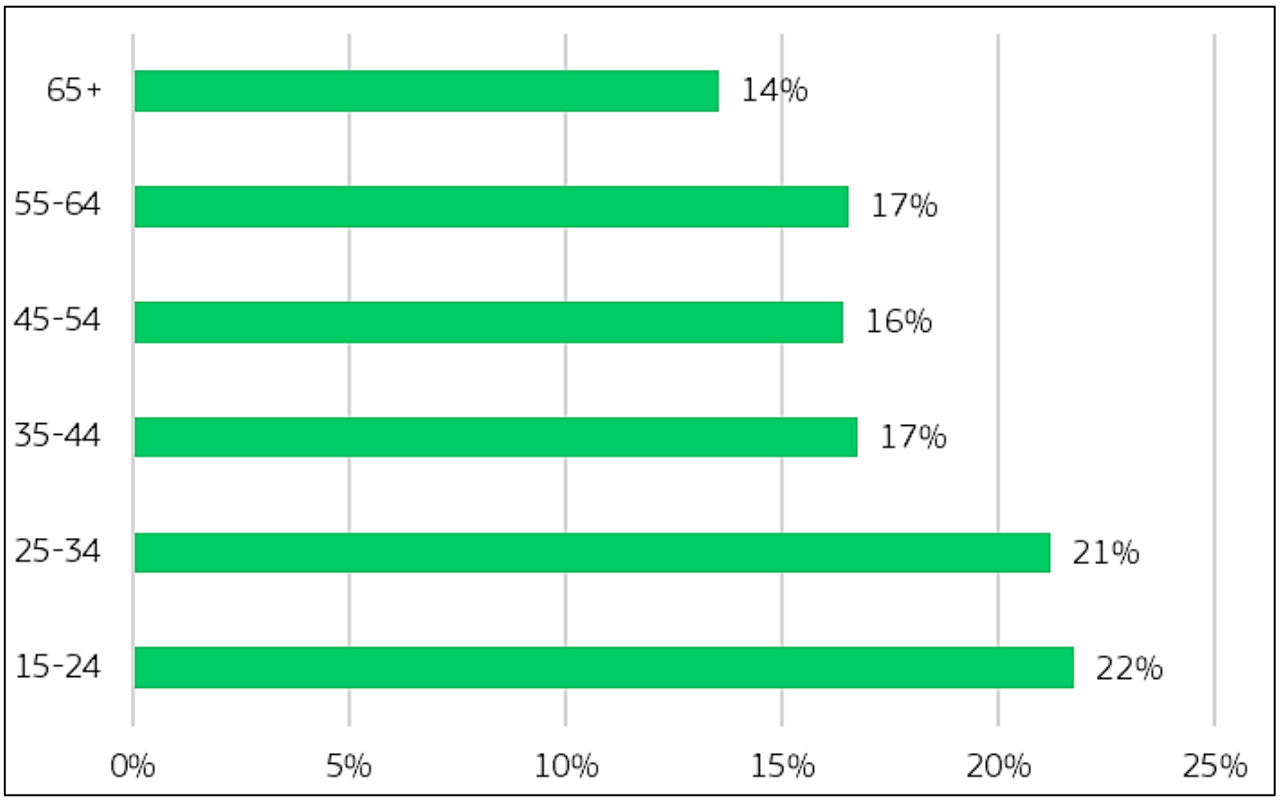
Source: Eurobarometer survey – Question: 'When you buy FAPs, which of the following aspects are the most important for you? (n= 26.510, 2024)

There is a **clear difference across age groups and Member States when considering environmental, social and ethical aspects**. Young consumers showed higher levels of concern for these aspects than older consumers. In 2024, more than 21% of the consumers aged 15-24 and those aged 25-34 mentioned environmental, social or ethical aspects as key factors when making purchasing decisions, compared with 17% among those aged 35 and over. The oldest generation (65 and over) showed the least concerns for these aspects, with only 14% of the respondents mentioning them as important (Figure 17). Maria et al. (2023)[28] studied whether members of Generation Z have sensitivity and awareness about environmental issues related to seafood production and consumption. The academic paper provided an overview of the existing literature review on the topic. The literature does not suggest that younger generations are systematically more sustainability-oriented than older consumers. Instead, it highlights that younger consumers are more likely to belong to consumer profiles where environmental considerations play a key role in purchasing decisions of FAPs. Literature suggests that these behaviours are shaped by a combination of factors, including education, socio-demographic characteristics, and product knowledge[29].

[28] The Sustainability of Seafood Products in the Opinions of Italian Consumers of Generation Z (2023). https://www.researchgate.net/publication/376001423_The_Sustainability_of_Seafood_Products_in_the_Opinions_of_Italian_Consumers_of_Generation_Z

[29] Consumer Demand for Environmental, Social, and Ethical Information in Fishery and Aquaculture Product Labels (2022). https://www.researchgate.net/publication/361764258_Consumers_demand_for_environmental_social_and_ethical_information_in_fishery_and_aquaculture_product_labels

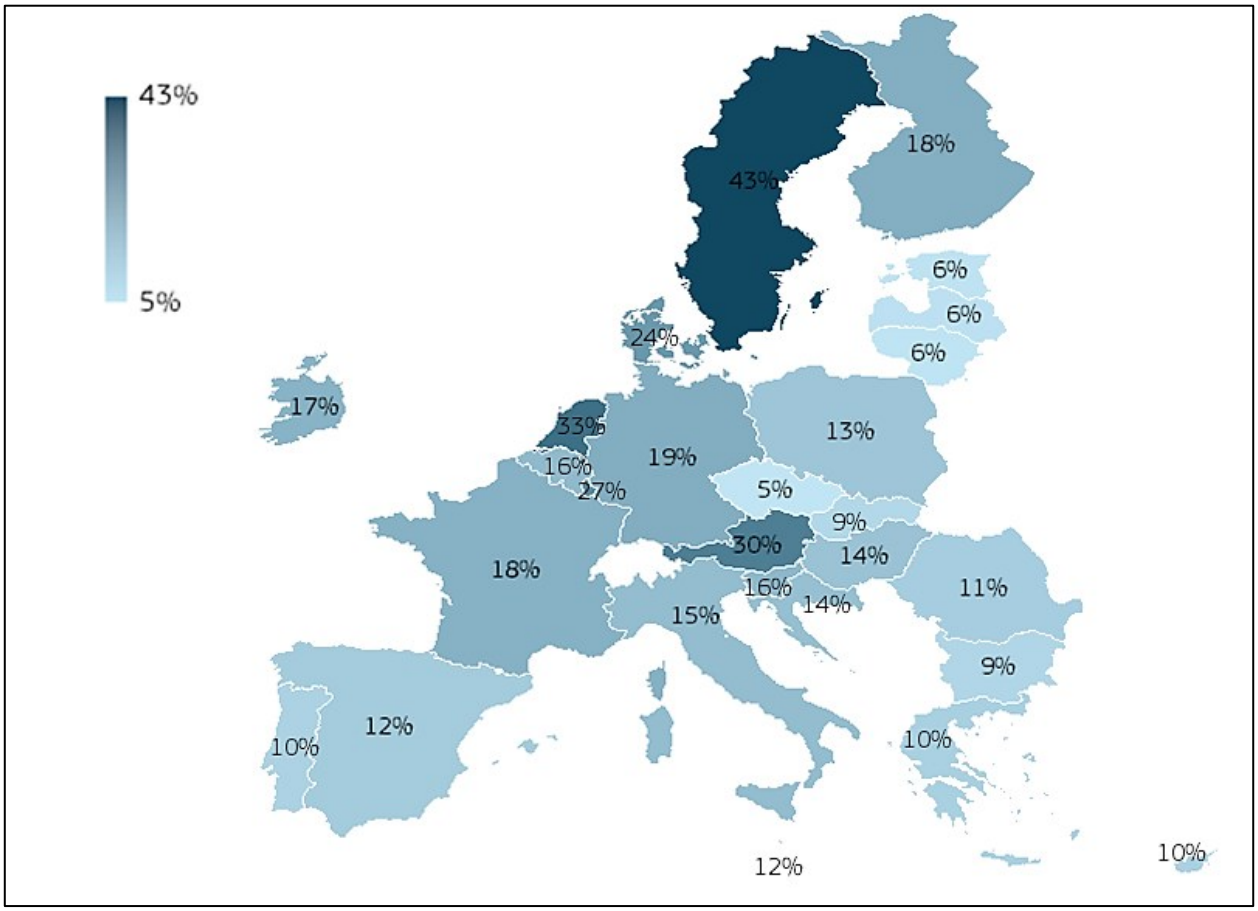
Figure 16: Importance of environmental, social or ethical impact by age category in 2024



Source: Eurobarometer survey – Question: 'When you buy FAPs, which of the following aspects are the most important for you? (n= 26.510, 2024)

Additionally, the consideration of this factor when making purchasing decision varies significantly depending on the Member States (Figure 18). Consumers in Sweden, the Netherlands and Austria place greater emphasis on these aspects than those in other countries, with 43%, 33% and 30% respectively considering them important. By contrast, interest is much lower in Estonia, Latvia and Lithuania, where only 6% of respondents mention environmental, social and ethical considerations when purchasing FAPs, with only 6% of the respondents mentioning these factors as important upon FAP purchase.

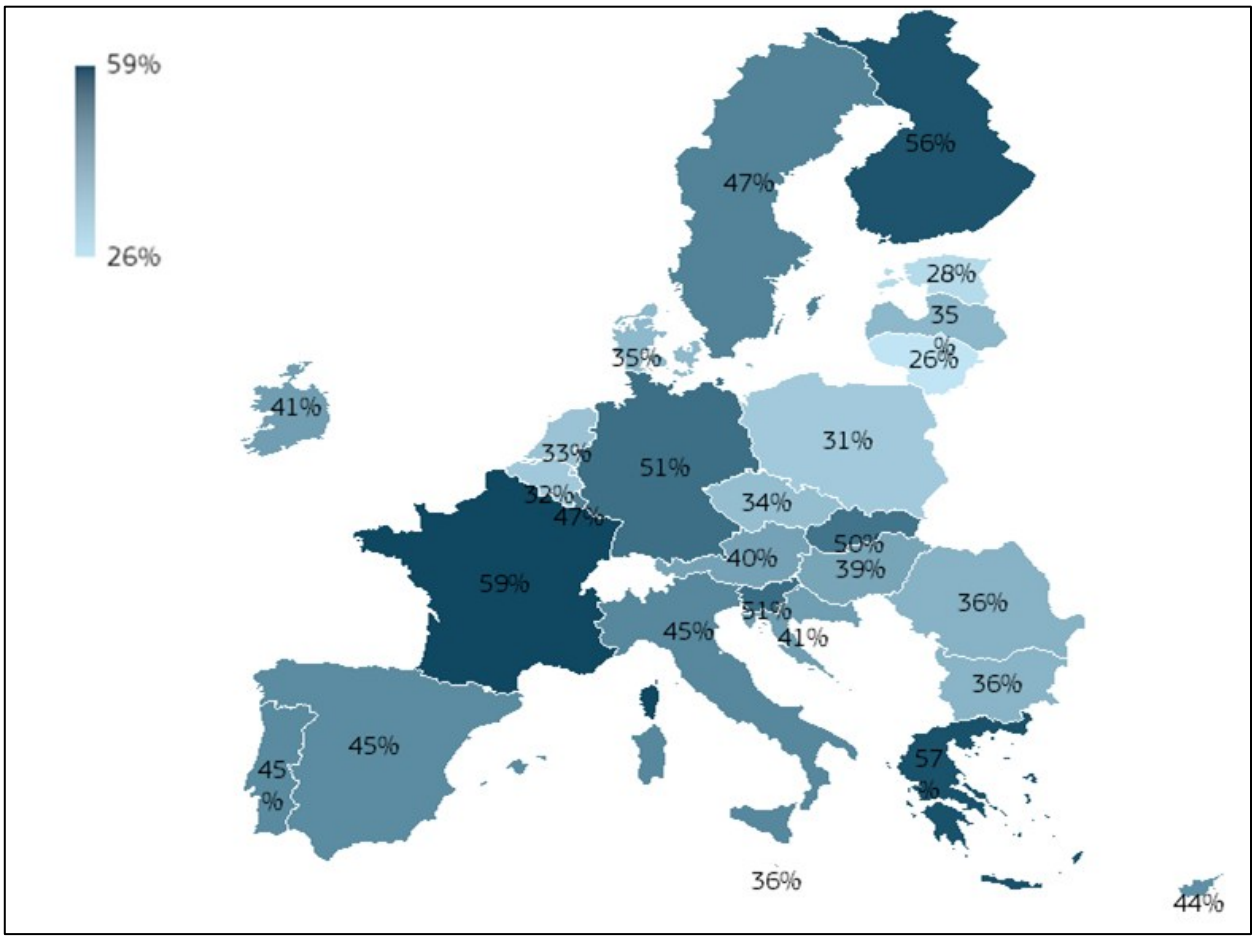
Figure 17: Importance of environmental, social, and ethical aspects of FAPs by Member State in 2024



Source: Eurobarometer survey – Question: 'When you buy FAPs, which of the following aspects are the most important for you? (n= 26.510, 2024)

The importance of product origin varies significantly according to Member States (Figure 19). Results from the Eurobarometer survey showed that French, Greek, and Finnish consumers showed the highest level of concern for product origin in 2024, with respectively 59%, 57%, and 56% of respondents mentioning origin as a key driver when making purchasing decisions. By contrast, concern for these aspects is much lower in Lithuania (26%), followed by Estonia (28%) and Poland (31%).

Figure 18: Importance of origin of FAPs by Member State in 2024



Source: Eurobarometer survey – Question: 'When you buy FAPs, which of the following aspects are the most important for you? (n= 26.510, 2024)

6 MARKET KEY DRIVERS FOR CONSUMPTION IN THE EU

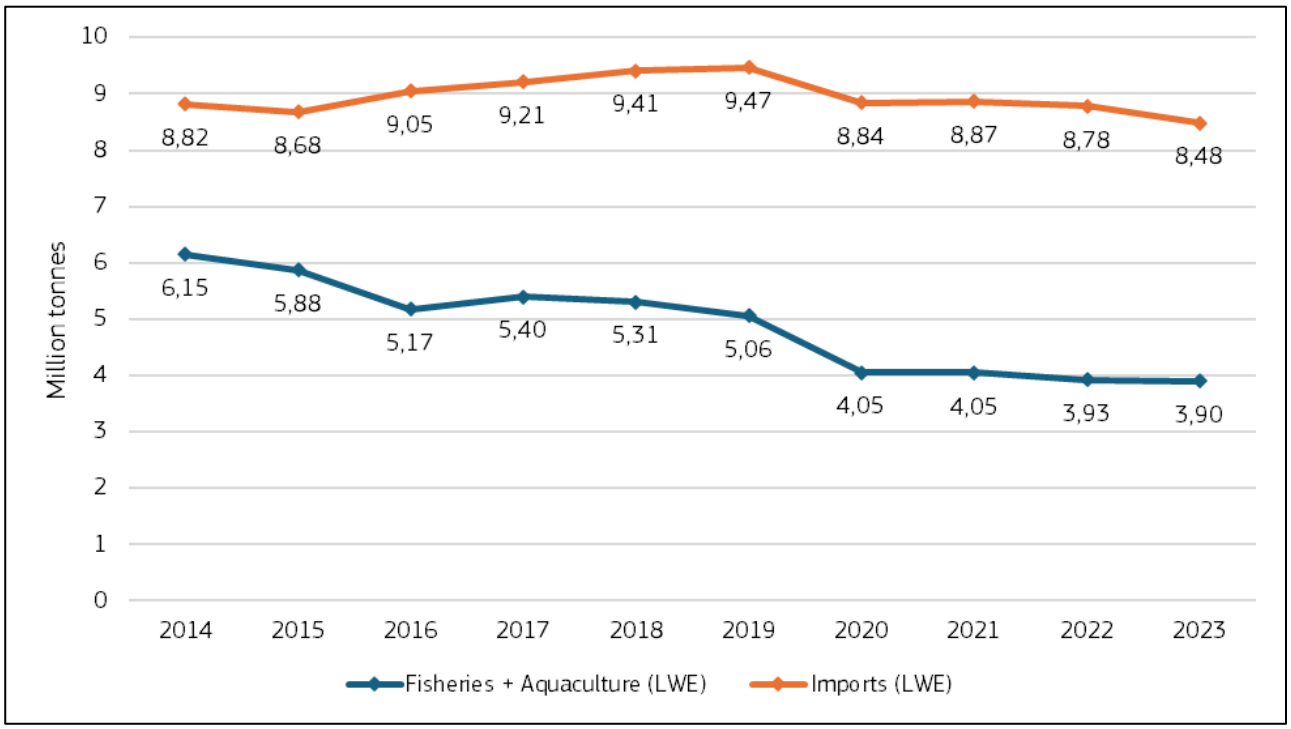
As outlined in section 2 on literature review, consumption of fishery and aquaculture products is impacted not only by consumer habits and preferences but also by market drivers, which play a major role in the availability and the diversity of the FAPs on the market. These drivers include retailer's strategies for supply, prices of FAPs, its evolution over the last few years and the accessibility of products for consumers. Other factors such as production fluctuations, trade policies and seasonality can also affect the quantity and the diversity of products offered on the market and hence affect the consumption patterns.

6.1 Imbalance between EU FAPs production and consumption patterns

- **Decrease in EU production and growing reliance on imports**

The EU fish market is supplied partly by domestic production, but it relies heavily on imports to meet consumer demand. According to EUMOFA estimates[30], around 70% of the FAPs consumed in the EU are supplied with imports[31], reflecting a structural dependency on external supply.

Figure 19: Evolution of the EU production (fishery and aquaculture) and imports of FAPs between 2014 and 2023 (in million tonnes LWE)



Source: EUMOFA supply balance

[30] Apparent consumption is calculated in Live Weight Equivalent and corresponds to : (catches + aquaculture production + imports) - exports. The full methodology of these estimates is provided in the methodological background of the EU fish Market, available on: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/eu-fish-market-reports/the-eu-fish-market-2025

[31] EUMOFA, "The EU Fish Market – 2025 Edition", 2025: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/eu-fish-market-reports/the-eu-fish-market-2025

The EU supply of FAPs has been characterised by a sharp decrease in EU domestic production, which fell by 37% between 2014 and 2023, while imports have only slightly decreased (4%) over the same period. The decrease has been particularly pronounced in the fisheries sector, due to reduced quotas and successive crises, including COVID-19, Brexit and Russian aggression against Ukraine which weakened the fishing industry and limited overall fishing opportunities (e.g. increased prices of energy, quota reduction, etc.).

For example, cod quotas decreased by 74% between 2014 and 2023, resulting in a 68% decrease of catches by the EU fleet, with the most pronounced contraction occurring after 2019, when quotas were substantially reduced in response to adverse scientific advice on key cod stocks. Similar trends can be observed for other species: mackerel quotas decreased by 21% over the same period, while sardine quotas decreased by 25% between 2017 and 2023. These quota reductions have had significant impacts on market availability of the species as well as on prices. In the case of cod, following quota reduction, wholesale prices increased significantly in Spain and France over the 2014-2024 period: +70% for frozen cod in Spain[32]; +88% for cod loins in France[33]. Higher prices and limited market availability of cod triggered substitution effects toward more readily available and affordable species. In the following sections on analysis by Member State (section 6), cod has frequently been substituted with other whitefish species, due to supply constraints resulting from quota reductions.

Changes in quota allocations for the EU fleet in UK waters following Brexit further contributed to the reduction of fishing opportunities. Table below summarises the evolution of EU quotas for the main shared stocks in UK waters. In addition to quota reallocation, the UK government implemented environmental management measures which resulted also in significant impacts on the availability of some species.

Table 3: Evolution of EU quotas for the main shared stocks in United Kingdom waters

Species	Evolution 2021/2020	Evolution 2024/2020
Atlantic herring	-39%	-13%
Atlantic mackerel	-24%	-33%
European plaice	-29%	-24%
European sprat	-28%	-50%
Norway lobster	-89%	-90%
Norway pout	+58%	-83%
Saithe	-37%	-38%
Sand eels	-55%	-63%

Source: own elaboration based on DG MARE (TACs, quotas regulations)

- **Mismatch between EU consumption patterns and domestic production**

The EU relies heavily on imports for the most consumed species. Species that account for the largest shares of consumption, such as tuna (12%), salmon (10%), Alaska pollock (8%), cod

[32] Data from MAPA (Ministerio de Agricultura, Pesca y Alimentacion)
[33] Data from Rungis RNM

(7%), and shrimps (7%), generally have very low self-sufficiency rates, ranging from 0% to 34%. Among the six most consumed species in the EU, which together account for half of the EU consumption of FAPs, only mussel has a self-sufficiency exceeding 50%.

Table 4: Self-sufficiency rates in the supply for the most consumed species at EU level (2023)

Main commercial species	Share in total consumption	Self-sufficiency rate
Tuna	12%	34%
Salmon	10%	1%
Alaska pollock	8%	0%
Shrimps	7%	11%
Cod	7%	5%
Mussel	5%	74%
Herring	4%	67%
Hake	4%	40%
Squid *	3%	15%
Mackerel	2%	87%
Trout	2%	84%
Sardine	2%	67%
Saithe (=Coalfish)	2%	11%
Gilthead seabream	1%	74%

Note: half of the EU consumption of FAPs is made with species highlighted in grey. Figures in red refer to species with self-sufficiency rate below 30%.

Source: EUMOFA estimates

Based on quantitative analysis and stakeholder interviews, consumption is becoming more concentrated on a small number of species, many of which are not produced in the EU or in small volumes. This is partly explained by the decrease in domestic production which increased the EU dependency on imports, as well as by downstream operators' preference for a stable and predictable supply of products, favouring imports over domestic production (as demonstrated in section below). As a result, consumption has shifted toward globally traded species, such as salmon, tuna, shrimps, which are widely produced outside the EU. During interviews, stakeholders refer to this as a "standardisation" of consumption, meaning that consumption patterns are focusing on fewer species. Additionally, the availability of these species all year, reduces consumer awareness of seasonality.

6.2 Impact of LSR strategies on supply and consumption

Large Scale Retailers (LSR) play a significant role in marketing FAPs in the EU. In 2024, 79% of consumers answering the Eurobarometer survey declared buying FAPs through this channel. As a result, their marketing strategies for FAPs play a key role in shaping consumption patterns for FAPs. In practice, retailer strategies reflect a balance between meeting consumer demand and addressing economic and marketing considerations.

Retailers adapt their strategies to the existing local consumption habits and local context (i.e. proximity to production/landing areas). Insights from stakeholder consultations show, for instance, that retailers in coastal areas tend to offer a wider range of fresh FAPs, while in urban areas, the offer of whole fresh products is more limited. Fish counters are also more common and occupy larger space in coastal areas, while they are less prevalent in urban areas. Additionally, analysis of a selection of annual retailer reports shows a growing alignment of sourcing strategies with environmental and sustainability considerations. In the Netherlands, for instance, retailers have implemented strict sourcing strategies that enable them to promote 100% sustainable FAPs (see section 7.5 for further details).

At the same time, retailers can also influence the consumption patterns and habits. For instance, retailers may prioritise species with stable prices and reliable supply volumes, as these are easier to manage and to include in promotional campaigns and related communication. For this reason, retailers offer often focus on species with large volumes, usually supplied from imports. While these species are already demanded by consumers, their year-round availability reinforces their uptake, as consumers can easily incorporate them into weekly meal planning.

6.3 Effects of price volatility

To assess how prices for FAPs have evolved over recent years, the analysis below draws on the following indicators:

- Household expenditure trends, based on data provided by EUROSTAT, with a focus on nominal expenditure in EUR. The expenditure concerns the final consumption expenditures on goods and services consumed by individual households.
- The Harmonized Index of Consumer Prices (HICP) which provides comparable measures of inflation across countries and measures changes over time of the prices of consumer goods and services purchased by households[34].
- Household prices of fresh FAPs, using data from EUROPANEL, which refer to households' purchases of selected fresh species in 11 Member States, and are aggregated for the EUMOFA purposes into "Main Commercial Species" and "Commodity Groups"[35].
- Retail price trends from national sources (e.g. France, Spain, Italy, etc.).

6.3.1 Rising prices of FAPs

EUROSTAT data[36] highlighted a continuous increase of household expenditure on FAPs across all Member States, reaching a total of EUR 62,8 billion in 2024, EUR 2,7 billion more than in 2023. This increase reflects the persistent high price level for FAPs, in line with a trend that started in 2020. The increases observed in 2020 and 2021 were largely driven by Covid-19 restrictions, while

[34] For FAPs, the Harmonised Index of Consumer Prices include "fresh or chilled", "frozen", "dried, smoked or salted" and
[35] Households' purchases are recorded daily by a sample of households in supermarkets, discount shops, micro-markets, groceries, fishmongers and online sales (Amazon Fresh included), who reports to EUROPANEL many information, among which species, quantities and values.
[36] EUMOFA, "The EU Fish Market – 2025 Edition", 2025: https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/eu-fish-market-reports/the-eu-fish-market-2025

the share increase of 2022 reflected broader economic and geopolitical factors. Although inflation slowed in 2023, inflationary pressures remained significant and continued to drive prices upward also in 2024.

The analysis of the HICP for FAPs shows that prices increase occurred in all Member States, but with high variability (Annex 5). Hungary recorded the sharpest increase of the HICP for fish and seafood (+97% between 2015 and 2025), followed by Romania (+79%), Poland (+72%) and Estonia (+72%). Over the same period, Ireland, Cyprus, and Czechia recorded the lowest rise, with 9%, 13%, and 27% in 2025, respectively.

Price increases are also observed when looking at household consumption of fresh FAPs by commodity group. In particular, as illustrated in Table 5, cephalopods, salmonids, and freshwater fish experienced the strongest consumer price increases in real terms, with growth rates of 27%, 24%, and 20%, respectively between 2015 and 2024.

Table 5: Consumer price evolutions by commodity groups at EU level for fresh products (nominal in EUR/kg)

Commodity groups (fresh products)	Price (2015)	Price (2024)	Evolution 2024/2015
Salmonids	11,48	18,04	+24%
Cephalopods	10,02	16,13	+27%
Tuna and tuna-like species	11,11	15,83	+12%
Crustaceans	15,16	15,43	-20%
Flatfish	9,99	12,65	0%
Groundfish	8,91	12,24	+8%
Freshwater fish	7,57	11,56	+20%
Miscellaneous aquatic products	8,29	11,25	+7%
Other marine fish	9,17	10,99	-5%
Small pelagics	4,96	6,93	+3%
Bivalves and other molluscs and aquatic invertebrates	4,17	5,04	-5%

Note: Evolution of prices is calculated in real terms[37]

Note: Prices provided in this table concern only fresh products, for a selection of species and in a selection of Member States. Their interpretation should be made with caution. They are provided to provide an indication and should not interpreted in their absolute terms.

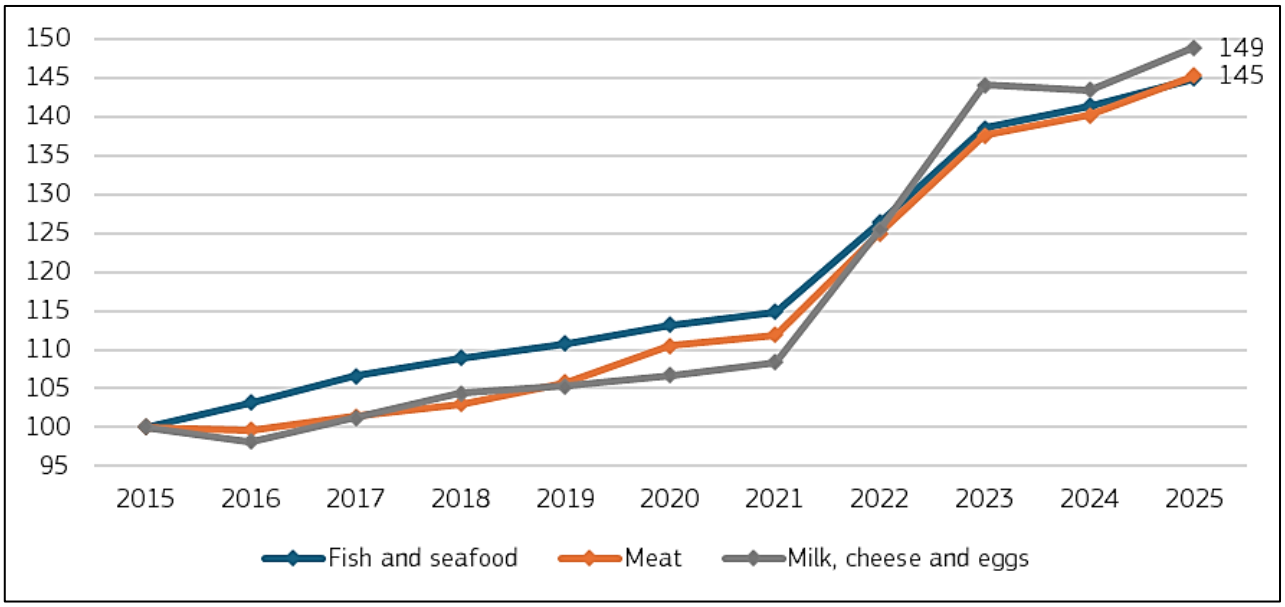
Source: EUMOFA data

[37] Values are deflated by using the GDP deflator (base=2020).

6.3.2 Comparison with other food products

The figure below illustrates the evolution of HICP for different categories of animal-based food products, including fish and seafood, meat, and milk, cheese and eggs. It shows that, since 2015, fish and seafood products recorded a price increase similar to that observed for meat (+45% for both categories), but lower than for milk, cheese and eggs, for which the price index increased by 49% over the same period.

Figure 20: Consumer price index evolution for different sources of animal proteins at EU level (2015 = 100)



Source: Eurostat

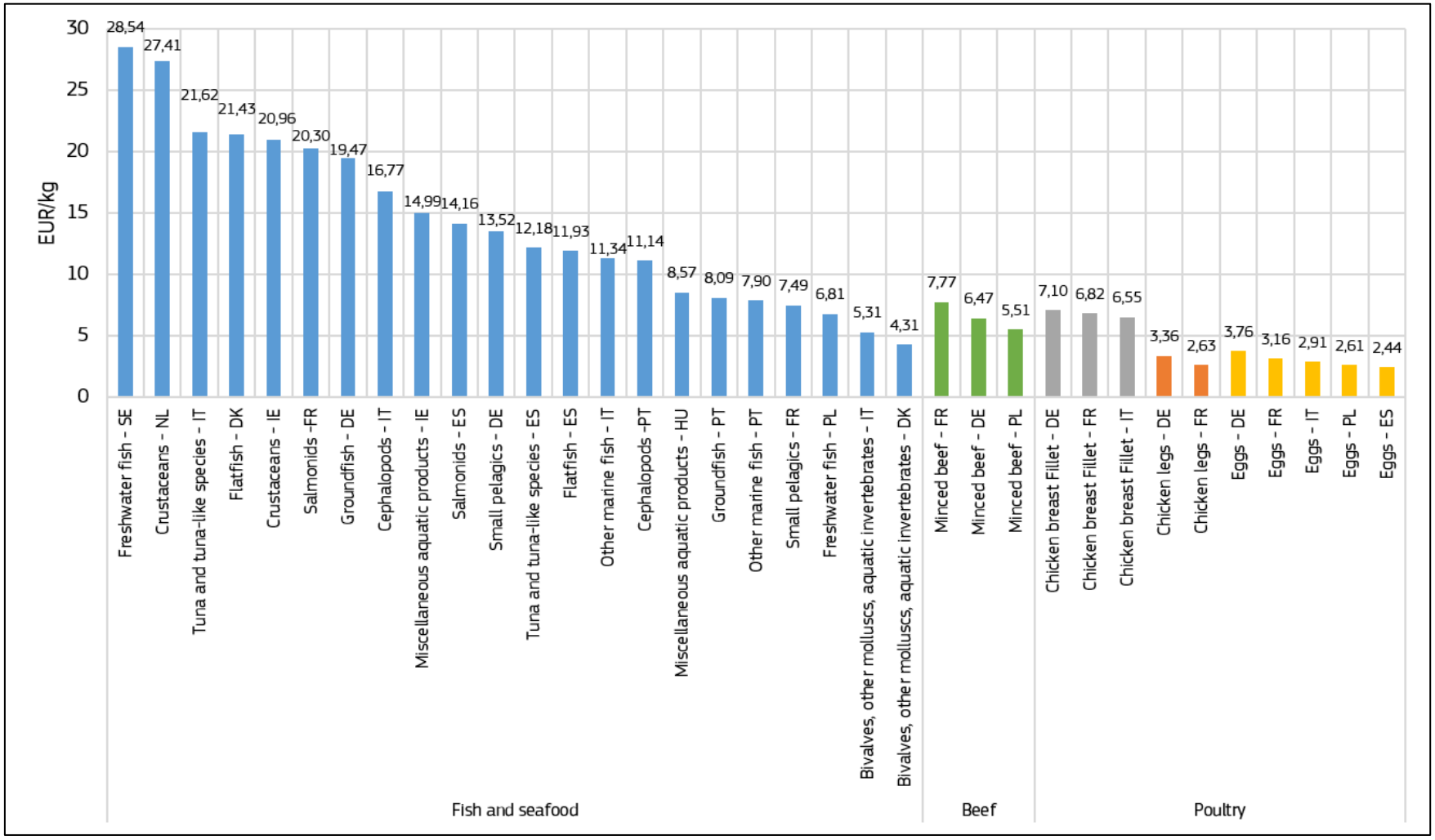
Even though prices for FAPs have increased at similar rates as for other animal-based food products, the fact that certain FAPs are sold at significantly higher prices than meat and other animal proteins reinforces the perception of FAPs as expensive products.

However, FAPs include a wide diversity of products, resulting in a broad range of price levels, unlike the other products analysed above, where product diversity is much more limited (as demonstrated in the section below).

6.3.3 Strong price heterogeneity within FAPs

As illustrated in Figure 22, prices within the FAP category vary substantially, from relatively expensive products, such as salmonids and tuna species, to more affordable options sold at prices comparable to, or even lower than, other animal proteins, including small pelagic species, bivalves, and molluscs. This reflects the high diversity of FAPs providing an offer that can fit the budgets of many households. This explains the fact that the substitution effect triggered by inflation can also occur within the FAPs, with consumers shifting towards less expensive fish species, rather than necessarily shifting to other sources of protein.

Figure 21: Consumer-level price of selected animal proteins in a selection of Member States in 2024 (nominal price in EUR/kg)

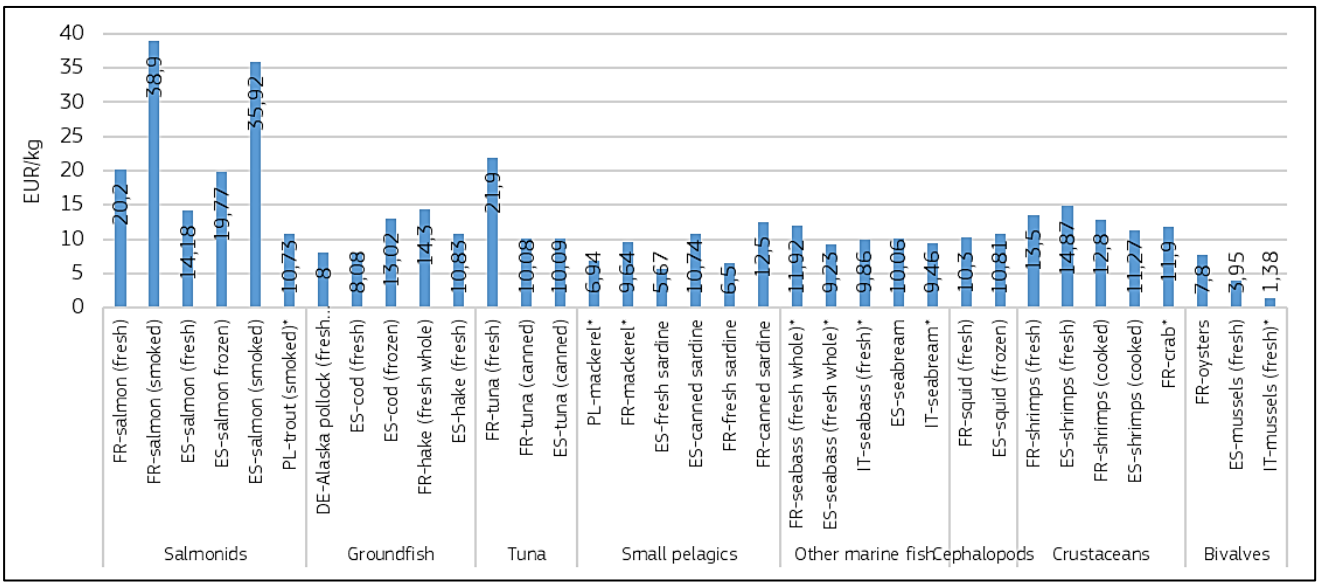


Source: EUMOFA data, Agridata

Note: The selection of products provided above considers data availability, while ensuring good coverage of a variety of Member States and products.

Additionally, within the FAPs category there is significant variation across Member States, preservation types and presentation forms, as illustrated in Figure 23. For example, the average retail price (nominal) for fresh salmon reached 20,20 EUR/kg in France in 2024, against 14,18 EUR/kg in Spain the same year. Similarly, smoked salmon nominal prices reached 38,90 EUR/kg in France and 35,92 EUR/kg in Spain. Mackerel nominal prices reached 6,94 EUR/kg in Poland in 2025 against 9,64 EUR/kg in France.

Figure 22: Price variability for fish and seafood products in different MS (nominal price EUR/kg, 2024)



Source: EUMOFA, FranceAgriMer, MAPA, ISMEA
price for 2025 (from January to September)

6.3.4 Price impact on consumption patterns

Based on feedback from stakeholders, price increases can affect consumption through several channels. First, by leading some consumers to stop consuming FAPs. Second, by adjusting the quantity or the frequency of consumption, particularly depending on the income levels. Third, by inducing substitution effects.

Section 4 highlighted that price is a key factor influencing the consumption of FAPs and constitutes the main barrier to their consumption. According to the Eurobarometer survey, price ranks as the second most important reason for not eating FAPs, with an upward trend observed since 2016. A study[38] reviewing 37 papers on the drivers and barriers to FAPs consumption identified price as the most commonly reported barrier to seafood consumption. The same study also concluded that FAPs consumption is positively correlated to income and age, with higher consumption levels observed among older and higher-income consumers.

[38] A systematic review of the determinants of seafood consumption (2021). Doi: 10.1017/S0007114520003773

While the literature review suggests that there is a limited substitution effect with other proteins, even in the case of low-income consumers, substitution appears to be more prevalent within the FAPs category. A study analysing the literature review on consumer preferences, drivers of seafood demand and demand for sustainable ocean management concluded that there is limited substitutability between fish and meat and that even in low-income countries a 1% increase in the price of meat only leads to a 0,004% increase in fish consumption. Substitution is slightly higher for fish and poultry compared to fish and red meat, in general[39]. By contrast, the paper emphasised a higher substitution effect within FAPs, which is consistent with the feedback from stakeholders and the price analysis provided above, which suggest that the wide diversity of FAPs translates into a broad range of price levels, allowing consumers to adjust their choices within the category according to their budget. However, some stakeholders interviewed indicated that the inflationary context increases price-sensitivity and may drive price-sensitive consumers to substitute towards cheaper protein sources, such as chicken and eggs (as indicated in Spain, France, see sections 7.1 and 7.2).

While substitution effect between FAPs and other animal-based protein products remain limited, FAPs may still act as an alternative protein source in the case of dietary changes, especially for consumers with strong consumer concerns about environmental aspects and carbon footprint of food products[40]. Additionally, as illustrated by examples in some Member States in the following section, substitution effects also occur within the FAPs, primarily between species, but also between different preservation types. For instance, during inflation, substitution between fresh and frozen products was observed (see section 7).

[39] Seafood Demand Literature Review: Consumer preferences, drivers of seafood demand and demand for sustainable ocean management (May 2019). Available on: https://www.foodandlandusecoalition.org/wp-content/uploads/2019/08/Seafood-Demand-Literature-Review-_final.pdf

[40] The role of fisheries and aquaculture products in ensuring sustainable and healthy food consumption in France (2024). https://doi.org/10.1051/alr/2024014

7 ANALYSIS BY MEMBER STATE

This section summarises the main findings of the analysis conducted in the six selected Member States, namely Spain, France, Italy, Poland, the Netherlands and Austria[41]. Detailed case study reports, providing the detailed assessment of Eurobarometer survey results at Member State level, consumption statistics, desk research, and feedback from stakeholders, are provided in the country profiles annex.

The selection of these Member States ensures coverage of a range of situations in terms of consumption levels and trends, based on the typology of Member States according to their level of consumption and its evolution over the past decade, as provided in section 4 (Figure 2). According to this typology, the selected Member States are distributed as follows:

- France and Spain belong to the group of Member States with high consumption level, but declining trends;
- Austria and the Netherlands belong to the group of Member States with low consumption levels and declining trends;
- Poland belongs to the group of Member States with low but growing consumption of FAPs;
- Italy belongs to the group of Member States with high and growing consumption of FAPs.

[41] The order of Member States here reflects the importance of the FAP consumption in the different Member States.

7.1 Spain

Main conclusions:

- **Strong and sustained decline in consumption**, characterised by a strong decline in household consumption. Consumption reached its lowest level in 2024. The decrease is most pronounced for fresh products and traditionally consumed species, while other products such as canned products or species such as salmon, seabass and seabream have remained stable or increased, supported by predictable supply and stable prices.
- **Shift from frequent at-home consumption to more occasional out-of-home consumption.** This is accompanied by reduced cooking frequency, especially among younger generations, and evolving expectations regarding preparation and product formats.
- **Growing importance of convenience as a key driver**, with increasing demand for ready-to-cook and ready-to-eat products. This trend supports the consumption of certain species and product categories, even when prices are relatively high.
- **Increasing importance of supply dynamics on consumption**, with species benefitting from supply predictability, stable prices and strong retail integration gaining market share.
- **Evolution of consumption patterns contributed to the consolidation of supermarkets and the decline of fishmongers**.

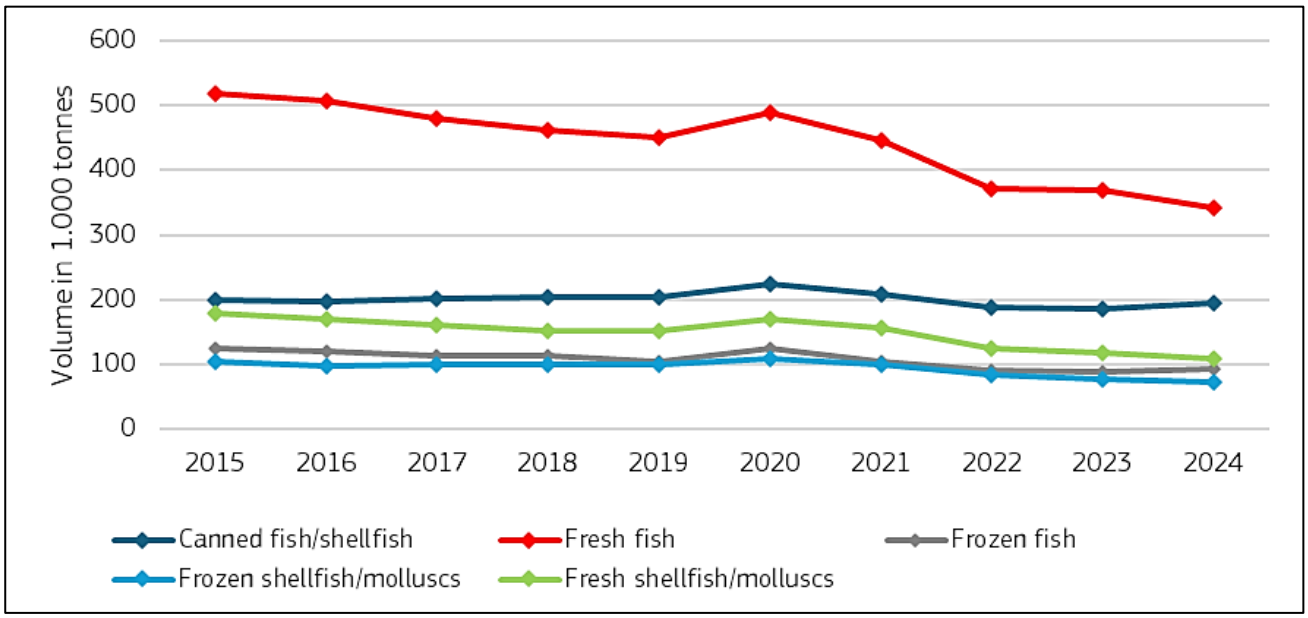
CONSUMPTION TRENDS OF FAPS

Consumption of FAPs in Spain has declined significantly and progressively over the last decade, reaching its lowest level in 2024. For all FAPs combined, household consumption decreased by 27% between 2015 and 2024, reaching 843.502 tonnes product weight in 2024[42]. This downward trend is also reflected in per-capita consumption. Average per capita household consumption decreased from 26,4 kg (product weight) in 2014 to 17,9 kg per capita in 2024, representing a decline of 32% in ten years. This trend was acknowledged by all operators interviewed and was observed across all marketing channels. A small recovery was recorded during the years of COVID-19, in relation to the increase of home-cooking due to restaurant closure, but this was temporary and did not affect the general decreasing trend. Almost all product categories were affected by the consumption decline, even though unevenly.

Fresh products have experienced the most pronounced decline, reflecting mainly changes in consumption habits, according to stakeholders. Fresh fish, which accounts for the largest share of FAPs consumption (42% of the FAPs in 2024) experienced the most significant drop (-34% in volume since 2014), while fresh shellfish and molluscs decreased even more (-39%). Frozen FAPs showed similar trends (-26% for frozen fish and -29% for frozen shellfish and molluscs), before a slight recovery since 2022. In contrary, canned products have experienced a notable resilience and stability over the last years, with a 3% decrease over the same period, which highlights the growing consumers' interest in shelf-stable and convenient products (Figure 24).

[42] Data from the Ministry of Agriculture, Food and Fisheries (MAPA).

Figure 23: Household consumption (volumes in 1.000 tonnes)



Source: MAPA

At species level, **most of the species traditionally consumed in Spain reported significant consumption decreases** over the last decade, as illustrated in figure below.

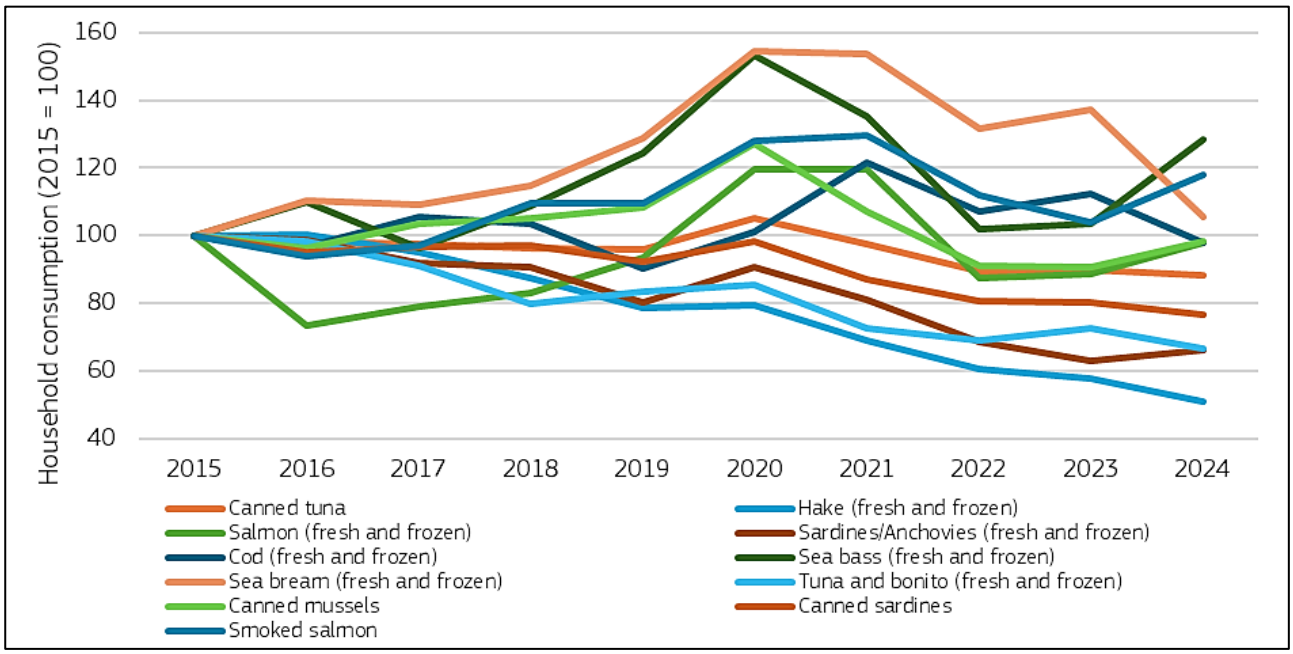
Main findings by species are as follows:

- **Hake** consumption decreased sharply by -49%, attributed according to stakeholders to stock issues, health concerns linked to Anisakis[43] and changing consumer preferences.
- The same trend was observed for **fresh sardine, anchovy, tuna and bonito**, which recorded consumption decreases between 30 and 35%, which further illustrates the consumption decline for traditional species.
- On contrary, **fresh and frozen salmon, seabass and seabream, and smoked salmon** have emerged as a clear exception because their consumption has remained relatively stable (-2% in the consumption of fresh and frozen salmon) or increased (seabream by 5%, seabass by 29%, and smoked salmon by 18%).

Overall, stakeholders link the decline in FAPs with strong changes in consumer behaviour and expectations, as illustrated in the following section.

[43] Anisakis is a parasite present in many species of wild fish that can cause allergic reactions and serious digestive problems.

Figure 24 – Evolution of consumption in Spanish households per fish species



Source: MAPA

CONSUMPTION BEHAVIOUR TOWARDS FAPS

Consumption behaviour in Spain is undergoing a strong transformation, characterised by a shift from frequent, home-based consumption towards more occasional, out-of-home consumption, alongside changing purchasing habits and consumer expectations for more convenient products.

Analysis of consumption behaviour, supported by the Eurobarometer survey, revealed that distribution channels remained relatively stable over the last decade despite the decline in fish purchases, with supermarkets absorbing 70% of the volume and fishmongers 11%[44]. While both marketing channels have maintained their market shares, restaurants increased their market share from 6% in 2015 to 11% in 2024, reflecting the growth of out-of-home consumption.

Even though, fishmongers maintained their market share, their number decreased sharply, with almost 5.000 fishmonger closures since 2007, representing one third of the sector. Stakeholders attribute this sharp decline to difficulties in generational renewal, demanding working conditions, and changes in consumer purchasing habits, with consumers increasingly favouring bulk purchases from large retailers over the more frequent purchases traditionally associated with fishmongers.

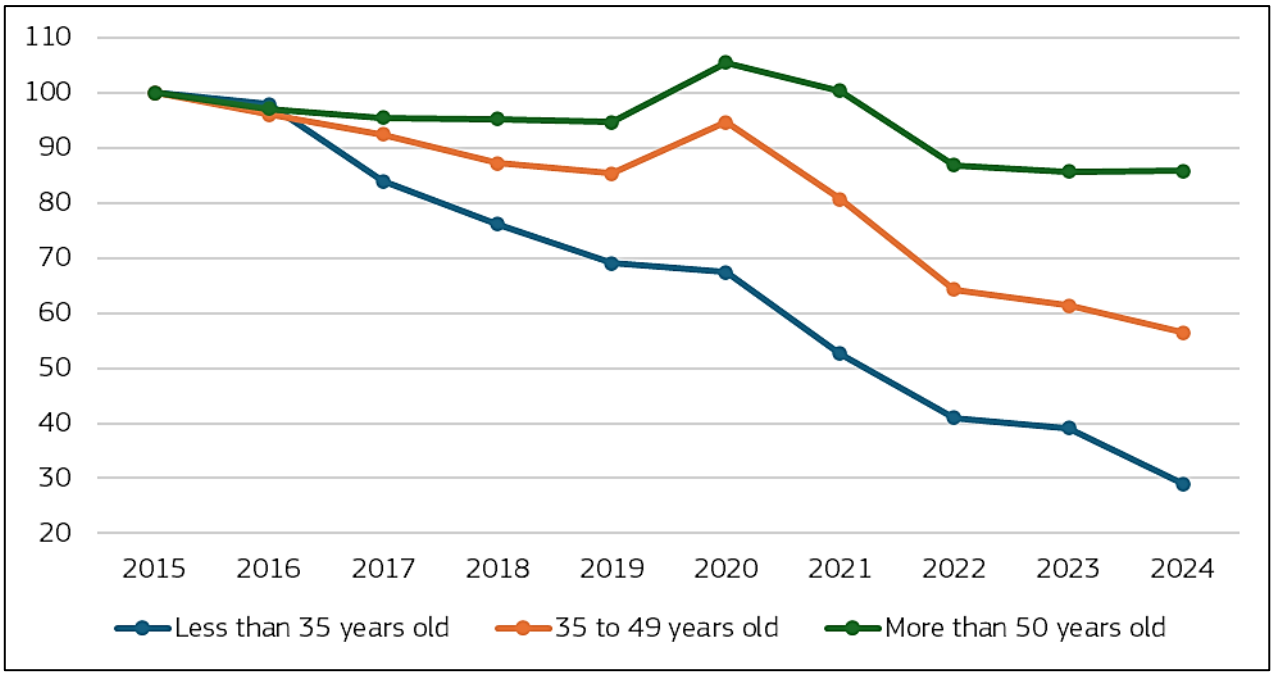
Stakeholders suggest that the decrease in household consumption reflects the changes observed in consumption habits. **Spanish consumers, particularly young generations, cook less frequently. They also increasingly perceive fish as time-consuming or difficult to prepare**. Demand is shifting towards products that are easy to handle, ready to eat or ready to cook. In parallel, FAPs are increasingly consumed out-of-home, where they are associated with leisure and social occasions rather than daily meals. This trend has supported restaurant demand

[44] According to the Eurobarometer survey. Q5 'Where do you buy your FAPs?'

and explains the relatively strong performance of premium species, shellfish and certain products such as salmon or tuna.

The **decline in FAPs consumption affects particularly the younger generations due to social changes**: lack of time, lack of knowledge, interest for quick and easy to prepare options, demand for prepared and ready-to-cook products.

Figure 25 – Evolution of Spanish household consumption in volume per age



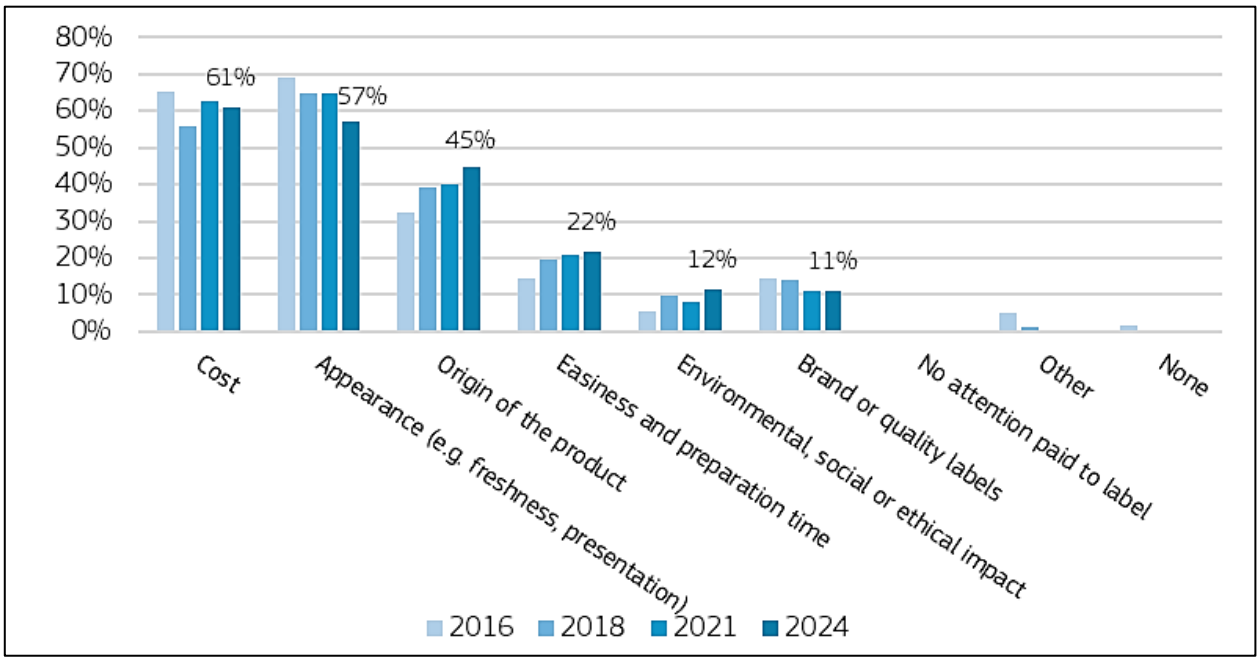
Source: MAPA

Overall, **FAP consumption in Spain is shifting from frequent to occasional consumption. At-home weekly consumption is decreasing while at-home monthly consumption and out-of-home consumption are increasing**. Eurobarometer data confirm this shift, showing a growing share of consumers eating fish out-of-home on a monthly or weekly basis[45].

Consumer preferences are also evolving. **While cost, freshness and appearance remain the most important criteria in the purchasing decision, their relative importance has declined in favour of origin, ease of preparation and broader environmental or ethical considerations**. In terms of information that consumers consider to be important on the product labels, the date of catch or production appears to be the most important (even though decreasing in the last years), which indicates an interest in freshness and quality. Consumers also increasingly expect more information on environmental aspects. Although a clear preference for wild products is still expressed among consumers, actual consumption patterns indicate increasing consumption of aquaculture products, such as salmon, seabass and seabream.

[45] According to the Eurobarometer survey – Q3 'How frequently do you eat FAPs at home/ at restaurants and other food outlets (canteens, bars, market stands, etc.)?'

Figure 26 - Evolution of main important aspects when buying FAPs in Spain



Source: Eurobarometer – Q20 'When you buy FAPs, which of the following aspects are the most important for you?' (n= 1.002, 2024)

Economic drivers for consumption

Insights from stakeholder consultations, Eurobarometer results and statistical data suggest that the decrease in consumption is driven by a combination of consumers preferences and behaviours and economic factors. Some stakeholders, and the literature review, suggest that **consumption trends are influenced not only by consumer preferences but also by the structure of the supply, which can in turn shape demand**. This is illustrated by the increased consumption of aquaculture products, such as seabass and seabream, whose production has increased significantly in recent years.

Stakeholders highlight that species caught or farmed in large volumes (e.g. salmon) offer different economic advantages, including more predictable supply, stable prices throughout the year, and large volumes suited to supermarket distribution. This makes them more attractive to retailers and processors and facilitate the development of convenient formats of FAPs. The fact that these species are available in the market can make the offer of FAPs more accessible and easy to find also for consumers, which make it more familiar.

According to Eurobarometer data, price is the most important criteria to drive purchasing decisions of FAPs. **All stakeholders identify the price as a major barrier for consumption**. Over the past decade (2015-2024), prices of FAPs in Spain have increased by 43,3% in real terms. All categories of FAPs were affected, in particular fresh shellfish (+57%), frozen fish (+54%), and fresh fish (43%). According to stakeholders, this upward trend reinforced the perception of FAPs as expensive products by consumers, encouraging substitution towards cheaper proteins such as meat, eggs or increasingly, plant-based alternatives. The comparison of price evolution of FAPs, eggs, meat and milk in Spain showed that prices of FAPs increase more than prices of meat and milk, but less than eggs.

However, insights from interviews and statistics emphasise that **the role of price in purchasing decisions is more nuanced than it is assumed**. First, price alone does not explain the consumption behaviour and trends. The example of salmon was cited by almost all interviewees who highlighted that salmon remain one of the most consumed species, despite its high price. This shows that availability, habits and convenience play a major role in purchasing decisions. Second, the diversity of the offer is reflected in a wide range of prices, including several affordable options, such as sardines, anchovies, hake, seabass, etc. Stakeholders pointed out a lack of communication on affordable and seasonal fish options, which contributes to reinforcing the perception of FAPs as expensive products.

Offering products that meet consumers demand is a key driver to stimulate the consumption of FAPs. Consumers increasingly prefer ready to cook and ready to eat products (e.g. products that are already cleaned and packed, etc.). Retailers indicate a strong shift from the traditional fish counters to pre-packed and prepared products. Meeting these requirements is becoming a priority for businesses seeking to reduce practical barriers to fish consumption.

Even though **sustainability considerations are not the most important criteria considered by Spanish consumers when buying FAPs, they become a strong B2B tool and play an important role in the supply strategies of large retailers**. Although, consumers have interest in origin, catching method and species (according to Eurobarometer data), stakeholders note that consumers are overwhelmed with information and that in most cases they are not able to understand and interpret it to make purchasing decisions.

STAKEHOLDERS FEEDBACK ON DRIVERS TO STIMULATE CONSUMPTION

Stakeholders highlighted the need for targeted communication campaigns to promote FAPs consumption, notably by highlighting health benefits, the wide range of the offer of FAPs and the availability of affordable options, such as seasonal species. Stakeholders highlighted the role of coordinated and targeted communication and marketing campaigns done by Norwegian producers in reinforcing salmon's attractiveness to families and children. These campaigns have been very successful, and the species is now one of the most consumed species in Spain, popular for its convenience, perceived quality, ease of preparation, and strong presence in both retail and food service.

Stakeholders also emphasised the importance of reducing VAT on fish products to align it with other essential products in Spain.

7.2 France

Main conclusions

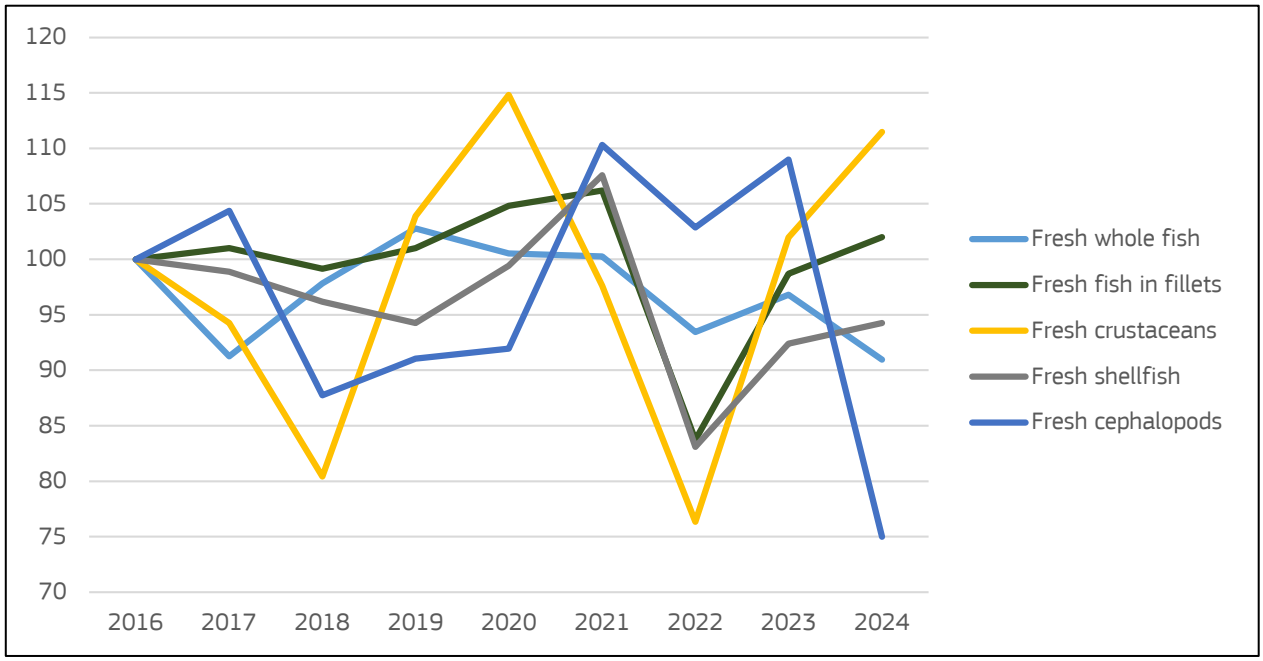
- **Moderate decline in FAP consumption**, characterised by decreasing per capita consumption (-7% over the 2014-2023 period). The decline is particularly pronounced for fresh products, especially fresh fish, shellfish, crustaceans and cephalopods, while prepared products such as canned, frozen and ready-to-eat products experienced were more resilient and stable.
- **Species-specific consumption trends are increasingly shaped by supply conditions and the structure of the retail offer.** Large retailers increasingly concentrate their offer on a limited number of species benefiting from stable supply, predictable prices and strong retail integration, such as salmon, shrimp and tuna species, which generally recorded increasing consumption. By contrast, species affected by supply constraints (e.g. quotas reduction, decline in domestic production, etc.) tended to record declining consumption trends. This evolution contributes to the standardisation of consumption patterns and reduces consumer exposure to the diversity and seasonality of fishery products.
- **Consumption patterns are increasingly shifting from fresh, whole fish to more convenient and processed products.** Growing demand for ready-to-cook and ready-to-eat products is closely linked to changing lifestyles, reduced consumer skills in fish preparation and stronger demand for convenience and price predictability.
- **Increasing price sensitivity is reshaping purchasing behaviour**, especially for price-sensitive consumers, where consumers reduce purchase frequency, potion sizes or substitute to other animal protein products, such as chicken.
- While environmental, social and ethical considerations are gaining importance, particularly among younger consumers, **purchasing decisions remain largely influenced by factors such as price, convenience, origin and the availability of products on the market**.

Consumption trends of FAPs

France ranks as the third-largest consumer of FAPs in the EU. Over the last decade (2014-2023), total consumption in LWE decreased slightly (-3%), while per capita consumption decreased more markedly by -7%.

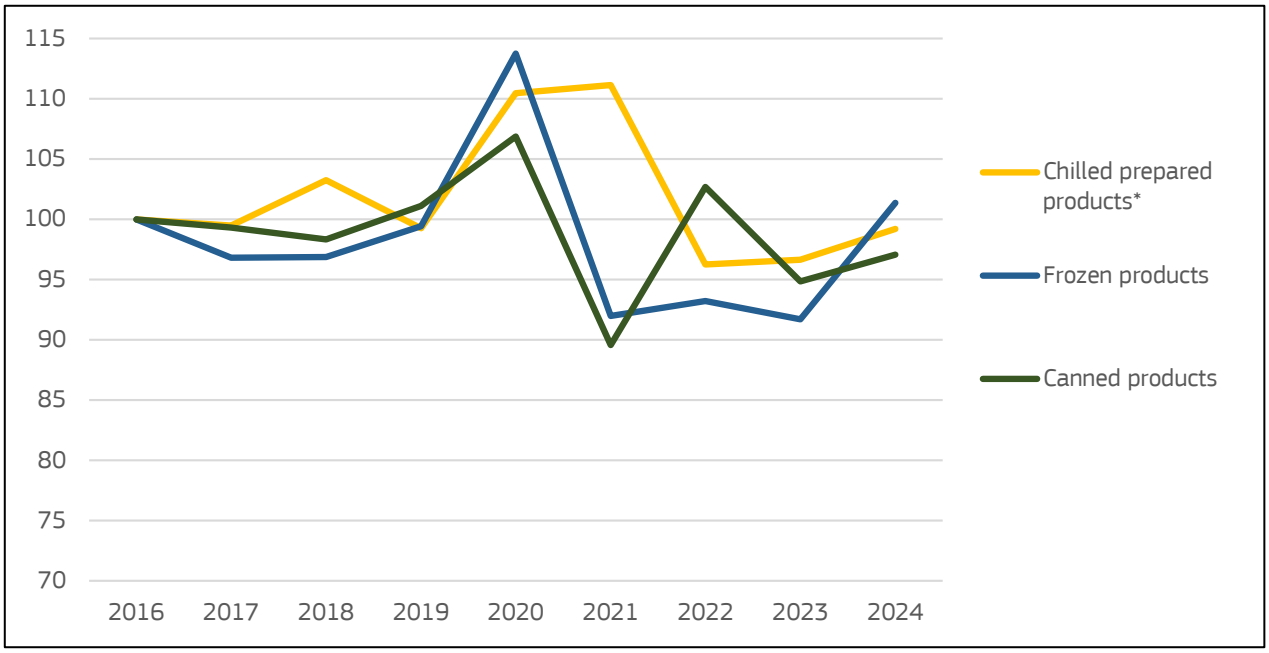
National statistics (available from 2016 to 2024) confirm these decreasing trends and provide further insights by product category. These data highlight a high volatility in the consumption of fresh products, especially for fresh crustaceans and cephalopods (Figure 28), while prepared products, including canned, frozen and chilled prepared products demonstrated more resilient and stable patterns (Figure 28). Notably, during the inflationary period (2022), consumption declined across most product categories, except for canned products, where consumption increased (Figure 29).

Figure 27: Evolution of consumption in French households for fresh products (volume index, 2016=100)



Source: EUMOFA elaboration, based on data from FranceAgriMer

Figure 28: Evolution of consumption in French households for other products (volume index, 2016=100)

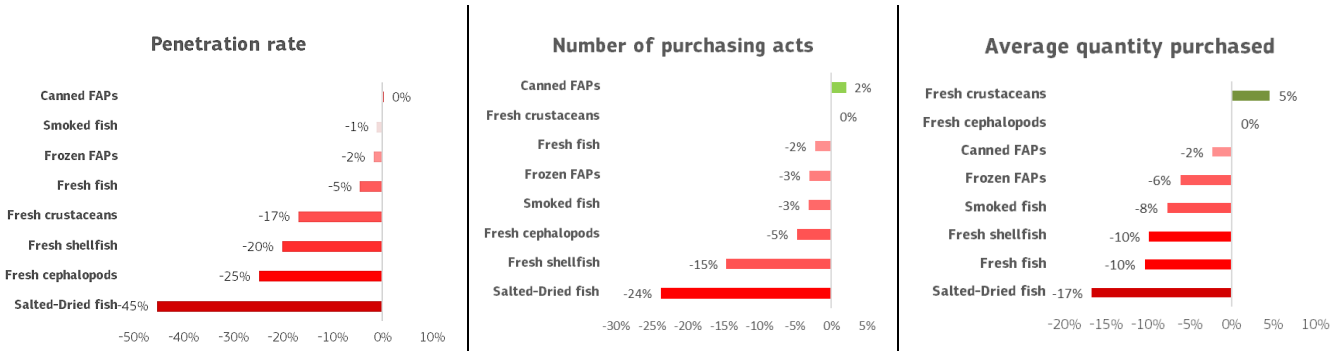


Source: EUMOFA elaboration, based on data from FranceAgriMer

Specific indicators from the national statistics (available for 2021-2024) allowed also to highlight the following (Figure 30):

- Fresh fish consumption decreased significantly (-14% in volume), driven by a reduction in both penetration (-5%) and average purchased volumes (-10%), indicating a decrease in the number of buyers and a decrease in the portions purchased by consumer. This was strongly emphasised by stakeholders who confirmed the strategy of reducing portions in the context of inflation.
- Fresh shellfish, cephalopods and crustaceans, also recorded a significant decrease over the same period, where sharp decline in penetration rates were recorded, by respectively -25%, -20% and -17%.
- Frozen and canned FAPs demonstrated greater resilience and stability, as outlined earlier. Frozen products maintained relatively stable volumes (-7%) while generating value growth (+4%), and canned products emerged at the most robust segment, with nearly stable volumes (-1%) and strong value growth (+14%), supported by higher prices and slightly increased purchasing acts (+2%).

Figure 29: Evolution of penetration rate, number of purchasing acts and volume per purchasing act between 2021 and 2024, by type of FAPs



Source: EUMOFA elaboration, based on FranceAgriMer data

Operators confirmed these trends and emphasised the growing consumption of prepared products. They mentioned that while consumption patterns previously favoured prepacked fresh products (which increased significantly until 2021, before slightly decreasing since), more recent trends indicate increasing demand for processed, ready-to-cook and ready-to-eat products.

The evolution by species indicates a contrasting situation, as illustrated below (see Annex 4):

- Among the 30 most consumed species in France, around 40% recorded increase in apparent consumption. The strongest growth was observed among the most widely consumed species: Salmon (+11%), Alaska pollock (+11%), skipjack tuna (+731%), warmwater shrimps (34%), yellowfin tuna (+208%).
- In contrary, approximately 60% of these species experienced a decline in consumption, notably cod (-35%), mussels (-12%), other marine fish (-9%), surimi (-23%), and sardines (-8%), etc.

Despite these changes, demand for FAPs remains relatively strong. Stakeholders expressed concerns about the ongoing decline of the domestic fishery sector, which may affect both supply and consumption patterns. While imports account for over 70% of consumption, they are

concentrated in a limited number of species. This is why domestic production plays an important role in maintaining product diversity and supporting consumer awareness, despite some challenging in selling less-known species for local fisheries and landed in small volumes.

CONSUMPTION BEHAVIOUR TOWARDS FAPS

Overall, results from the Eurobarometer survey and stakeholder consultations confirm a continued shift in consumption behaviour, **characterised by declining frequency, increasing price sensitivity, a growing preference for convenience and increasing substitution towards alternative proteins.** The evidence suggests that this trend has started even before the recent crises, such as COVID-19 and inflation but has since been further reinforced.

The Eurobarometer survey results suggest a shift from regular to more occasional patterns (Figure 31). This was illustrated by the decline of the share of consumers reporting eating FAPs at least once a week from 52% in 2016 to 36% in 2024 (France is one the EU countries reporting the strongest decline of regular consumers). This shift is further reflected in purchasing behaviour, with a decrease in the number of purchase acts across almost all product categories between 2021 and 2024, except for a slight increase in canned products (as outlined above, see Figure 30).

Price remains the primary determinant of purchasing decisions, and its importance increased slightly between 2016 and 2024 according to the Eurobarometer survey. Nominal prices increased across all categories of FAPs, ranging between 5% and 30%. Although real price increases appear more moderate and partly reflect the broader inflationary context (see the French country profile (see the report annex on country profiles) for further details about prices evolution), consumers are primarily exposed to nominal prices, which may reinforce the perception of FAPs as expensive products. Stakeholders reported that price-sensitive consumers tend to reduce FAPs consumption, either by buying FAPs less frequently or in smaller quantities. Fish counters may be particularly affected, as prices are generally displayed per kilogram, making it more difficult for consumers to anticipate the final price of the purchased portion and to control their food budget. However, stakeholders also emphasised that price alone does not fully explain purchasing behaviour. Continued strong demand for some high-value species suggests that convenience, taste and product image remain important determinants of consumer choices.

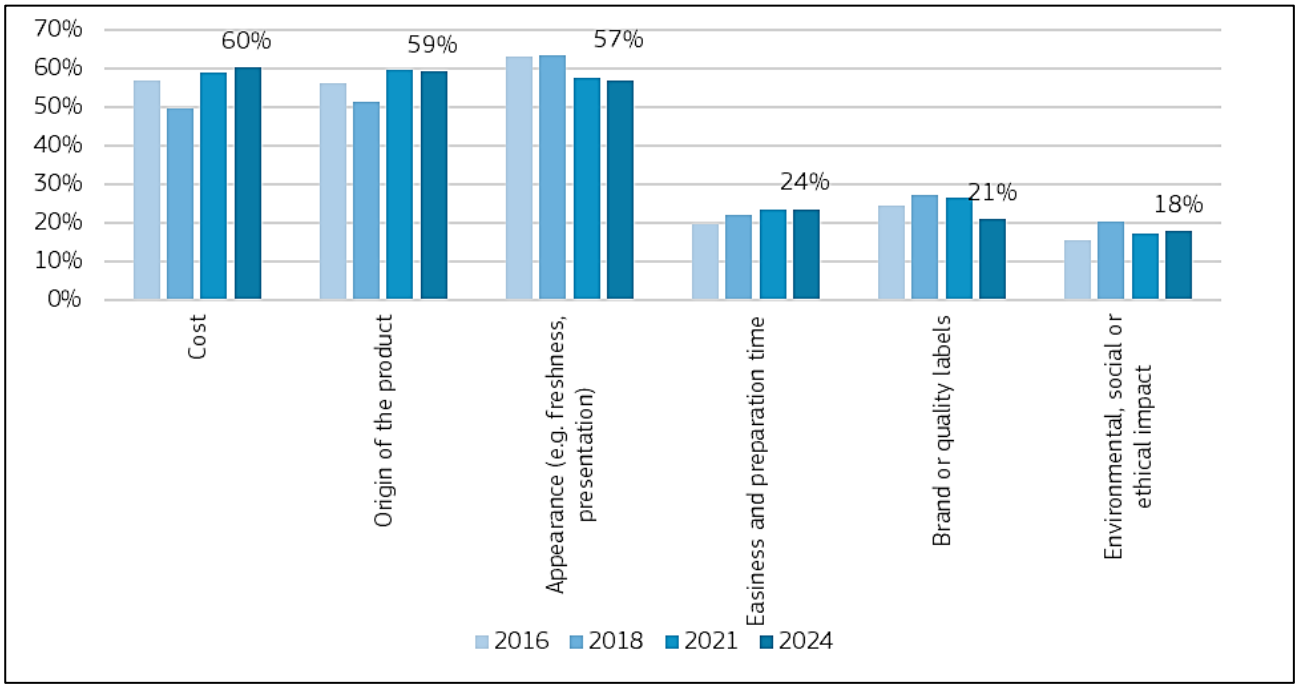
Origin follows as the second most important aspect considered by consumers when they buy FAPs. The consultation shows that origin is adequately addressed by operators in the supply chain, thanks to collective brands and labels, such as "*Pavillon France*".

Although this factor appears secondary in the Eurobarometer survey, easiness and preparation time have become increasingly important drivers of consumption. All stakeholder interviews reported a decline in consumer skills to prepare fish, leading to increased demand for ready-to-cook and ready-to-eat products. Stakeholders identify it as one of the most dynamic segments, where consumers are willing to pay premium prices.

Based on the Eurobarometer survey, **environmental, social and ethical considerations do not seem to be determinant factors in the purchasing decisions**. However, their importance is growing in recent years, particularly among young consumers. These aspects are only partially addressed through private sustainability certifications. The share of consumers considering that information of environmental, social, and ethical aspects should be mentioned on labels has

increased between 2016 and 2024: +6% for environmental information, +5% for the registration country of the ship, +7% for information on fisher or farmer, +5% for ethical information, and +4% for social information[46]. On the contrary, the share on consumers considering that the date of catch or production should be mentioned on label decreased by 6 points to 71% in 2024.

Figure 30: Evolution of main important aspects considered by consumers when buying FAPs in France



Source: Eurobarometer survey – Question: 'When you buy FAPs, which of the following aspects are the most important for you?' (n=1.012, 2024)

Consumer preferences also vary significantly across age groups. **Older consumers tend to prioritise origin and product appearance, while younger consumers are more sensitive to environmental and ethical considerations. Middle-aged consumers, particularly families with young kids, place greater emphasis on price and ease of preparation**.

Economic drivers of consumption

Evidence from the consultation indicates that consumption patterns are not driven only by factors related to consumer habits but also by economic factors.

One of the main drivers of the FAP consumption in France is the capacity of operators to offer products that meet consumer expectations. As outlined earlier, operators in the value chain have adapted their activities to the growing demand for convenience, leading to significant development of the offer of prepacked and prepared products. However, the stagnation or decline in overall consumption of FAPs suggests that these developments alone have not been sufficient to revert consumption trends of FAPs.

[46] According to the Eurobarometer survey. Q26 'Which of the following information do you think should be mentioned on the label of fresh, frozen, smoked and dried fishery products?'

Stakeholder feedback suggests that consumption patterns are strongly linked to the structure of the offer at the retail stage. In France, large retailers account for up to two-thirds of FAP sales and therefore play a key role in shaping consumption patterns. Stakeholders, particularly from the fishery sector highlight that the offer in these large retailers is highly standardised, focusing on a limited number of imported species, namely salmon, shrimps and cod, which provide greater stability in supply and prices. This concentration of the offer can have an impact on how consumers perceive FAPs and may limit their awareness of the diversity and the seasonality of fishery products. At the same time, stakeholders suggest that distribution channels influence consumption patterns to some extent. **The decline of traditional fish counters within large retailers has contributed to lower consumption of fresh and whole fish**. Stakeholders partly attribute this trend to difficulties in recruiting qualified staff. Although the number of specialised fishmongers declined between 2017 (1.945 enterprises) and 2020 (1.880), the sector has shown signs of recovery, reaching 1.912 enterprises in 2023. Stakeholders nevertheless emphasised their continued importance in maintaining product diversity and supporting consumer education, particularly in urban areas.

Stakeholders indicate that consumption trends by species in France are closely linked to product availability on the market. Species that benefit from stable and predictable supply tend to show increasing consumption. This is typically the case of species that rely heavily on imports such as salmon (+11% between 2014 and 2023), Alaska pollock (+11%), warmwater shrimps (+34%) and tuna species (+731% for skipjack tuna and +208% for yellowfin tuna). By contrast, species facing supply constraints tend to show declining or more mixed consumption trends. For example, cod consumption declined by 35% over the same period, in a context of reduced quotas. Similarly, mussels which are largely domestically produced, recorded a decline in consumption (-12%) alongside a decrease in domestic production (-26%). Monkfish follows the same pattern, with consumption declining (–15%) in line with reduced landings (–21%), partly due to fleet reductions after Brexit. These trends suggest that lower consumption is driven primarily by reduced availability rather than by weaker consumer demand.

Table 6: Overview of consumption trends and share of domestic production in total supply for the top-10 most consumed species in France

	Share in total consumption*	Evolution in consumption	Share in the supply**
Salmon	10%	**11%**	0%
Alaska pollock	8%	**11%**	0%
Skipjack tuna	7%	**731%**	31%
Cod	6%	**-35%**	4%
Warmwater shrimp	6%	**34%**	0%
Tuna, yellowfin	5%	**208%**	30%
Mussel Mytilus spp	4%	**-12%**	55%
Other marine fish	4%	**-9%**	4%
Oyster	4%	**10%**	93%
Surimi	3%	**-23%**	0%

** consumption in this table corresponds to apparent consumption estimates in LWE. ** the percentages provided in the table correspond to the share of domestic production in the total supply (the calculation is made by taking into account the volumes in LWE). Red: Low contribution of domestic production in the supply, Brown: Medium contribution, Green: significant contribution.*

Source: EUMOFA, based on elaboration of Eurostat data

Additionally, supply constraints affecting several wild-caught species including cod; mackerel and sardines, have increased interest among operators in aquaculture products, including emerging species such as sole, meagre and cod, which offer greater price stability and supply predictability for processors and retailers.

STAKEHOLDERS FEEDBACK ON DRIVERS TO STIMULATE CONSUMPTION

Stakeholders highlighted the fact that there are already several initiatives to promote the consumption of FAPs, including the communication campaigns carried out by *France Filière Pêche*, an interprofessional association in France. Stakeholders don't see a strong need for additional campaigns to stimulate consumption but express strong concerns about the future of the fishery sector in France, particularly in the context of recent crises. Stakeholders also confirmed that consumption is strongly driven by supply and that one of the main drivers to sustain consumption is preserving the specificity and diversity of the domestic production.

They emphasised the fact that the diversity of products on the French market is largely related to the domestic landings, which provide a wide range of species. The offer of prepacked products, while meeting consumer demand, tends to standardise the offer and may limit consumer ability to understand and to appreciate the diversity and the specific characteristics of the FAPs.

7.3 Italy

Main conclusions:

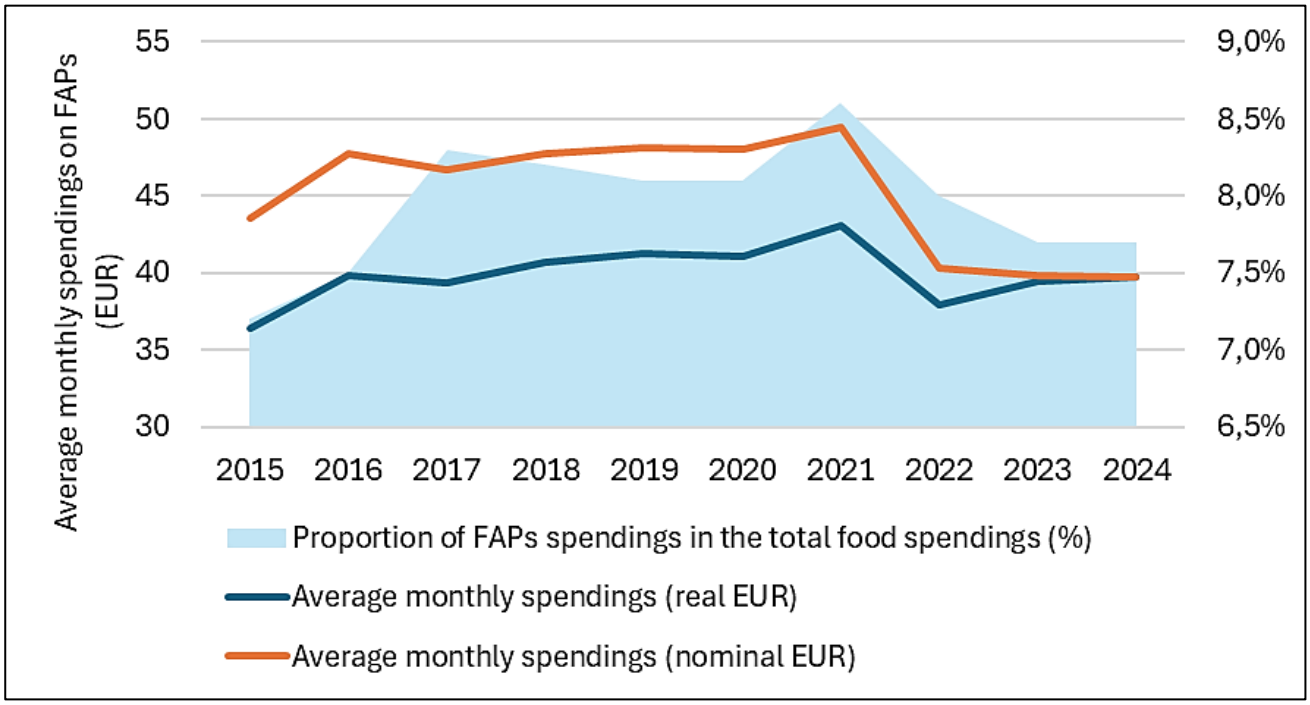
- **Overall FAP consumption in Italy remained broadly stable in volume over the past decade, demonstrating stronger resilience to recent economic shocks,** including COVID-19 and inflation, compared with several other EU countries. However, **expenditure showed higher volatility, reflecting increasing consumer sensitivity to price developments.**
- **Increasing price sensitivity is reshaping purchasing behaviour, particularly among large families and lower-income consumers.** Inflation contributed to substitution effects within the FAP category (not with other animal proteins) and to product downgrading, with consumers increasingly adapting quantities, species choices and product formats in response to price increases.
- **Consumption is progressively shifting towards more convenient and elaborated product formats**. Although fresh products continue to dominate FAP consumption in Italy, demand for frozen, processed and convenience-oriented products is increasing, supported by changing lifestyles, growing demand for convenience and evolving consumer expectations regarding preparation time.
- **Species-specific consumption trends are increasingly influenced by convenience, health perception and supply integration within retail and foodservice channels.** Consumption of species such as salmon and tuna continued to increase, supported by their strong availability, convenience and wide offer in terms of product format. At the same time, more traditional species, including small pelagics, clams and mussels, maintained stable consumption thanks to their strong integration into Italian culinary practices and food culture.
- **Appearance, price and origin remain among the main determinants of purchasing decisions, while convenience and environmental considerations are gaining importance, particularly among younger consumers and urban households.** Future consumption growth will likely depend on the capacity of the sector to align supply with consumer expectations regarding health, convenience, origin and affordability.

CONSUMPTION TRENDS OF FAPS

The **overall consumption of FAPs in Italy has remained broadly stable over the last decade, demonstrating stronger resilience to recent economic shocks and inflation compared to other countries**. This stability was largely attributed to strong national tradition of eating FAPs and a strong image of healthy products. Italy is one of the main European consumers of FAPs, with a total apparent consumption of around 1,8 million tonnes (LWE). Over the past decade, the overall consumption showed a strong increase in the pre-COVID-19 period, with a peak in 2018, before decreasing in 2020 (By -3,8%), due to the closure of the HORECA sector and stabilising since 2021, around 1,7-1.8 million tonnes. A small increase was observed from 2023. Stakeholders confirm these trends but emphasise that the volume stability hides strong volatility in value, especially in 2022, where the inflation was particularly strong.

Household consumption trends reinforce this picture of resilience in volume, and high volatility in value. Between 2018 and 2024, household FAPs consumption remained broadly stable at around 570,000 tonnes (product weight), with a temporary increase in 2020–2021 as at-home consumption substituted consumption at restaurants. Over the period between 2015-2024, household spending increased by 9% in real terms. However, a sharp decrease was observed in 2022 where real-term spending decreased by 12%, before slightly increasing the following years. These trends show a strong sensitivity to price increase, accompanied by a reduced share of the seafood expenditure in the total household expenditure since 2021 (see Figure 32). This was explained by stakeholders by a shift from expensive to cheaper options and not necessarily a shift to other food categories. **This suggests the central place of the FAPs in the Italian consumers, as the inflation has driven adjustments and shifts in consumption behaviour within the FAP category but not a strong shift from the FAPs consumption to other protein substitutes.**

Figure 31: Evolution of households' average monthly spendings on FAPs



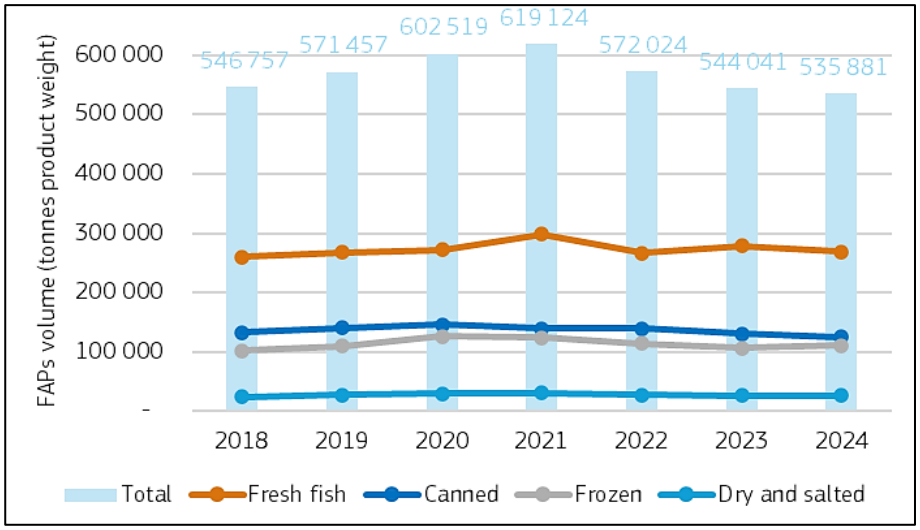
Source: ISTAT and ISMEA

Consumption statistics show that the successive crises affected mostly large families, illustrated by higher expenditure volatility and a clear downgrading strategy, reducing per capita spending and shifting towards less expensive products to maintain volumes. The COVID-19 period temporarily increased at-home spending across all profiles, but inflationary pressures likely reinforced price sensitivity, particularly among larger households.

The household consumption by preservation type (Figure 33) shows a stability in the consumption of fresh products, which dominates the consumption of FAPs, representing between 45% and 53% of total household consumption between 2018 and 2024. Over the same period, consumption of frozen and dried and salted products increased by 10% and 8%, respectively. Stakeholders explain this trend by a gradual shift towards processed and more convenient products, such as frozen

seafood-based pasta sauces and fish fingers. On contrary, the consumption of canned FAPs was affected by price-increase.

Figure 32: Household consumption of FAPs by product type (product weight)



Household consumption of FAPs peaked during the COVID-19 crisis, in relation to the shutdown of the HORECA sector, before going back to pre-Covid levels. Evolutions by FAP category differ with stability of fresh, an increase of frozen, and dry and salted FAPS, while canned products recorded a decline.

Source: ISMEA

At species level, Italian consumers consume a wide range of species. However, consumption patterns have evolved substantially, over the past years, with increased consumption of species such as **salmon and tuna, both driven by convenience reasons, as well as by the possibility to consume them in a variety of presentations and preservations** (fresh, prepared, smoked, canned, etc.) **and by sustained demand from both retail and food sectors, including the expansion of sushi restaurants**. Traditional Mediterranean species such as mussels, clams and small pelagics remain central in Italian consumption due to their integration in regional culinary practices. However, some historically important species, such as cod and hake, have experienced declines in consumption, influenced by supply constraints and quota reductions in the case of cod, leading to substitution effects (e.g. increased consumption of Alaska pollock).

There is also a strong increase in the consumption of species originating from stable aquaculture supply chains such as seabass and seabream.

Consumption behaviour towards FAPs

While overall consumption of FAPs remained relatively stable over the last decade, significant shifts were observed in distribution channels, purchasing frequency and consumer preferences. These changes are largely driven by evolving lifestyles, increasing demand for convenience, and sustained attention of Italian consumers to product origin.

Data on household consumption of FAPs by channel shows a dominance of large-scale retail, which accounted for 64% of the total household FAP volumes, in 2024, while traditional retail (open markets and fishmongers) accounted for 23% of the household volumes. Eurobarometer survey shows another perspective, highlighting the importance of fishmongers in the distribution channels. It also shows a sharp decrease of purchases from open markets, from 29% to 15% between 2016 and 2024, which aligns with the stakeholder feedback who attribute this decrease to time

constraints and changing lifestyles. Direct purchases from fishers or fish farms is low, unlike some EU countries such as Austria (below 10%), but could be significant in coastal regions where local products are perceived as fresher and of higher quality. Online channels remain underdeveloped and are generally considered unsuitable for fresh supply chains.

The consumption of FAPs in Italy, especially at-home consumption, follows strong seasonality patterns with peaks in consumption during Christmas and, to lesser extent in Easter. The Eurobarometer survey results show a decrease of at-home consumption frequency. Weekly consumption decreased between 2016 and 2024. At the same time, occasional consumption (monthly or several times per year) increased. This shift is explained by limited time for cooking, reduced culinary skills and concerns about waste, smell and shelf-life which is further illustrated by the increased preference for ready-to-cook, ready-to-eat, portions, and waste-free products. Data on consumption frequency by species, further illustrates that species which meet these preferences have seen their purchase frequency increase, such as salmon and some frozen products. In contrast, because of their increased prices, canned products are typically bought during promotional campaigns, resulting in an overall decrease in purchase frequency.

Findings from the Eurobarometer survey indicate that, except in 2021, where out-of-home consumption patterns have been altered by the closure of the HORECA sector, these have remained broadly stable over the 2016-2024 period. A notable shift from consumers who never eat FAPs in restaurant to those eating at least once a year FAPs in restaurants is observed. According to stakeholders, this is related to the developing popularity of sushi restaurants.

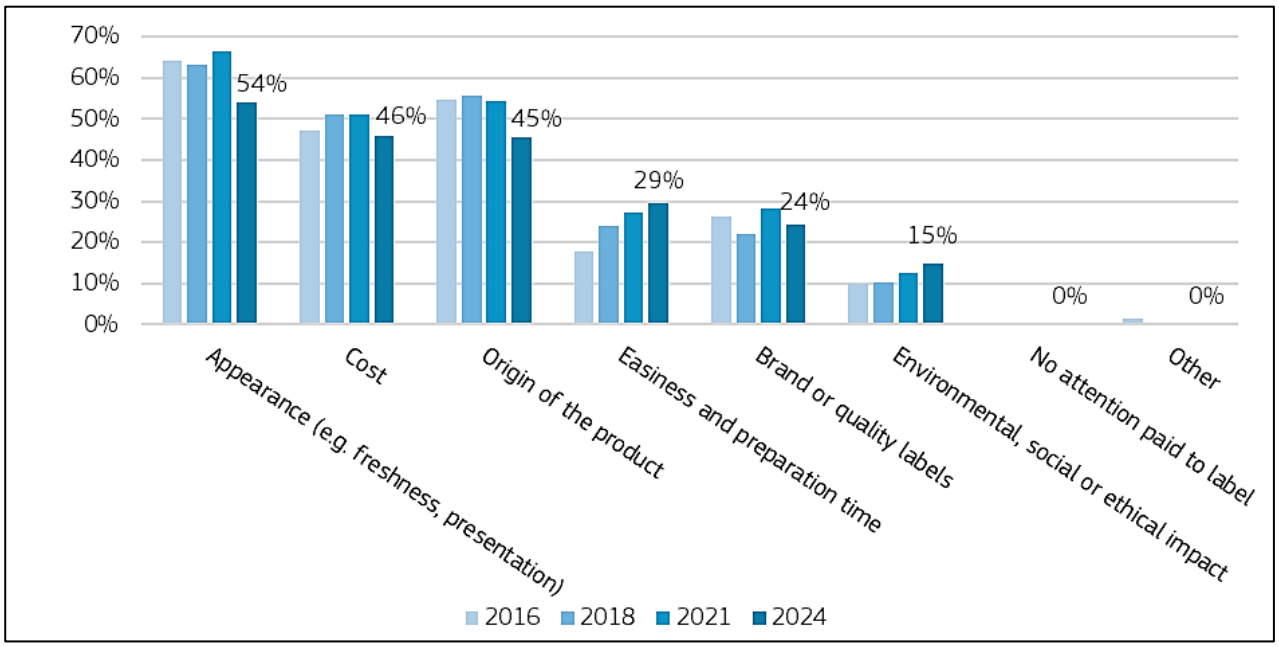
Consumer preferences regarding FAPs are also evolving, as illustrated in the Eurobarometer survey (Figure 34). **Appearance remains the most important aspect for consumers when buying FAPs, followed equally by the cost and the origin**, even though their relative importance has decreased between 2016 and 2024. Stakeholders indicate the importance of origin for Italian consumers and a **clear preference for Mediterranean origin, perceived as healthier and tastier** compared to imported products. **Convenience-related factors have gained importance substantially since 2016**. The share of consumers citing easiness and preparation time as important purchase criteria increased. This is illustrated by the increase in the consumption of more elaborated products, as indicated earlier. Environmental, social, and ethical considerations are also increasingly important, although they remain secondary compared to appearance and price.

According to Eurobarometer survey, wild-caught products are also largely preferred over aquaculture products. However, in practice, preference for wild products is not reflected in the consumption trend, as three of the most consumed species in Italy originate from aquaculture, namely trout, seabass and seabream.

Regarding consumer information, demand for information on FAP labels decreased for all aspects except for environmental and ethical aspects[47]. **The date of production remains the most important aspect (though decreasing over the years), reflecting the interest towards fresh products.**

[47] According to the Eurobarometer survey – Q26 'Which of the following information do you think should be mentioned on the labels of fresh, frozen, smoked, and dried FAPs?'

Figure 33: Evolution of main important aspects when buying FAPs in Italy



Source: Eurobarometer – Q20 'When you buy FAPs, which of the following aspects are the most important for you?' (n= 1.029, 2024)

Economic drivers for consumption

Findings from the statistics, Eurobarometer survey and feedback from stakeholders show that **consumption of FAPs in Italy, has been shaped by a combination of factors, including shifts in consumer preferences, supply dynamics and inflationary context.** While the consumption volumes have been stable over the last decade, this stability reflects adaptation strategies both from consumers and operators.

The **primary driver of FAP consumption remains the perception of fish as a healthy food choice**. Stakeholders consistently highlight nutrition and health benefits as key motivations supporting stable demand over the past decade. Italian consumers seem to attach great attention to the origin and to favour Mediterranean fish, over imported products. Some studies, as highlighted in the Italian country profile in the Country Profiles Annex, suggests that Italian consumers are willing to pay more for Italian products. To meet this expectation, retailers and producers actively promote local sourcing and short supply chain initiatives.

At the same time, convenience has become increasingly central. All stakeholders agreed that there is a strong demand for more elaborated products, particularly among young consumers**. Retailers and processors have responded to these trends by expanding ranges of value-added and convenience products**, including ready-made sauces, prepared seafood dishes and innovative formats such as poke bowls.

Predictability of the supply has become a key consideration for operators throughout the supply chain. This explains why aquaculture has emerged as a stabilising factor, as it provides greater predictability of volumes and stability in prices. Supply constraints for some species, even the most traditional ones, such as cod, makes operators and consumers shift easily to other alternatives, in terms of species and products formats.

As outlined earlier, even during the inflation period, the Italian consumption of FAPs has remained stable in volume, but this stability masks a sensitivity to price pressure, as high prices observed during the inflation period has driven adjustments and shifts in consumption behaviour. Statistics show that nominal consumer prices for FAPs increased substantially between 2015 and 2024, with variations ranging from +13% to +52% depending on category. The most pronounced increases occurred between 2021 and 2023, driven by inflation, rising energy costs and feed prices. Over the decade, fish prices increased faster than most meat categories. However, rather than substituting fish with other animal proteins, Italian households maintained their consumption of FAPs, but with some adjustments, by:

- Moving between product formats (fresh, frozen, canned),
- Downgrading strategy by opting for low-priced products (e.g. sardines, anchovies, mussels) to maintain volumes, especially for larger families.

STAKEHOLDERS FEEDBACK ON DRIVERS TO STIMULATE CONSUMPTION

The stakeholder consultation allowed to identify already implemented strategies to stimulate FAPs consumption. Promotional actions in large retail effectively boost sales, especially among price-sensitive consumers. Some specialised press magazines play a major role in contributing to share a more positive perception of the sector, by promoting sustainable practices and innovative production and processing practices.

stakeholders highlighted the need to promote farmed FAPs, highlighting their benefits, their safety and virtuous farming methods. Specific work is being carried out to arise consumers awareness about aquaculture products, by reinforcing transparency, quality standards and regulatory credibility.

7.4 Poland

Main conclusions:

- **Apparent stability in FAP consumption masks structural change**: the evidence points out a structural reshaping of fish consumption in Poland rather than an expansion in volume. Per-capita consumption stays low and volatile, while purchasing behaviour becomes more selective and polarised. Consumers adapt through species substitution (e.g., towards salmon, Alaska pollock, selected substitutes), through format substitution (towards fillets, MAP, sushi and convenience-oriented products) and reducing consumption frequency.
- **Inflation in 2022–2023 acted as an accelerator of these trends**, strengthening the role of price, discounters, and convenience, while seasonality of demand (especially for carp) remains a defining feature of the market.
- **Price dominates the purchasing decision but perception matters:** Although consumers express support for transparency and sustainability, actual purchasing decisions are primarily driven by price, habits and simple cues. **Over the longer term, product image, popularity and perceived modernity increasingly influence demand alongside relative prices**.
- Successful operators adapt their offer to consumer expectations through active price and promotion management, stronger emphasis on convenience formats, and simplified communication focused on clear health benefits and origin.

CONSUMPTION TRENDS OF FAPS

Fish consumption in Poland is structurally characterised by a strong dependence on imports, limited domestic production (around 20% of total consumption), low product diversity in fresh retail and a high share of processed products.

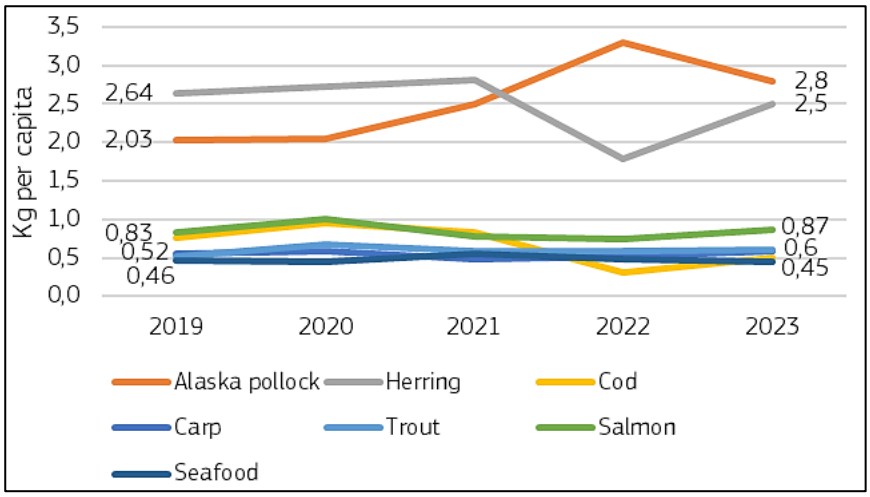
Per capita apparent consumption of FAPs increased by 5% in Poland between 2014 and 2023, reaching 13,67 kg/capita, according to EUMOFA estimates. Total apparent consumption according to EUMOFA estimates showed comparable trend, with 7% increase over the same period. National statistics did not allow to confirm this trend over the period because of a methodology change in 2019. Analysis of national data are given for the 2019-2023 period only. Over this period, FAP consumption in Poland fluctuated, peaking in 2021 at 13,68 kg per capita, with an overall slight increase of 3% over the 2019-2023 period.

This slight increase in per capita apparent consumption hides significant structural changes in terms of species consumed. There are different examples in the FAP market which emphasise the importance of the substitution phenomenon in the FAP market:

- Alaska pollock remains the dominant species in volume over the period and plays a stabilising role in the market, despite fluctuations over time. The recent increase in consumption reflects a substitution effect for more expensive whitefish particularly cod, whose consumption has declined by 34% between 2019 and 2023 due to price increase and supply constraints.
- Challenges regarding cod have resulted in increased consumption of hake and grenadier, since 2019, though these species remained secondary in volume.

- Small pelagics such as herring, sprat and mackerel have experienced some fluctuations with an overall long-term decline. This highlights the high sensitivity to price changes and product formats, especially in marinated and chilled products.
- Salmon has strengthened its position as a key growth driver in fresh, smoked and sushi categories (with an apparent consumption around 0,74–0,87 kg/capita).
- Carp, trout and tuna remained stable and resilient segments. Carp is resilient but non-growing product, despite being strongly shaped by seasonality and changes in retail practices, with the withdrawal of sales of live carps. Trout and tuna have similar trends indicating a strong market position.

Figure 34: Per capita consumption by species in Poland (kg LWE)



The Polish market has shifted away from cod (decline by 32% of per capita consumption between 2019 and 2023) and pangasius towards Alaska pollock (+38%), salmon (+5%) and alternative whitefish species (hake, grenadier), while maintaining stable consumption of carp, trout and tuna.

Source: Warsaw: Institute of Agricultural and Food Economics[48]

There are no statistics on the consumption data by type of preservation in Poland. However, feedback from stakeholders emphasised a clear decrease in the consumption of fresh and chilled which is seen as the most price-sensitive segment and thus exposed to decline in consumption during inflation. Canned products are described by stakeholders as stable and resilient and considered as safe options by consumers, especially during inflation periods.

Consumption pattern regarding frozen products is less clear, but this category seems to benefit from stable price and long shelf life, especially for certain species such as frozen shrimps.

Consumption behaviour towards FAPs

Quantities and frequency of FAP consumption have significantly changed in Poland during the last decade. While the consumption remained relatively stable in volume, with a slight increase overall and clear year-to-year volatility, consumption habits and frequency have evolved.

Fish consumption in Poland remains strongly shaped by seasonality and cultural traditions, particularly the peak demand for carp in December. This pronounced seasonality increases demand volatility and constrains sustained volume growth. Feedback from stakeholders interviewed

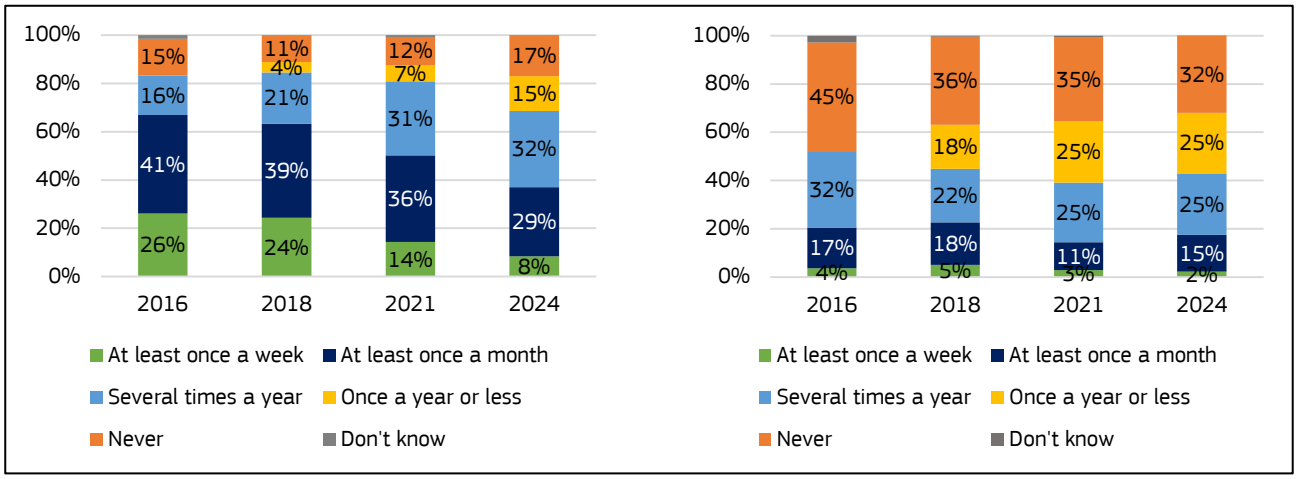
[48] (Hryszko, K. (Ed.). (2024). *Rynek ryb* (No. 35/2024). Warsaw: Institute of Agricultural and Food Economics – National Research Institute (IERiGŻ-PIB). ISSN 1732-5889)

confirms that this pattern will persist despite efforts to diversify consumption through new product formats.

Findings from the Eurobarometer survey carried out between 2016 and 2024 show that large retailers and specialised retailers remain the favoured purchase locations of FAPs with a penetration rate reaching 64,5% and 44,3% in 2024, respectively. The survey also shows the development of online purchases in the recent years, with a penetration rate going from 1,5% in 2016 to 3,9% in 2024. This channel remains a minor one in volume but has a growing influence. According to stakeholders, digital media function as a "decision gate", influencing what consumers consider buying later offline, through recipes, short videos, influencers and promotional content.

Regarding at home consumption, **there is a strong shift from frequent to occasional consumption of FAPs. At-home weekly consumption of FAPs declined significantly between 2016 and 2024**, from 26,1% to 8,5% of the respondents, monthly consumption followed the same trend (from 40,8% to 28,6%), while occasional consumption (several times a year and once a year or less) increased. This shift is supported by retailer observations, indicating the weakening of the traditional weekly habit of fish consumption. Out-of-home consumption of FAPs in Poland is low, and the recent developments show the same trend observed for at-home-consumption with a shift from frequent to occasional consumption.

Figure 35: Evolution of frequency of "at home" (left) and "out of home" (right) consumption in Poland



Source: Eurobarometer survey – Question: 'How frequently do you eat FAPs at home/ at restaurants and other food outlets? '(n= 1.018, 2024)

Findings from stakeholder interviews regarding consumer expectations are supported by Eurobarometer data. Stakeholders highlighted that the polish market for FAPs is segmented around based on price and quality, by distinguishing the following types of consumers:

- strongly price-oriented consumers;
- consumers balancing price and quality;
- quality- and origin-oriented consumers.

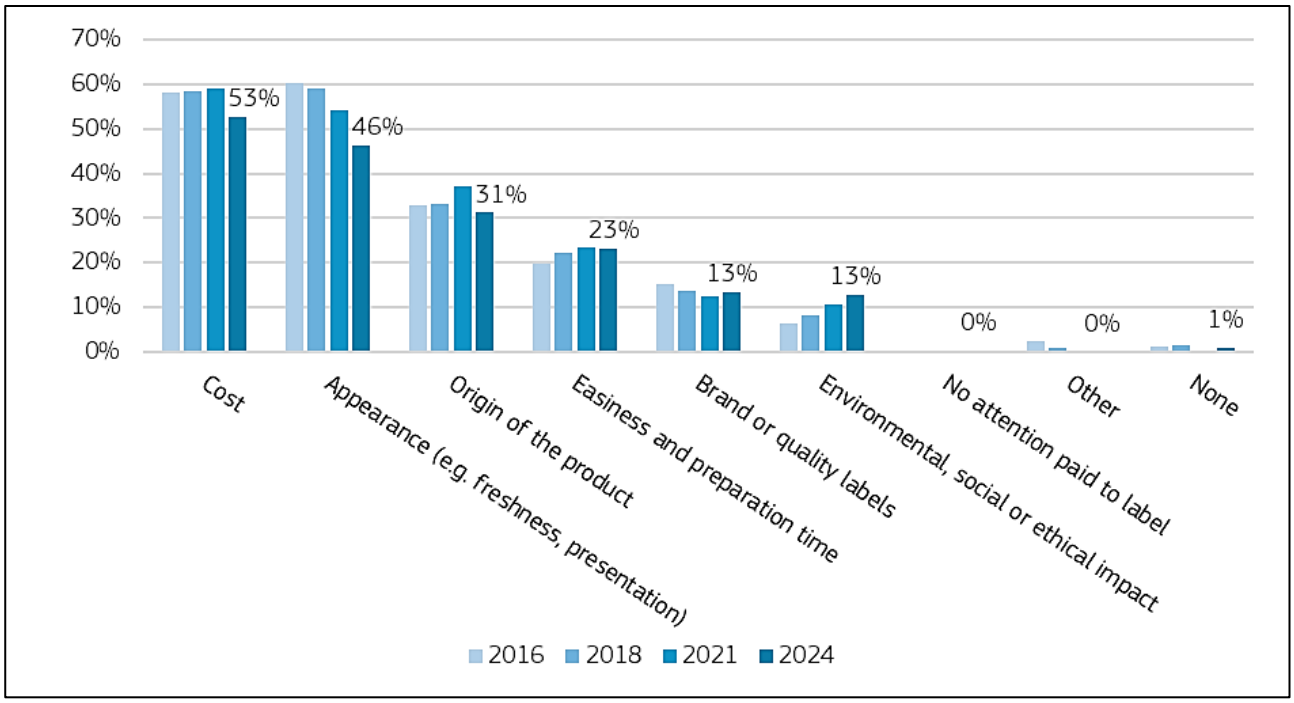
Results from the Eurobarometer survey confirm these trends with **cost being the main driver of FAPs purchase for more than half of the consumers**. Quality (freshness, presentation) and

origin are also strong drivers, considered important aspects for respectively 46,3% and 31,4% of the consumers.

Easiness and preparation time is an increasingly important aspect when buying FAPs (+4 points between 2016 and 2024). This was strongly supported by feedback from stakeholders who emphasised that changes in lifestyle, especially reduced time dedicated to cooking, are widely seen as one of the strongest structural drivers of consumption patterns. **Less time for meal preparation directly translates into demand for simplicity, portions and ready-to-use formats.**

The role of origin in purchasing decisions is more nuanced. While stakeholders frequently identified origin as one of the main criteria considered by consumers, particularly for carp, its importance is less evident according in the Eurobarometer data. Though the origin of the product is the third most important aspects for Polish consumers when purchasing FAPs (for 31,4% of consumers in 2024), this criterion is not increasing and has even declined by 1 point since 2016.

Figure 36: Evolution of main important aspects when buying FAPs in Poland



Source: Eurobarometer survey – Question: 'When you buy FAPs, which of the following aspects are the main important for you?' (n= 1.018, 2024)

Polish FAP consumers increasingly expect fish products to deliver clear benefits, especially health-related (protein, omega-3, vitamins), but communicated in a simple and practical way. Driven by the convenience trend, consumers want products that fit everyday routines without sacrificing perceived quality.

Feedback from stakeholders and Eurobarometer survey on consumer expectations in terms of information on the labels of FAPs showed that **while consumers express support for transparency in principle, actual purchasing decisions are primarily driven by price,**

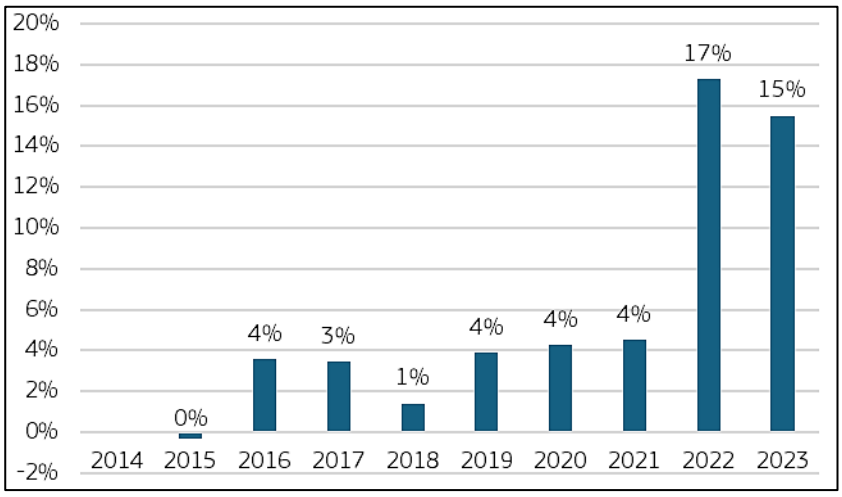
habits and simple cues. Stakeholders also report growing scepticism towards complex sustainability claims, with preference for clear and credible messaging.

Economic drivers for consumption

First, the Polish fish market has undergone a **structural retail transformation that significantly shapes consumption patterns**. The expansion of discounters and convenience-oriented formats has favoured packaged, processed and easy-to-prepare fish products, including modified atmosphere packaging fresh items and sushi.

The second driver for FAP consumption, which plays a significant role in the recent years is price. Inflation in food commodities has had a very strong influence on fish consumption. **The sharp increase in food prices in 2022–2023 coincided directly with a downturn in fish consumption volumes.** Fish, particularly fresh and chilled products, was among the first categories where consumers reduced purchase frequency or quantities. Inflation reduced tolerance for price experimentation and reinforced cautious shopping behaviour. For instance, sharp price increases, such as the 60% rise in carp prices in 2022 and the volatility of salmon prices, led to declines in sales, confirming the high price sensitivity of fish consumption and its vulnerability to inflationary pressures. Even after the easing of inflation in 2024–2025, price sensitivity remains high, as fish is still perceived as expensive relative to other everyday foods.

Figure 37: Fish retail price change (%), 2014-2023



Price of FAPs have sharply increased over the last decade, with an overall increase by 55%, and prices of some products doubling over the period (+60% for carp). The most pronounced rises were experienced in 2022 and 2023, affecting particularly the fresh products. These price increases negatively affected the volumes of FAPs consumed.

Source: Warsaw Institute of Agricultural and Food Economics[49]

Even though prices of the other food products, such as milk, cheese, eggs and meats, increased more than fish, fish remains relatively more expensive in absolute terms. Consequently, even similar percentage increases translated into substantially higher prices for fish products. This reinforced the perception of fish as a premium and increasingly restrictive choice in everyday diets. As a result, higher fish prices relative to meat and poultry encourage partial reallocation of food expenditure to other animal proteins.

[49] Annual Fish Market reports edited by K. Hryszko and articles by K. Hryszko entitled Fish Market, published in the Fish Industry Magazine (Magazyn Przemysłu Rybnego). Warsaw: Institute of Agricultural and Food Economics – National Research Institute (IERiGŻ-PIB)

There is a broad agreement that **relative prices and substitution effects play a key role in shaping consumption patterns**. When prices of certain species rise or availability declines, consumers tend to substitute within the fish category rather than abandon it entirely. Examples frequently mentioned include the growing role of Alaska pollock as a substitute for more expensive whitefish species such as cod, as well as shifts towards salmon, shrimp or alternative product forms.

Additionally, while consumers frequently complain about high fish prices, the share of premium products such as salmon, shrimps and sushi continues to grow. Conversely, cheaper species, including small pelagic fish such as herring and sprat, have lost relevance in several market segments. **This suggests that, in the longer term, price alone does not determine success. Image, popularity and perceived attractiveness increasingly shape demand**, favouring products that are seen as modern or aspirational over those that are merely affordable.

Inflation reinforced social polarisation in fish consumption patterns. Rising fish prices have had differentiated social effect, disproportionately impacting low-income households, such as pensioners, single-person households and households with limited budget flexibility. These groups have reduced purchase frequency, substituted cheaper proteins, or confined fish consumption to seasonal or promotional occasions.

By contrast, higher-income consumers, especially those having strong heath awareness have remained relatively price-insensitive, sometimes maintaining or increasing consumption in premium segments.

STAKEHOLDERS FEEDBACK ON DRIVERS TO STIMULATE CONSUMPTION

One of the main drivers and strategies implemented by operators to stimulate fish consumption is to align the offer with consumer behaviour. This offer should cover distinct, but complementary dimensions, such as active price and promotion management, stronger focus on convenience formats, simplified communication focused on basic health benefits and origin. Overall future consumption will depend less on habit and more on delivering clear value, convenience and relevance within economic constraints.

Category-level campaigns, such as promoting carp through simple, positive and locally anchored messaging, are seen as successful best practices.

7.5 Netherlands

Main conclusions:

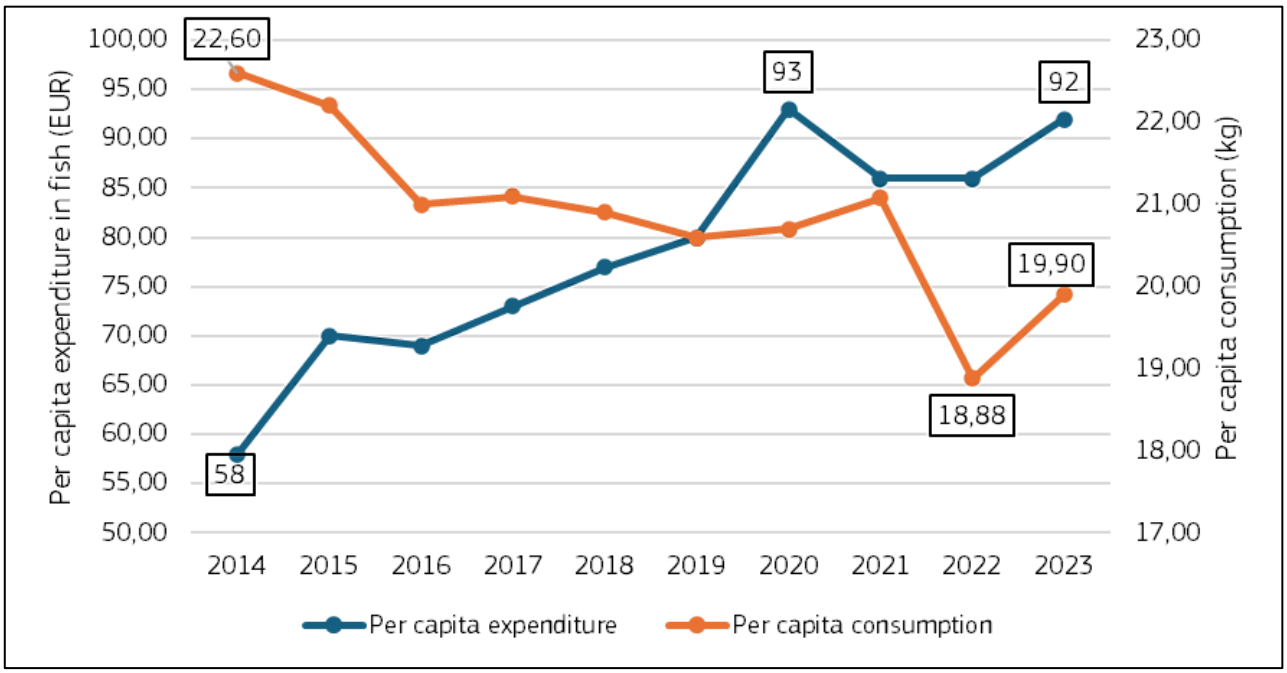
- **Strong and progressive decline in consumption in volume, characterised by a decline of per capita consumption, mainly of fresh products and a strong shift towards out-of-home and occasional consumption.** Per capita consumption of FAPs in the Netherlands has declined significantly and progressively over the last decade reaching its lowest level in 2022 before a slight recovery in 2023. Fresh products and the traditionally consumed species are the most impacted, while other products such as prepared/preserved products are gaining popularity. Species such as salmon, tuna, and Alaska pollock remained stable or increased, driven by perceived health benefits, culinary trends, and convenient range of products, typically ready-to-cook and ready-to-eat products.
- **Shift from frequent at-home towards more occasional and out-of-home consumption, reduced skills and cooking frequency, growing demand for convenience, and evolving expectations regarding preparation and product formats**. Rising prices, in particular since 2021 have further contributed to declining consumption. **Younger consumers (under 35) show the sharpest decline in consumption and are more price-sensitive.**
- **Structural dietary shift towards plant-based alternatives**, supported by environmental awareness and targeted campaigns, contributes significantly to declining fish consumption.
- **Increasing importance of sustainability among Dutch consumers:** Retailers have aligned sourcing strategies accordingly, making sustainability a market standard within the Dutch FAP market.

Consumption trends of FAPs

Consumption of FAPs in the Netherlands has progressively declined over the 2014-2023 decade (12% fall in total apparent consumption). Per capita consumption reached its lowest level in 2022 (18,88 kg per capita), before recording a small recovery in 2023 (19,90 kg per capita). In contrast, FAP expenditure per capita increased by 21% over the same period, largely driven by inflation. According to the Globescan seafood consumption study[50], only 7% of the Dutch population consumes the World Health Organisation's recommended amount of fish and seafood (two portions per week).

[50] MSC Consumer Insights 2024 – Netherlands Report: https://globescan.com/

Figure 38: Per capita expenditure and consumption of FAPs (expenditure in EUR, volumes in kg)



Source: EUMOFA based on Eurostat

At species level, salmon and mussels are the most consumed species in the Netherlands. Over the last decade, warmwater shrimps and seabream are the only species recording increased apparent consumption. Evidence from data analysis and stakeholder consultations revealed that consumption is shifting away **from traditional species such as herring, seen as less "fashionable" towards species such as salmon and tuna**, for which consumption is driven by health and culinary trends, as well as increased demand for convenient products, as illustrated below.

Aquaculture species like shrimps, mussels, seabass and seabream are getting more popular and are increasingly available in the retail. Interviews suggest that this shift does not necessarily reflect consumer preferences towards these species, but rather an increased interest from the retail towards the economic assets that they offer, such as predictability of the supply and the sustainability certification to which the Dutch consumer attach a great importance.

Consumption behaviour towards FAPs

Consumption behaviour in the Netherlands is undergoing a strong transformation, characterised by a shift from frequent, home-based consumption towards more occasional, out-of-home consumption, alongside changing consumer expectations for more convenient products.

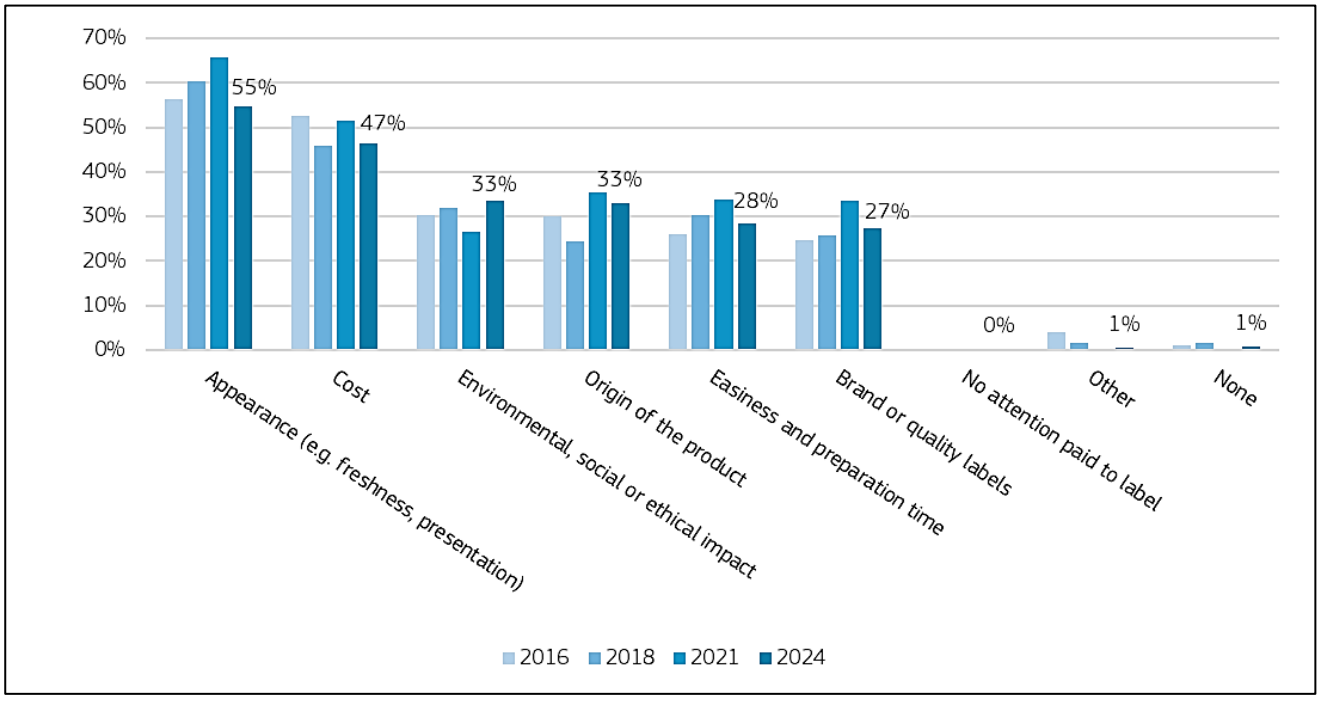
Analysis of consumption behaviour in the Netherlands, supported by the Eurobarometer survey, revealed that distribution channels remained fairly stable over the last decade despite the decline in fish purchases in volume. Large retailers are the favoured purchase channel of FAPs with supermarkets absorbing 30% of the volume, fish stalls 19%, fishmongers 14%, and HORECA 14%[51].

[51] According to Eurobarometer survey. Q5 'Where do you buy you fishery or aquaculture products?'

Stakeholders highlighted a **strong shifting from at-home to out-of-home and from frequent to more occasional consumption.** Results from the Eurobarometer survey confirm these findings with decreasing weekly at-home consumption and increasing frequency of out-of-home consumption (both weekly and a monthly consumption have increased between 2016 and 2024). Other social changes such as reduced time for cooking and culinary skills drive consumers to **look for easy products like ready-to-cook or read-to-eat products and prepared meals**. This convenience trend is supported by Eurobarometer data, with an increasing number of respondents not consuming FAPs because of the difficulty to prepare or eat these products[52].

Consumer preferences are also undergoing notable evolutions. While **appearance (freshness and presentation) and cost remain the most important criteria in the purchasing decisions, their relative importance has declined in favour of environmental or ethical impacts**. This was supported by interviews with stakeholders who report the great importance Dutch consumers attach to environmental and ethical aspects. It is worth noting that sustainability concerns are already addressed to some extent by Dutch retailers thanks to their supply strategies for FAPs, putting a strong focus on sustainable products.

Figure 39: Evolution of main important aspects when buying FAPs in the Netherlands



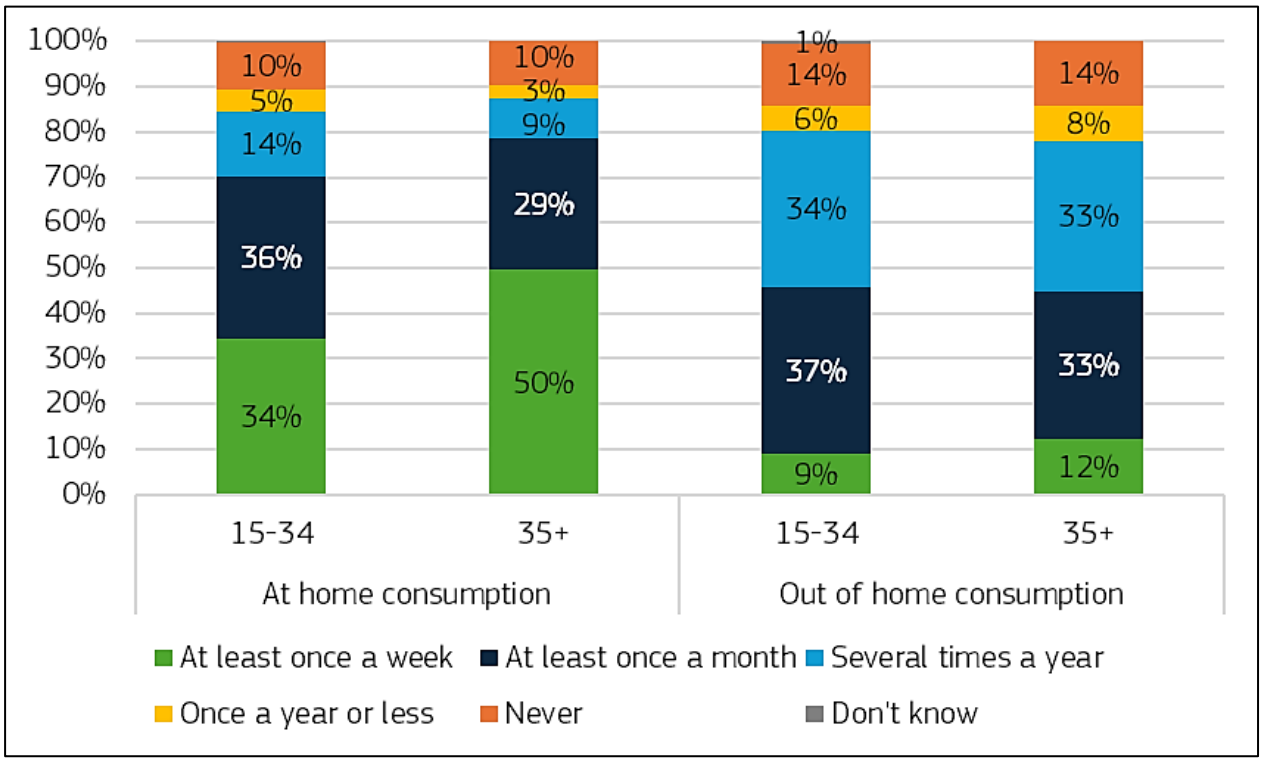
Source: Eurobarometer -Q20 'When you buy FAPs, which of the following aspects are the most important for you?' (n= 1.086, 2024)

Results from the Eurobarometer survey suggest that younger generations (under 35) have been more impacted by the decline in FAP consumption. They consume FAPs less frequently than older generations both 'at-home' and 'out-of-home'. At the same time, the decrease in consumption frequency has been more pronounced among these consumers (15-34 years old).

[52] According to the Eurobarometer survey – Q4 'Which of the following are the main reasons why you never eat any FAPs?'

In terms of purchasing criteria, younger consumers attach greater emphasis on price compared to older generations, which may partly explain the decrease in consumption, especially in the inflationary context. Time constraints and limited skills to prepare and cook the products further act as key barriers to consumption among younger generation.

Figure 40: 'At home' and 'out of home' consumption in the Netherlands by age in 2024

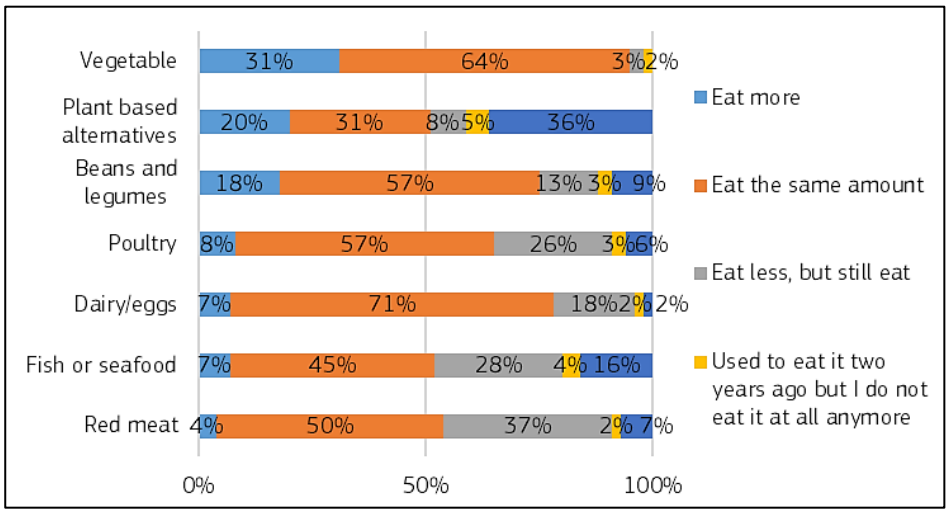


Source: Eurobarometer - Q3 'How frequently do you consume FAPs at home/ at restaurants and other food outlets (canteens, bars, market stands, etc.)?' (n= 1.086, 2024)

Economic drivers for consumption

Several factors contribute to the decline of FAP consumption in the Netherlands. The first reason is a structural and profound change in consumers dietary habits, illustrated by a strong shift from animal to plant-based proteins. **There is also a growing awareness about environmental issues among Dutch citizen, entailing this shift from animal to plant-based proteins.** Plant-based alternatives are getting more popular, and their consumption is encouraged by marketing and communications campaigns. At the same time, there are strong NGO campaigns to raise consumers awareness about environmental and health impacts of animal proteins, including fish and seafood, which further reinforces this shift. As an illustration, the MSC Globescan study indicates 28% of respondents eating less seafood in 2024 than in 2022, and 20% eating more plant-based alternatives than before

Figure 41: Dietary changes of Dutch consumers between 2022 and 2024



There is a notable shift from animal proteins towards plant-based alternatives. 28% of respondents eat less FAPs in 2024 than in 2022, 37% eat less red meat, 20% eat more plant-based alternatives, and 31% eat more vegetables.

Source: MSC Globescan study – Consumer insights 2024, Netherlands Report – Question: 'Do you eat more or less of the following foods than you did two years ago?' (n = 1.490)

In the Netherlands, one of the key drivers of FAP consumption is the alignment of the offer with the strong consumer expectations regarding sustainability. This appears to be a standard to which retailers responded by adapting their sourcing strategies for FAPs. For example, supermarkets restrict their offer to species classified as 'green' or 'orange' in the list under the VISwijzer sustainability tool[53]. Species classified as red are no longer offered.

While Dutch consumers seem to put more emphasis on sustainability, environmental considerations and quality aspects than the EU average consumers, the price increase, illustrated by statics below, especially during the inflation period has contributed to the overall consumption decrease and to the change in consumers' buying strategies towards affordable options, such as discount products and promotions. Analysis of EUMOFA data suggests that **between 2021 and 2025, FAP price at the retail stage for a selection of products rose by 29% in the Netherlands, in relation to global market inflation of the recent years**. All species and categories of FAPs were impacted, with particularly strong price increases for frozen salmon in fillets (+109%), prepared/preserved tuna in oil (+50%), smoked mackerel fillets (+45%), or frozen squid rings (+35%). Stakeholders reported the use of 'shrinkflation' by retailers, by which the volume per sale unit is reduced, to mitigate the impact of price. This has led consumers to increasingly turn towards discount products and promotions. However, as illustrated in other EU Member States, interviewees confirm that the price alone is not the only driver for FAP consumption, and that the steady increase in consumption of some expensive species, such as salmon, suggests that other factors such as convenience plays a major role.

Analysis of price evolutions of FAPs and other food products that FAP prices increased more than food products in average, but less than meat, experiencing a similar increase than milk, cheese and eggs over the 2015-2024 period.

[53] Online tool attributing scores to species and stock according to a sustainability evaluation - https://www.goodfish.nl/en/search/

STAKEHOLDERS FEEDBACK ON DRIVERS TO STIMULATE CONSUMPTION

Interviewed stakeholders highlighted **the need for targeted communication campaigns to promote the benefits of FAPs**. In the context of increasing environmental considerations, they mentioned that FAPs are sometimes negatively affected by broader communication campaigns highlighting health and environmental impacts of animal production. As a result, stakeholders emphasised the importance of clearly communicating the specific health and environmental benefits of FAPs compared to other animal proteins.

To address the generational gap in FAP consumption, stakeholders highlighted the need to focus this promotion on younger generations. One best practice mentioned was the **EU funded project SeaNext project 2025-2027[54], which specifically targets young consumers and aims to strengthen the role of FAPs within the protein diet of younger generations.**

Another best practice mentioned was the European initiative Mr.Goodfish, with its tool **VISwijzer[55] which applies a standardised traffic light system (green, orange, and red) to rate species according to their sustainability**. Beyond the colour rating, VISwizer provides certification details and suggests alternatives to species classified in the orange and red lists.

[54] https://www.seanext.nl/
[55] https://www.goodfish.nl/fr/

7.6 Austria

Main conclusions:

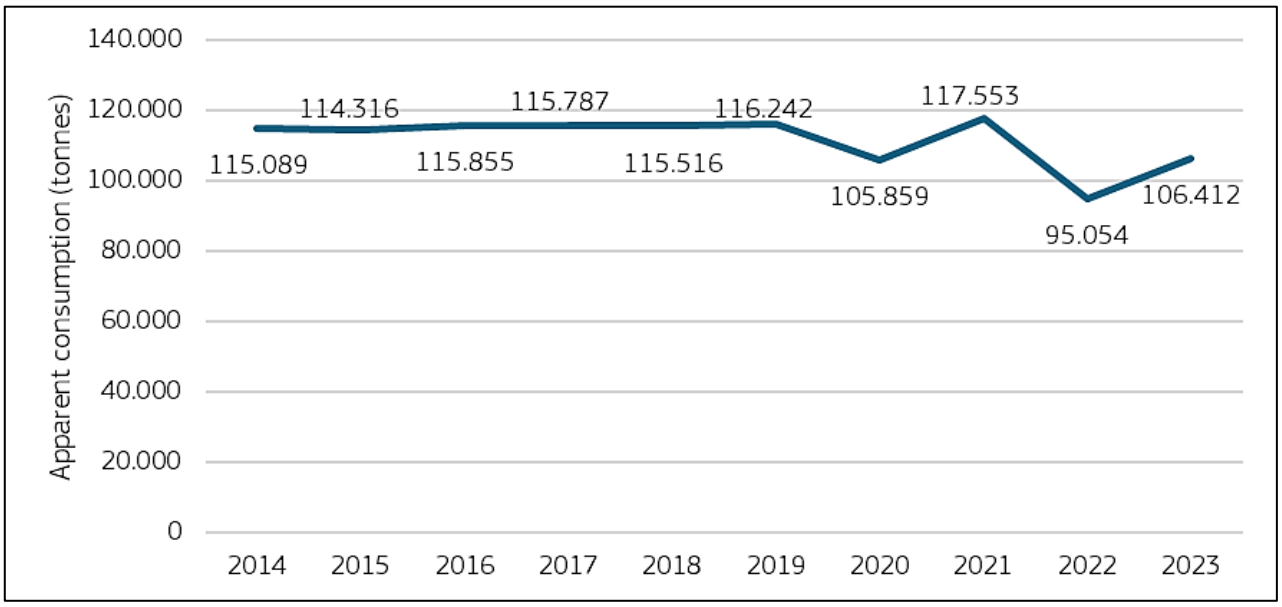
Consumption of FAPs declined over the past decade,

- **Sustained decline in apparent consumption of FAPs** (-9%), over the 2014-2023 decade, characterised by a marked drop during the COVID-19 period and only a partial recovery thereafter. Household consumption of FAPs in Austria has remained stable between 2015 and 2019, before declining during the COVID-period and not fully recovering thereafter. Consumption in large retail remained relatively stable, while consumption in other distribution channels decreased, notably in HORECA.
- **Shifts in consumption of fish from aquaculture has progressed over wild-caught fish**, driven notably by a strong increase in imported salmon. Consumption of FAPs benefitting from certifications has increased in a market that remains strongly segmented between premium buyers and consumers of entry-level products.
- **Growing importance of convenience as a key driver**, with increasing demand for pre-packed, ready-to-eat and easy-to-prepare products such as salmon fillets and sushi. This trend has supported the development of self-service fish counters and reinforced the role of large retail in FAP distribution.
- **Rising prices increasingly influence purchasing behaviour and contribute to market segmentation**. The stronger increase in FAP prices compared with meat and other food products has reinforced price sensitivity, leading consumers to purchase smaller quantities and rely more frequently on discounts and promotions.

CONSUMPTION TRENDS OF FAPS

Over the past decade, the apparent consumption of FAPs has decreased by 9%, from 115.849 tonnes LWE in 2019 to 106.156 tonnes LWE in 2022. Consumption of FAPs in Austria was relatively **stable before 2019** but **declined during the COVID-19 period** and has **only partially recovered** since then. Stakeholders reported an increase in retail sales, while HORECA consumption declined during the COVID-19 period. The recent rise in prices and inflation has led to a return to pre-COVID habits; however, only a partial recovery for the HORECA sector is seen, leading to an overall decline in consumption of FAPs.

Figure 42: Apparent consumption of FAPs in Austria (tonnes LWE)



Source: EUMOFA

Between 2014 and 2025, EUMOFA estimates show an **increase in apparent consumption for fish from aquaculture over consumption of wild-caught**, with the main findings at species level as follows:

- There was a strong rise in apparent consumption for salmon (+34%). According to stakeholders, salmon accounts for 60% to 70% of fish volumes available in large retail in Austria. This increase is driven by the shift in consumer consumption towards more convenient products.
- Rise in apparent consumption of trout (+25%) and an increase for other freshwater fish (+3%),
- Apparent consumption decreased slightly for other marine fish (-2%), as well as for tuna, herring and Alaska pollock.
- Apparent consumption of shrimps also progressed strongly over the period (+19%).
- Demand for freshwater FAPs such as trout and char has increased slightly during this period, due to an increase in domestic production.

CONSUMPTION BEHAVIOUR TOWARDS FAPS

Consumption habits in Austria are evolving, which can be seen with the decline in the frequency of consumption, both at-home and in HORECA[56]**.** The shares of "frequent consumers" declined by 20 pts for "at home consumption" and by 9 pts for consumption in HORECA, reaching respectively 32% and 21% in 2024. According to the Eurobarometer survey, the marketing of FAPs in Austria is dominated by large retail chains, with 80% of the purchases happening through this channel. However, it was highlighted that the **average quantity per buy has decreased in large retail**. Additionally, Eurobarometer results indicate a decrease in the

[56] According to the Eurobarometer survey – Q3 'How frequently do you eat FAPs at home/ at restaurants and other food outlets (canteens, bars, market stands, etc.)?'

consumers purchasing from specialised retailers, but an increase in the share of those buying directly from fish farms or fishers, driven by increased offer at production sites and a certain level of familiarity of consumers with aquaculture production.

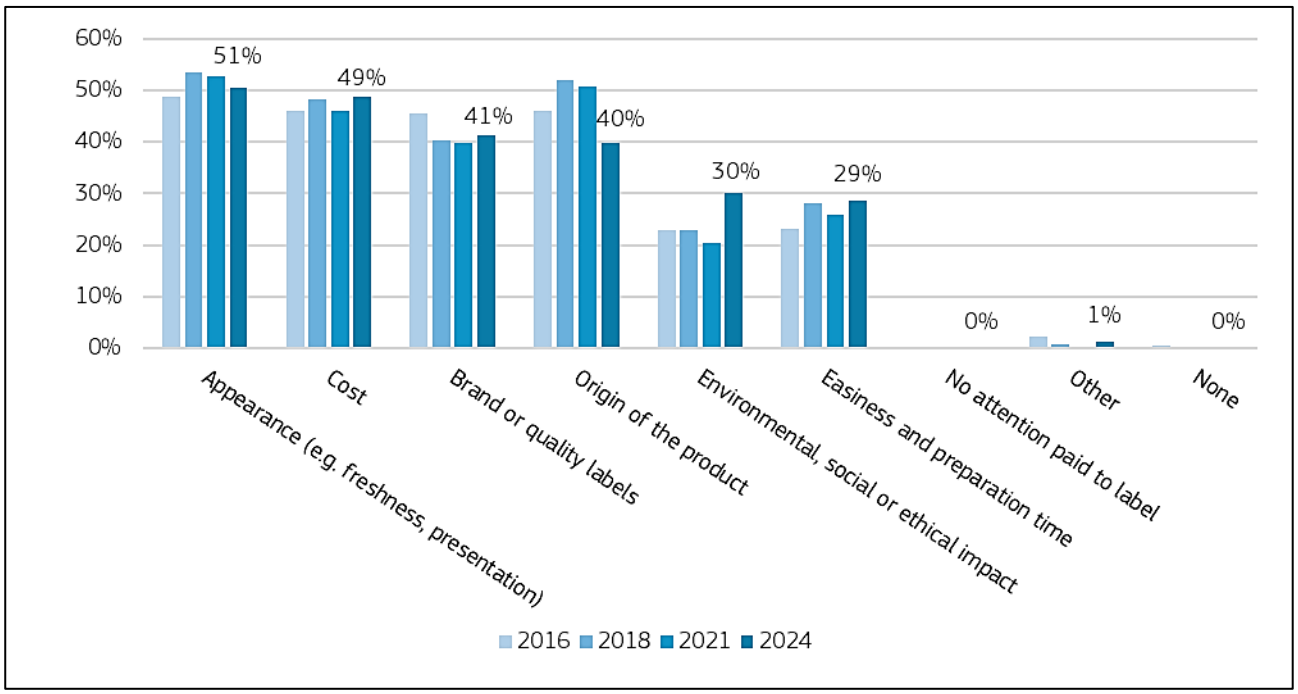
Appearance and price remain the primary drivers of consumer purchasing decisions for FAPs, with price gaining importance in 2024. According to the Eurobarometer survey, brand or quality labels and origin both play a significant role in consumer choices, even though their importance shows some fluctuation over time, with an overall decline over 2016-2024 period. This trend has allowed a stability of consumption over the past decade, but its influence on purchasing decisions has weakened since the inflationary context, as price considerations have become more dominant. Stakeholders still report a lasting **growth in the certified and organic segments** of FAPs.

Eurobarometer survey results also showed that consumers attach greater importance to environmental, social or ethical considerations, alongside the criteria about easiness and preparation time, which both recorded a significant increase in 2024, compared to 2016.

This is in line with stakeholders view who reported a shift in consumption habits towards more convenient FAPs. This trend is reflected in the decline in consumption of whole fish and the increase in fish fillets, of species with little fat and bones, and of processed FAPs, notably baked fish, sushi or fish in salads, etc. These trends have also accelerated the concentration of consumption on a small number of species that meet consumers expectations, such as salmon, as outlined above.

An increased consumer demand for healthy and sustainable products has also been observed.

Figure 43: Evolution of main important aspects when buying FAPs in Austria



Source: Eurobarometer survey – Question: 'When you buy FAPs, which of the following aspects are the most important for you?' (n= 1.006, 2024)

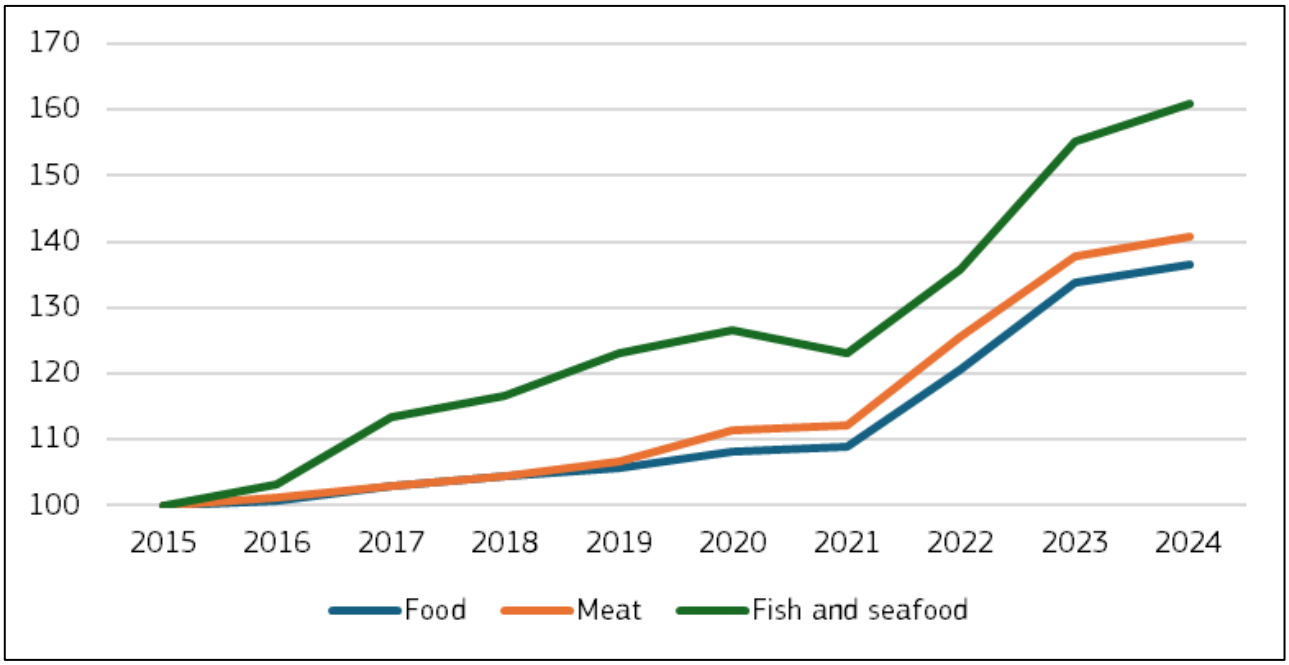
Stakeholders indicated that consumption of FAPs is highly segmented by revenue and age. Consumers of FAPs tend to be older than average, with most having over 40 years old. Even though

stakeholders observed growing interest of young generations in FAPs, driven by health considerations, these trends have been affected by the inflation, reorienting young consumers to entry-level products that also meet their expectations in terms of convenience and ease of preparation. Large families tend to prioritise less expensive and discounted options.

ECONOMIC DRIVERS FOR CONSUMPTION

The main driving factor behind recent consumption evolutions is the price, with a very clear impact since 2023, as retail prices for FAPs have risen significantly faster than for meat and overall food products (see figure below). The sharp increase in FAPs prices, now substantially higher than pork and poultry, has reinforced substitution effects towards cheaper proteins and more affordable fish products.

Figure 44 - Evolution of HICP for food, meat and fish & seafood in Austria, base of 100 in 2015



Source: Eurostat

STAKEHOLDERS FEEDBACK ON DRIVERS TO STIMULATE CONSUMPTION

Strategies implemented to boost consumption include linking FAPs consumption with authenticity and heritage to promote consumption of local fish, through initiatives such as the recognition of Lower Austria's century-old carp ponds as a Globally Important Agricultural Heritage System (GIAHS) by the FAO in May 2025[57], or the **creation of local certification schemes, such as the *Waldviertler Karpfen* label[58].**

On the retail side, promotional actions with **temporary discounts** are especially important. Discounts can be based on traditional consumption periods, such as Lent (starting with the Heringsschmaus on Ash Wednesday), Easter, and Christmas, or on specific products for shorter

[57] https://www.fao.org/giahs/news-and-events/news/news-detail/celebrating-the-agricultural-heritage-of-austria-s-carp-ponds/en#:~:text=09%2F05%2F2025%2C,region's%20farming%20and%20aquaculture%20communities.
[58] https://oceans-and-fisheries.ec.europa.eu/system/files/2016-09/op-austria-fact-sheet_en.pdf

periods. Communication actions have also promoted specific fish species during their fishing season ("catch of the month"). To adapt to the consumer's demand for convenience, the large retail is developing **self-service** for entry-level fresh fish products.

The importance of **communication on social media** to reach younger generations of consumers is highlighted by both producers selling directly to the consumer and large retailers. Promotional videos often focus on both cases with a storytelling valorising the fish's origin and producer.

7.7 Conclusions

Overall, while all countries exhibit a shift toward convenience, increased price sensitivity, and changing consumption habits, they differ in terms of the intensity of decline, the resilience of demand, and the relative importance of cultural, economic, and structural drivers.

- Spain stands out as one of the most affected EU markets, with a strong and sustained decline in consumption. The fresh whole fish is the most affected by the decline, while segments such as canned products and species/products offering convenience and stable supply such as salmon, seabass and seabream, have maintained or increased their consumption.
- France presents a more moderate decline in overall consumption, but with significant structural changes across product categories. While demand remains relatively strong, fresh products are under pressure, and processed products show greater resilience. The French market is characterised by two opposite trends, both contributing in shaping consumption behaviours: role of domestic fisheries in maintaining product diversity and the growing standardisation of the retail offer, around a few species.
- Consumption of FAPs in Italy was characterised by its strong resilience, with overall consumption remaining broadly stable despite economic shocks. Rather than reducing consumption, Italian consumers tend to adjust through substitution, downgrading, and changes in product formats. Traditional species remain central due to their integration into culinary practices, while convenient and processed products are gaining importance.
- Poland is characterised by slight increasing consumption levels which hides significant structural changes. The market is increasingly shaped by substitution between species and formats, strong price sensitivity, and the growing influence of discounters and promotions. Consumption remains highly seasonal, particularly around carp, and consumer behaviour is strongly segmented between price-driven and quality-oriented purchases.
- The Netherlands shows a sharp decline in consumption, combined with a broader dietary shift towards plant-based alternatives. While convenience trends are similar to other countries, the Dutch market is distinguished by the strong role of environmental and ethical considerations, which are increasingly integrated into retail strategies. This, combined with rising prices, contributes to a structural reduction in FAP consumption, particularly among younger consumers.
- Austria combines a moderate decline in consumption with strong growth in convenience-oriented products. The market is highly structured by large retail chains and shows increasing segmentation between premium and entry-level consumers.

The Eurobarometer survey results across the different Member States, indicate that one of the clearest and increasing cross-country shifts concerns easiness and preparation time. This confirms the growing role of convenience in FAP purchasing decisions. The other aspect that is clearly gaining ground in most markets is environmental, social and ethical considerations, even though it remains secondary compared with traditional drivers.

The Eurobarometer results suggest that while price and appearance remain the core purchasing criteria (price is for instance cited by half of consumers and more), their dominance is gradually weakening in favour of convenience and to lesser extent environmental and ethical considerations.

Table 7: Changes in consumer purchasing criteria for FAPs by Member State, based on Eurobarometer survey results (2016–2024)

MS	Convenience	Origin	Appearance	Cost	Brand/label	Env., social, ethical
AT	++	- -	+	+	-	++
FR	+	- -	- -	+	-	+
IT	++	- -	- -	-	-	+
NL	+	+	-	- -	+	+
PL	+	-	- -	- -	-	++
ES	++	++	- -	-	-	++

Source: Eurobarometer survey

Legend: strong increase (green), moderate increase (light green), moderate decrease (orange), strong decrease (red).

8 ANNEXES

8.1 Annex 1: List of references

Quantitative

- Eurobarometer survey
- Eurostat
- Eurostat-COMEXT
- EUMOFA supply balance
- GFK
- National statistics:
    - MAPA - https://www.mapa.gob.es/es/
    - Mercamadrid - https://www.mercamadrid.es/en/home/
    - RNM Rungis - https://rnm.franceagrimer.fr/
    - ISMEA - https://www.ismea.it/istituto-di-servizi-per-il-mercato-agricolo-alimentare
    - ISTAT - https://www.istat.it/
    - BMTI - https://ittico.bmti.it/Prezzi/pages/index
    - CBS – Statistics Netherlands - https://www.cbs.nl/en-gb
    - Statistik Austria - https://www.statistik.at/

Qualitative

- Interviews
- DG MARE TACs and quotas regulations
- The EU Fish Market 2025 https://fishery-aquaculture-market-observatory.ec.europa.eu/en/publications/eu-fish-market-reports/the-eu-fish-market-2025
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8.2 Annex 2: Stakeholders interviewed

Member State	Type of stakeholders
Austria	Wholesaler
	National authority
	Retailer
	Producer
France	Producer Organisation
	Wholesaler
	Retailer
	Research Institute
Italy	Associazione dei consumatori italiani
	Federgrossisti
	Large retail representative
	Molluscs PO of fishers and aquaculture farmers
	Fisheries specialized media
	Confcommercio Milano
The Netherlands	Representative organisation of the fish sector in the Netherlands
	National trade association for the processing, wholesale and import/export of fish and seafood products
	Producer organisation
	International non-profit organisation
Poland	Professional Organisation
	Processors
	Wholesaler
	Research Institutes
	Research Agency
Spain	Retailer
	Professional Organisations
	Representative Organisation
	Retailer Association
	National authority

8.3 Annex 3: Evolution of per capita consumption by Member State

MS	Per capita consumption in 2014 (kg LWE)	Per capita consumption in 2023 (kg LWE)	Evolution 2023/2014
PT	55,3	53,6	-3%
ES	46,2	40,7	-12%
FR	34,4	32,1	-7%
IT	28,9	30,4	5%
LU	33,1	29,5	-11%
CY	25,0	28,2	13%
HR	18,4	23,0	25%
BE	24,9	21,8	-13%
LV	25,5	21,6	-15%
GR	17,3	20,3	18%
LT	44,7	20,0	-55%
NL	22,6	19,9	-12%
FI	23,9	17,9	-25%
EE	18,1	17,5	-3%
PL	13,0	13,7	5%
DE	13,3	12,1	-9%
AT	13,4	11,7	-13%
SI	10,8	11,2	4%
SK	7,8	10,2	31%
RO	6,3	8,8	39%
BG	6,0	7,6	27%
HU	4,6	5,8	27%
CZ	7,5	5,6	-25%
EU-27	**25,5**	**22,9**	**-10%**

Source: EU Fish Market

Due to data unavailability, per capita consumption is not given for Denmark, Ireland, Malta, and Sweden.

8.4 Annex 4: Apparent consumption and most consumed species in 2023 by Member State

Member State	Apparent consumption in 2023 (tonnes LWE)	% top 3 species	% top 5 species	Main commercial species	Commodity groups
France	2.065.793	25%	36%	Salmon, Alaska pollock, Skipjack tuna, Cod, shrimp warmwater	Groundfish (25%), tuna and tuna-like species (15%), bivalves and other molluscs and aquatic invertebrates (14%)
Spain	1.878.558	23%	34%	Hake, Cod, Salmon, Mussel Mytilus spp, Yellowfin tuna	Groundfish (22%), other marine fish (12%), bivalves and other molluscs and aquatic invertebrates (12%)
Italy	1.721.485	24%	37%	Other marine fish, Salmon, Skipjack tuna, Yellowfin tuna, Squid	Tuna and tuna-like species (18%), other marine fish (15%), cephalopods (15%)
Germany	1.023.362	63%	76%	Alaska pollock, Salmon, Skipjack tuna, Herring, Trout	Groundfish (40%), salmonids (23%), tuna and tuna-like species (14%)
Poland	591.060	50%	65%	Alaska pollock, Herring, Sprat, Mackerel, Salmon	Groundfish (38%), small pelagics (37%), salmonids (11%)
Portugal	551.256	44%	53%	Cod, hake, other marine fish, salmon, skipjack tuna	Groundfish (42%), other marine fish (16%), cephalopods (8%)
Sweden	300.676	37%	53%	Salmon, Sprat, other groundfish, Herring, Cod	Groundfish (28%), small pelagics (25%), salmonids (17%)
Denmark*	270.880	-	-	Blue whiting, other groundfish, herring, salmon, Miscellaneous shrimp	Groundfish, small pelagics, salmonids
Belgium	248.045	32%	47%	Salmon, Skipjack tuna, Cod, Mussel Mytilus spp, other marine fish	Groundfish (18%), salmonids (16%), bivalves and other molluscs and aquatic invertebrates (13%)
Greece	186.001	25%	36%	Squid, other marine fish, Salmon, Sardine, Anchovy	Cephalopods (17%), other marine fish (16%), groundfish (16%)
Romania	170.273	36%	49%	Mackerel, Carp, Salmon, Skipjack tuna, Hake	Small pelagics (33%), freshwater fish (15%), tuna and tuna-like species (13%)
Finland	158.505	49%	67%	Herring, Salmon, Trout, other freshwater fish, Sprat	Small pelagics (32%), salmonids (29%), freshwater fish (10%)
Ireland	154.691	56%	70%	Blue whiting, Seaweed and other algae, other marine fish, salmon, Cod	Ground fish (39%), miscellaneous aquatic products (18%), other marine fish (15%)

Lithuania	137.946	50%	67%	Blue whiting, Herring, Mackerel, Atlantic horse mackerel, other horse mackerel	Small pelagics (52%), groundfish (26%), crustaceans (7%)
Netherlands*	119.360	-	-	Other horse mackerel, Cod, Alaska pollock, Mackerel, other flatfish	Small pelagics, groundfish, flatfish
Czechia	108.585	36%	54%	Alaska pollock, salmon, tuna skipjack, herring, carp	Groundfish (23%), small pelagics (20%), salmonids (15%)
Austria	106.412	43%	53%	Other marine fish, Salmon, Trout, tuna skipjack, shrimp miscellaneous	Salmonids (26%), other marine fish (18%), groundfish (12%)
Croatia	87.809	33%	46%	Squi, Herring, Mackerel, Skipjack tuna, hake	Small pelagics (26%), cephalopods (15%), other marine fish (15%)
Malta*	63.811	-	-	Herring, bluefin tuna, mackerel, sardine, tuna skipjack	Small pelagics, tuna and tuna-like species, salmonids
Hungary	57.388	49%	65%	Carp, freshwater catfish, skipjack tuna, other marine fish, hake	Freshwater fish (45%), tuna and tuna-like species (14%), groundfish (13%)
Slovakia	54.942	42%	59%	Alaska pollock, tuna miscellaneous, Slamon, Skipjack tuna, other marine fish	Groundfish (28%), tuna and tuna-like species (21%), salmonids (14%)
Bulgaria	49.676	32%	46%	Mackerl, mollusc and aquatic invertebrates, other, trout, hake, sprat	Small pelagics (25%), salmonids (14%), bivalves and other molluscs and aquatic invertebrates (11%)
Estonia*	44.780	-	-	Herring, sprat, salmon, Alaska pollock, shrimp miscellaneous	Small pelagics, salmonids, groundfish
Cyprus	27.545	29%	42%	Other marine fish, Salmon, Skipjack tuna, Gilthead seabream, Squid	Other marine fish (23%), cephalopods (16%), tuna and tuna-like species (16%)
Slovenia	24.399	37%	52%	Skipjack tuna, Squid, other marine fish, Hake, Salmon	Tuna and tuna-like species (25%), cephalopods (16%), other marine fish (14%)
Luxembourg	19.203	34%	48%	Salmon, Cod, other marine fish, Scallop, tuna miscellaneous	Groundfish (18%), salmonids (17%), bivalves and other molluscs and aquatic invertebrates (16%)
Latvia*	17.708	-	-	Sprat, herring, salmon, trout, other freshwater fish	Salmonids (26%), small pelagics (16%), groundfish (12%)

Source: own elaboration based on EUMOFA data

*the share of the top 3 and top 5 species could not be calculated

8.5 Annex 5: Consumer price index for fish and seafood by Member State

Evolution of consumer price index for fish and seafood (index 2015 = 100)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Hungary	100	102	108	109	115	121	127	157	190	190	197
Romania	100	97	98	102	105	110	116	134	160	170	179
Poland	100	104	107	109	113	118	123	143	165	168	172
Estonia	100	106	114	113	112	113	115	148	167	169	172
Latvia	100	102	108	109	112	114	115	137	153	159	165
Sweden	100	105	110	113	121	122	121	137	165	166	165
Lithuania	100	104	108	109	112	115	117	137	156	156	163
Austria	100	103	114	117	123	127	123	136	155	161	161
Slovakia	100	102	103	105	109	111	115	129	149	153	153
Netherlands	100	103	113	116	119	120	121	132	149	151	153
Croatia	100	103	102	103	105	105	105	119	132	139	150
Germany	100	103	107	110	113	115	117	130	149	149	150
Finland	100	108	116	116	116	114	115	139	153	150	150
Belgium	100	108	113	116	114	119	120	131	144	147	149
Bulgaria	100	100	101	100	103	106	107	121	133	138	146
Spain	100	104	107	110	111	114	116	126	136	141	145
France	100	104	108	111	114	117	118	129	141	141	143
Luxembourg	100	105	108	112	114	116	118	128	137	138	139
Denmark	100	102	108	108	110	111	112	123	132	132	135
Portugal	100	101	103	105	105	107	106	118	123	127	134
Malta	100	104	106	106	102	103	107	118	124	130	134
Italy	100	103	104	107	108	110	111	120	128	130	133
Slovenia	100	100	103	108	109	110	110	118	130	131	132
Czechia	100	104	107	106	107	109	111	120	132	126	127
Greece	100	101	100	100	101	100	105	108	115	121	127
Cyprus	100	101	104	102	100	99	98	106	113	112	113
Ireland	100	100	96	94	94	94	94	98	105	106	109

Source: EUROSTAT - Harmonised index of consumer prices

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