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Foreword

Dear Reader,

Europe intrinsically understands the need for the sustainability of fish resources. Fish stocks may be renewable, but unless they are managed properly they are also finite – and we risk overfishing and depleting them. Sustainable management, on the other hand, creates stable conditions to invest, and contributes to the economic viability of our industry, in line with the European Commission's agenda for jobs and growth. Managing fish stocks properly means at least two things. First of all, policy must be based on science: we need to have a good *biological* understanding of the state of the stocks as well as sound *economic* and social data on the sector before we decide how much our fishermen can fish. And secondly, we need to have a transparent and fair set of rules for fishermen – rules that governments must enforce by promoting a culture of compliance and applying deterring sanctions for wrongdoers.

The EU's new Common Fisheries Policy (or CFP) contains those elements and more. We have made it our main goal to make fisheries environmentally, economically and socially sustainable. The concept of maximum sustainable yield is now the main reference for the management of our common stocks, and our actions are based on scientific advice. We have also modernised our decision-making and gotten scientists and stakeholders on board. The new rules against discards are incentivising fishermen to fish more selectively than before, and are making us waste less fish. We are streamlining the regulation in force for a simpler and more effective framework. And we have a dedicated Fund that supports the transition towards more sustainable fishing in all its aspects.

Wild fish is not our only resource. Healthy, fresh and local seafood also comes to us from our top-notch farming industry. Yet, out of four fish we eat in the EU only one comes from aquaculture today. That is not nearly enough, especially considering that seafood products farmed in the EU are as safe as can be – for animals and ecosystems as well as for us humans. One of my goals is to help this industry grow and bridge part of the demand gap with top-quality fish.

Fish do not know borders or carry a passport. The political and legal efforts of the EU will be in vain if all international players do not play the same collaborative game. When stocks are perfectly healthy across the world's oceans, then Europe will be able to rest. Until then the EU works with other countries to ensure full compliance with the international law that underpins the sustainability of fisheries resources.

As a very last resort, our legal instruments against illegal fishing go as far as blocking trade of fish from the countries which are manifestly in breach of their international obligations. After all, we are the top global market in value, and this carries a big responsibility in terms of stocks governance. In a seafood market that, like many others, is becoming more and more integrated and globalised, we must ensure that the fish that enters our market has been caught in a sustainable way. It is therefore no coincidence that this 2016 edition of "*Facts and figures on the Common Fisheries Policy*" should feature broader information on consumption patterns and a new section on illegal fishing.

Our experience with the reform of our CFP shows us that structural change is possible, and that it carries substantial economic benefits. Like Rome, stocks are not (re)built in a day. Many Mediterranean stocks are still in dire straits. But some numbers are already going up, particularly in the North-East Atlantic; that is reassuring – and boosts our determination to continue along the narrow path.

Karmenu Vella
European Commissioner for Environment, Maritime Affairs and Fisheries

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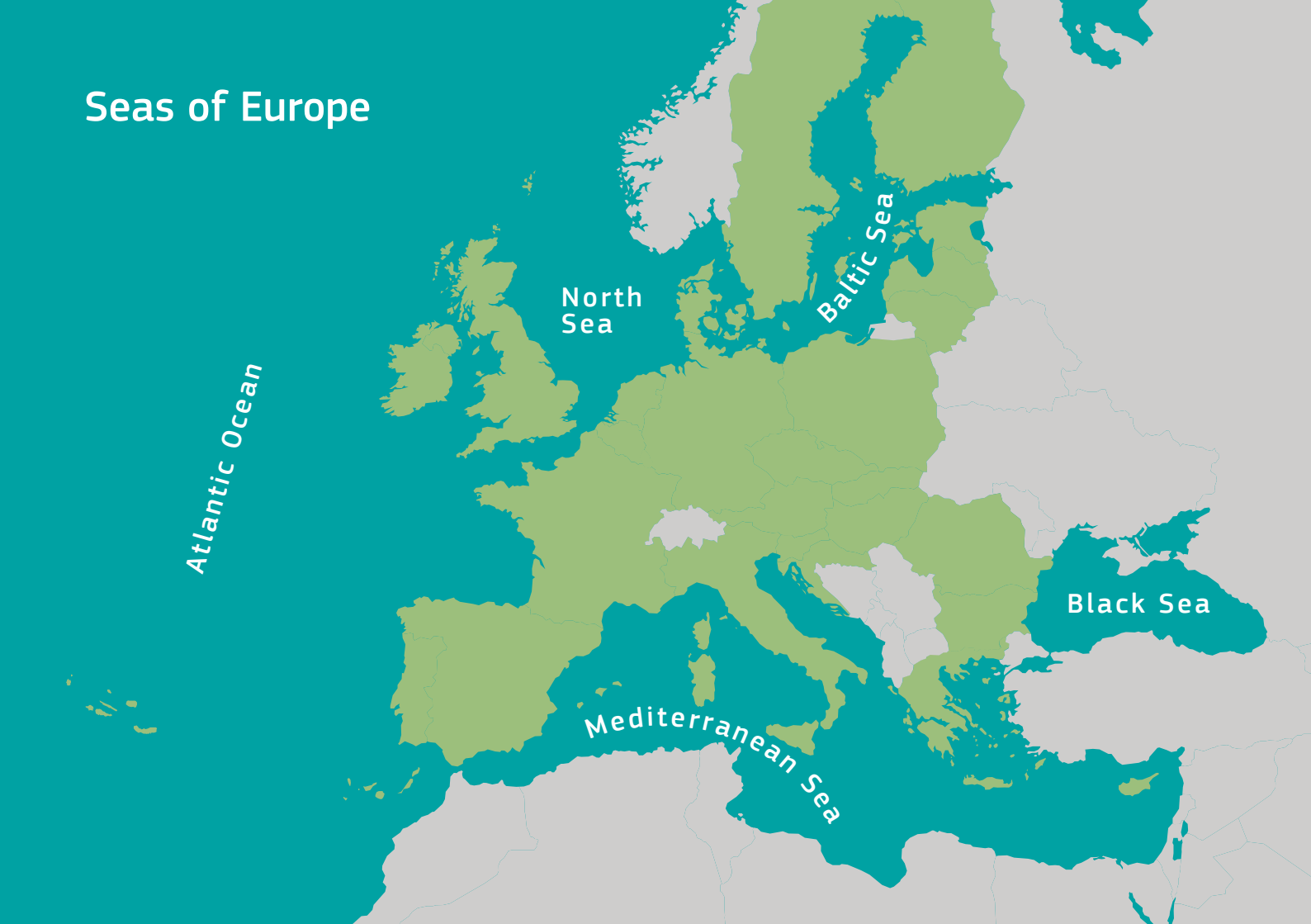

Seas of Europe
Atlantic Ocean
North Sea
Baltic Sea
Black Sea
Mediterranean Sea

1 | Responsible and sustainable fishing

State of stocks

The European Union has agreed that by 2015 where possible and by 2020 at the latest all fish stocks should be exploited at a level that will let them produce the maximum sustainable yield for the long term (MSY). This means taking the highest catches possible without affecting future productivity of the stocks.

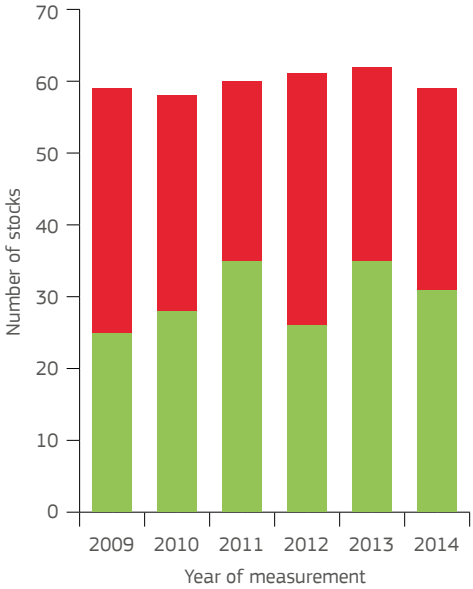
In the North East Atlantic and adjacent waters (North Sea, Baltic Sea, Skagerrak, Kattegat, West of Scotland Sea, Irish Sea and Celtic Sea), catches are limited to levels based on scientific advice – the means for doing this is by setting total allowable catches (TACs) which are subdivided into national quotas. These set limits on the amount of fish that can be caught and landed.

The chart on the right shows the numbers of stocks that were fished according to the MSY objective (in green) and the numbers of stocks that were overfished compared to that objective (in red).

In the Mediterranean Sea, 93 % of assessed fish stocks were overfished in 2015.

The unintended effects of fishing on the marine environment and on ecosystems also have to be mitigated. Where necessary, the EU adopts measures to protect vulnerable habitats such as deep-sea corals, and to reduce unintended harm to seabirds, seals and dolphins.

North-East Atlantic and adjacent waters



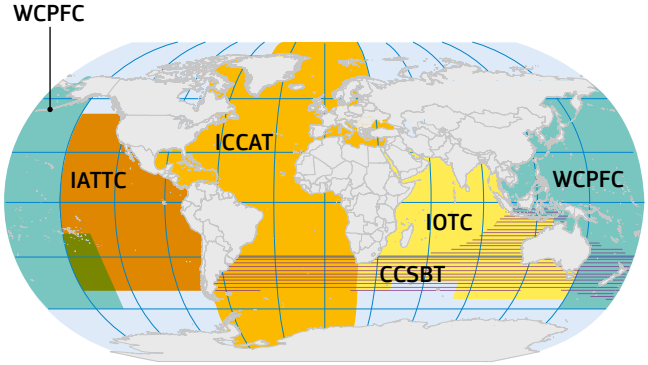
Source: Scientific, Technical and Economic Committee for Fisheries (STECF), *Monitoring the performance of the Common Fisheries Policy* (STECF-16-03), Luxembourg, Publications Office of the European Union, 2016.

Regional Fisheries Management Organisations (RFMOs)

Regional Fisheries Management Organisations (or RFMOs) are international bodies formed by countries with fishing interests in a same area or a same species or group of species. Within these bodies, countries collectively set catch and/or fishing effort limits, technical measures and control obligations to encourage fair and sustainable management of the shared marine resources.

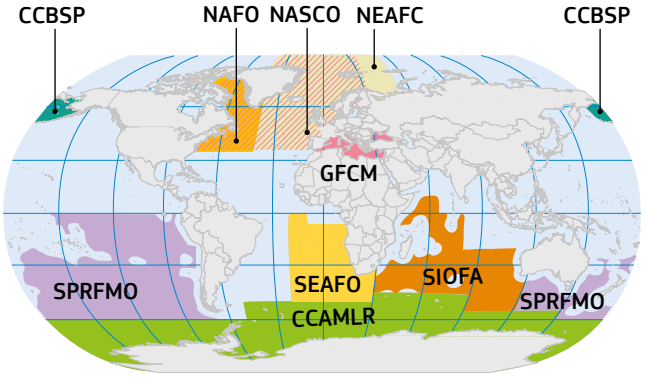
Today, the majority of the world's waters are covered by RFMOs that deal with a specific region or species. There are RFMOs that only manage highly migratory fish stocks, like tuna, and RFMOs that manage other fish stocks. In the case of tuna, stocks have improved significantly over the past few years and this is mainly thanks to the dedication and hard work of RFMOs. Out of the 16 main tuna stocks for the EU, 13 were fished sustainably in 2014. Six years before, in 2008, the figure was 6.

RFMOs are open to both the coastal states of the region and the countries which fish or have other fisheries-related interests in the region. Represented by the European Commission, the European Union plays an active role in six tuna RFMOs (including the Agreement on the International Dolphin Conservation Program, sister organisation to the IATTC) and in 9 non-tuna RFMOs. The EU is also a member of two Regional Fisheries Management Organisations that have a purely advisory role: the Western Central Atlantic Fishery Commission and the Fishery Committee for the Eastern Central Atlantic.



RFMOs for highly migratory fish stocks (tuna and associated species)

CCSBT	Commission for the Conservation of Southern Bluefin Tuna
IATTC	Inter-American Tropical Tuna Commission
ICCAT	International Commission for the Conservation of Atlantic Tunas
WCPFC	Western and Central Pacific Fisheries Commission
IOTC	Indian Ocean Tuna Commission



RFMOs for non-tuna species

CCAMLR	Commission for the Conservation of Antarctic Marine Living Resources
CCBSP	Convention on the Conservation and Management of Pollock Resources in the Central Bering Sea
GFCM	General Fisheries Commission for the Mediterranean
NEAFC	North East Atlantic Fisheries Commission
NASCO	North Atlantic Salmon Conservation Organization
NAFO	Northwest Atlantic Fisheries Organization
SEAFO	South East Atlantic Fisheries Organization
SPRFMO	South Pacific Regional Fisheries Management Organization
SIOFA	South Indian Ocean Fisheries Agreement

Source: European Commission – Eurostat/GISCO. Administrative boundaries: © EuroGeographics, © FAO (UN), © TurkStat.

Sustainable Fisheries Partnership Agreements and Northern Agreements

The sustainable fisheries partnership agreements (SFPAs) that the EU signs with third countries allow EU vessels to fish in the third countries' exclusive economic zone (EEZ). Tuna agreements allow EU vessels to target and catch highly migratory fish stocks; mixed agreements give them access to a wide range of fish stocks, especially ground fish species (mainly shrimps and cephalopods) and/or pelagic species.

To ensure sustainable fishing, EU vessels have access only to surplus resources that the partner country is not willing or capable of fishing. In exchange, the EU pays a financial contribution: an access fee for the right of access into the partner country's EEZ, and a sectorial support. The sectorial support is tailored to the needs of the partner country, with the main view of reinforcing fisheries governance, strengthening administrative and scientific capacities, fostering monitoring and control activities and supporting small-scale fisheries. In addition, EU vessel operators pay a licence fee for access. The burden of payment is shared between the EU and the industry, with the latter sustaining a higher share.

Today, SFPAs set the standard for international fishing policy. They are all centred on resource conservation and environmental sustainability, with EU vessels subject to strict supervision and transparency rules. All protocols contain a clause concerning the respect for human rights in the hosting country.

The agreements are negotiated and concluded between the European Commission on behalf of the European Union and the partner country; transparency and accountability are the driving principles of the negotiation process. The texts of the agreements are public and open to the scrutiny of other public institutions and civil society.

Tuna agreements Indian Ocean

11 Comoros
12 Madagascar
13 Mauritius
14 Seychelles

Tuna agreements Pacific Ocean

15 Cook Islands

'Dormant' agreements*

16 The Gambia
17 Equatorial Guinea
18 Mozambique
19 Micronesia
20 Solomon Islands
21 Kiribati
22 Iceland

Northern agreements

23 Faroe Islands
24 Norway

* Agreements where no protocol is in force.

Since the late 1970s the EU has had fisheries agreements with Norway and the Faroe Islands, and since the early 1990s with Iceland.

The agreement with Norway provides importantly for the joint management of shared stocks (notably, total allowable catches and quotas) in the North Sea and Skagerrak areas, which is framed within long-term management strategies ensuring sustainable fisheries. It includes an annual reciprocal exchange of fishing possibilities guaranteeing continuation of traditional fishing patterns.

The agreements with the Faroe Islands and Iceland are based solely on the annual reciprocal exchange of fishing possibilities in each other's waters, although no exchange of quotas has taken place with Iceland since the 2008 fishing season.

Illegal, unreported and unregulated (IUU) fishing

Illegal fishing is a major threat to global marine resources. It depletes fish stocks, destroys marine habitats, distorts competition, puts honest fishers at an unfair disadvantage, and destroys the livelihoods of coastal communities, particularly in developing countries.

It is estimated that between 11 and 26 million tonnes of fish are caught illegally a year, corresponding to at least 15% of he world's catches.

As the world's largest importer of fisheries products, the EU has adopted an innovative policy to fight against illegal fishing worldwide, by not allowing fisheries products to access the EU unless they are certified as legal.

The IUU Regulation entered into force on 1 January 2010. It concerns EU Member States and non-EU countries alike and applies to all vessels that commercially exploit fisheries resources destined for the EU market.

Under the Regulation, the EU enters into a structured process of dialogue and cooperation with the third countries that have problems meeting international IUU rules, with the aim of helping them undertake the necessary reforms (see illustration on the right).

In this context, the EU is currently in dialogue with 50 third countries. Thanks to this cooperation, more than 30 third countries have improved their systems to join the EU in fighting IUU fishing.

The IUU Regulation has also helped to improve EU control standards. It has allowed Member States to better verify and, if appropriate, refuse imports into the EU, for instance by sharing intelligence.

The EU fleet is tightly controlled thanks to a comprehensive legal framework and elaborate control system that applies anywhere and under any flag.

The EU also regularly publishes a list of IUU vessels. More than 200 cases of alleged IUU fishing activities involving vessels from 27 countries have been investigated. As a direct consequence, sanctions against more than 50 vessels have been imposed, amounting to roughly EUR 8 million.

To find out more: http://ec.europa.eu/fisheries/cfp/illegal_fishing/info/index_en.htm

The IUU process explained

PRE-IDENTIFICATION

The European Commission opens a formal dialogue during a minimum of 6 months.

If the country improves its situation, the 6-month period can be prolonged and ultimately the **pre-identification can be removed**.

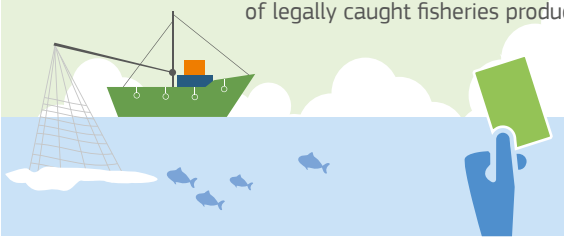
IDENTIFICATION

If the country does not address the problems, it will be **identified** by the European Commission as non-cooperating.

A ban of all products for which the catch certificate is validated after the Decision enters into force.

DELISTING

Continued dialogue can lead to restoring the import of legally caught fisheries products.



LISTING BY THE EU

Fisheries products caught by fishing vessels flying the flag of these countries cannot be imported into the EU while the countries remain listed.

The Decision triggers further measures, including a fishing ban for EU vessels in these countries' waters.

2 | Fishing fleet

Fleet capacity management is an essential tool for the sustainable exploitation of fisheries resources, which is one of the main objectives of the Common Fisheries Policy. The EU fishing fleet is very diverse, with vessels ranging from under six metres to over 75. Under EU law the total capacity of the fishing fleet may not be increased and any decommissioning of vessels or reduction of fleet capacity obtained through public support must be permanent.

For the last 20 years, the EU fishing fleet capacity has declined in terms of both tonnage and engine power. Despite enlargements to the EU, the number of EU vessels in 2015 was 85 154 – 18 693 fewer than in 1996.

Healthier stocks contribute to a more sustainable industry. Overall, the EU fleet was profitable in 2013, consolidating the gradual recovery of recent years, when both gross profit and net profit margin of the fleet have shown an upward trend.

EU fishing fleet capacity by length category (2015)

	Length	Number of vessels	Gross tonnage	Engine power in kW	Average age
	< 12	72 301	182 989	2 603 689	25
	12 - 24	9 998	399 193	1 830 772	24
	> 24	2 855	1 041 399	2 035 719	19
	TOTAL	**85 154**	**1 623 581**	**6 470 180**	**22.6**

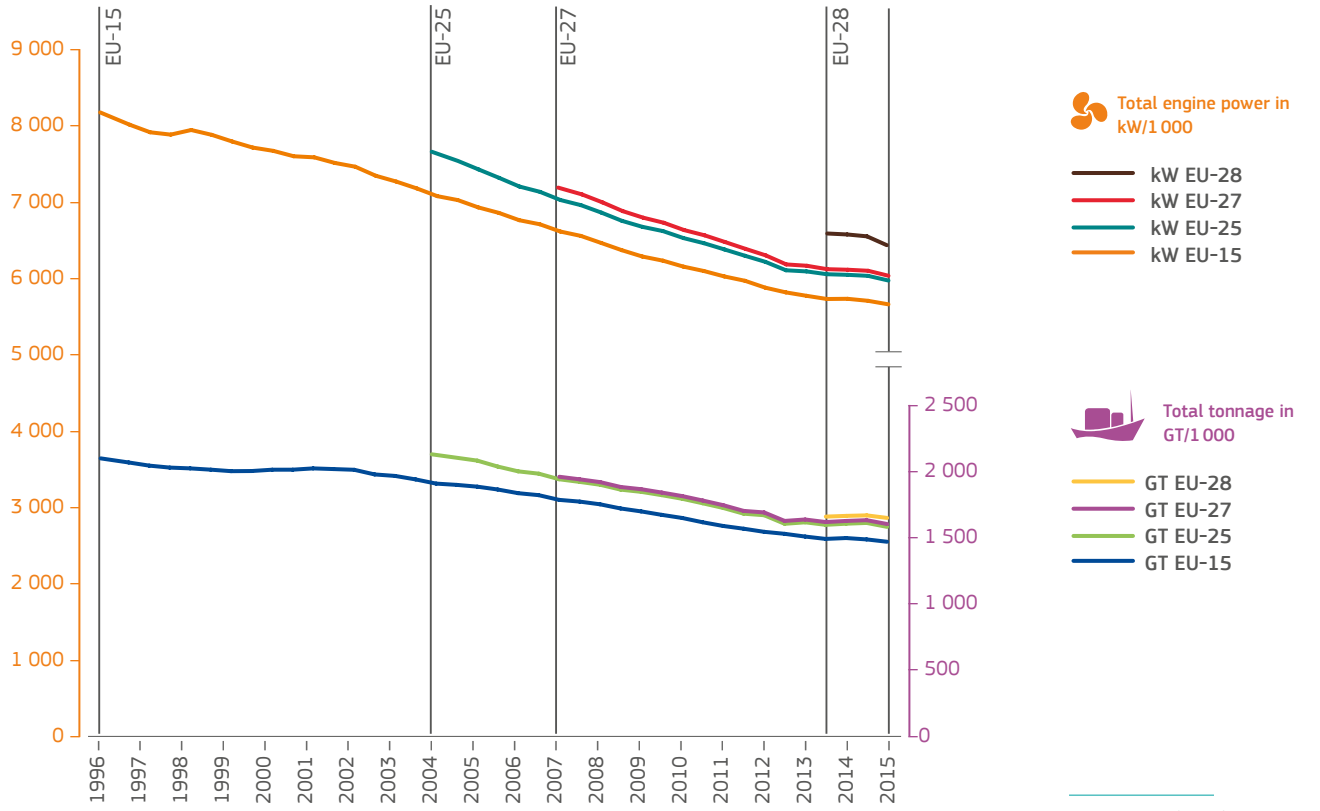
NB: Length refers to total length.
Source: EU Fishing Fleet Register. Situation as in September 2015.

The fishing fleet of the Member States (2015)

	Number of vessels		Gross tonnage		Engine power in kW	
MS		%		%		%
BE	78	0.1%	14 535	0.9%	46 289	0.7%
BG	1 989	2.3%	6 541	0.4%	58 043	0.9%
DK	2 396	2.8%	69 607	4.3%	224 769	3.5%
DE	1 465	1.7%	64 221	4.0%	141 679	2.2%
EE	1 534	1.8%	13 225	0.8%	43 714	0.7%
IE	2 156	2.5%	62 331	3.8%	189 442	2.9%
EL	15 638	18.4%	76 573	4.7%	449 534	6.9%
ES	9 572	11.2%	354 186	21.8%	815 872	12.6%
FR	6 964	8.2%	171 544	10.6%	1 001 603	15.5%
HR	7 540	8.9%	52 341	3.2%	414 618	6.4%
IT	12 414	14.6%	162 749	10.0%	1 003 301	15.5%
CY	893	1.0%	3 502	0.2%	40 209	0.6%
LV	688	0.8%	24 671	1.5%	43 114	0.7%
LT	144	0.2%	41 403	2.6%	46 484	0.7%
MT	1 005	1.2%	7 106	0.4%	73 106	1.1%
NL	832	1.0%	133 995	8.3%	312 548	4.8%
PL	874	1.0%	26 293	1.6%	76 256	1.2%
PT	8 136	9.6%	96 596	5.9%	359 633	5.6%
RO	152	0.2%	870	0.1%	6 146	0.1%
SI	169	0.2%	597	0.0%	8 540	0.1%
FI	2 839	3.3%	15 613	1.0%	160 475	2.5%
SE	1 357	1.6%	30 398	1.9%	167 214	2.6%
UK	6 319	7.4%	194 683	12.0%	787 592	12.2%
EU-28	**85 154**	**100.0%**	**1 623 581**	**100.0%**	**6 470 180**	**100.0%**

Source: EU Fishing Fleet Register. Situation as in September 2015.

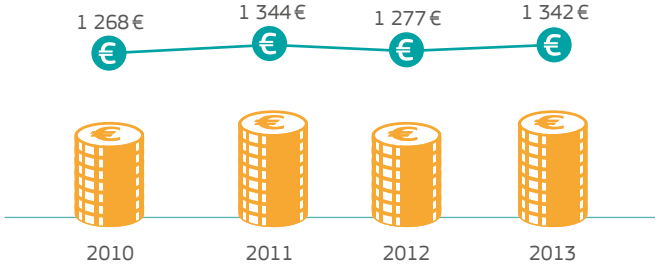
Evolution of EU fishing fleet capacity between 1996 and 2015



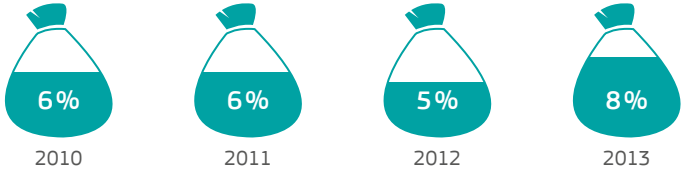
Source: EU Fishing Fleet Register.

EU fishing fleet economic performance indicators between 2010 and 2013

Gross profit
(in billions of EUR)



Net profit margin
(as percentage of income)



Energy consumption
(in millions of litres of fuel)

Fuel consumption decrease from 2009 to 2013 (in green)

NB: Estimation based on a sample of national fleets.

Source: Scientific, Technical and Economic Committee for Fisheries (STECF), *The 2015 Annual Economic Report on the EU Fishing Fleet* (STECF 15-07), Luxembourg, Publications Office of the European Union, 2015 (Report EUR 27428 EN, JRC 97371).

3 | Employment

In several EU regions the fishing sector plays a crucial role for employment and economic activity – in some European coastal communities as many as half the local jobs are in the fishing sector (as shown in the map on the right-hand side).

Employment in the fishing sector tends to be concentrated in a handful of countries. Spain alone accounts for a quarter of total employment, and the four countries with the highest levels of employment (Spain, Italy, Greece and Portugal) make up around 70 %.

The aquaculture sector is also significant in socio-economic terms, with roughly 80 000 staff (including part-time and full-time jobs in both marine and freshwater aquaculture).

The processing industry counts approximately 3 500 enterprises centered on fish processing (5 % less than in previous years). The mainstay of EU production is conserves and ready meals of fish, crustaceans and molluscs. Employment too has decreased by 5 % to around 123 000 people across the EU between 2008 and 2012. Of these, 55 % are women, and 86 % are employed in firms with less than 50 staff.

Employment dependency on fishing in EU regions (2011)

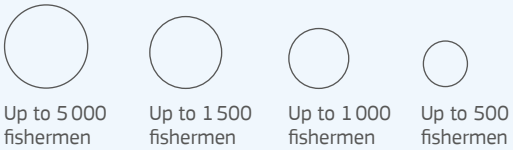
Fishing dependency in NUTS 3 regions (measured as the ratio between the fishing fleet employment and total employment in the region):

- Very low to low
- Low to moderate
- Moderate to high
- High to very high

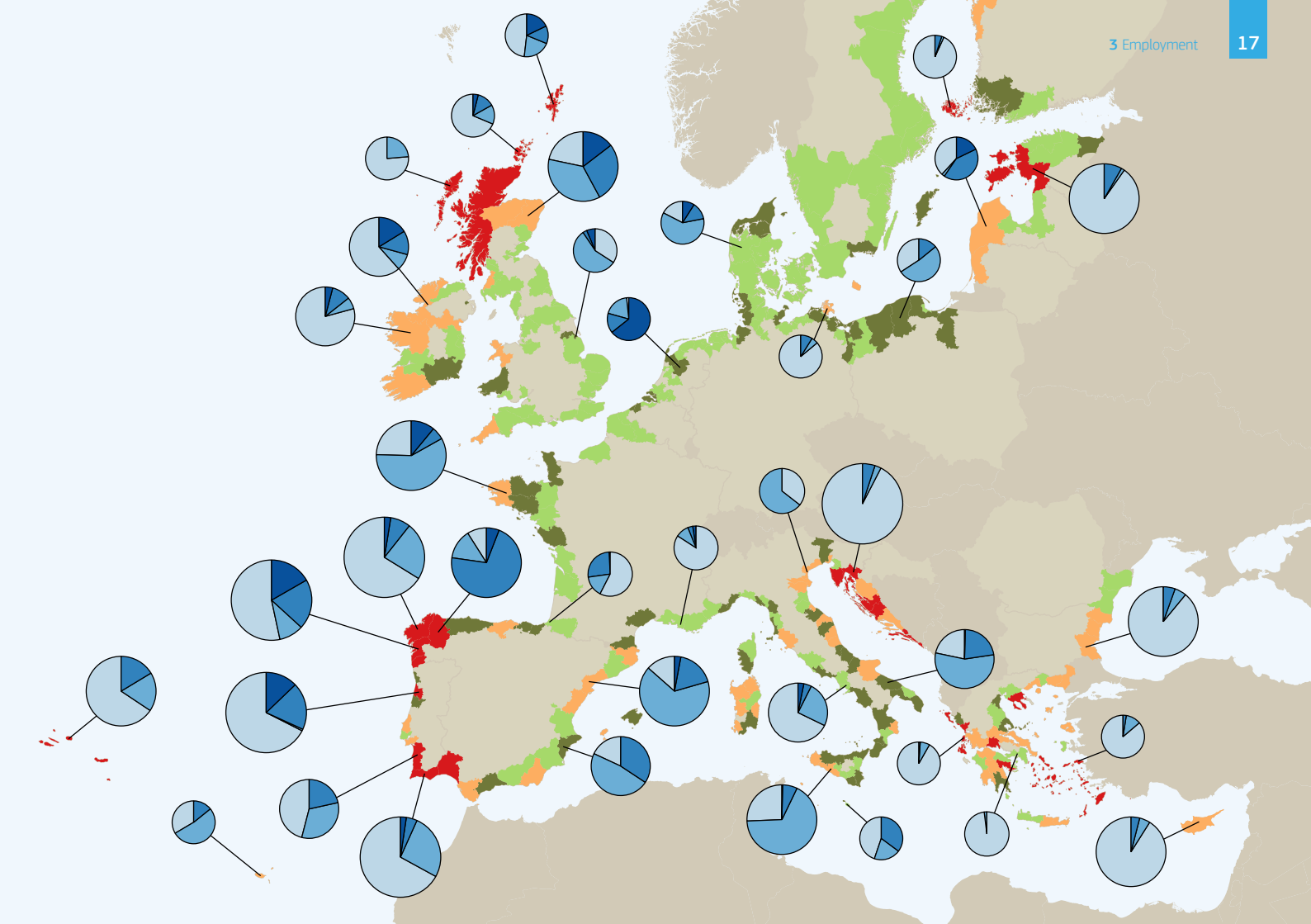
Top 10 NUTS 3 regions (regions at level 3 of the Nomenclature of Territorial Units for Statistics):
Lefkada (EL), Shetland Islands (UK), Eilean Siar (Western Isles) (UK), Samos (EL), Zadarska županija (HR), Dubrovačko-neretvanska županija (HR), Orkney Islands (UK), Preveza (EL), El Hierro (ES), Kefallinia (EL).

Employment according to vessel size categories (size of pie charts depends on the total amount of people employed):

- <12 m
- 12-24 m
- 24-40 m
- >40 m



Source: Scientific, Technical and Economic Committee for Fisheries (STECF), *The 2015 Annual Economic Report on the EU Fishing Fleet* (STECF-15-07), Luxembourg, Publications Office of the European Union, 2015 (Report EUR 27428 EN, JRC 97371).



Employment in the fisheries, aquaculture and processing sectors

(measured in full-time equivalents)

1 Data not available for AT, CZ, HU, LU and SK.

2 2012 data.

3 Data cover only marine aquaculture. Data not available for AT, BE, CZ, DE, HU, LT, LU, LV, SI and SK.

4 2011 data.

5 Data not available for AT, CZ, HU, LU and SK.

Fisheries (2013)[1]

ES	33 129
IT	26 758
EL	24 486
PT	17 875
UK	12 022
FR	10 262
HR	4 872
IE	3 169
PL	2 430
NL	2 123
EE	2 046
FI	1 817
DE	1 647
SE	1 577
DK	1 489
CY[2]	1 290
BG	895
LT	763
LV	680
MT	389
BE	355
RO	304
SI	107

Source: Scientific, Technical and Economic Committee for Fisheries (STECF), *The 2015 Annual Economic Report on the EU Fishing Fleet* (STECF 15-07), Luxembourg, Publications Office of the European Union, 2015 (Report EUR 27428 EN, JRC 97371).

Aquaculture (2012)[3]

ES	19 892
FR	18 640
PL	5 583
IT	5 164
EL	4 900
UK	3 231
RO	2 968
PT	2 572
HR	1 892
IE	1 708
NL[4]	467
BG	454
DK	432
FI	402
SE	370
CY	259
MT	167
EE	22

Processing (2012)[5]

UK	19 070
ES	18 324
FR	16 184
PL	15 972
DE	7 010
PT	6 823
IT	6 197
LV	5 781
LT	4 451
NL	3 567
DK	3 409
IE	3 342
BE	2 492
EL	2 330
SE	2 135
EE	1 861
HR	1 365
FI	930
RO	780
SI	354
BG	252
CY	56
MT	56

Source: Scientific, Technical and Economic Committee for Fisheries (STECF), *The Economic Performance Report on the EU Fish Processing* (STECF-14-21), Luxembourg, Publications Office of the European Union, 2014 (Report EUR 27029 EN, JRC 93340).

4 | Fisheries and aquaculture production

The EU is the fifth largest producer worldwide, accounting for about 3.2 % of global fisheries and aquaculture production. 80 % of production comes from fisheries and 20 % from aquaculture.

Spain, the United Kingdom, France and Denmark are the largest producers in terms of volume in the EU.

Main world producers (2013) (catches and aquaculture)

(volume in tonnes live weight and percentage of total)

	Catches	Aquaculture	Total production	% total
China	16 557 949	57 113 175	73 671 124	38.63 %
Indonesia	6 120 137	13 147 297	19 267 434	10.10 %
India	4 645 182	4 554 109	9 199 291	4.82 %
Vietnam	2 803 800	3 294 480	6 098 280	3.20 %
EU-28	4 841 560	1 211 259	6 052 819	3.17 %
Peru	5 876 322	125 693	6 002 015	3.15 %
United States	5 242 379	441 098	5 683 477	2.98 %
Japan	3 741 959	1 027 185	4 769 144	2.50 %
Myanmar	3 786 840	930 780	4 717 620	2.47 %
Philippines	2 335 404	2 373 386	4 708 790	2.47 %
Russia	4 351 209	155 540	4 506 749	2.36 %
Norway	2 228 513	1 247 865	3 476 378	1.82 %
Bangladesh	1 550 446	1 859 808	3 410 254	1.79 %
Chile	2 288 874	1 045 718	3 334 592	1.75 %
Others (*)	27 192 695	8 606 314	35 799 009	18.77 %
Total	**93 563 269**	**97 133 707**	**190 696 976**	**100.00 %**

(*) FAO estimate.

Source: Eurostat, Eumofa and FAO for EU-28 and FAO for other countries.

4.1 Catches

Much like in previous years, the EU accounts for just over 5 % of total fisheries production worldwide.

Catches add up to around 80 % of the total volume of the EU production. Although the European fleet operates worldwide, EU catches are taken primarily in the North-East Atlantic, in the Mediterranean and in the Eastern Central Atlantic, and the species most fished are herring and mackerel.

The leading fishing countries in terms of volume are Spain, Denmark, the United Kingdom and France, which combined, account for more than half of EU catches.

Total EU catches in fishing areas (2013)

(volume in tonnes live weight and percentage of total)

Atlantic, North-East	3 600 950	74.4 %
Mediterranean	413 841	8.5 %
Atlantic, Eastern Central	379 677	7.8 %
Indian Ocean, West	187 815	3.9 %
Atlantic, South-West	125 491	2.6 %
Atlantic, North-West	65 196	1.3 %
Atlantic, South-East	44 869	0.9 %
Inland waters	12 569	0.3 %
Black Sea	11 152	0.2 %
Total	**4 841 560**	**100.0 %**

Source: Eurostat and FAO.

Total catches of world's main producers (2013)
(volume in tonnes live weight and percentage of total)

China	16 557 949	17.70 %
Indonesia	6 120 137	6.54 %
Peru	5 876 322	6.28 %
United States	5 242 379	5.60 %
EU-28	**4 841 560**	**5.17 %**
India	4 645 182	4.96 %
Russia	4 351 209	4.65 %
Myanmar	3 786 840	4.05 %
Japan	3 741 959	4.00 %
Vietnam	2 803 800	3.00 %
Philippines	2 335 404	2.50 %
Chile	2 288 874	2.45 %
Norway	2 228 513	2.38 %
Thailand	1 843 747	1.97 %
Others (*)	26 899 394	28.75 %
Total	**93 563 269**	**100.00 %**

(*) FAO estimate.

Source: Eurostat and FAO for EU-28 and FAO for other countries.

Total catches per Member State (2013)
(volume in tonnes live weight and percentage of total)

ES	904 126	18.67 %
DK	668 338	13.80 %
UK	617 592	12.76 %
FR	528 732	10.92 %
NL	324 370	6.70 %
IE	246 240	5.09 %
DE	219 001	4.52 %
PL	195 477	4.04 %
PT	194 610	4.02 %
SE	176 789	3.65 %
IT	172 907	3.57 %
FI	144 297	2.98 %
LV	115 759	2.39 %
HR	75 267	1.55 %
LT	74 803	1.55 %
EE	66 763	1.38 %
EL	63 638	1.31 %
BE	25 377	0.52 %
BG	9 535	0.20 %
HU	6 472	0.13 %
CZ	3 761	0.08 %
MT	2 355	0.05 %
SK	1 986	0.04 %
RO	1 617	0.03 %
CY	1 166	0.02 %
AT	350	0.01 %
SI	232	0.005 %
Total EU-28	**4 841 560**	**100.00 %**

NB: Not relevant for LU.

Source: Eurostat for all Member States except FAO for AT, CZ, HU and SK.

Top 15 species caught by the European Union (2013)

(volume in tonnes live weight and percentage of total)

Herring	716 043	14.8 %
Mackerel	450 246	9.3 %
Sprat	337 676	7.0 %
Sardine	243 376	5.0 %
Horse mackerel	190 193	3.9 %
Skipjack tuna	163 134	3.4 %
Hake	154 703	3.2 %
Cod	142 229	2.9 %
Small pelagics	132 144	2.7 %
Yellowfin tuna	128 127	2.6 %
Blue whiting	122 378	2.5 %
Sharks	112 350	2.3 %
Plaice	95 231	2.0 %
Anchovy	90 567	1.9 %
Scallop	80 458	1.7 %

Source: Eurostat.

Main species caught per Member State (2013)

(volume in tonnes live weight and percentage of total)

BE		
Plaice	8 228	32.4 %
Sole	4 005	15.8 %
Monk	1 633	6.4 %
Ray	1 413	5.6 %
Cod	1 343	5.3 %

BG		
Sea snails	4 834	50.7 %
Sprat	3 794	39.8 %

CZ		
Common carp	2 917	77.6 %

DK		
Herring	141 028	21.1 %
Sprat	96 386	14.4 %
Pouting	38 364	5.7 %
Mussel	37 491	5.6 %
Mackerel	33 260	5.0 %

NB: Not relevant for LU. Data by main species is not available for AT.
Source: Eurostat except FAO for CZ, HU and SK.

DE		
Herring	71 841	32.8%
Small pelagics	28 685	13.1%
Mackerel	20 935	9.6%
Shrimp Crangon	16 165	7.4%
Cod	14 537	6.6%
Sprat	11 899	5.4%
Blue whiting	11 418	5.2%
Saithe	10 903	5.0%

EE		
Sprat	29 805	44.6%
Herring	21 941	32.9%
Coldwater shrimps	6 653	10.0%

IE		
Mackerel	56 603	23.0%
Small pelagics	35 441	14.4%
Herring	23 192	9.4%
Blue whiting	13 205	5.4%

EL		
Anchovy	8 752	13.8%
Sardine	6 865	10.8%
Seabreams	5 242	8.2%
Hake	4 694	7.4%

ES		
Skipjack tuna	128 027	14.2%
Sharks	92 452	10.2%
Hake	88 801	9.8%
Yellowfin tuna	85 794	9.5%
Sardine	49 024	5.4%
Mackerel	47 010	5.2%

FR		
Yellowfin tuna	41 809	7.9%
Hake	32 348	6.1%
Scallop	30 977	5.9%
Herring	30 142	5.7%
Skipjack tuna	29 432	5.6%
Sardine	27 519	5.2%

HR		
Sardine	53 159	70.6%
Anchovy	8 904	11.8%
Small pelagics	5 128	6.8%

IT		
Anchovy	29 664	17.2%
Sardine	22 986	13.3%
Clam	16 898	9.8%
Hake	9 767	5.6%
Tropical shrimp	8 949	5.2%

CY		
Albacore tuna	359	30.8%
Seabreams	170	14.6%
Picarel	88	7.5%
Red mullet	74	6.3%

LV		
Sprat	33 310	28.8%
Small pelagics	27 066	23.4%
Herring	20 720	17.9%
Mackerel	12 112	10.5%
Sardine	9 947	8.6%

LT		
Horse mackerel	33 919	45.3%
Mackerel	11 786	15.8%
Sardine	10 955	14.6%
Sprat	5 775	7.7%

HU		
Common carp	3 390	52.4%
Cyprinids	1 337	20.7%
Silver carp	370	5.7%

MT		
Swordfish	460	19.5%
Mackerel	308	13.1%
Sardine	219	9.3%
Bluefin tuna	155	6.6%
Scabbardfish	123	5.2%

NL		
Herring	88 010	27.1%
Horse mackerel	63 027	19.4%
Blue whiting	51 584	15.9%
Plaice	33 748	10.4%
Mackerel	22 873	7.1%
Shrimp Crangon	20 280	6.3%

PL		
Sprat	80 988	41.4%
Horse mackerel	27 758	14.2%
Herring	23 560	12.1%
Cod	19 104	9.8%
Sardine	17 348	8.9%
European flounder	11 861	6.1%

PT		
Mackerel	45 442	23.4%
Sardine	27 854	14.3%
Horse mackerel	23 043	11.8%
Octopus	11 750	6.0%
Redfish	10 660	5.5%

RO		
Molluscs and aquatic invertebrates	1 314	81.3%
Anchovy	111	6.9%

SI		
Whiting	57	24.6%
Sardine	29	12.5%
Anchovy	21	9.1%
Octopus	19	8.2%
Sole	15	6.5%

SK		
Common carp	1 463	73.7%

FI		
Herring	122 318	84.8%
Sprat	11 086	7.7%

SE		
Herring	77 225	43.7%
Sprat	52 909	29.9%

UK		
Mackerel	163 801	26.5%
Herring	93 569	15.2%
Scallop	45 038	7.3%
Haddock	39 742	6.4%
Crab	30 936	5.0%

4.2 Aquaculture

Aquaculture is a significant activity in many European regions. It covers over 20% of the total EU fish production, producing around 1.2 million tonnes and EUR 4 billion in value. In the total world aquaculture production, EU aquaculture occupies a share of 1.25% in terms of volume and 3.4% in terms of value.

The main aquaculture-producing countries in terms of volume are Spain, the United Kingdom, France, Greece and Italy.

Total aquaculture production per Member State (2013)

(value in thousands of EUR, volume in tonnes live weight and percentage of total)

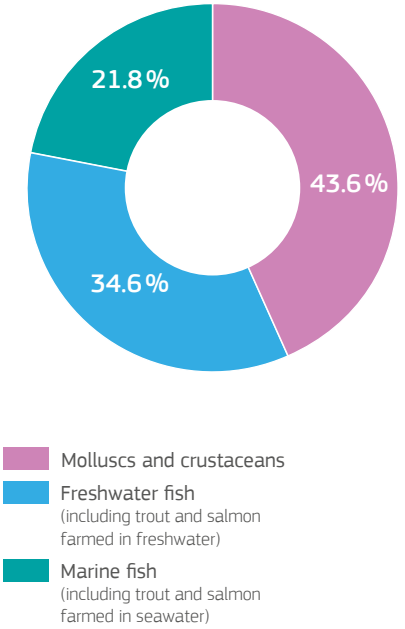
	value	% value	volume	% volume
UK	896 701	22.34%	203 263	16.78%
FR	693 087	17.26%	200 332	16.54%
EL	639 963	15.94%	145 373	12.00%
ES	429 438	10.70%	226 222	18.68%
IT	392 882	9.79%	140 879	11.63%
IE	114 185	2.84%	34 200	2.82%
NL	110 151	2.74%	46 605	3.85%
MT	105 865	2.64%	9 077	0.75%
DK	98 584	2.46%	31 790	2.62%
HR	78 946	1.97%	13 720	1.13%
PL	75 073	1.87%	31 258	2.58%
DE	70 525	1.76%	23 287	1.92%
PT	49 266	1.23%	7 874	0.65%
FI	47 921	1.19%	13 286	1.10%
SE	43 591	1.09%	13 366	1.10%
CZ	35 267	0.88%	19 360	1.60%
CY	29 214	0.73%	5 341	0.44%
HU	25 575	0.64%	14 383	1.19%
BG	23 027	0.57%	11 244	0.93%
RO	20 645	0.51%	10 146	0.84%
AT	16 528	0.41%	2 946	0.24%
LT	8 292	0.21%	3 812	0.31%
SK	3 164	0.08%	1 085	0.09%
SI	2 848	0.07%	1 084	0.09%
LV	1 617	0.04%	644	0.05%
EE	1 522	0.04%	509	0.04%
BE	749	0.02%	173	0.01%
EU-28	4 014 626	100.00%	1 211 259	100.00%

NB: Not relevant for LU.

Source: Eurostat data, integrated with data from Eumofa for DE, DK, EL and corresponding totals.

EU aquaculture production per product type (2013)

(percentage of total volume)



Source: Eurostat and Eumofa.

Total aquaculture production by other major producers (2013)

(value in thousands of EUR, volume in tonnes live weight and percentage of total)

	value	% value	volume	% volume
China	55 031 892	46.38 %	57 113 175	58.80 %
Indonesia	7 935 385	6.69 %	13 147 297	13.54 %
India	7 797 576	6.57 %	4 554 109	4.69 %
Chile	5 687 048	4.79 %	1 045 718	1.08 %
Norway	5 193 051	4.38 %	1 247 865	1.28 %
Vietnam	4 699 994	3.96 %	3 294 480	3.39 %
EU-28	4 014 626	3.38 %	1 211 259	1.25 %
Japan	3 400 319	2.87 %	1 027 185	1.06 %
Bangladesh	3 323 540	2.80 %	1 859 808	1.91 %
Thailand	2 383 713	2.01 %	1 056 944	1.09 %
Philippines	1 664 420	1.40 %	2 373 386	2.44 %
Egypt	1 572 824	1.33 %	1 097 544	1.13 %
South Korea	1 405 241	1.18 %	1 533 446	1.58 %
Myanmar/ Burma	1 291 190	1.09 %	930 780	0.96 %
Others (*)	13 261 146	11.18 %	5 640 711	5.81 %
Total	**118 661 965**	**100.00 %**	**97 133 707**	**100.00 %**

(*) FAO estimate.

Source: FAO for extra-EU countries and Eurostat and Eumofa for EU-28.

Top 10 species in aquaculture in the European Union (2013)

(value in thousands of EUR and percentage of total)

	value	% value
Salmon	855 936	21.32 %
Trout	561 378	13.98 %
Gilt-head seabream	541 724	13.49 %
Oyster	446 092	11.11 %
Seabass	438 777	10.93 %
Mussel	411 797	10.26 %
Bluefin tuna	183 472	4.57 %
Clam	174 460	4.35 %
Carp	148 442	3.70 %
Turbot	66 982	1.67 %

Top 10 species in aquaculture in the European Union (2013)

(volume in tonnes live weight and percentage of total)

	volume	% volume
Mussel	405 654	33.49 %
Trout	183 444	15.14 %
Salmon	172 679	14.26 %
Gilt-head seabream	110 150	9.09 %
Oyster	92 609	7.65 %
Carp	79 473	6.56 %
Seabass	77 470	6.40 %
Clam	30 000	2.48 %
Bluefin tuna	11 642	0.96 %
Turbot	9 360	0.77 %

Source: Eurostat and Eumofa.

Main species in aquaculture per Member State (2013)

(value in thousands of EUR and percentage of total value – volume in tonnes live weight and percentage of total volume)

BE	value	% value	volume	% volume
Trout	749	100.0%	173	100.0%

BG	value	% value	volume	% volume
Trout	9 865	42.8%	2 892	25.7%
Carp	8 600	37.3%	5 542	49.3%
Mussel	1 530	6.6%	1 787	15.9%

CZ	value	% value	volume	% volume
Carp	30 236	85.7%	17 700	91.4%

DK	value	% value	volume	% volume
Trout	87 474	88.7%	29 856	93.9%

DE	value	% value	volume	% volume
Trout	36 461	51.7%	10 656	45.8%
Carp	13 802	19.6%	5 836	25.1%
Mussel	10 878	15.4%	5 036	21.6%

EE	value	% value	volume	% volume
Trout	1 368	89.9%	465	91.4%
Carp	136	9.0%	44	8.6%

IE	value	% value	volume	% volume
Salmon	55 680	48.8%	9 125	26.7%
Oyster	39 906	34.9%	8 640	25.3%
Mussel	14 906	13.1%	15 361	44.9%

EL	value	% value	volume	% volume
Gilt-head seabream	362 043	56.6%	73 300	50.4%
Seabass	248 627	38.9%	48 600	33.4%
Mussel	6 987	1.1%	18 638	12.8%

ES	value	% value	volume	% volume
Seabass	92 559	21.6%	14 946	6.6%
Mussel	79 962	18.6%	162 012	71.6%
Gilt-head seabream	76 924	17.9%	18 897	8.4%
Trout	42 156	9.8%	15 799	7.0%

FR	value	% value	volume	% volume
Oyster	389 122	56.1%	77 511	38.7%
Mussel	132 173	19.1%	74 139	37.0%
Trout	103 196	14.9%	31 764	15.9%

NB: Not relevant for LU.
Source: Eurostat data, integrated with data from Eumofa for DE, DK, EL and corresponding totals.

HR	value	% value	volume	% volume
Bluefin tuna	37 942	48.1%	2 616	19.1%
Seabass	15 975	20.2%	2 826	20.6%
Gilt-head seabream	15 394	19.5%	2 978	21.7%
Carp	5 101	6.5%	2 739	20.0%
Mussel	2 012	2.5%	1 950	14.2%

IT	value	% value	volume	% volume
Clam	127 650	32.5%	24 609	17.5%
Trout	107 972	27.5%	36 850	26.2%
Mussel	44 354	11.3%	64 235	45.6%

CY	value	% value	volume	% volume
Gilt-head seabream	18 880	64.6%	3 795	71.05%
Seabass	9 271	31.7%	1 422	26.62%

LV	value	% value	volume	% volume
Carp	1 068	66.1%	529	82.1%
Trout	150	9.3%	30	4.7%

LT	value	% value	volume	% volume
Carp	7 026	84.7%	3 532	92.7%

HU	value	% value	volume	% volume
Carp	19 614	76.7%	11 881	82.6%
Freshwater catfish	4 644	18.2%	2 262	15.7%

MT	value	% value	volume	% volume
Bluefin tuna	92 797	87.7%	6 123	67.5%
Gilt-head seabream	10 927	10.3%	2 550	28.1%

NL	value	% value	volume	% volume
Mussel	72 834	66.1%	37 112	79.6%
Eel	24 523	22.3%	2 885	6.2%
Freshwater catfish	4 650	4.2%	3 100	6.7%
Oyster	3 719	3.4%	2 958	6.3%

AT	value	% value	volume	% volume
Trout	12 162	73.6%	2 066	70.1%
Carp	2 339	14.2%	660	22.4%
Other salmonids	1 599	9.7%	182	6.2%

PL	value	% value	volume	% volume
Carp	35 996	47.9%	17 364	55.6%
Trout	31 054	41.4%	11 419	36.5%

PT	value	% value	volume	% volume
Clam	24 727	50.2%	2 370	30.1%
Turbot	12 724	25.8%	2 453	31.2%
Gilt-head seabream	4 393	8.9%	810	10.3%
Seabass	3 071	6.2%	489	6.2%
Oyster	2 477	5.0%	980	12.4%

RO	value	% value	volume	% volume
Carp	15 640	75.8%	8 729	86.0%
Trout	4 263	20.6%	1 106	10.9%

SI	value	% value	volume	% volume
Trout	2 014	70.7%	582	53.7%
Seabass	371	13.0%	50	4.6%
Carp	295	10.4%	123	11.3%
Mussel	164	5.7%	327	30.2%

SK	value	% value	volume	% volume
Trout	2 279	72.0%	738	68.0%
Carp	516	16.3%	232	21.4%

FI	value	% value	volume	% volume
Trout	39 626	82.7%	12 027	90.5%
Other salmonids	7 646	16.0%	1 155	8.7%

SE	value	% value	volume	% volume
Trout	30 539	70.1%	9 763	73.0%
Other salmonids	11 034	25.3%	1 808	13.5%
Mussel	1 180	2.7%	1 702	12.7%

UK	value	% value	volume	% volume
Salmon	799 780	89.2%	163 518	80.4%
Mussel	44 057	4.9%	22 480	11.1%
Trout	35 305	3.9%	12 824	6.3%

4.3 Processing sector

Despite the increase in production costs, and the low profit margins, the fish processing industry is still viable, with an overall turnover of nearly EUR 28 billion. The main countries in terms of output are the United Kingdom, France, Spain, Italy and Germany.

In several of the countries with a strong processing sector, the industry outsources activities both inside and outside the EU. In most EU Member States, however, net investments are declining, even in countries such as Denmark and Poland, which still record positive net profits. Only Germany and Spain remain net investors.

Turnover (2012)

(in thousands of EUR)

UK	5 009 468
FR	4 861 618
ES	4 533 205
IT	2 557 006
DE	2 040 378
DK	2 009 993
PL	1 934 753
PT	1 077 971
BE	825 897
NL	775 383
IE	656 463
SE	613 214
LT	290 812
FI	264 749
EL	232 861
LV	226 708
EE	143 152
HR	48 009
SI	32 262
RO	30 353
MT	29 566
CY	7 424
BG	7 188
Total	**28 208 434**

NB: Data are not available for AT, CZ, HU, LU and SK.

Source: Scientific, Technical and Economic Committee for Fisheries (STECF), *The Economic Performance Report on the EU Fish Processing Sector* (STECF-14-21), Luxembourg, Publications Office of the European Union, 2014 (Report EUR 27029 EN, JRC 93340).

4.4 Organisation of the sector

Producer organisations (2015)

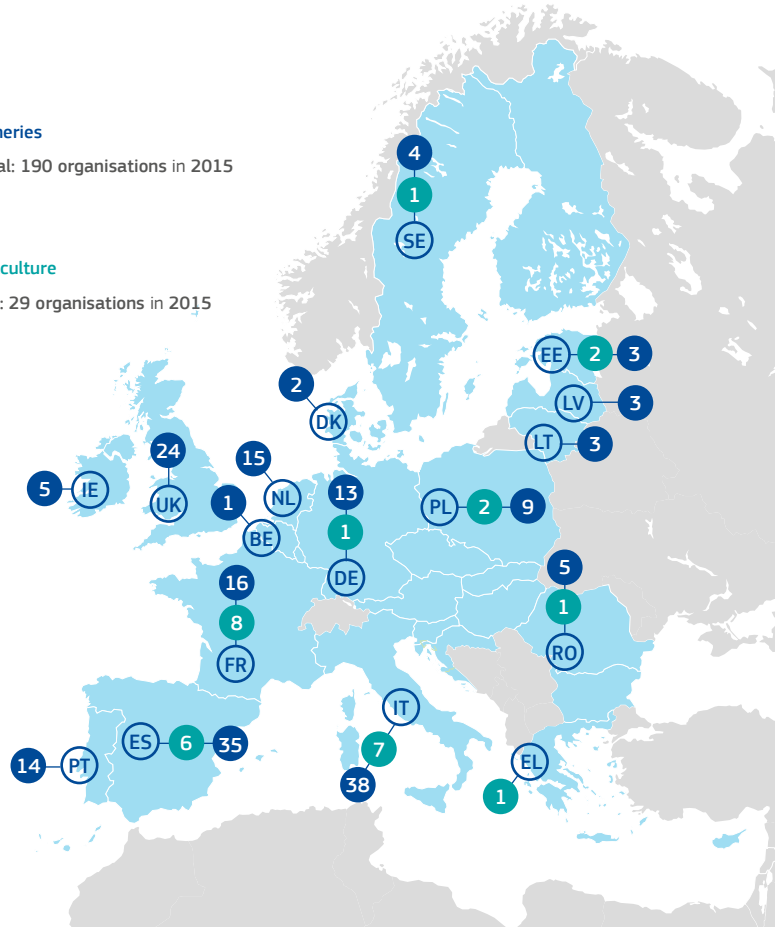
Fishermen and fish farmers may join forces through producer organisations to make their production sustainable and efficiently market their products. They do so through the establishment of production and marketing plans. These organisations are key actors in the fisheries and aquaculture sector. In 2015, there were 219 producer organisations across 17 EU Member States.

Fisheries

Total: 190 organisations in **2015**

Aquaculture

Total: 29 organisations in **2015**



NB: In AT, BG, CY, CZ, FI, HR, HU, LU, MT, SI and SK, there are no producer organisations.

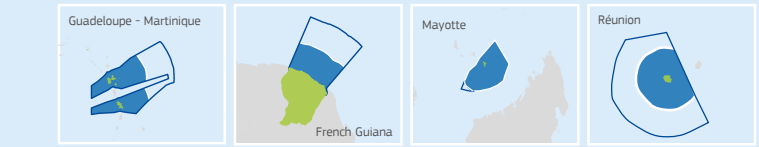
Source: Member States. For Romania: *Official Journal of the European Union*, C 68, 8/3/2013.

Advisory Councils

Advisory Councils are stakeholders' organisations composed of representatives from the industry and from other interest groups (with a 60% - 40% allocation of seats in the general assembly and the executive committee). Their purpose is to submit to the European Commission and Member States recommendations on issues related to fisheries and aquaculture. Advisory Councils may also provide information for the development of conservation measures, while Member States are to consult them in the context of regionalisation.

As they pursue an aim of general interest for Europe, Advisory Councils receive EU financial assistance from the European Commission to cover part of their operational costs.

In addition to the seven existing Advisory Councils (Baltic Sea, Long Distance Fleet, Mediterranean Sea, North Sea, North-Western waters, Pelagic stocks, South-Western waters), the new CFP has established four new Advisory Councils for the Black Sea, Aquaculture, Markets and Outermost regions. The first three are already operational.


Guadeloupe - Martinique
French Guiana
Mayotte
Réunion

5 External trade

The EU is the leading trader of fisheries and aquaculture products in the world in terms of value. EU trade (imports and exports) has increased over the past few years, reaching EUR 45.9 billion in 2014. Norway, China, Ecuador and Morocco are the EU's main suppliers, while the United States, Norway, Switzerland and China are the EU's main customers.

The EU is a net importer of fisheries and aquaculture products, mostly frozen and prepared. Spain, Sweden, the United Kingdom and Denmark are the leading importing Member States.

If EU aquaculture products stay within the European market, EU exports will be almost entirely composed of products from captured fisheries. Between 2012 and 2014 EU exports to third countries increased to EUR 4.3 billion. Spain, the United Kingdom, Denmark and the Netherlands are the leading exporting Member States to third countries.

Trade between EU countries is very significant and plays an essential role in the EU's fisheries trade. Its value is comparable to that of imports coming from outside the EU, i.e. EUR 20.6 billion in 2014. The main exporters to other EU Member States are Sweden, Denmark, the Netherlands and Spain. The main importers are France, Germany, Italy and Spain.

Trade of fisheries and aquaculture products between the European Union and third countries (2014)

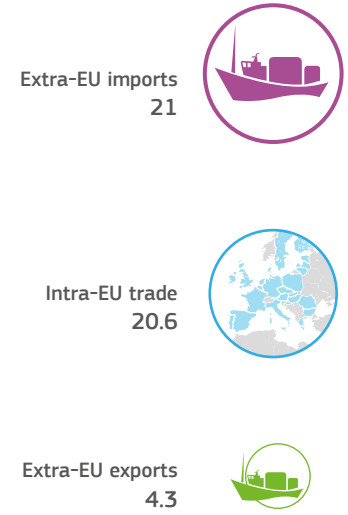
(volume in tonnes and value in thousands of EUR)

	Imports		Exports	
	tonnes	value	tonnes	value
Pelagic fish	1 057 615	3 226 300	1 118 369	1 372 097
Salmonids	837 320	4 429 927	117 676	702 642
Other fish	1 881 271	5 917 574	405 804	1 191 656
Crustaceans	621 184	4 474 711	66 816	311 198
Molluscs	614 215	1 997 959	46 291	225 477
Non-food use products	936 103	914 014	390 213	518 314
Total EU-28	5 947 708	20 960 485	2 145 169	4 321 384

Source: Eurostat and Eumofa.

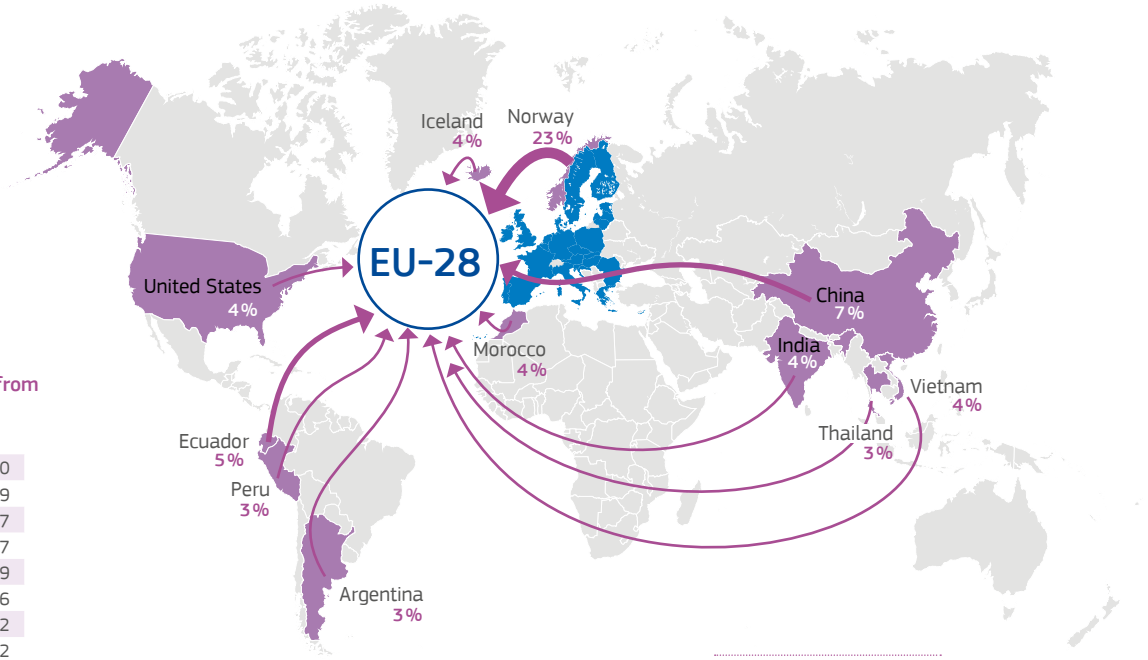
Extra- and intra-EU trade (2014)

(value in billions of EUR)



Trade of fisheries and aquaculture products between the European Union and third countries – Main suppliers (2014)

(value in thousands of EUR and percentage of total)

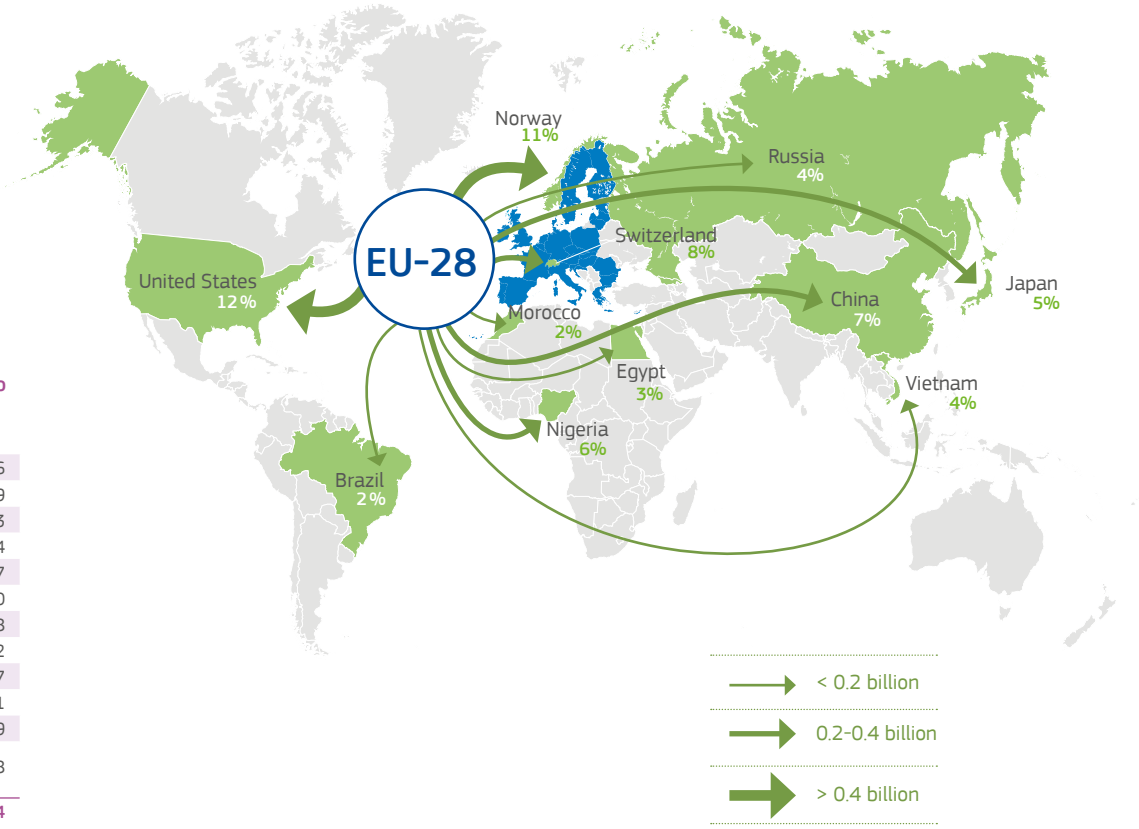


Value of EU-28 imports from the main suppliers

Norway	4 836 790
China	1 463 159
Ecuador	1 067 347
Morocco	941 417
Iceland	935 539
Vietnam	929 766
United States	892 392
India	875 452
Thailand	652 419
Argentina	570 419
Peru	551 168
Other third countries	7 244 617
Total	20 960 485

Trade of fisheries and aquaculture products between the European Union and third countries – Main customers (2014)

(value in thousands of EUR and percentage of total)



Value of EU-28 exports to the main customers

United States	516 216
Norway	477 119
Switzerland	352 433
China	316 844
Nigeria	277 397
Japan	218 420
Russia	173 548
Vietnam	165 132
Egypt	130 397
Morocco	99 961
Brazil	81 549
Other third countries	1 512 368
Total	4 321 384

Trade of fisheries and aquaculture products between the European Union and third countries (2014)

(value in thousands of EUR and percentage of total)

Main Member States **importing** from third countries

ES	3 395 282	16%
SE	3 174 285	15%
UK	2 388 140	11%
DK	2 072 802	10%
DE	1 963 153	9%
FR	1 902 438	9%
NL	1 892 037	9%
IT	1 883 901	9%
Other Member States	2 288 447	11%
Total EU-28	20 960 485	100%

Main Member States **exporting** to third countries

ES	765 957	18%
UK	706 941	16%
DK	630 015	15%
NL	591 627	14%
DE	299 755	7%
FR	288 839	7%
IE	180 225	4%
PT	179 715	4%
Other Member States	678 309	16%
Total EU-28	4 321 384	100%

Source: Eurostat and Eumofa.

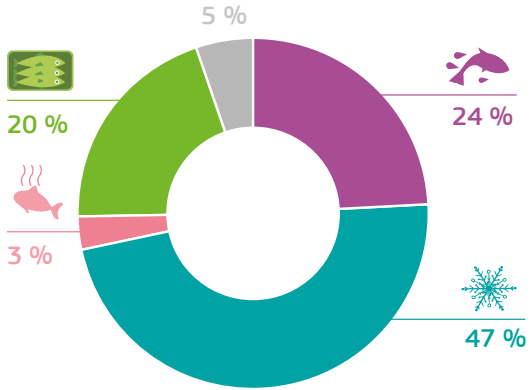
Imports and exports of fisheries and aquaculture products – Extra-EU trade (2014)

(volume in tonnes and value in thousands of EUR)

	Imports		Exports	
	tonnes	value	tonnes	value
BE	123 495	741 933	4 633	22 554
BG	9 186	13 853	3 270	11 460
CZ	15 394	42 655	2 718	8 686
DK	881 085	2 072 802	275 564	630 015
DE	674 650	1 963 153	143 050	299 755
EE	9 707	22 471	76 451	59 223
IE	48 647	28 566	158 976	180 225
EL	71 161	181 400	8 444	49 071
ES	1 040 637	3 395 282	445 728	765 957
FR	438 136	1 902 438	75 955	288 839
HR	8 564	22 279	14 104	46 217
IT	442 689	1 883 901	29 410	127 018
CY	7 828	29 044	3 021	19 264
LV	16 178	29 981	66 378	59 187
LT	53 105	109 351	22 749	32 955
LU	14	1 212	323	3 498
HU	3 022	5 757	1 002	2 838
MT	9 138	12 519	4 166	49 977
NL	509 313	1 892 037	514 189	591 627
AT	9 521	48 859	1 877	12 308
PL	174 389	369 908	26 817	93 495
PT	129 318	400 539	39 376	179 715
RO	16 617	33 241	795	3 196
SI	3 815	8 008	2 012	8 578
SK	5 968	9 991	341	893
FI	64 319	176 880	14 268	10 529
SE	661 651	3 174 285	17 205	57 362
UK	520 164	2 388 140	192 346	706 941
Total EU-28	**5 947 708**	**20 960 485**	**2 145 169**	**4 321 384**

Imports of fisheries and aquaculture products by main preservation categories – Extra EU-trade (2014)

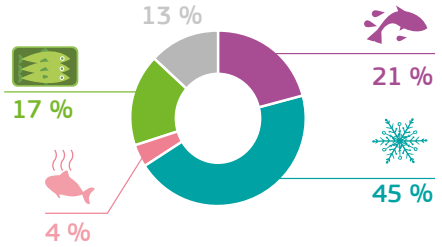
(value in thousands of EUR and percentage of total)



Fresh and chilled products	5 123 620
Frozen products	9 893 989
Smoked, salted and dried products	686 812
Ready meals and conserves	4 112 037
Unspecified	1 144 026
Total	20 960 485

Exports of fisheries and aquaculture products by main preservation categories – Extra EU-trade (2014)

(value in thousands of EUR and percentage of total)



Fresh and chilled products	900 690
Frozen products	1 946 539
Smoked, salted and dried products	192 783
Ready meals and conserves	730 300
Unspecified	551 072
Total	4 321 384

Source: Eurostat and Eumofa.

Imports of fisheries and aquaculture products – Extra-EU trade (2014)

(value in thousands of EUR)

Pelagic fish

ES	737 990
IT	560 316
FR	484 830
UK	409 141
DE	270 493
NL	265 523
PL	87 623
BE	76 447
Other Member States	333 935
Total EU-28	**3 226 300**

Salmonids

SE	2 586 277
DK	752 518
DE	337 452
UK	322 836
FI	116 731
FR	92 535
NL	49 081
PL	36 874
Other Member States	135 624
Total EU-28	**4 429 927**

Other fish

NL	996 136
UK	833 523
ES	791 218
DE	786 056
DK	557 392
FR	443 585
SE	392 852
IT	310 325
Other Member States	806 486
Total EU-28	**5 917 574**

Crustaceans

ES	907 247
UK	682 220
FR	648 371
NL	460 263
BE	411 175
IT	405 967
DK	399 566
DE	285 575
Other Member States	274 327
Total EU-28	**4 474 711**

Molluscs

ES	855 305
IT	558 300
FR	175 299
PT	87 537
NL	78 437
EL	64 175
UK	56 091
BE	44 166
Other Member States	78 648
Total EU-28	**1 997 959**

Non-food use products

DK	279 176
DE	249 784
UK	84 328
ES	74 618
FR	57 817
NL	42 598
EL	34 174
IT	28 407
Other Member States	63 111
Total EU-28	**914 014**

Source: Eurostat and Eumofa.

Exports of fisheries and aquaculture products – Extra-EU trade (2014)

(value in thousands of EUR)

Pelagic fish

ES	426 727
NL	333 525
IE	121 540
UK	97 914
FR	66 458
IT	60 435
LV	52 195
MT	47 330
Other Member States	165 974
Total EU-28	**1 372 097**

Salmonids

UK	464 979
DK	46 280
PL	39 108
DE	35 598
NL	30 848
FR	21 711
SE	20 741
LT	7 351
Other Member States	36 026
Total EU-28	**702 642**

Other fish

ES	238 076
DK	181 166
FR	137 462
NL	123 718
PT	109 269
DE	93 475
IT	44 408
UK	42 900
Other Member States	221 181
Total EU-28	**1 191 656**

Crustaceans

DK	105 061
NL	87 235
UK	32 976
FR	17 025
DE	15 330
ES	13 837
EE	10 069
BE	8 357
Other Member States	21 310
Total EU-28	**311 198**

Molluscs

ES	73 631
UK	33 157
FR	32 299
IE	24 585
PT	22 638
IT	10 424
BG	8 065
NL	5 520
Other Member States	15 157
Total EU-28	**225 477**

Non-food use products

DK	289 952
DE	128 187
UK	35 015
FR	13 884
NL	10 782
ES	10 052
IE	9 942
PT	4 086
Other Member States	16 414
Total EU-28	**518 314**

Source: Eurostat and Eumofa.

6 | Consumption

Fisheries and aquaculture products are an important source of protein and a crucial component of a healthy diet. This is particularly true for the average European, who consumes 24.9 kg of fish or seafood per year (6 kg more than in the rest of the world).

Consumption, however, varies greatly across the EU, from 5.3 kg per person in Hungary to 56.8 kg in Portugal.

Three quarters of the fish or seafood consumed in the EU comes from wild fisheries, while the remaining quarter comes from aquaculture. The most popular species are tuna, salmon and cod.

Consumption of fisheries and aquaculture products (2011)

(quantity in live weight (kg/inhabitant/year))

PT	56.8
LT	43.4
ES	42.4
FI	35.6
FR	34.6
SE	31.0
MT	30.5
LU	29.1
LV	27.5
IT	25.4
BE	25.1
EU-28	**24.9**
NL	23.6
CY	23.3
DK	23.0
IE	22.3
HR	19.7
EL	19.6
UK	19.0
EE	14.7
DE	14.2
AT	13.3
PL	12.0
SI	11.2
CZ	9.5
SK	8.1
BG	6.6
RO	6.1
HU	5.3

Source: FAO, Eurostat and Eumofa.

Consumption of fisheries and aquaculture products in the major world economy (2011)

(quantity in live weight (kg/inhabitant/year another)

Iceland	90.1
Japan	53.7
Norway	53.4
China	32.9
EU-28	24.9
Canada	22.3
Russia	22.3
United States	21.7
World average	18.9
Brazil	10.6
India	5.2

Source: FAO, Eurostat and Eumofa.

The main species consumed in the European Union (2012)

(quantity in live weight (kg/inhabitant/year another)

	Per capita (kg)	% wild	% farmed
Tuna (canned)	2.02	100%	0%
Salmon	1.97	7%	93%
Cod	1.96	98%	2%
Pollack	1.60	100%	0%
Herring	1.52	100%	0%
Mussel	1.27	12%	88%
Hake	0.86	100%	0%
Pangasius	0.82	0%	100%
Mackerel	0.78	100%	0%
Squid	0.76	100%	0%
Tropical shrimps	0.68	42%	58%
Sardine	0.54	100%	0%
Scallop	0.48	81%	19%

Source: Eumofa, *The EU fish market*, 2015 edition.

Consumption of proteins

In the EU, the 2011 average consumption of protein from fish and seafood remained stable at 6.64 grammes per day per person, which corresponds to around 7% of total protein intake and 11% of animal protein intake.

All animal proteins make up 58% of individual protein intake (58.87 grammes per day), while vegetal proteins cover the remaining 42% (42.50 grammes per day).

*Meat, milk, cheese, egg, etc.

Source: FAO.

Consumption of proteins per Member State (2011)

(grammes per capita per day)

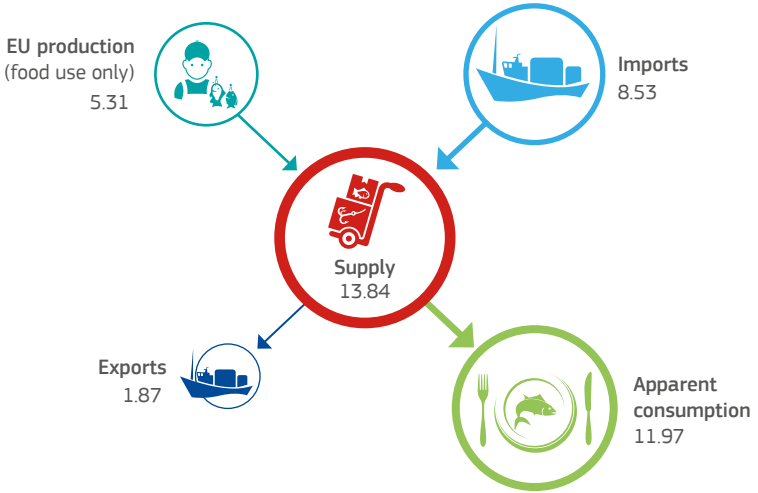
	Fish and seafood	Other animal proteins*	Vegetables
LT	16.60	59.00	48.70
PT	15.20	53.80	42.20
ES	12.90	52.30	38.10
FI	10.20	59.50	42.90
FR	9.50	61.50	41.60
DK	9.20	59.10	39.40
LV	8.70	49.00	39.40
SE	8.40	62.50	36.10
MT	8.20	51.00	50.10
LU	7.20	64.90	43.10
IT	7.00	52.90	50.00
NL	7.00	63.80	35.40
EU-28 average	**6.64**	**52.23**	**42.50**
BE	6.30	52.40	42.40
CY	6.20	41.20	31.50
HR	6.00	39.90	36.50
PL	5.80	46.80	49.40
UK	5.40	53.00	44.30
EL	5.30	56.60	49.50
IE	5.30	54.30	45.50
DE	4.50	57.70	40.90
EE	3.90	47.40	45.20
AT	3.70	60.70	42.20
CZ	2.90	49.30	38.50
SI	2.90	52.70	43.40
SK	2.30	33.60	38.30
BG	2.00	37.20	44.90
RO	1.70	47.50	55.60
HU	1.50	42.70	34.80

Supply balance

The supply to the EU market is ensured by the EU's own production and by imports, for a total of 13.84 million tonnes available for human consumption in 2012. In the same year, the apparent consumption, obtained by subtracting exports from this figure, was 11.97 million tonnes.

Supply balance (2012)

(volume in million tonnes live weight equivalent)



Source: Eumofa.

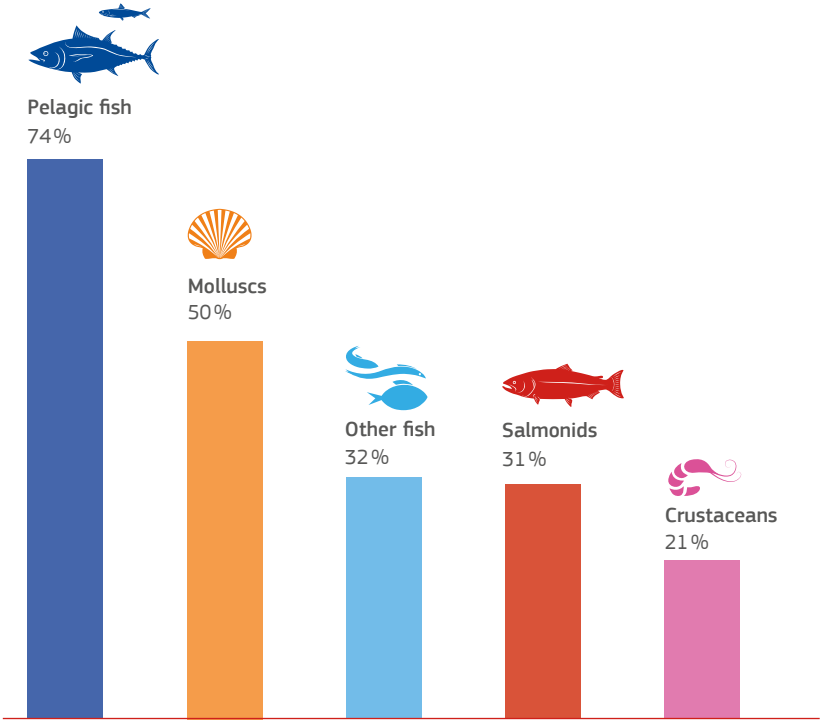
Self-sufficiency

The EU's self-sufficiency rate, which is the ratio between own production (catches plus aquaculture) and total apparent consumption, was stable at around 45% between 2008 and 2012.

The EU's production covers two thirds of consumption for pelagics and half that of molluscs, but is more dependent on external sourcing for crustaceans and salmonids.

European Union's self-sufficiency rate (2012)

(percentage by commodity group)



Source: Eumofa.

7 | European Union support

Five European Structural and Investment Funds[1] support the economic recovery of the EU until 2020. One of them, the European Maritime and Fisheries Fund (EMFF), is specifically tailored to Europe's seas and coasts. Its EUR 6.4 billion budget (5.7 billion of which are allocated to and managed by the Member States under shared management) is focused not only on underpinning the new Common Fisheries Policy (CFP) and making fisheries and aquaculture more sustainable and profitable but also on diversifying local economies for the sustainable development of maritime regions and inland fisheries and aquaculture areas.

The EMFF supports initiatives ailing at rebuilding fish stocks, phasing-out of discards, collecting fisheries data and reducing man-made impacts on the marine environment. Control and enforcement actions are equally covered, to ensure proper compliance with the rules. The Fund also favours international cooperation and integration in maritime domains such as spatial planning and surveillance.

The EMFF has the following six main priorities:

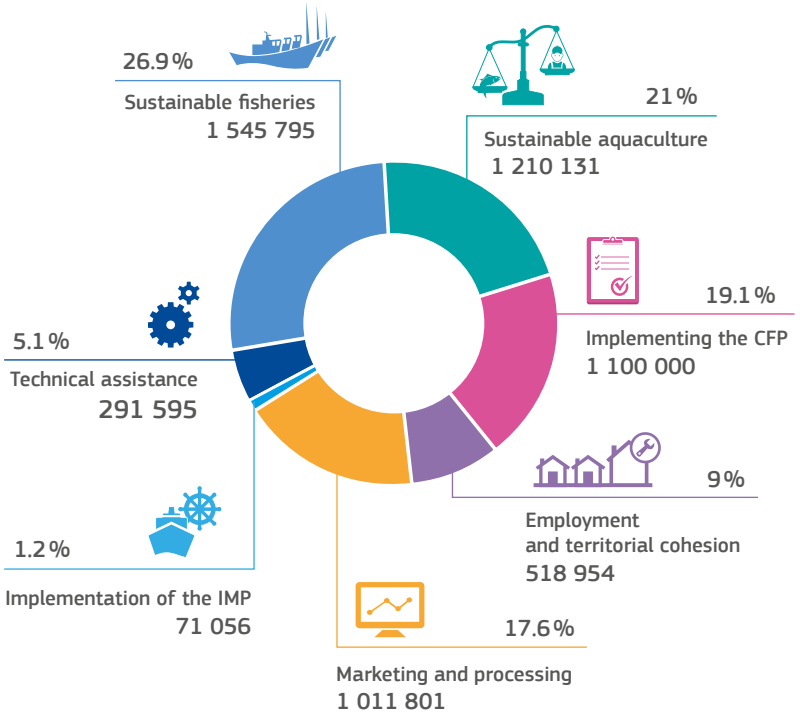
- **Sustainable fisheries (26.9%):** to strike a balance between human fishing capacity and available natural resources, to fish more selectively and to reduce unintended catches.
- **Sustainable aquaculture (21%):** to make the sector more successful and competitive by focusing on quality, health and safety, as well as eco-friendly production; and to provide consumers with high-quality, highly nutritional and trustworthy products.
- **Implementing the CFP (19.1%):** to improve data collection, scientific knowledge, control and enforcement of fisheries legislation.
- **Employment and territorial cohesion (9%):** to help coastal and inland fisheries and aquaculture communities gain more value for their products and diversify their economies into other maritime fields such as tourism or direct sales.
- **Marketing and processing (17.6%):** to improve market organisation, market intelligence and consumer information in the world's largest seafood market.
- **Implementing the Integrated Maritime Policy (IMP) (1.2%):** to improve marine knowledge, better plan activities at sea, promote cooperation in maritime surveillance and manage sea basins according to their individual needs.

The remaining 5.1% concerns **technical assistance** to help Member States to implement the above priorities.

[1] The European Regional Development Fund (ERDF), the European Social Fund (ESF), the Cohesion Fund (CF), the European Agricultural Fund for Rural Development (EAFRD) and the European Maritime and Fisheries Fund (EMFF).

EMFF priorities

(in thousands of EUR and percentage of total)



Above and beyond these priorities, the EMFF does not prescribe how every cent should be spent, but rather allocates a share of the total budget to each country, and leaves it to each national authority – and each local community – to choose the projects and solutions that work best for their own economy.

EMFF contribution – 2014-2020 programming period – Per priority

(in thousands of EUR and percentage of total)

	Sustainable fisheries	Sustainable aquaculture	Implementation of the CFP	Employment and territorial cohesion	Marketing and processing	Implementation of the IMP	Technical assistance	Total per MS	% per MS
BE	14 375	6 725	14 245	0	4 101	1 000	1 300	**41 746**	**0.73%**
BG	18 921	27 161	10 477	15 180	9 703	2 500	4 125	**88 067**	**1.53%**
CZ	0	20 772	2 653	0	5 976	0	1 707	**31 108**	**0.54%**
DK	74 150	25 750	70 546	7 518	19 868	2 500	8 022	**208 355**	**3.62%**
DE	41 195	64 232	59 695	20 910	23 081	2 500	7 983	**219 596**	**3.82%**
EE	19 325	13 402	11 655	23 600	24 664	2 500	5 824	**100 970**	**1.76%**
IE	33 500	14 900	69 791	6 000	17 282	5 335	795	**147 602**	**2.57%**
EL	128 025	67 319	70 433	46 000	59 777	4 446	12 778	**388 778**	**6.76%**
ES	352 491	205 906	155 955	107 674	274 410	5 335	59 851	**1 161 621**	**20.20%**
FR	150 941	88 790	122 279	22 581	163 236	5 335	34 818	**587 980**	**10.23%**
HR	86 827	55 261	34 824	18 954	40 618	1 000	15 159	**252 643**	**4.39%**
IT	173 056	110 567	102 429	42 430	72 088	4 446	32 247	**537 263**	**9.34%**
CY	12 928	9 450	8 692	5 250	1 246	1 400	750	**39 715**	**0.69%**
LV	30 450	34 700	11 148	12 750	40 786	2 500	7 500	**139 834**	**2.43%**
LT	10 404	21 219	7 440	10 396	9 302	1 000	3 672	**63 432**	**1.10%**
HU	2 541	25 768	2 451	0	7 984	0	352	**39 096**	**0.68%**
MT	8 548	2 480	8 692	0	407	1 200	1 300	**22 627**	**0.39%**
NL	36 240	4 920	49 460	0	3 424	2 500	4 980	**101 523**	**1.77%**
AT	45	3 604	1 400	0	1 690	0	227	**6 965**	**0.12%**
PL	130 176	201 740	23 627	79 700	61 603	2 500	31 873	**531 219**	**9.24%**
PT	103 625	59 000	55 447	35 000	111 229	5 335	22 850	**392 485**	**6.83%**
RO	13 204	84 258	12 943	33 684	11 766	2 500	10 067	**168 421**	**2.93%**
SI	3 000	6 000	4 266	5 000	3 558	1 000	1 985	**24 809**	**0.43%**
SK	0	9 407	1 400	0	4 041	0	937	**15 785**	**0.27%**
FI	12 300	15 600	30 018	4 400	5 530	4 446	2 100	**74 393**	**1.29%**
SE	22 042	11 871	60 401	8 343	7 189	4 446	5 864	**120 156**	**2.09%**
UK	67 487	19 327	97 634	13 584	27 244	5 335	12 528	**243 139**	**4.23%**
Total per priority	**1 545 795**	**1 210 131**	**1 100 000**	**518 954**	**1 011 801**	**71 056**	**291 595**	**5 749 332**	**100.00%**

NB: Not relevant for LU.
Source: Member States' operational programmes.

To find out more

European Commission websites

Directorate-General for Maritime Affairs and Fisheries:
Common Fisheries Policy: http://ec.europa.eu/fisheries
European Atlas of the Seas: http://ec.europa.eu/maritimeatlas

Eumofa - European Market Observatory for Fisheries and Aquaculture products
http://www.eumofa.eu/

Eumofa is an on-line multilingual database which provides access to real-time comprehensive data on price, value and volume of fisheries and aquaculture production across the EU as well as market information and analysis.

Eurostat, statistics on fisheries:
http://epp.eurostat.ec.europa.eu/web/fisheries/statistics-illustrated

Member States codes used in this publication

BE	Belgium	**LT**	Lithuania
BG	Bulgaria	**LU**	Luxembourg
CZ	Czech Republic	**HU**	Hungary
DK	Denmark	**MT**	Malta
DE	Germany	**NL**	The Netherlands
EE	Estonia	**AT**	Austria
IE	Ireland	**PL**	Poland
EL	Greece	**PT**	Portugal
ES	Spain	**RO**	Romania
FR	France	**SI**	Slovenia
HR	Croatia	**SK**	Slovakia
IT	Italy	**FI**	Finland
CY	Cyprus	**SE**	Sweden
LV	Latvia	**UK**	United Kingdom

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