



CASE STUDY

CONSUMPTION OF FISHERY AND AQUACULTURE PRODUCTS IN THE EU

ANNEX

COUNTRY PROFILES



E U M O F A

European Market Observatory for Fisheries and Aquaculture Products

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1 Spain

1.1 Consumption trends of FAPs

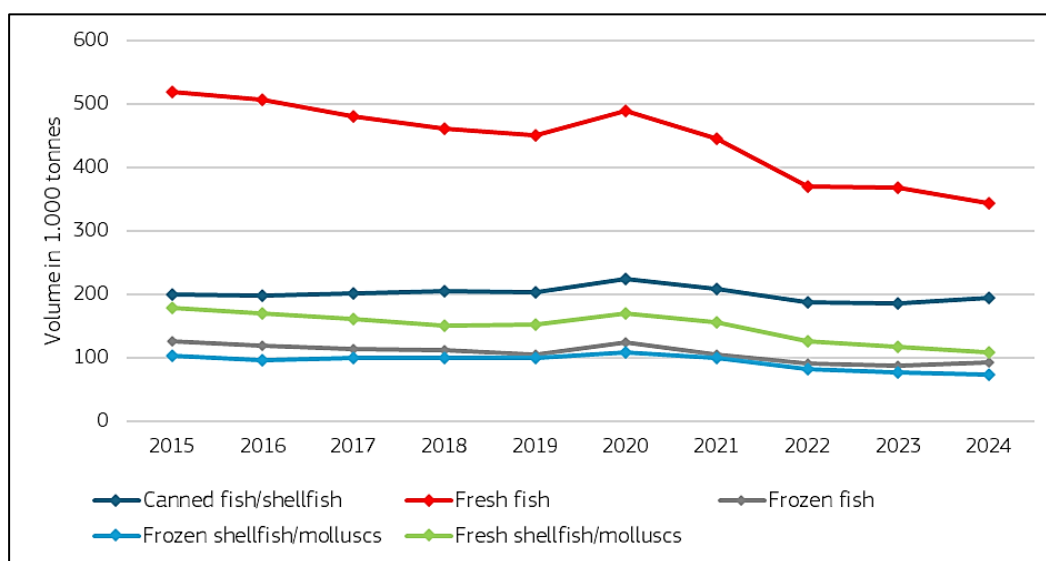
1.1.1 General trends

The consumption of fish products within households has declined significantly and progressively in recent years, reaching its lowest levels in 2024. All FAPs combined, the household consumption decreased by 27% between 2015 and 2024, reaching 843.502 tonnes product weight in 2024¹. This decline is confirmed by all stakeholders and for all marketing channels. For instance, one of the largest retailers in Spain reported a general decline in the FAPs sales by 20%.

This decline affects all product categories, but to varying degrees:

- The most significant decline is in fresh FAPs:
 - Fresh fish, which accounts for the largest volumes, 42% of the total FAPs in 2024, decreased by 34% over the last decade.
 - Fresh shellfish and molluscs, which accounted for 13% of the total FAPs in 2024, decreased by 39% over the last decade.
 - Frozen FAPs, which represented 21% of the total FAPs in 2024, declined by 26% for frozen fish and 29% for frozen shellfish and molluscs over the last decade. However, a slight recovery has been noted since 2022 (+2%).
 - Canned products, which accounted for 24% of the total FAPs in 2024, have held up well compared to the other product categories, with a slight decline of 3% over the last decade and a slight recovery since 2022 (+3%).

Figure 1 - Household consumption (volumes in tonnes)



Source: MAPA

¹ Ministry of Agriculture, Food and Fisheries (MAPA)

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Stakeholders interviewed noted that inflation, the decline in purchasing power, and changes in consumption habits (see section 1.2.2) have led to a sharp decline in consumption of fresh FAPs. Frozen and prepared products are less affected by this phenomenon.

Some stakeholders pointed out that the shift in the type of fresh fish consumed, from whole fresh fish consumed in the past to more prepared products that are lighter in volume, led to a decrease in the overall consumption volumes. This is also associated with increased consumption of fresh fish in sushi, which tends to reduce the overall fish portion. This evolution in product preference has also led retailers to adapt their sales models. For instance, one of the largest retailers in Spain has significantly reduced its fresh fish counter offerings to focus more on prepackaged products. The same retailer reported a decline of more than 50% in fresh fish counter sales over the past decade.

Additionally, a decrease in consumption frequency, primarily due to the time required to cook fish, contributes to the overall decline in consumption of fresh fish (see section 1.2.2 on changes in consumption habits). However, there was a brief recovery in the consumption of fresh fish during the COVID-19 pandemic (see Figure 1) as consumers had more time to cook fresh fish at home that was usually consumed outside before the pandemic. This encouraged the consumption of FAPs during this very specific period. However, all opinions gathered agree that the COVID-19 crisis has not changed long-term trends.

Evolution of per-capita consumption

As shown by general trends, fish is going through a particularly difficult period in Spanish households, marked by a sharp decline in per capita consumption.

Fish markets and fishmongers have been losing ground in the shopping basket at a rate that is evident in the per capita household consumption data calculated by the MAPA: while in 2014 each Spanish citizen consumed an average of 26,4 kilograms of fish per year (product weight), by 2024 that figure had fallen to 17,9 kilograms (product weight); which means a 32% drop in just a decade. If we broaden the comparison period, the decline is even greater. In 2009, consumption was close to 30 kg.

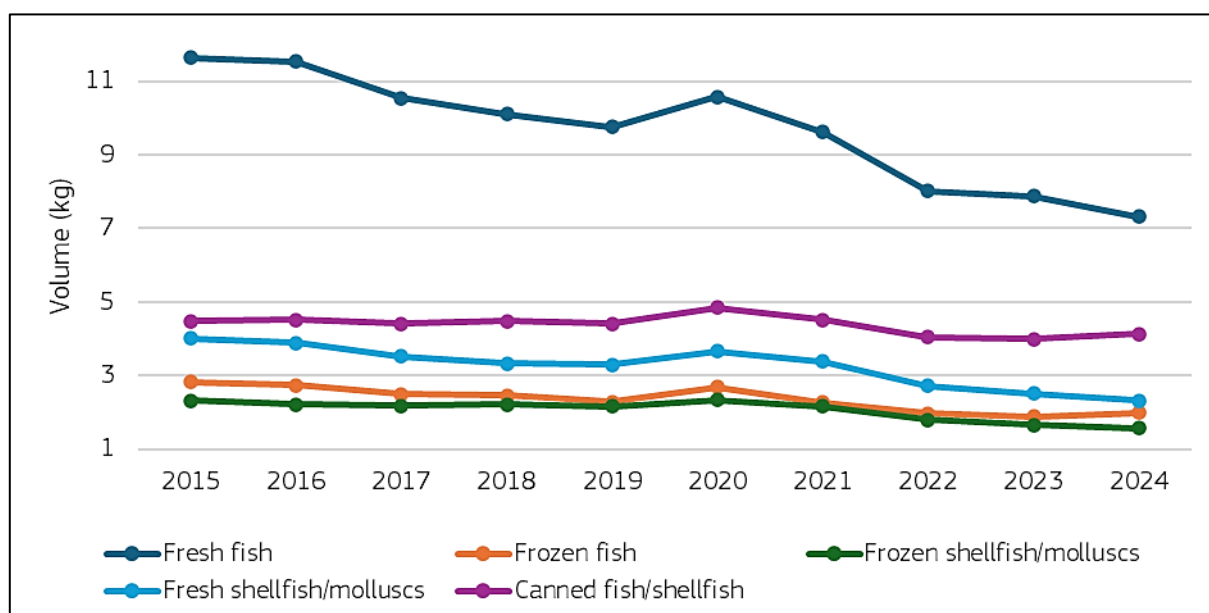
According to the latest tables from the MAPA on monthly domestic consumption². In May 2025, each Spanish consumer ate an average of 1,48 kg, spending EUR 17 per month. The consumption figure is similar to 2024, but far from the 2,13 kg in 2015 or the 2,33 kg in 2005.

The drop is stronger for fresh FAPs than for frozen ones, following the same trend as for the general consumption:

- -37% between 2015 and 2024 for fresh fish (7,3 kg/head) and -42% for fresh shellfish and molluscs (2,3 kg/head in 2024).
- -29% for frozen fish (2 kg/head in 2024) and -33% for frozen shellfish and molluscs (1,6 kg/head in 2024).
- -8% for canned FAPs (4,13 kg/head in 2024).

² <https://www.mapa.gob.es/es/alimentacion/temas/consumo-tendencias/panel-de-consumo-alimentario/series-anuales>

Figure 2 – Consumption per head in Spain (kg of product weight/year/head)



Source: MAPA

1.1.2 Evolution at the species level

In general, stakeholders interviewed pointed out that the variety of fish available at fishmongers is not as wide as it used to be. This decline in variety is perceived as detrimental to consumption.

Statistical data provided by MAPA in its report “Fishing month by month”³, indicate a significant decline in volumes of household consumption for most main species over the last decade: -49% for hake; -34% for sardines and anchovies; -33% for tuna and bonito; -12% for canned tuna.

It must be highlighted that despite the decrease of canned tuna and canned sardines by 12% and 23% respectively, the whole category of canned products indicates a very slight decrease of 3% over the last decade due to the increase of 37% of the category “other canned fish” which accounts for 28% of the total volume of canned FAPs.

Interviewees remarked that hake was the most consumed species ten years ago. However, household consumption of hake has declined markedly, primarily attributed to the decrease in stocks. In addition, the most widely consumed hake species as fresh fish, particularly those caught in European waters, has been significantly affected by anisakiasis. This shifted consumers toward purchasing it from sources that are free of anisakis issue, or to frozen options. In addition, some retailers are introducing fresh hake preparations that are becoming popular.

Consumption of some other species has remained stable, with only slight declines over the last ten years: salmon (-1,9%) and cod (-2,2%).

MAPA reports that certain species have experienced increases in consumption over the past year, including trout (+19,4% between March 2024 and March 2025), sea bass (+18,4%), sardines and anchovies (+11,5%), and salmon (+11%). The evolution of salmon is particularly noteworthy, not

³ <https://www.mapa.gob.es/dam/mapa/contenido/alimentacion/temas/consumo-y-tendencias-en-alimentacion/panel-de-consumo-alimentario/ultimos-datos/informacion-consumo-por-sectores/archivos-consumo-pesca/la-pesca-mes-a-mes-marzo-2025.pdf>

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so much for its percentage growth as for its volume, with one of the highest per capita consumption rates among the species identified by MAPA (1,31 kg/head in 2024 for fresh and frozen salmon). Demand for smoked salmon has increased by 14% since 2015 and by 25% between March 2024 and March 2025.

Farmed salmon has become one of the most popular species in Spain (fresh salmon is the third most consumed species in Spain). According to stakeholders interviewed, there are several reasons for its consumer preference: it offers high quality as it has no bones, it has an attractive colour, and it is easy to prepare and easy for children to eat. Another significant reason is Norway's coordinated communication campaigns across all social networks and in the media, conducted systematically to increase consumer demand. Salmon is increasingly seen on the weekly menus of many restaurants in Spain. Some stakeholders interviewed perceive a threat, as salmon is primarily imported and increases in volumes affect the profitability of national fleets. However, it is important to note that despite increased consumption, the price of salmon remains relatively high.

Fresh cod from Norway is also gaining ground on the shelves thanks to combined communication campaigns with salmon.

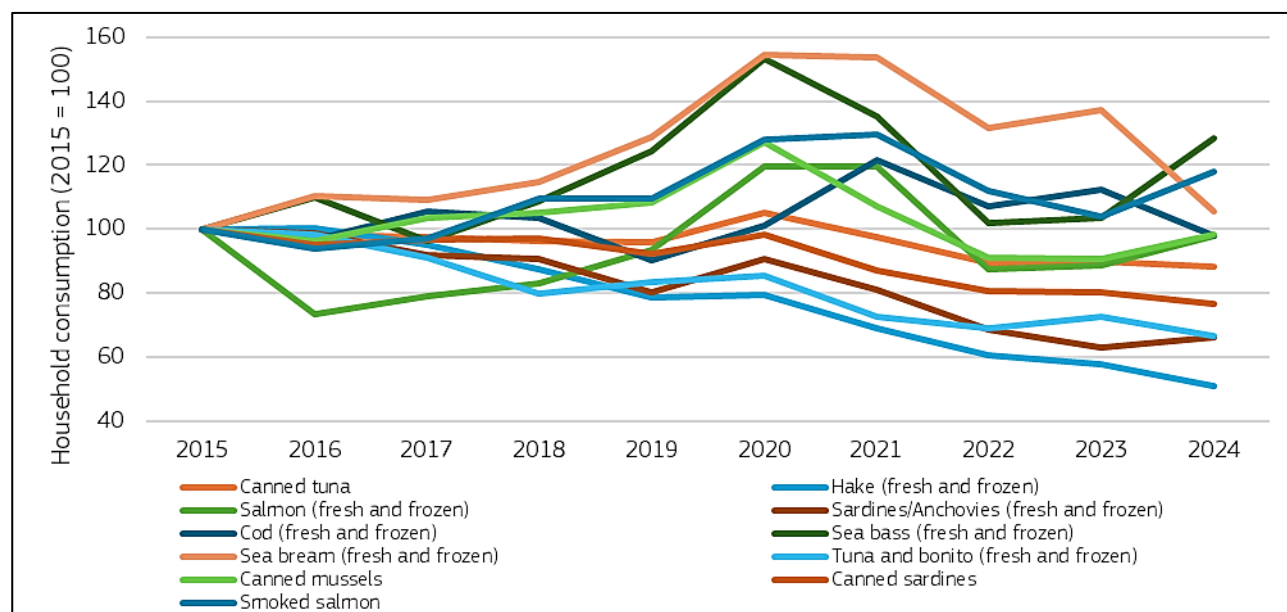
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Table 1 – Household consumption by fish species (tonnes of product weight)

	2015	2017	2019	2021	2023	2024	Evol. 15/24
Canned tuna	103.951	101.283	99.815	101.338	93.245	91.672	-11,8%
Hake (fresh and frozen)	150.580	143.295	118.152	103.874	86.944	76.698	-49,1%
Salmon (fresh and frozen)	62.422	49.381	58.285	74.729	55.382	61.233	-1,9%
Sardines/Anchovies (fresh and frozen)	72.390	66.399	58.215	58.554	45.540	47.952	-33,8%
Cod (fresh and frozen)	45.949	48.492	41.554	55.869	51.538	44.950	-2,2%
Sea bass (fresh and frozen)	22.395	21.534	27.830	30.293	23.165	28.769	+28,5%
Sea bream (fresh and frozen)	23.673	25.820	30.495	36.391	32.485	24.945	+5,4%
Tuna and bonito (fresh and frozen)	26.996	24.598	22.509	19.662	19.660	17.987	-33,4%
Canned mussels	12.906	13.380	13.994	13.826	11.709	12.713	-1,5%
Canned sardines	11.845	11.461	10.946	10.292	9.529	9.097	-23,2%
Smoked salmon	6.422	6.245	7.033	8.309	6.685	7.564	+17,8%

Source: MAPA

Figure 3 – Evolution of household consumption by fish species



Source: MAPA

1.2 Consumption behaviour: analysis based on Eurobarometer survey

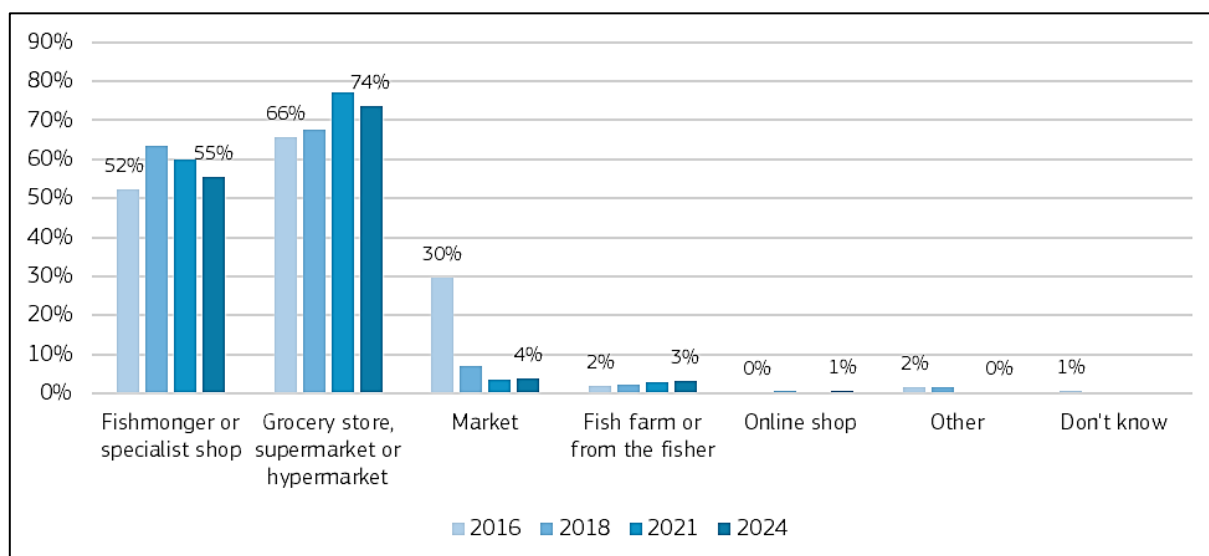
1.2.1 Changes in distribution channels

Distribution of sales channels has not changed in the last decade, with supermarkets, fishmongers and restaurants gathering around 90% of the distribution of FAPs. According to quantitative data

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from MAPA⁴, supermarkets absorb 70% of the distribution, and fishmongers absorb 11%. Despite the overall decline in consumption volumes, both channels remained stable in their distribution over the last decade. These trends are confirmed by the Eurobarometer results presented in the figure below.

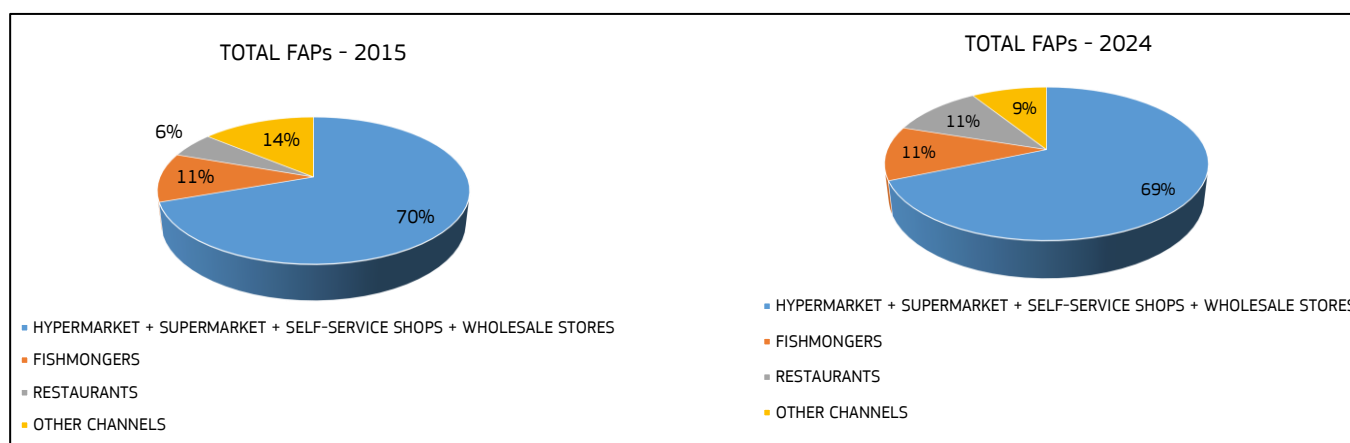
Figure 4 - Evolution of distribution channel of FAPs in Spain



Source: Eurobarometer survey -Question: 'Where do you buy your FAPs?' (n= 1.002, 2024)

According to MAPA data, restaurants gained 5 percentage points in channel distribution, rising from 6% in 2015 to 11% in 2024. This phenomenon was widely highlighted during the interviews conducted.

Figure 5 – Distribution of sales channels for FAPs in Spain, in 2015 and 2024



Source: MAPA

Despite a stable distribution of sales across channels, the decline in fish purchases has been accompanied by the closure of 5.000 fishmongers in Spain. According to a representative of a professional organisation, “a third of the 15.000 fishmongers that existed in 2007 have been lost,

⁴ <https://www.mapa.gob.es/es/alimentacion/temas/consumo-tendencias/panel-de-consumo-alimentario/series-anuales>

which means the closure of more than 350 traditional fishmongers per year”. The same interviewee emphasised that the number of people employed in the sector fell from 26.237 to 18.396 during the same period. There are many reasons for this phenomenon: political decisions, the arduous nature of the work (with the working day of a fishmonger starting at 4 a.m.), as well as changes in consumer demand, with people preferring to buy enough for several days rather than just for the day.

Another important change that has been highlighted during the field work, especially from the professional organisations interviewed, is the strong development of online sales (especially for seafood)⁵ by cold chains, with excellent delivery service. Although this channel remains minor (0,5% in 2015 and 2% in 2024, according to the MAPA), its growth warrants highlighting.

1.2.2 Changes in consumption habits

Fish consumption habits in Spain have undergone several changes in recent years due to a combination of economic, social and cultural factors. Several key factors underlie this phenomenon, including cultural and educational changes that affect purchasing behaviour and consumer perceptions of its cost, as well as other factors detailed below.

- Consumers are cooking less fish

According to most interviewees, Spain is living in a time of profound social change and new consumer trends, driven largely by the growing influence of the internet and technology. Spanish consumers are cooking less at home, and many have stopped going to fishmongers, either due to time constraints or uncertainty about which fish to buy and how to prepare it.

In the current fast-paced lifestyle, consumers are increasingly looking for seafood options that are quick and easy to prepare. The current trend is characterised by a lack of time, convenience (i.e., quick preparation), and ease of consumption. There is a clear demand, particularly among younger consumers, for clean, prepared, and ready-to-cook products.

- Increase in out-of-home consumption

Fish consumption may be declining in households, but it is performing better in restaurants and other food outlets, as it is associated with leisure. Mercasa's 2024 report⁶ on 'out-of-home consumption' suggests that FAPs are becoming more popular in restaurants, bars, hotels and other businesses.

To be more precise, Mercasa has identified that in 2023, almost 150 million kilos were consumed in this way, 2,6% more than in 2022. Although the figure is not yet at pre-pandemic levels, it is the highest since 2019. This represents an average consumption of 6,3 kilos per capita per year. According to the Mercasa report, over the year 2023, 68,1% of consumers between the ages of 15 and 75 have eaten fish or seafood in a meal outside the home at least once. In addition, when Spanish consumers leave home, they are mainly interested in seafood, such as prawns and squid. This can explain why shellfish and crustaceans are holding up better in global consumption trends, and this also corroborates the fact that, according to stakeholders, the most expensive FAPs are more and more consumed in restaurants (more occasionally).

⁵ For example: “Pesco&Go”; “Fresco y del mar”; “Saborea Huelva”; “Danionline”.

⁶ <https://www.mercasa.es/alimentacion-en-espana-2024-consumo-y-gasto-en-pescados-y-mariscos/>

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Similarly, Spanish consumers may not consider cooking seabass for lunch, but they like to go out for sushi, sashimi, poké or ceviche for dinner, which also could explain why the consumption of salmon and bluefin tuna is increasing, whereas the global consumption of FAPs is declining.

During the first quarter of 2025, ‘out-of-home consumption’ of fish continued to increase, recording an 8,1% growth compared to the beginning of 2024.

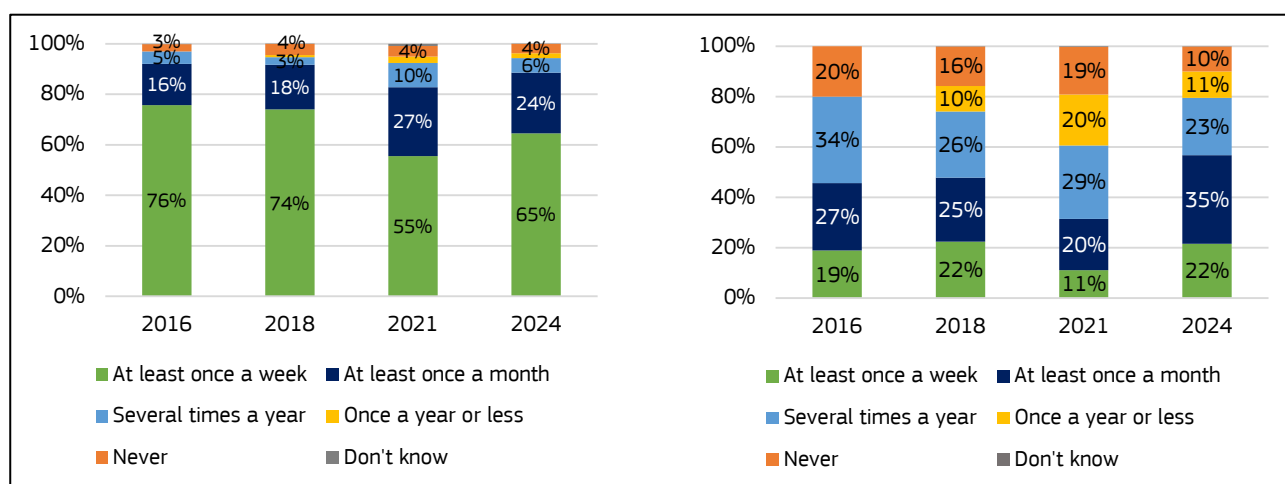
- From frequent to occasional consumption

Overall, all interviewees agreed that fish consumption in Spanish households has shifted from frequent to occasional, mainly due to consumers’ perceptions (see chapter 1.3.3 on price evolution) and lack of knowledge about how to prepare fish, especially for younger consumers.

Data from Eurobarometer indicate a clear shift in consumption habits over the past 10 years: the share of consumers declaring eating FAPs at home once a week has declined from 76% in 2016 to 64% in 2024, while the share of those declaring eating once a month has increased from 16% in 2016 to 24% in 2024), which confirms the observations of stakeholders interviewed. Conversely, there is a clear trend towards FAPs consumption outside (restaurants and other food outlets), with the share of consumers eating FAPs once a month evolving from 27% to 35% between 2016 and 2024, and the share of those eating once per week evolving from 19% to 22% (as illustrated in the figure below).

Regarding fresh fish, stakeholders highlighted that consumption seasonality remains unchanged: it continues to rise during Christmas and falls sharply in summer.

Figure 6 – Evolution of frequency of “at home” (left) and “out of home” (right) consumption of FAPs in Spain



Source: Eurobarometer – Question: ‘How frequently do you eat FAPs at home/ at restaurants and other food outlets (canteens, bars, market stands, etc.)?’ (n= 1.002, 2024)

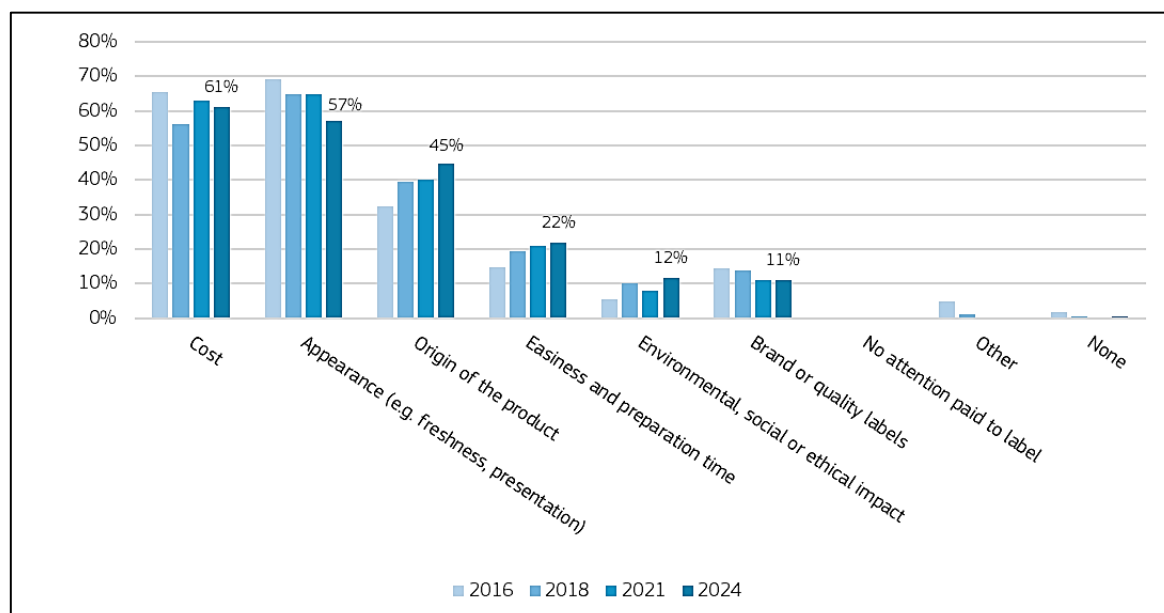
1.2.3 Changes in consumer preferences

According to the Eurobarometer results: cost, appearance (freshness, presentation) and origin of the product are the most important aspects for Spanish consumers when they buy FAPs. However, it is interesting to note that cost and appearance have tended to decrease in favour of origin, ease, and preparation time, as well as environmental, social, and ethical impacts.

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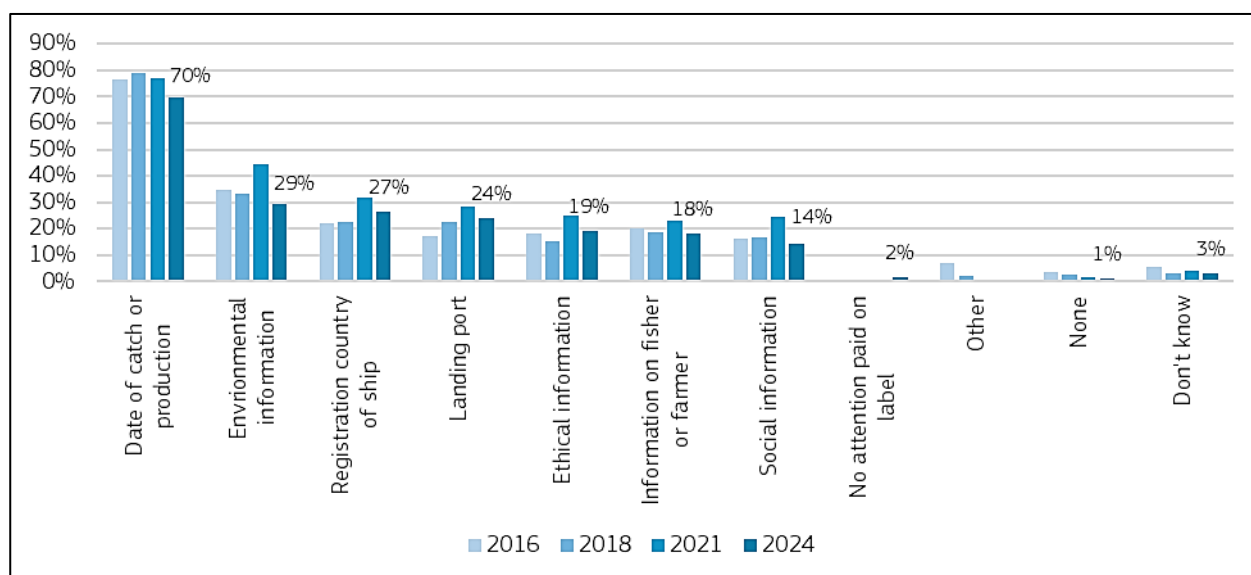
Regarding the information that should be mentioned on the label of all FAPs, the Eurobarometer results highlight the date of catch or production as the main information expected, and to a lesser extent, environmental information, the registration country of the ship and the landing port.

Figure 7 - Evolution of main important aspects when buying FAPs in Spain



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

Figure 8 - Information that should be mentioned on the label of all FAPs in Spain



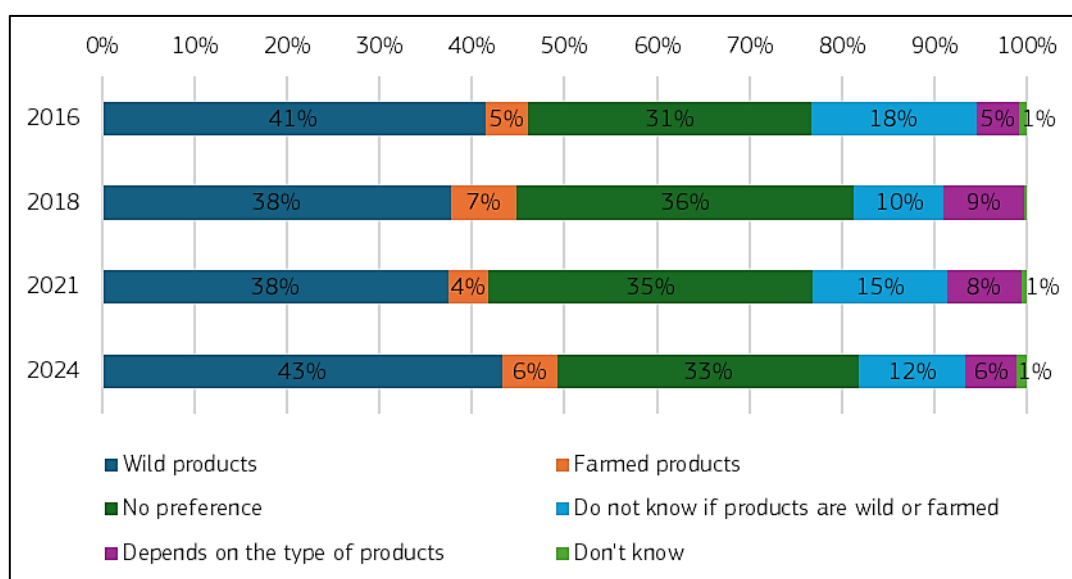
Source: Eurobarometer survey – Question: ‘Which of the following information do you think should be mentioned on the label of fresh, frozen, smoked and dried FAPs?’ (n= 1.002, 2024)

Regarding the preference type of FAPs in Spain, the preference for wild products predominates and seems to have remained constant during the last decade. However, this stated preference among consumers is inconsistent with observed consumption patterns, which indicate an increase in aquaculture product consumption, but this is linked to resource availability (see chapter 1.3.2 on

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the availability of the supply). Approximately one-third of consumers do not express any particular preference on this matter.

Figure 9 - Evolution of preference type of FAPs in Spain

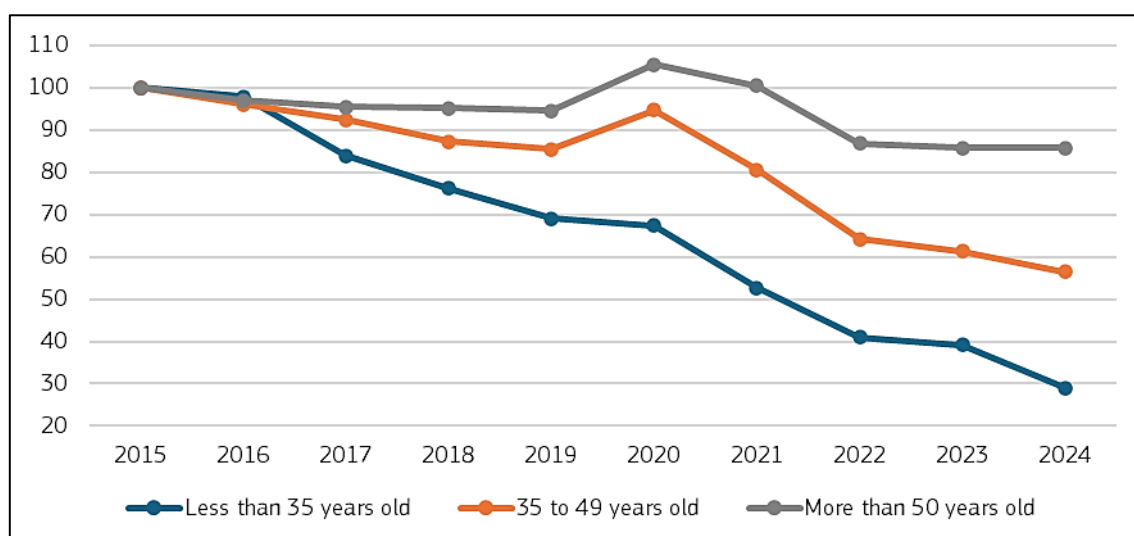


Source: Eurobarometer survey – Question: ‘Would you say that you prefer...’ (n= 1.002, 2024)

1.2.4 Changes in consumer profiles of fisheries and aquaculture products

According to the quantitative data from MAPA, the decline in the consumption of FAPs was observed more among younger consumers than older consumers. Between 2015 and 2024, consumption volumes among consumers under 35 years old fell by 71%, while volumes decreased by only 14% for consumers over 50 years old. Consequently, the share of consumers less than 35 years old has fallen from 8% in 2015 to 3% in 2024, whereas the share of consumers over 50 years old has risen from 64% in 2015 to 75% in 2024.

Figure 10 – Evolution of Spanish household consumption in volume per age



Source: MAPA

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A recent survey conducted by a large retailer among a sample of consumers showed that older consumers eat FAPs more frequently than younger ones. In particular, Spanish consumers under 35 eat FAPs once or less per week, whereas consumers aged 35-60 eat FAPs 2 times per week.

This survey also showed that consumers purchase fewer bulk items and more prepared portions, with quantities more suited to family size (smaller portions).

1.3 Economic drivers for consumption

1.3.1 Availability of products that meet consumer demand and expectations

The results of the Eurobarometer presented in the chapter 1.2.3 are fully consistent with the qualitative data gathered during the interviews. The main key factors regarding demand and expectations of consumers can be summarised as follows:

- Sustainability

According to a stakeholder interviewed, sustainability is not the primary factor influencing purchases, although it is becoming increasingly important for consumers who increasingly value aspects such as origin, sustainability, and responsible production. Spanish companies have been working hard for years to achieve sustainability in the sector. All actors along the supply chain are continuing to adapt and meet new demands through greater innovation and the development of increasingly healthy and sustainable products that reduce environmental and social impacts throughout the chain.

Sustainable proposals that are adapted to consumer needs will attract and retain customers who are increasingly aware of the impact of their consumption decisions. However, one professional organisation's opinion differs slightly on this point, considering that demand for sustainability and information on origin is more prevalent in the B2B sector.

- More information

According to the opinion of most interviewees, catching method, origin and species are the most important pieces of information with an increasing expectation from consumers.

However, a representative of retailers noted that consumer demand for more information is not clear. Consumers are overwhelmed with information. They want something very basic: an origin (but an understandable one; not FAO zones), information to facilitate preparation, and clarification of their perception of price. All that is linked with mandatory information (traceability, ensuring the viability of fisheries; ecological matters like soy-based food, etc. is not demanded by consumers except in B2B.

- Traceability

The interview with a representative of a large retailer highlighted that traceability has become a key component in seafood sustainability policies. That is why labelling plays a crucial role: it provides key information to both consumers and retailers about the origin, production practices and sustainability of the product, ensuring that products can be traced throughout the supply chain to verify their origin and compliance with current legislation. Large retailers continue to make progress and learn in this area.

- Convenience

According to retailers' representatives, consumers are increasingly opting for convenience, and formats that offer fish that is cleaned, packaged and ready to eat. The closer the product is to the customer's mouth, the better it is.

In a society with a fast-paced lifestyle, where sustainability is increasingly important and where the consumption of seafood has decreased significantly, the challenge for the primary and processing sectors, as well as distribution, is to "re-engage" consumers. To meet this demand, a stakeholder interviewed indicated that professional actors are adapting to the new sales model, investing significantly in more processed products.

A representative of large retailers testifies that the gradual shift in the sales model (more packaged and clean products; reducing counter sales) is a winning strategy. It took time for people to accept it (counter sales are an important tradition in Spain), but little by little, this change is working. Most retailers are introducing new formats of semi-prepared products (e.g. battered hake, fish nuggets) and clean formats (e.g. farmed sea bass, salmon, sea bream, etc.) that are ready to cook. Even in the frozen sector, there is a wider variety of clean and prepared products.

1.3.2 Availability of the supply

As highlighted in the chapter 1.1.2 on the evolution of the species consumed, trends based on national statistical data (MAPA) show a sharp decline in hake population (-49% in the last decade) and growth in three farmed species with large volumes: sea bass (+28,5%), sea bream (+5,4%) and salmon (+17,8%).

Almost all interviewees pointed the development of aquaculture species in the last decade. When certain common species are no longer (or less) available, like hake, consumers turn to the species available in shops; in the Spanish case, it is aquaculture products. Thus, fish farm production is becoming increasingly important as an alternative for bringing fresh fish to the table.

There is an increase in the consumption of aquaculture species despite consumers' preference for wild fish, as demonstrated in the Eurobarometer survey, which reveals that Spanish consumers favour wild fish by far over farmed fish (see section 1.2.3). Several stakeholders interviewed pointed out that consumers do not differentiate FAPs from wild fish and products from aquaculture. Furthermore, the availability of aquaculture products, as well as the control of planning and raw material, means that these products are sometimes preferred by large retailers.

Stakeholders interviewed explained that aquaculture permits the production and stocks to be better controlled, which attracts more large retailers. It was noted that "FAPs from aquaculture are increasingly high in quality and have very stable prices throughout the year, because their supply is not as exposed to unforeseen events and can, to a certain extent, be planned". Finally, these FAPs from aquaculture are also usually pre-packaged (which suits the consumer demand) and well-suited to supermarket sales (large volumes to ensure visibility of the supply).

1.3.3 Price evolution and comparison with other food products

According to the results of the Eurobarometer presented in chapter 1.3.1 (availability of products that meet consumer demand and expectations), price was the most important factor influencing

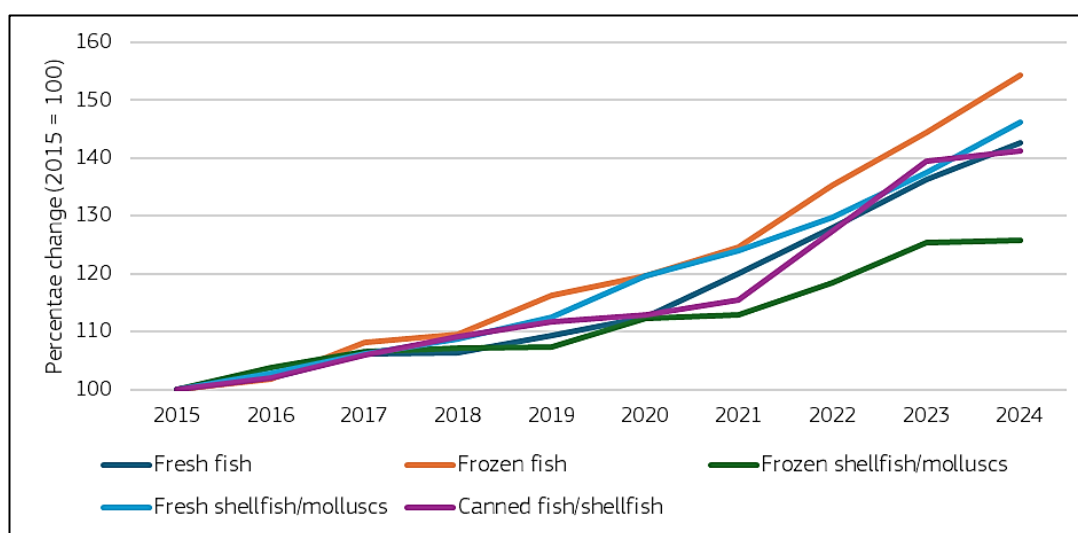
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FAPs' purchase in 2024. Previously, it was the second factor, just behind the appearance (freshness, presentation).

The evolution of prices of FAPs in the last decade indicates a general increase in prices, regardless of the product category: according to the national statistics from MAPA, prices of FAPs increased by 43,3% between 2015 and 2024 (real terms). This increase is more pronounced for frozen fish (+54,4%) than for fresh fish (+42,6%). But the trend is reversed for shellfish: fresh shellfish prices increased more than frozen ones (respectively +46,3% and +25,7%). The increase in the price of canned products remains significant, although slightly below the increase recorded for other categories (+41,2%). According to the interviewed stakeholders, factors that may explain the rise in prices include logistics, supplier price increases, inflation, fuel costs, etc.

All interviewees agree that young people are the most directly affected by price increases.

Figure 11 - Evolution of Spanish prices per category of FAPs



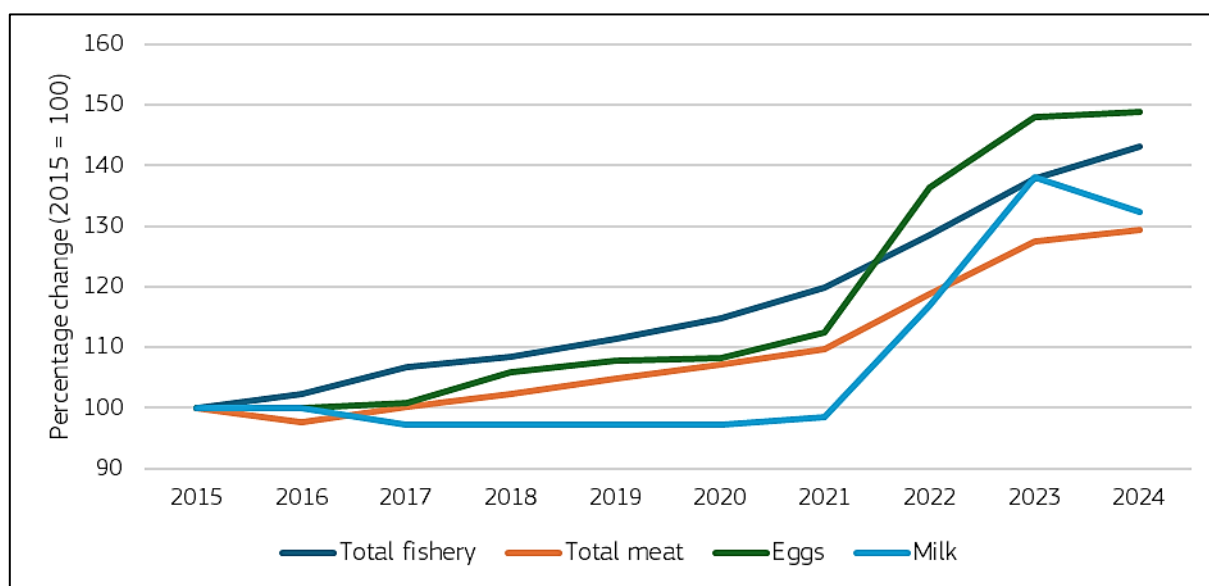
Source: MAPA

Comparison with other food products

The comparison of FAPs prices with other protein products reveals the same observation. Considering all FAPs species, as presented in the Figure 12 below, prices of FAPs increased more than prices of meat and milk, but less than eggs, whose prices increased sharply since 2021.

The opinions gathered agree that consumers eat more meat and eggs, which are cheaper than fish that is more expensive. Statistical data from MAPA on household consumption confirms this statement when these data are considered at a general level (all species included): the average price (in real terms) of fish in 2024 was 11 EUR/kg, whereas it was 8,46 EUR/kg for meat and 3,23 EUR/kg for eggs. Furthermore, these data show that the price increase is less pronounced for meat (+29% in real terms between 2015 and 2024) than for fish (+43%). Conversely, the price of eggs increased more than the price of fish over the last decade (+49% vs +43%).

Figure 12 – Evolution of prices of fish compared to meat, eggs and milk



Source: MAPA

According to the opinion of most interviewees, the emergence of new ways of consuming protein has impacted the consumption of FAPs. In addition to animal protein, a range of manufactured products made from vegetable protein or similar ingredients have been developed, such as milkshakes, yoghurts, biscuits, and bars. This trend is particularly noticeable among young consumers (18 to 35 years old).

In the opinion of one stakeholder, the availability of plant-based substitutes represents a threat to the animal protein sector as a whole.

All interviewees identified the price as a key factor discouraging the consumption of FAPs. However, according to them, this is largely a matter of perception rather than the actual price level, yet it remains one of the main challenges of the sector.

Indeed, the overall increase in prices can be nuanced if the evolution of prices is analysed at the species level:

- Fresh salmon recorded a strong increase (+64,3% over the last decade) as well as fresh mussels (+60,8%) and fresh hake (+50,8%). Less significant changes have been recorded for fresh cod (+7,4%) and seabass (+29,8%).
- Frozen octopus and squids increased by 64%; frozen cod increased by 58,3%, and frozen salmon increased by 48,1%.

Stakeholders interviewed highlighted a lack of communication, information and marketing campaigns to explain that consuming seasonal fish often means finding products at very reasonable prices. Similarly, comparing fish prices with other protein products shows more nuanced statements at the species level.

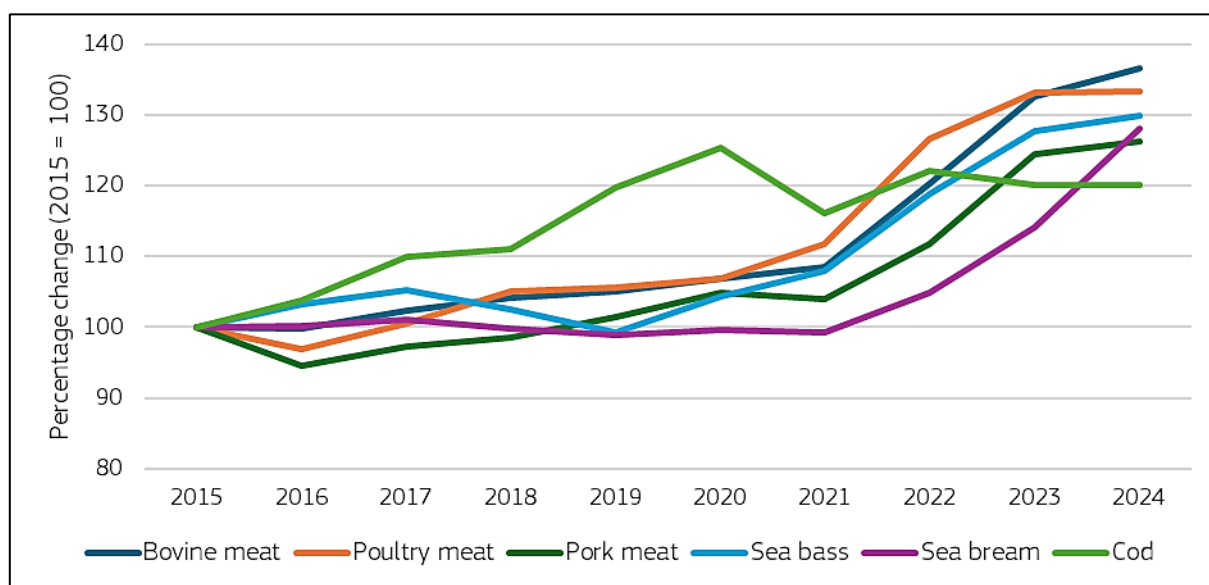
The data below illustrates the price increase for different protein products. The prices of sea bass, sea bream and cod increased less sharply than the prices of bovine and poultry meat over the period between 2015 and 2024 (20% for cod compared to 37% for bovine meat).

Table 2 – Evolution of Spanish prices (real terms) of consumption in households for several species of fish and meats

	2015	2020	2024	Evol. 2015-2024
Bovine meat	9,20	9,84	12,57	36,6%
Poultry meat	4,10	4,38	5,47	33,4%
Pork meat	6,02	6,31	7,60	26,2%
Sea bass	8,36	8,73	10,86	29,8%
Sea bream	7,89	7,86	10,11	28,2%
Cod	7,78	9,76	9,34	20,1%

Source: MAPA

Figure 13 - Evolution of Spanish prices per category of food product



Source: MAPA

According to an interview with a retail representative, inflation and high prices do not encourage consumption. During periods of inflation, consumers tend to reduce spending, which ultimately affects consumption. The same interview also highlights the idea that FAPs suffer from the widespread misconception of being expensive, when in reality, there are species to suit all budgets.

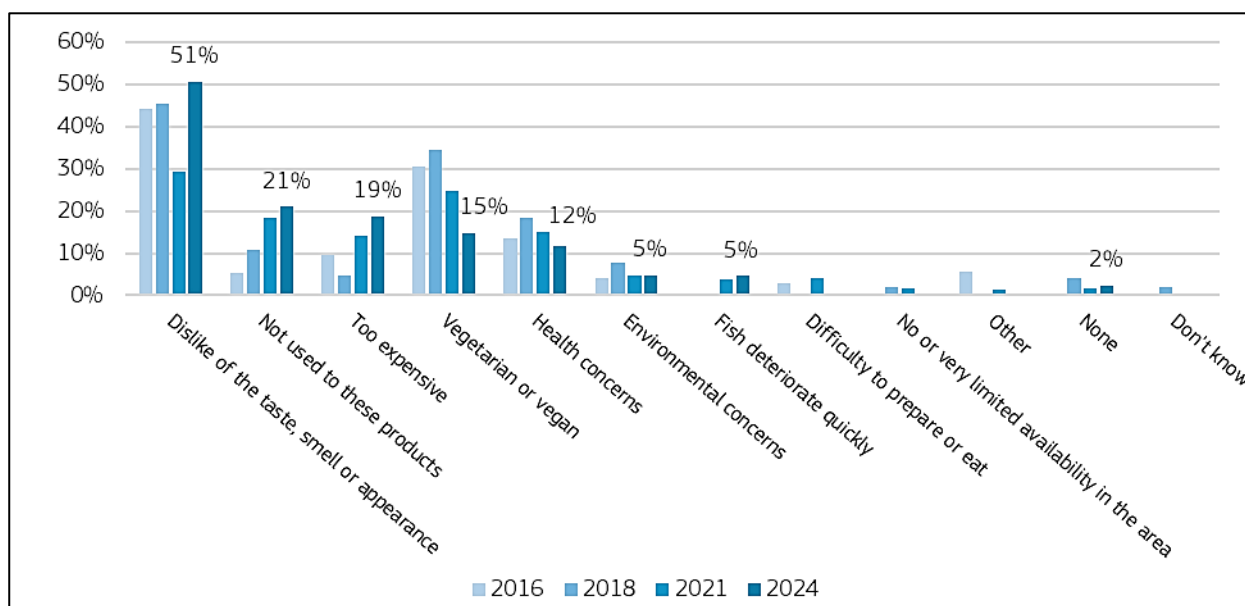
Even though all interviewees agreed on the fact that FAPs suffer from this reputation of being expensive, they also highlighted that this is not the only reason behind the decline in the consumption of FAPs. The increase in salmon consumption, one of the most expensive species, is often cited to illustrate that price alone does not determine consumers' purchasing decisions.

1.4 Strategies implemented to stimulate consumption

1.4.1 Enhancing consumption with communication campaigns

The results of the Eurobarometer survey indicate that the main reasons for Spanish consumers not consuming FAPs are, first, a dislike of the taste/smell/appearance (around half of them); second, a lack of familiarity with these products; and third, their perceived high cost. Health and environmental concerns rank only 4th and 5th. This indicates what direction the sector should take to encourage and boost consumption of FAPs.

Figure 14 - Evolution of main reasons for not consuming FAPs



Source: Eurobarometer survey – Question: ‘Which of the following are the main reasons why you never eat any fishery or aquaculture products?’ (n= 1.002, 2024)

Professional organisations and retailers pointed out that communication campaigns are essential to conveying to the public that fish is a good and nutritious product. The entire chain and the authorities involved must continue to communicate its many nutritional benefits to regain consumer trust. Both fresh and frozen fish are high-quality, healthy products.

Systematic consumption and preparation campaigns, following Norway’s example, are needed. The decrease in costs resulting from certain sustainability, traceability, and waste management policies, in addition to VAT, ultimately affects the final price.

One of the professional organisations interviewed invests heavily in communication campaigns on fish preparation:

- Investment of more than €1 million in a national campaign.
- EUR 800.000 in an interactive centre like a museum for children, teaching that fish is one of the healthiest proteins.
- Communication campaigns to fight against a national regulation on school canteens that foresees an increase in the share of vegetarian meals, leaving limited room for fish.

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Another professional organisation interviewed is also advocating for the introduction of more nutritional information in schools and the promotion of fish as a highly healthy product.

1.4.2 Reduction of VAT for a product that is highly healthy

According to the views of all stakeholders interviewed, the decrease in consumption of FAPs in Spain is a major issue, as a large part of the population in coastal areas depends on fishing and fish processing. Several interviewees pointed out the issue of the VAT rate: currently, VAT is 10%, reflecting a classification that determines which products are considered basic and which are not. Unifying VAT at 4% (as a basic product) is perceived as of capital importance. According to these stakeholders, if VAT were reduced to 4%, as in other basic products, consumption could increase significantly.

Professionals are confident about the outcome of this fight, which affects the entire fishing sector.

1.4.3 Promote the generational renewal in fishing sector

Although the closure of establishments coincides with changes in consumption and a reduced presence of fish in the country's refrigerators, stakeholders interviewed acknowledge that this is not the only challenge facing the sector. They pointed out the absence of a generational replacement, attributable to long working hours and a lack of firm commitment to training. To diversify their income, some have begun exploring new business avenues, such as pet food.

To try to curb the phenomenon of fishmongers' closure, a professional organisation implemented several actions:

- A hospitality and food school opened recently. The aim is to train new professionals to take over the business.
- Attempts are being made to increase online sales, distribution channels, home delivery, promotions, and more prepared and packaged products.

2 France

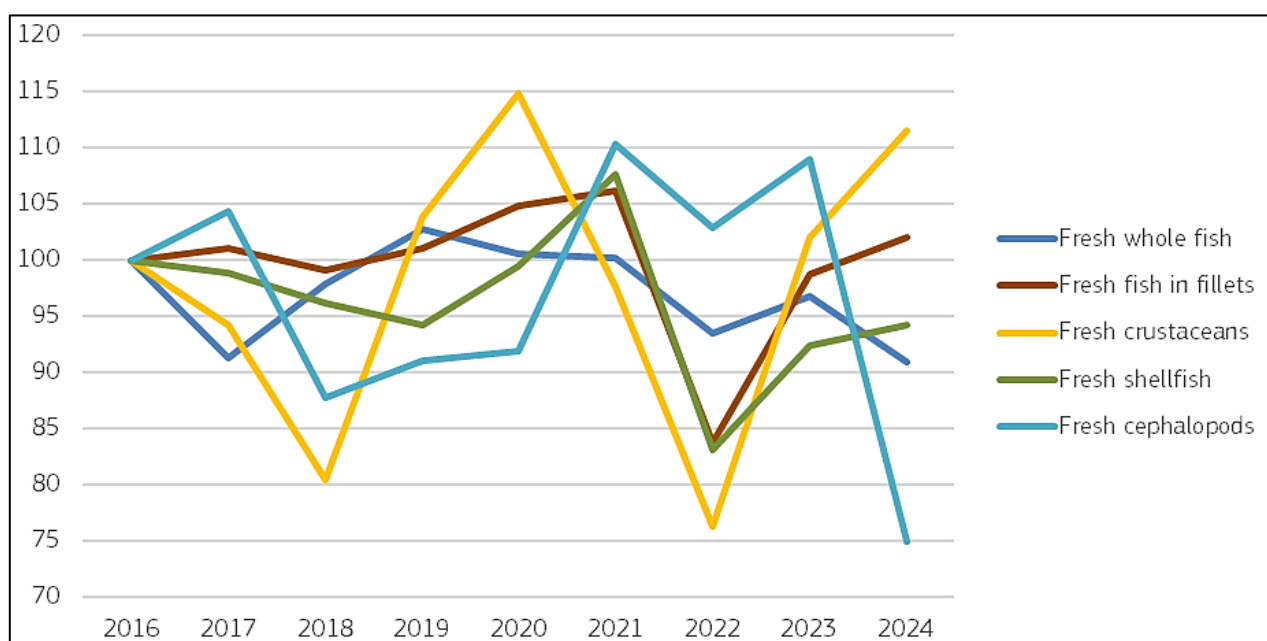
2.1 Consumption trends of FAPs

2.1.1 General trends

France is the third largest consumer of FAPs in the EU, with a capita consumption of 32,14 kg in 2023, marking a significant decrease of -7% over the period between 2014 and 2023.

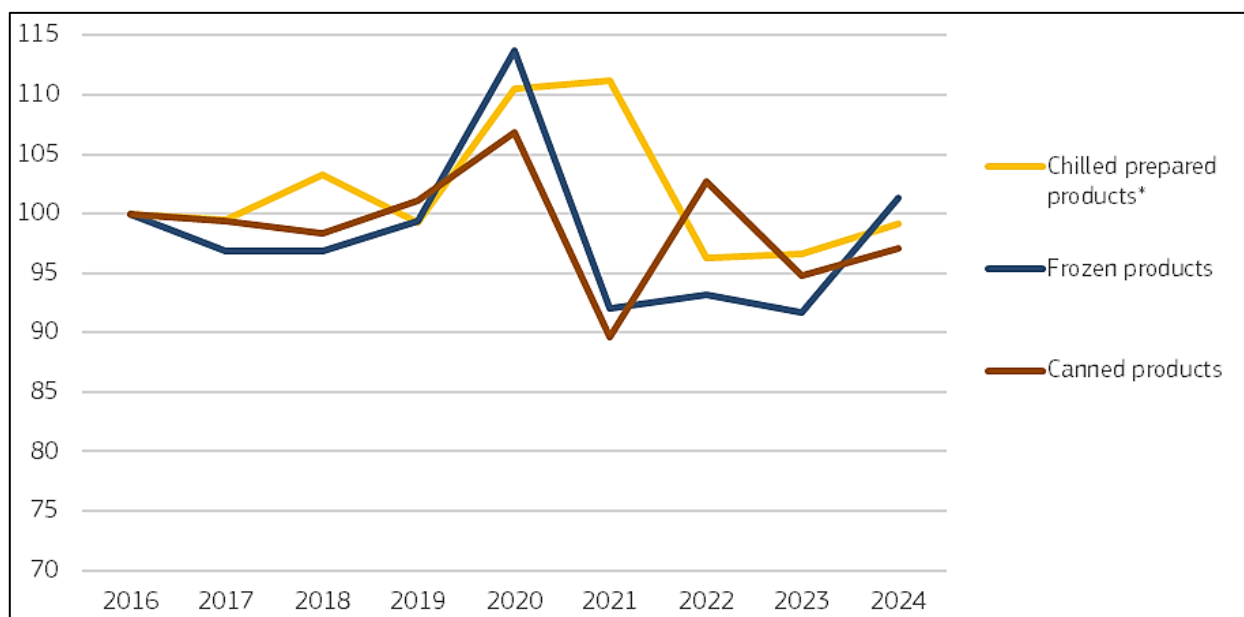
National statistics (available from 2016 to 2024) confirm these decreasing trends and provide further insights by product category. These data highlight a high volatility in the consumption of fresh products, especially for fresh crustaceans and cephalopods (Figure 15), while the prepared products, including canned, the frozen and chilled prepared products demonstrate greater resilience and stability (Figure 16). Notably, during the inflationary period (2022), consumption declined across all categories of products, except for canned products, where consumption increased.

Figure 15: Evolution of consumption in French households for fresh products (volume index, 2016=100)



Source: EUMOFA elaboration, based on data from FranceAgriMer

Figure 16: Evolution of consumption in French households for other products (volume index, 2016=100)

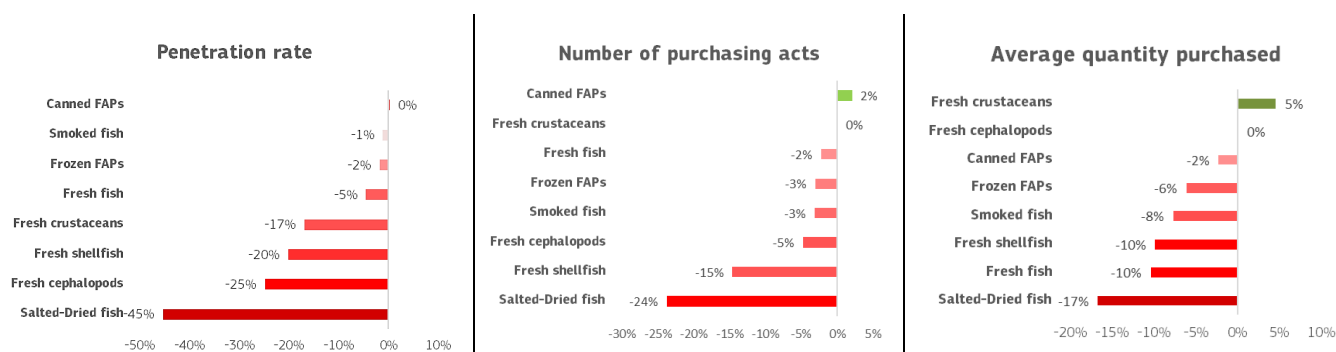


Source: EUMOFA elaboration, based on data from FranceAgriMer

Specific indicators from the national statistics (available for 2021-2024) allowed also to highlight the following (Figure 17):

- 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 17: 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 five years ago the consumption patterns were in favour of prepacked fresh products (which increased significantly until 2021, before slightly decreasing since), more recent trends indicate a marked shift toward increasingly processed and ready-to-eat products.

2.1.2 Evolution at species level

The evolution of consumption by species confirms the same trends outlined earlier:

- Among the 30 most consumed species in France, around 60% 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 40% of these species experienced a decline in consumption, notably cod (-35%), mussels (-12%), other marine fish (-9%), surimi (-23%), and sardines (-8%).

According to stakeholders, recent consumption trends by species largely reflect their availability on the French market. Imported species such as tuna, salmon and shrimps benefit from high and stable availability, whereas some locally produced species face supply constraints, leading to a decline in landings. This reduction is mainly linked to lower fishing quotas and the permanent cessation of activities by several large vessels following Brexit. Stakeholders suggest that this availability affect the availability in the market and then the consumption level. This is why they consider that the species for which the consumption trends are increasing are those from imports while consumption of locally produced products is decreasing.

Monkfish is frequently cited as an example: its consumption declined sharply (-43% between 2016 and 2024), alongside a decrease in landings of 27% over the same period.

Interviews with stakeholders showed that the main highlight of the French consumption for FAPs is that the demand is still high, despite evolving consumption habits. At the same time, supply chain operators express strong concern about the significant deterioration of the fisheries sector in France, as the decline is expected to affect both supply and consumption patterns. Even though the French market is highly dependent on imports, which represent more than 70% of the consumption of FAPs in France, domestic fisheries production plays a major role in maintaining

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product diversity in the retail stage. French fisheries production introduces a wide range of species, such as pouting, gurnard, plaice, rays, etc., while imports are concentrated around a few species such as cod, salmon, and shrimps. Even though operators report some difficulties to market locally-produced species due to limited consumer familiarity with them, this diversity contributes to consumer education, the image of the FAPs and contributes also to broadens consumption options.

2.2 Consumption behaviour towards FAPs

2.2.1 Changes in distribution channels

Table below highlights the evolution of the retail structure for FAP sales between 2016 and 2024. In particular, it shows a decline of traditional specialised channels and a growing importance of alternative and price-oriented retail channels (i.e. discounters). While hypermarkets and supermarkets remain by far the dominant distribution channel, their sales volumes declined by 26% over the period, resulting in a reduction of their market share from 71% to 65%. At the same time, discounters experienced the strongest growth among all channels, with sales volumes more than doubling (+114%) and market share increasing from 3% to 7%. This trend likely reflects increasing consumer price sensitivity and the search for more affordable food options in an inflationary context.

Traditional channels experienced the sharpest declines. Open markets and fishmongers recorded decreases of respectively 38% and 39% in sales volumes, accompanied by declining market shares. This may indicate changing consumer purchasing habits, including stronger preference for one-stop shopping and increased demand for affordable options.

Table 3: Evolution of sales of FAPs across the different distribution channels in France, between 2016 and 2024

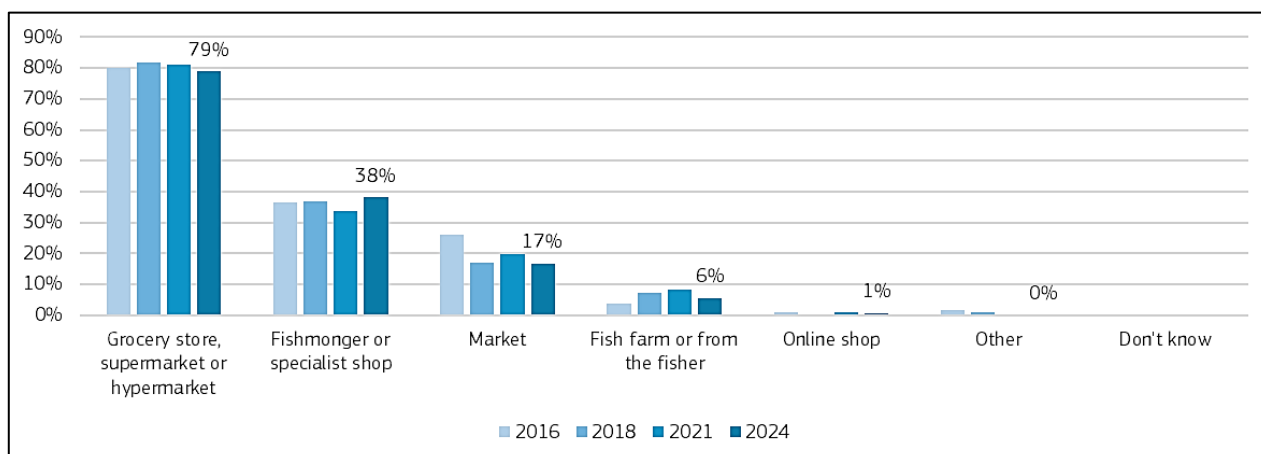
	2016	Market share 2016	2024	Market share 2024	Evol. 2024/16
Hypermarkets & Supermarkets	157.493	71%	115.962	65%	-26%
Discounters	5.676	3%	12.119	7%	114%
Open market	26.191	12%	16.168	9%	-38%
Fishmongers	17.291	8%	10.471	6%	-39%
Others	15.767	7%	22.658	13%	44%

Source: EUMOFA elaboration, based on FranceAgriMer data

In line with the national statistics, Eurobarometer Data revealed the prevalence of supermarkets, in terms of preferred channels for buying FAPs, with almost 80% in 2024⁷. Eurobarometer data show more nuanced situation for traditional channels. Fishmongers maintained their position, while the share of consumers declaring purchasing FAPs from open markets decreasing by 9 points over the 2016-2024 period, confirming stakeholders feedback.

⁷ According to the Eurobarometer survey. Q5 'Where do you buy your FAPs?'

Figure 18: Evolution of purchase location of FAPs in France

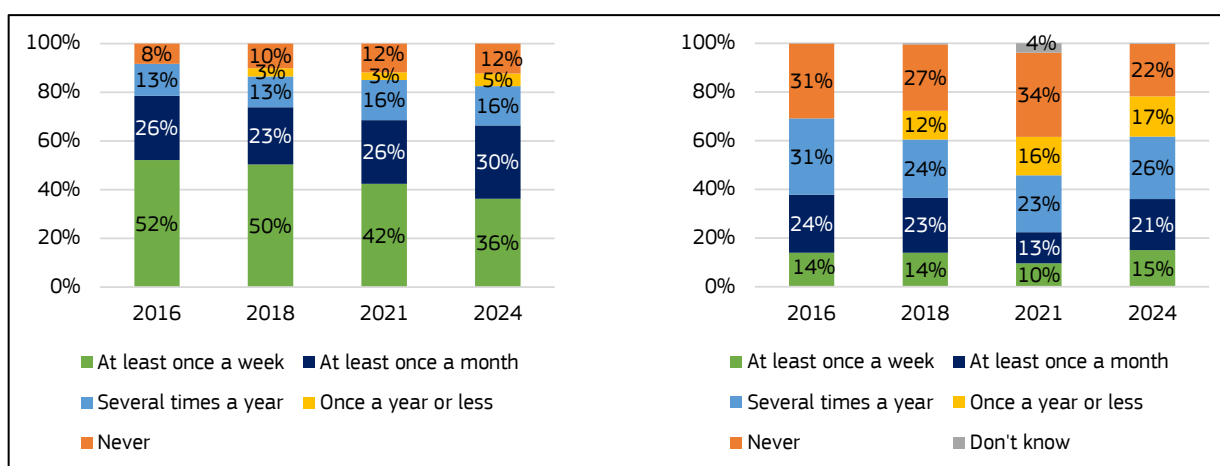


Source: Eurobarometer survey -Question: ‘Where do you buy your FAPs?’ (n= 1.012, 2024)

2.2.2 Changes in consumption habits

The Eurobarometer survey results suggest a shift from regular to more occasional patterns. 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 consumer 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.

Figure 19: Evolution of frequency of “at home” (left) and “out of home” (right) consumption of FAPs in Spain



Source: Eurobarometer – Question: ‘How frequently do you eat FAPs at home/ at restaurants and other food outlets (canteens, bars, market stands, etc.)?’ (n= 1.012, 2024)

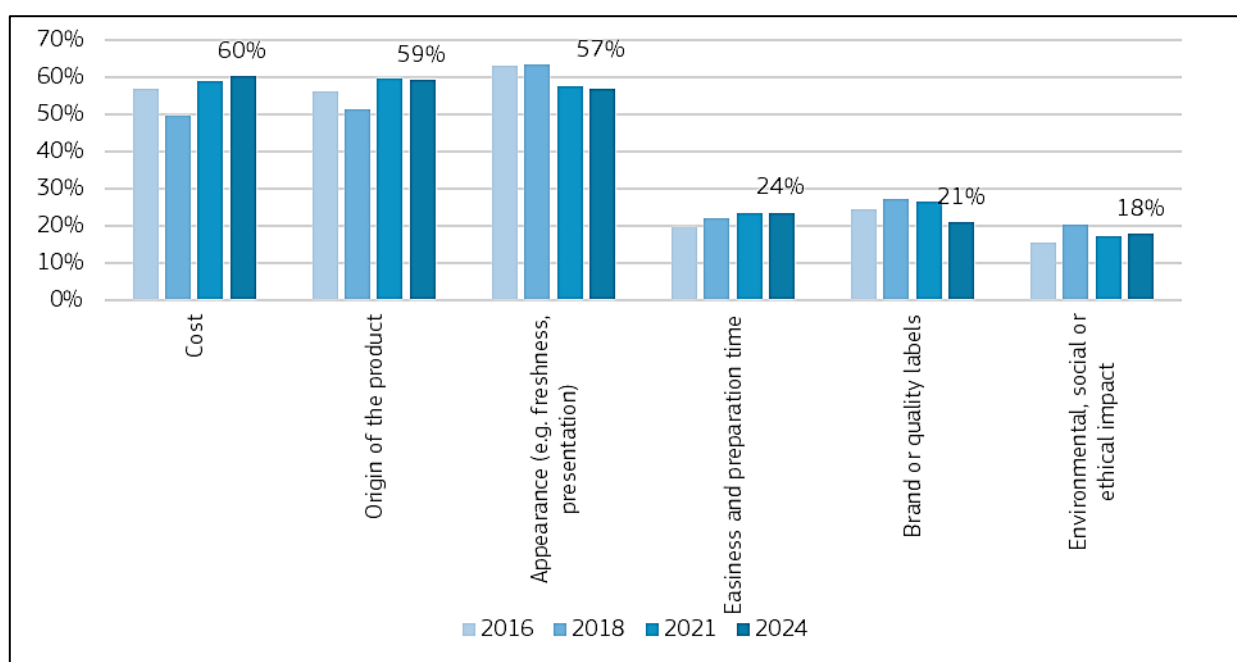
2.2.3 Changes in consumer preferences

Price remains the primary determinant of purchasing decisions, with its importance slightly increasing between 2016 and 2024, according to the Eurobarometer survey.

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 is a major driver of consumption. All stakeholders’ interviews reported a decline in consumers’ ability or willingness 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.

Figure 20: 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)

2.2.4 Changes in consumer profiles

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**, as illustrated in table below.

Table 4: Main important aspects considered by consumers when buying FAPs in France, by age group in 2024

	15-24	25-34	35-44	45-54	55-64	+65
Easiness and preparation time	24%	20%	32%	21%	20%	21%
Origin of the product	49%	61%	59%	60%	62%	62%
Appearance (e.g. freshness, presentation)	54%	49%	49%	54%	56%	69%
Cost	56%	64%	59%	71%	58%	59%
Brand or quality labels	16%	25%	21%	24%	18%	21%
Environmental, social or ethical impact	27%	26%	16%	13%	23%	15%

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

2.3 Economic drivers for consumption

2.3.1 Availability of products that meet consumer preferences and availability of supply

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.

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 fisheries 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 5: 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.

Evidence from the Eurobarometer survey and from stakeholder consultation confirms that **price is a key determinant in purchasing decisions for FAPs**. However, its role should be interpreted with caution, as consumer choices are influenced by a broader set of factors. On the one hand, rising prices have had a clear impact on price-sensitive consumers, who increasingly adjust their behaviour. Stakeholders report growing substitution effects, both within the FAP category and towards other protein sources, in particular chicken. On the other hand, FAPs have traditionally been associated with occasional consumption and pleasure, where price considerations are not predominant in purchasing decisions. This positioning now appears to be weakening, with some consumers turning instead to other products, such as beef. This shift is reflected in consumption

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patterns: even the most frequently consumed species is eaten up to 4 to 5 times per year, with a declining trend in the recent years, whereas beef is consumed around 9 times per year and continues to increase, despite similar price levels.

2.3.2 Price evolution and comparison with other food products

Prices of FAPs have increased for all categories of FAPs (in nominal terms), varying between 5% and 30%. The increase is less evident in real terms and concerns mainly prepared-chilled products and canned products, while it remains moderate for fresh fish and decreased for the other categories, as illustrated in table below. While real price developments suggest that increases are relatively moderate and partly reflect the general inflationary context, the rise in nominal prices, which are directly observed by consumers, may reinforce the perception of FAPs as expensive products and influence consumption behaviour. In this context, price-sensitive consumers tend to reduce FAPs consumption, either by buying FAPs less frequently or in smaller quantities. For this category of consumers, the final price to pay is a key constraint, which can place fish counters, where prices are typically displayed per Kg, at disadvantage. Even among higher-income consumers, stakeholders note that prices have reached levels that are not anymore accepted. However, they also emphasised that price alone does not fully explain consumers behaviour. The continued strong demand for some of the more expensive species suggests that other factors, such as convenience, product image and taste, also play a key role in consumer choices.

Table 6: Evolution of prices by product category in France, between 2016 and 2024 (EUR/kg)

	2016	2017	2018	2019	2020	2021	2022	2023	2024	Evol* 2024/2016
Fresh fish	14,73	15,07	14,90	15,34	15,30	15,12	15,70	15,36	14,92	1%
Fresh shellfish	6,36	6,43	6,36	6,2	6,2	6,2	6,4	6,3	6,0	-5%
Fresh crustaceans	13,99	14,12	14,8	15,7	14,4	15,0	14,6	13,2	12,3	-12%
Fresh cephalopods	10,28	10,96	11,57	11,1	11,2	10,7	10,3	9,9	9,9	-4%
Processed-chilled products	14,42	14,5	14,3	14,3	14,3	14,4	15,0	15,6	15,6	8%
Canned FAPs	9,01	10,01	9,28	9,6	9,6	10,0	10,5	10,0	9,8	8%
Frozen FAPs	10,92	11,17	10,74	11,2	11,1	10,4	11,8	11,1	10,8	-1%

Note: Prices are deflated by using the GDP deflator (base = 2020)

Source: EUMOFA elaboration, based on FranceAgriMer data

2.4 Strategies implemented 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 fisheries 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.

3 Italy

3.1 Consumption trends of FAPs

3.1.1 General trends

Annual FAPs consumption in Italy averaged around 1,8 million tonnes Live Weight Equivalent (LWE) over the 2014-2023 period (**Errore. L'origine riferimento non è stata trovata.**).

Over 2014-2023, national FAPs consumption increased by 2% in volume. However, significant variations have been observed during this period, with a 2018 peak in apparent consumption at around 1,88 million tonnes LWE, followed by a 3,8% decrease between 2019 and 2020. After this drop to 1,79 million tonnes LWE in 2020, which was the sharpest decline over the period, FAPs annual consumption remained stable around 1,7 million tonnes LWE. Notwithstanding a small increase between 2022 and 2023, stakeholders confirmed that FAPs consumption is currently stable.

Annual household consumption of FAPs since 2018 averages 570.258 tonnes product weight, and showed little variation between 2018 and 2024, decreasing by 2% in total (Figure 2).

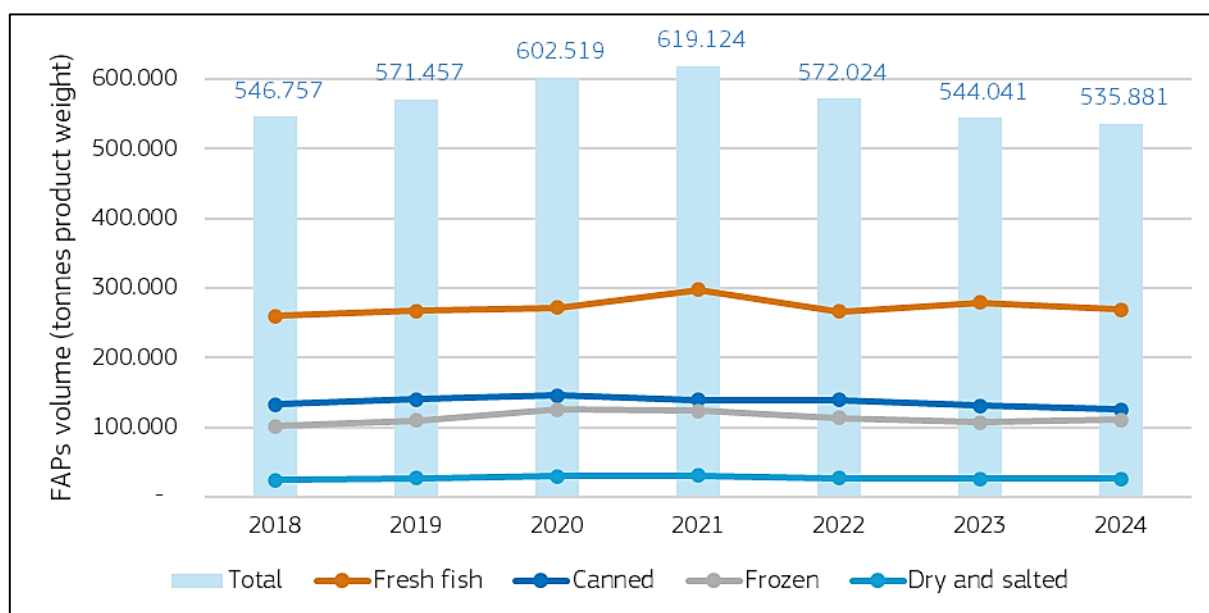
The main disruption in household FAPs consumption was in 2020 and 2021, when household consumption reached a peak of 619.124 tonnes, due to the partial shutdown of the HORECA sector. However, in 2022, household consumption dropped by 7,6% in volume, decreasing to pre-covid 2019 levels.

The fresh fish segment is the first product category consumed by households, representing 45 to 53% of FAP consumption in volume.

Canned FAPs represent the second most consumed FAP category. However, since 2020, canned FAPs consumption has been decreasing, resulting in a -9% reduction in consumed volume between 2018 and 2024.

Frozen, dry and salted FAPs consumption have experienced a 9% increase along the 2018-2024 period. According to stakeholders, this increase is largely due to frozen FAPs, which have been increasingly consumed over the last 20 years. This rise is mainly attributable to frozen pasta sauces with FAP ingredients, and to frozen fish fingers, that make most of the overall frozen FAPs volume.

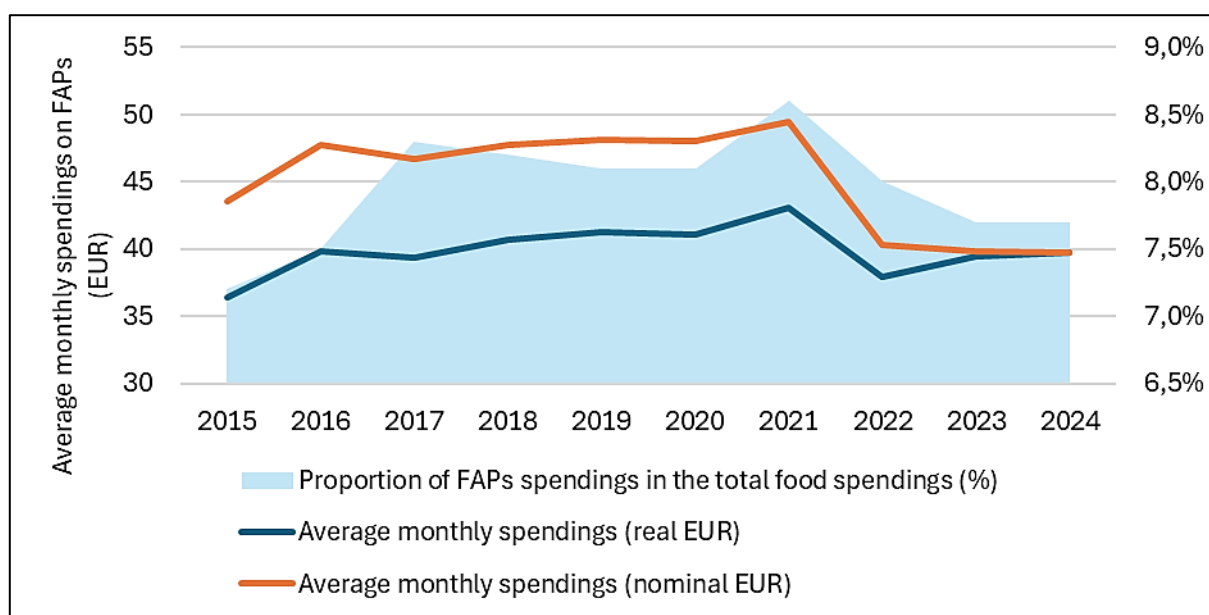
Figure 21: Household consumption of FAPs (product weight)



Source: ISMEA

Even though households' FAPs consumption did not significantly vary in volume between 2018 and 2024, the spending by households for these products has recorded significant fluctuations. According to the Italian Statistics Institute (ISTAT), between 2015 and 2024, Italian households increased spendings on FAPs by 9,3% in real value (Figure 22). The sharpest decline was observed in 2022, where the spending for FAPs declined by 12% in real terms, leading to a decrease of around 1 point in the share of FAPs within the total monthly food expenditure.

Figure 22: Evolution of households' average monthly spendings on FAPs

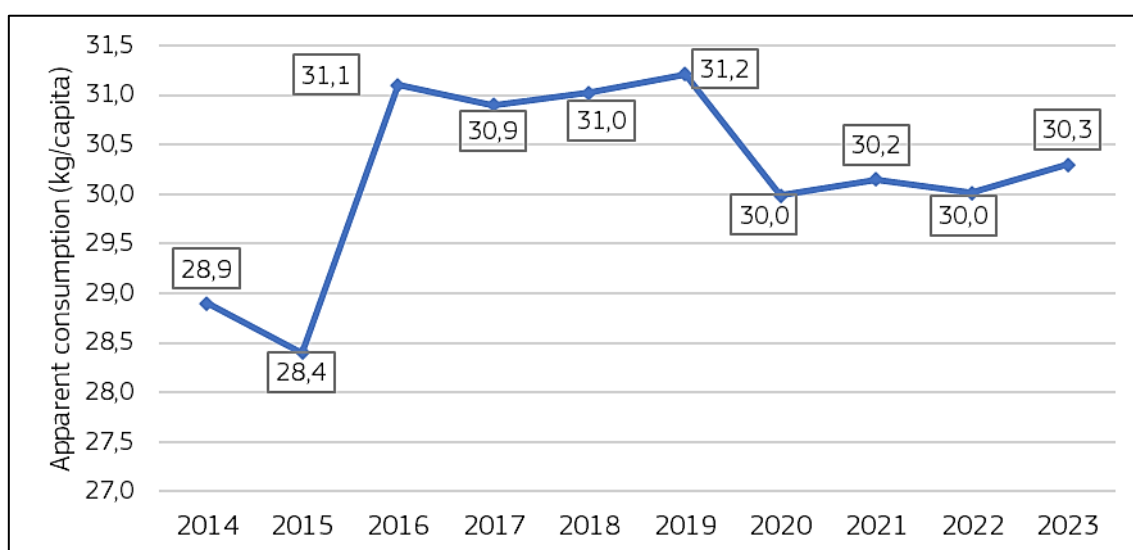


Source: ISTAT and ISMEA

3.1.2 Evolution of per capita consumption

Apparent consumption per capita rose in 2016, from its 2013-2015 average of 27,6 kg/capita to an average of 31 kg/capita between 2016 and 2019 (Figure 23). Between 2019 and 2020, it fell to its present level of 30 kg/capita and was on average stable throughout the pandemic and inflation period. The 2019-2020 decrease in apparent consumption can be explained by a diminished fishing activity and by a diminished consumption due to the HORECA sector's shutdown.

Figure 23: Evolution of per capita consumption (kg LWE per capita)



Source: EU Fish Market

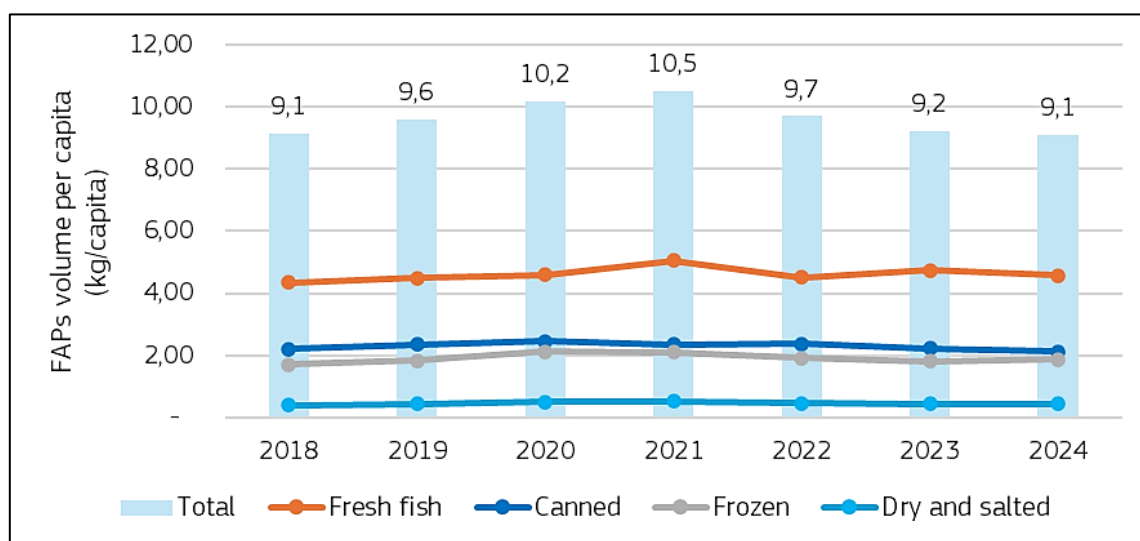
The household consumption per capita (Figure 5) follows the same trend as the overall per capita consumption (Figure 2). Households' FAP consumption remained relatively stable overall over the 2018-2024 period, around 9,6kg/capita. A consumption peak was observed in 2021, probably in reaction to HORECA shutdown during the pandemic and subsequent lockdowns, before household consumption per capita fell to its pre-pandemic levels.

Consumption evolution is proportionally higher for frozen and dry and salted FAPs than for fresh fish between 2018 and 2023. In volume, canned and frozen FAPs are the categories showing the greatest increases in consumers' household consumption over the same period:

- +10,3 % for frozen FAPs (+0,2 kg/capita) and +7,7% for dry and salted FAPs (+0,03 kg/capita), mainly pushed by smoked salmon;
- +5,0% for fresh fish (+0,2 kg/capita);
- -4,0% for canned FAPs (-0,1 kg/capita).

Stakeholders confirmed this trend, observing a rise in the consumption of frozen products, as well as prepared and portioned fresh FAPs.

Figure 24: FAP household consumption per capita



Source: ISMEA and ISTAT

3.1.3 Evolution at species level

The species consumed have greatly evolved in the past ten years: in 2014, the first three species consumed in volume LWE were squid, salmon and mussels. Yellowfin tuna then quickly rose as the first consumed species in 2016, whereas salmon took the first place since 2022 (Table 7).

Species caught in the Mediterranean such as squid, mussels and small pelagics (sardines, anchovies) are also preponderant in FAP consumption in Italy. Traditionally consumed, they are appreciated for their taste, and because they correspond to cooking methods and recipes.

Table 7: Apparent consumption in Italy per main fish species, all preservation type combined (tonnes LWE)

	2014	2016	2018	2020	2022	2023	Evol 2023/14
Other marine fish	129 673	135 460	144 081	134 770	150 163	146 564	13%
Salmon	95 520	104 445	118 978	124 541	143 417	142 283	49%
Tuna, yellowfin	27 144	139 321	143 532	147 532	130 780	122 972	353%
Squid	130 642	131 486	115 346	93 950	115 344	121 884	-7%
Tuna, skipjack	-83	81 668	119 241	93 997	112 004	109 070	34%
Mussel <i>Mytilus spp</i>	89 820	86 676	92 520	76 888	95 722	95 596	6%
Cod	88 052	93 545	95 269	89 761	81 278	75 676	-14%
Hake	78 609	78 697	84 586	82 771	74 502	69 326	-12%
Clam	55 937	54 773	53 179	54 912	66 138	60 891	9%
Octopus	68 485	79 444	74 353	55 343	62 699	57 795	-16%

Source: EUMOFA

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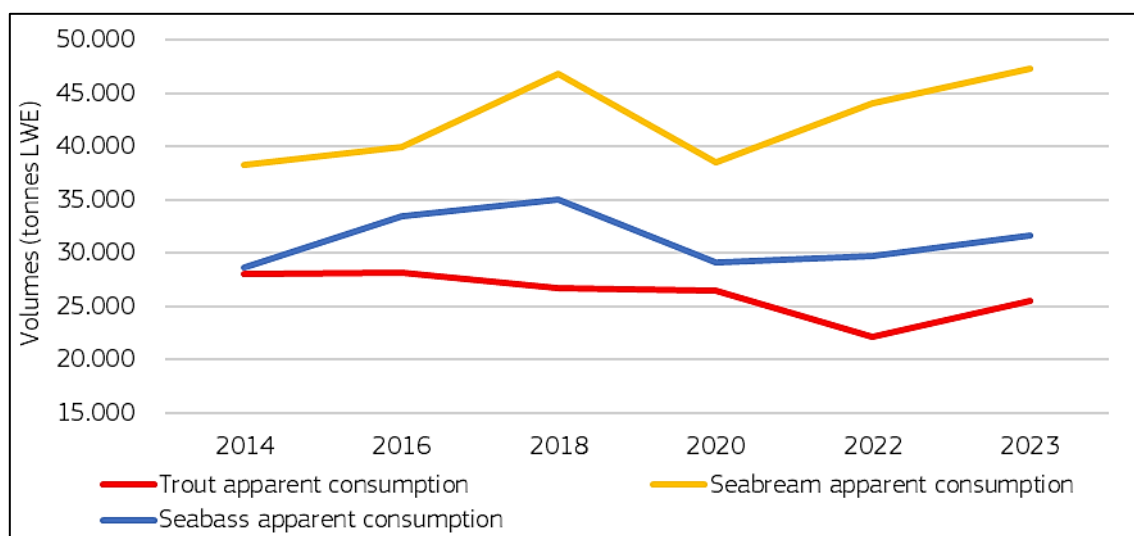
The evolution by species of the decade between 2014 and 2023 is as follow:

- Other marine fish was the first category of FAPs in apparent consumption volumes in Italy. The evolution shows an upward trend, explained by stakeholders by the fact that Italian FAPs' consumption culturally relies on a large variety of species.
- Salmon is the second most consumer species, and with an increased consumption of almost 50% over the 2014-2023 decade. According to stakeholders, salmon benefits from major consumption trends and media visibility as well as from the possibility to be consumed in a variety of forms (e.g. fresh, smoked, in ready meals), and its reputation as a healthy product. In value, it is one of the main fish bought fresh in large retail. Finally, salmon, as well as tuna, are very popular in the HORECA sector and have benefitted from the increased popularity of sushi restaurants.
- Tuna apparent consumption has increased at different rates depending on the species (from +34% to +353%). Tuna is mainly consumed canned and its volume represents the majority of the canned fish in Italy. According to stakeholders, consumption is mainly pushed by premium canned tuna. Similarly to salmon, tuna is consumed more frequently by Italian consumers and is bought in a variety of products (canned, fresh, prepared, etc.). It is to be noted that yellowfin and skipjack tuna consumption has been decreasing since 2020 and 2022 respectively, due to price increases, negatively affecting the canned FAPs consumption (Figure 21).
- Molluscs such as mussels and clams are increasingly consumed, gaining respectively 6 and 9% in consumed volumes over the last decade. Their integration into many traditional recipes make them essential ingredients to wide-spread Italian recipes, notably pasta sauces. Because a lot of work is required to open them, and their preparation produces large volumes of waste, molluscs are increasingly sold already open, fresh under skin, or frozen in prepared sauces.
- Cod was traditionally a very common and affordable fish. Its dry equivalent *stoccafisso* or salted equivalent *baccalà* being used in many traditional recipes. In 2014, it was still the 5th most consumed fish in Italy. Since 2018, apparent consumption has declined. According to stakeholders, this evolution has been even more acute in the past three years, in relation to quota reductions, notably in Norway⁸. Cod was gradually replaced by Alaska pollock, which apparent consumption rose by 28% in volumes over the same period (EUMOFA).

Stakeholders reported large volumes and consumption of fish originating from stable aquaculture supply chains, prevalently trout, seabream and seabass. Apparent consumption data for these species show a decrease in the volume of trout consumed (by 9%), while volumes of seabream and seabass increased by 23% and 11%, respectively.

⁸ [Norway, EU, UK agree to cut quotas in North Sea; cod fishery kept open in 2026 | SeafoodSource](#)

**Figure 25: Evolution of apparent consumption of main aquaculture species in Italy
(volume in tonnes LWE)**

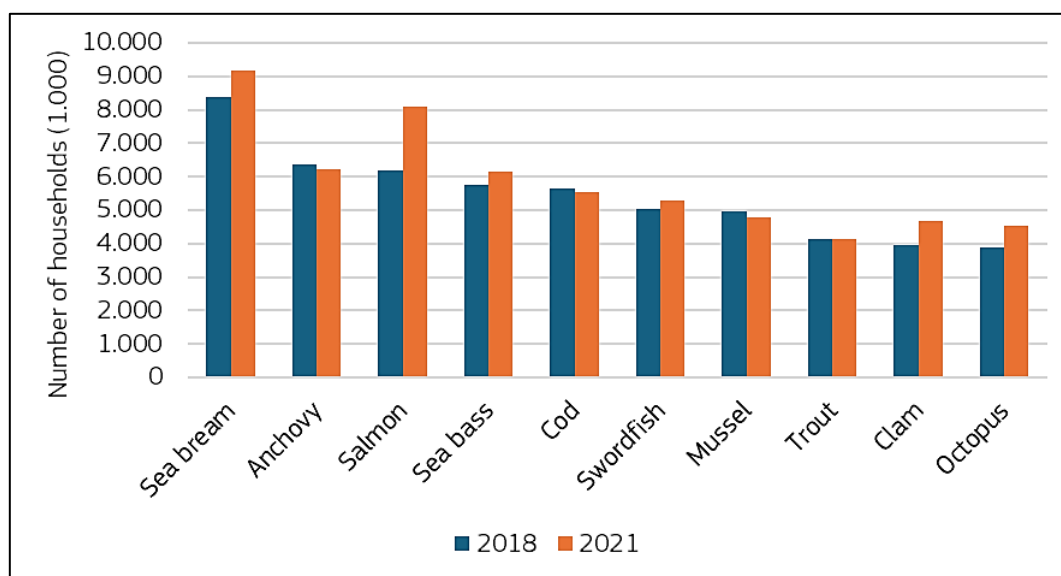


Source: EUMOFA

Focus on fresh fish

In value, about half of Italian FAPs are consumed fresh (51 % in 2021, ISMEA). Figure 26 illustrates the evolution in the number of householders buying fresh FAPs over the 2018-2021 period. The most frequently purchased species include seabream and seabass (which are supplied from national aquaculture production, as well as from imports), anchovy for which Italy is the second EU producer, salmon which is exclusively imported, among others. Out of the ten species that are bought by the largest number of households, six gained popularity between 2018 and 2021, notably seabream, salmon and clam, as they are bought by highest number of households. For some of these species, the increased popularity was accompanied by higher volumes consumed, such as for salmon and seabream. For others, the increased number of households buying the species did not translate into increased consumed volumes because the volume bought by purchase event is limited and even decreased, as is the case for octopus and seabass.

Figure 26: Number of households buying fresh FAPs by species, between 2018 and 2021



Source: BMTI

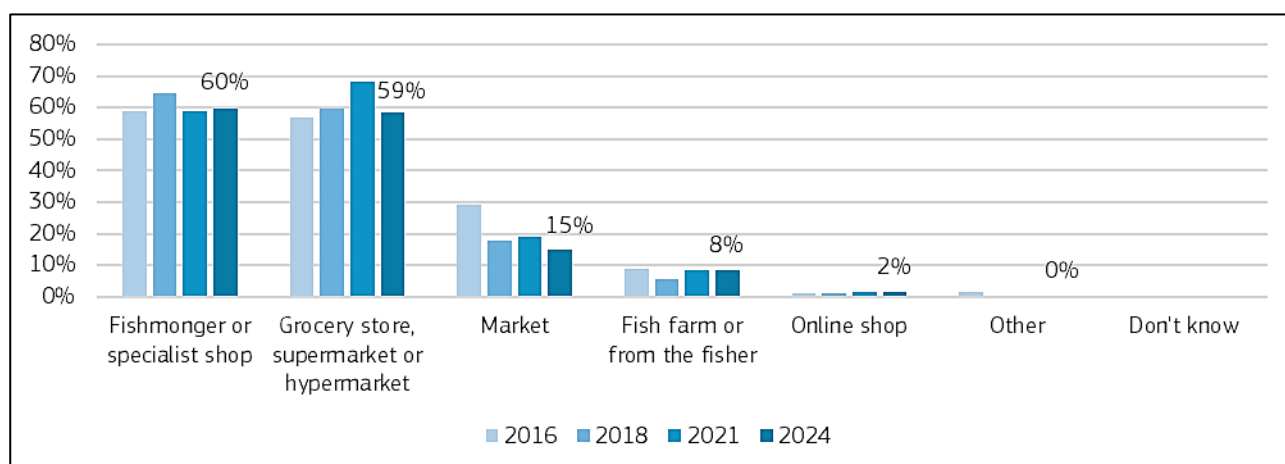
3.2 Consumption behaviour: analysis based on Eurobarometer survey

3.2.1 Changes in distribution channel

The Eurobarometer data suggests that distribution channels of FAPs remained relatively stable since 2016 (Figure 27). Survey respondents declared buying in roughly equal proportions from fishmongers or specialist shops and super/hypermarkets. Consumers declaring buying FAPs from markets is decreasing significantly. This trend was confirmed by stakeholders who explain this by the lack of time and changing lifestyles with both parents working. This leads to the reduction of whole fish consumption, which may require some preparation time. A small minority of consumers (less than 10%) declares buying directly from fish farms or from the fishers. According to stakeholders, these purchasing habits are more prevalent in coastal areas, and reflect how consumers perceive local products as being fresher and of better quality.

Stakeholders interviewed confirmed that online channels are uncommon for FAPs consumption and are not adapted to fresh fish distribution.

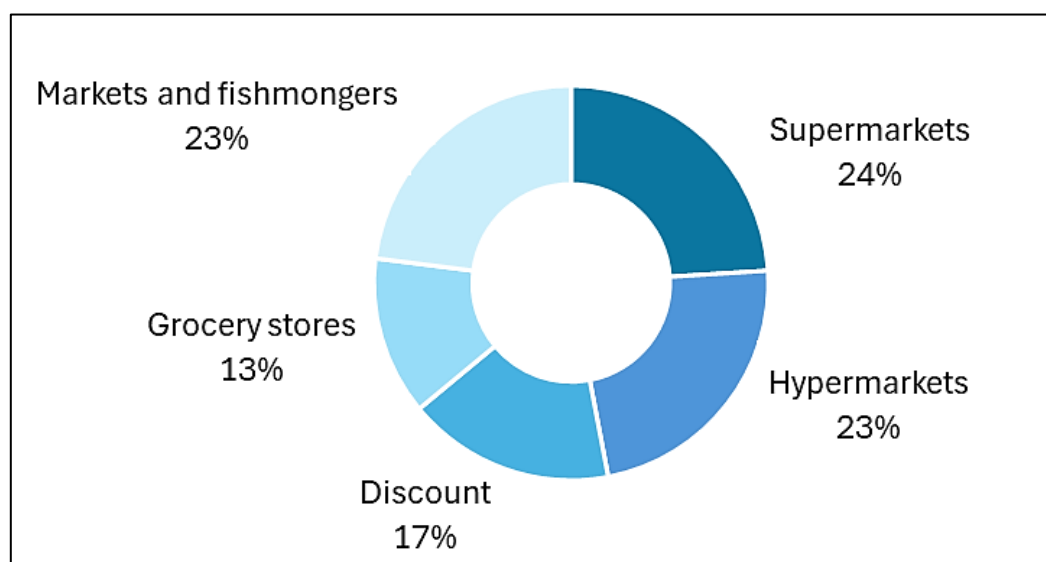
Figure 27: Evolution of purchase locations of FAPs in Italy



Source: Eurobarometer survey -Question: 'Where do you buy your FAPs?' (n= 1.029, 2024)

Data on household consumption of FAPs by channel shows a different perspective, placing the supermarkets, hypermarkets and discount as the main distribution channels. Together, they make up for 64% of the total FAPs volume bought by households, while traditional retail (markets and fishmongers) only sells 23% of the national FAPs volume. This is in part due to the diversity of FAPs found and bought in large retail, which enable clients to buy larger total volumes of fish, under varied forms.

Figure 28: Market share by purchase channels for FAPs, in volume (tonnes product weight), in 2023



Source: ISMEA, 2024

3.2.2 Changes in consumption habits

- **At-home consumption: the gap between frequent and occasional consumers widens**

FAPs consumption traditionally varies along the year with an annual peak during Christmas (ISMEA, 2023) and a smaller peak in early spring at the time of Easter.

From 2018 to 2021, fresh FAPs were purchased on average 13 times per year per household, but this frequency dropped by 5,2% over the studied period (BMTI, Tableau Public del consumo ittico). An interviewed retailer highlighted that the purchase frequency and its evolution vary depending on product categories. For instance, the frequency of canned products purchase is generally low because the large majority of consumers buy this type of products solely on the occasion of interesting sale offers. On the contrary, the frequency of purchases of some products such as salmon or frozen products has increased. Even though stakeholders interviewed perceive an increase in the purchase frequency, this seems to reflect favourable trends in supermarkets/hypermarkets. In contrast, the statistics supported by the Eurobarometer data indicate a decrease in the overall average frequency; In particular, the weekly consumption decreased by 8,6 points between 2016 and 2024. At the same time, more occasional consumption increased. The proportion of households consuming FAPs at least once a month, or only several times a year, rose by respectively 3,2 and 3 points.

According to stakeholders, at-home-consumption in Italy in the recent years has been characterised by a maintained consumption of a large variety of species, even though there is a clear and increased preference for more convenient, ready-to-eat products, waste free products, and portioned products. This trend is largely driven by lifestyle changes and the reduced time households allocate to cooking.

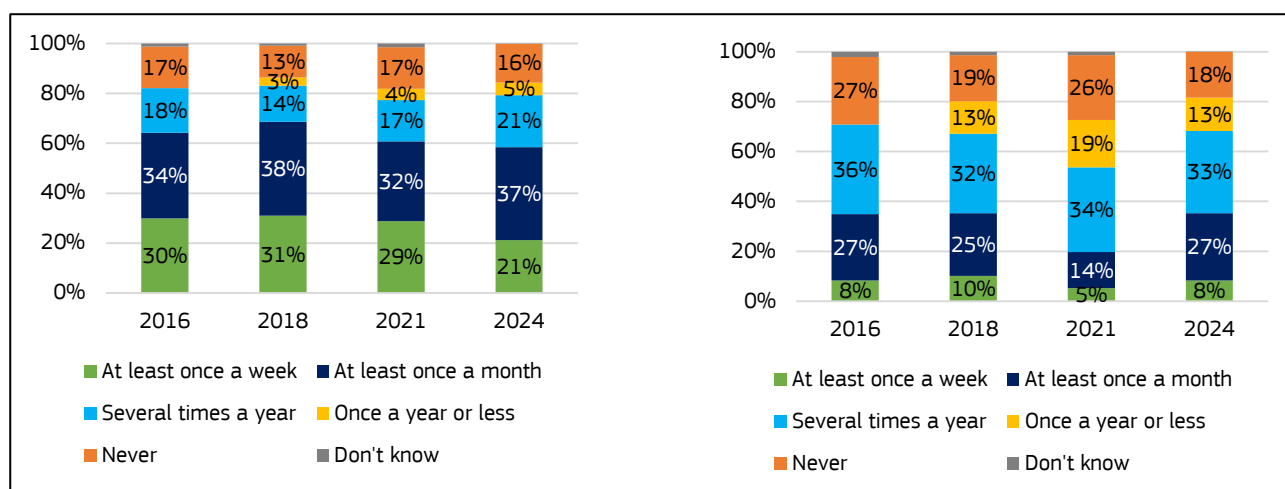
Parallely, premium products remain largely consumed for their quality and their image of onerous products. These are often associated by consumers to festive occasions, and they are largely preferred over meat or other alternatives.

- **In restaurants, FAPs consumption remains stable**

FAPs consumption in restaurants and other food outlets follow a different trend. Compared to 2016, the shares of consumers according to the consumption frequency in 2024 remained broadly unchanged. The main change is the emergence of a category of consumers who consumes FAPs in restaurants once a year or less. This category amounted to 13,34% of the respondents in 2024 and grew over the years at the expense of the category of consumers that never consume.

According to stakeholders, the resistance of restaurant and food outlets, despite the general decrease of consumption is related to the rising trend of sushi consumption.

Figure 29: Evolution of frequency of “at home” (left) and “out-of-home” (right) consumption in Italy



Source: Eurobarometer – Question: ‘How frequently do you eat FAPs at home/ at restaurants and other food outlets (canteens, bars, market stands, etc.)?’ (n= 1.029, 2024)

3.2.3 Changes in consumers preferences

According to the EU barometer (Figure 30), the most important criterion when buying FAPs in Italy is the appearance of the product: its freshness and presentation. It has been the first criteria throughout the period between 2016 and 2024, although its importance reduced between 2021 and 2024.

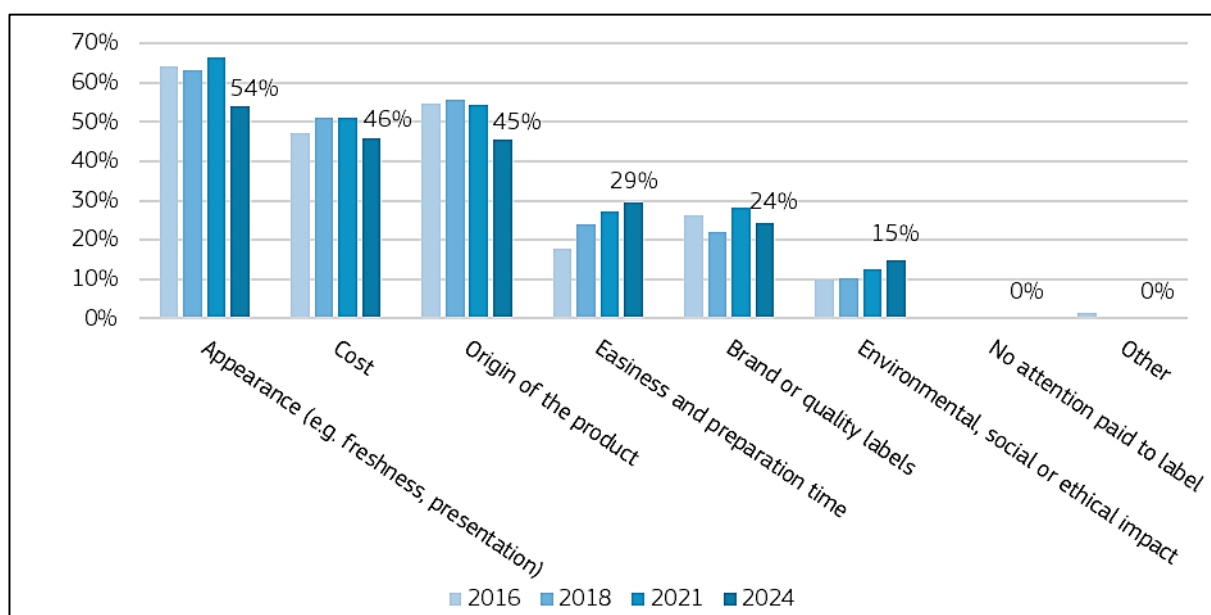
Cost and product origin are equally and constantly important to Italian FAPs consumers. According to a study on consumers’ preferences⁹, Italian consumers are more willing to pay higher prices than in other European countries for the national origin (Stefani, 2011). Cost became the second most important criteria in 2024, surpassing product origin. Product origin is considered an important aspect when buying FAPs for 45,4% of consumers. According to stakeholders, national or mediterranean origin is associated with a better taste, and benefit from increased trust in comparison to imported FAPs.

Easiness and preparation time, as well as environmental, social or ethical considerations are also cited by respectively 30% and 15% of the respondents. The importance of these aspects has significantly increased since 2016. The importance of easiness and preparation time has grown from 18% to 29% since 2016. This trend was emphasised by all interviewees and was explained by the changes in the lifestyle. People dedicate less time and energy to shop raw material and cook FAPs, due to lack time, skills, and recipes. Dislike of the smell, short shelf-life of fresh products, and concerns related to waste are other reasons explaining the rising popularity of ready-to-cook and prepared and preserved products.

Many of the stakeholders interrogated confirmed the influence of sustainability labels on consumers’ choice, and the rise of demand for a clear information on products’ label.

⁹ [Exploring consumer’s preferences for farmed sea bream | Aquaculture International | Springer Nature Link](#)

Figure 30: Evolution of main important aspects when buying FAPs in Italy

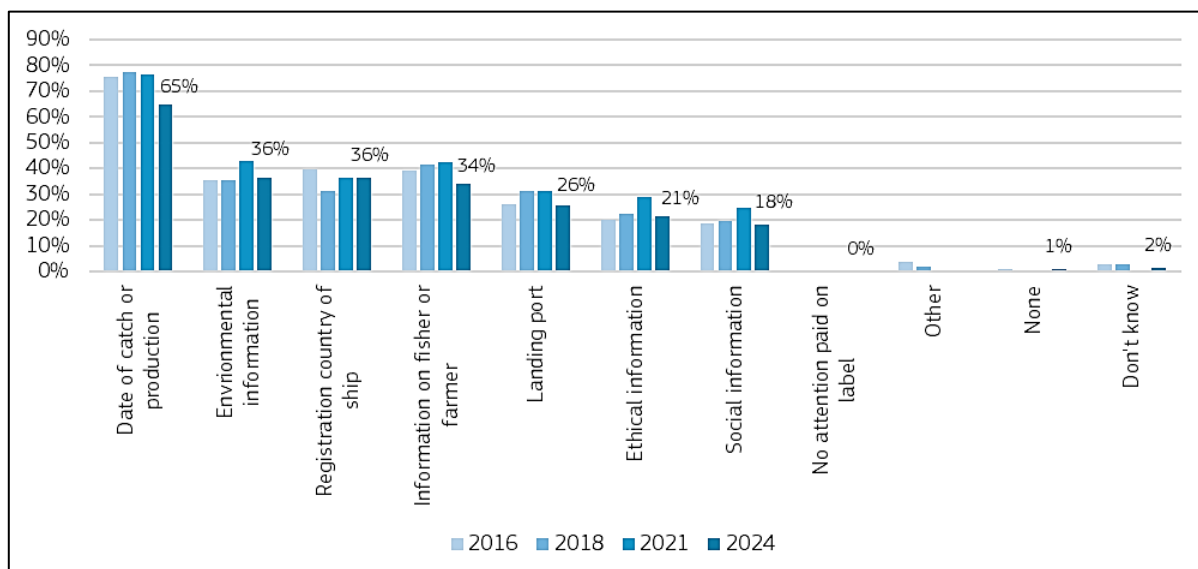


Source: Eurobarometer survey – Question: ‘When you buy FAPs, which of the following aspects are the most important for you?’ (n=1.029, 2024)

In the 2016-2024 period, demand for information on FAPs labels decreased for most criteria, except for environmental and ethical information (Figure 31). Information that consumers require the most include the date of catch or production, for sanitary purposes. However, this demand is decreasing, as well as many others, perhaps because of the increased transparency of operators in the market.

Environmental information comes second. The importance attached to the national origin, as outlined earlier, is also reflected in this demand for “registration country of the ship”, as well as for “landing port information”, which are mentioned by respectively 36% and 26% of the respondents.

Figure 31: Information that should be mentioned on the label of all FAPs in Italy



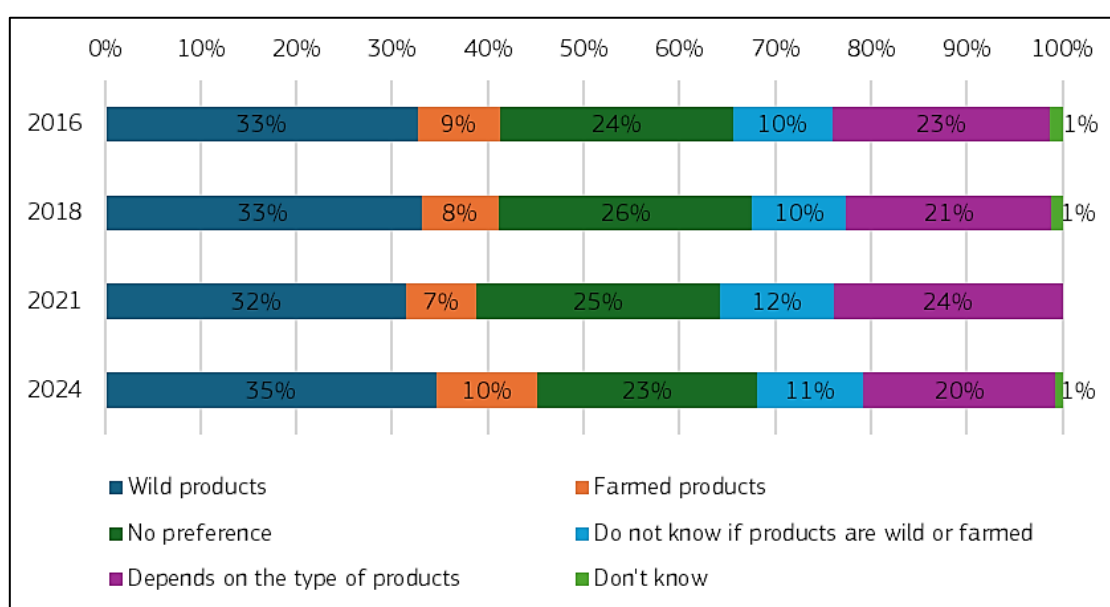
Source: Eurobarometer survey – Question: ‘Which of the following information do you think should be mentioned on the label of fresh, frozen, smoked and dried FAPs?’ (n= 1.029, 2024)

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As regards to wild or farmed products, there is a strong preference for wild products over farmed products. With a slightly increasing trend, the former are preferred by a majority of consumers (Figure 32). According to stakeholders, wild-caught products are associated with healthier nutritional values, as it is the case for wild salmon. They are largely preferred over farmed products, which consumers suspect of excessive antibiotic use and poor animal welfare.

Additionally, the proportion of consumers who prefer farmed FAPs gradually rose, from 8,63% in 2016 to 10,47% in 2024. This is correlated to the increase of consumption of aquaculture products, but there is no strong evidence that consumers understand the difference between farmed and wild products. Stakeholders explain this by a general improvement of aquaculture methods, which might drive consumer preferences.

Figure 32: Evolution of preference type of FAPs in Italy



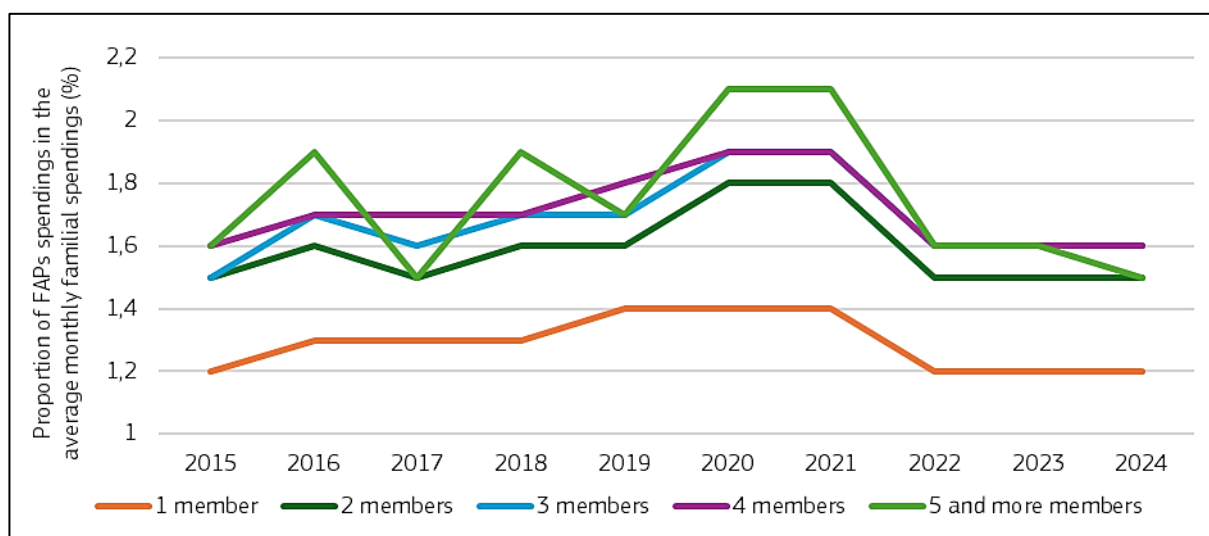
Source: Eurobarometer survey – Question: ‘Would you say that you prefer...’ (n= 1.029, 2024)

3.2.4 Changes in consumers profiles of fisheries and aquaculture products

Although households’ spendings on FAPs are relatively stable in real value (figure 3), this general trend hides disparities between family types. Single person households consistently spend less on FAPs than larger households (Figure 33). However, total family spendings suggest that spendings per capita are inversely proportional to the family size: to maintain consumed volumes, large families have a downgrading strategy, relying on the cheapest FAPs.

Throughout the period, spendings are most variable for larger families (5 and more members), and slightly peaked for all households in 2020 and 2021, probably due to the post-Covid increase of at-home FAPs consumption.

Figure 33: Evolution of the proportion of FAPs spendings in the average spendings of families, per family size



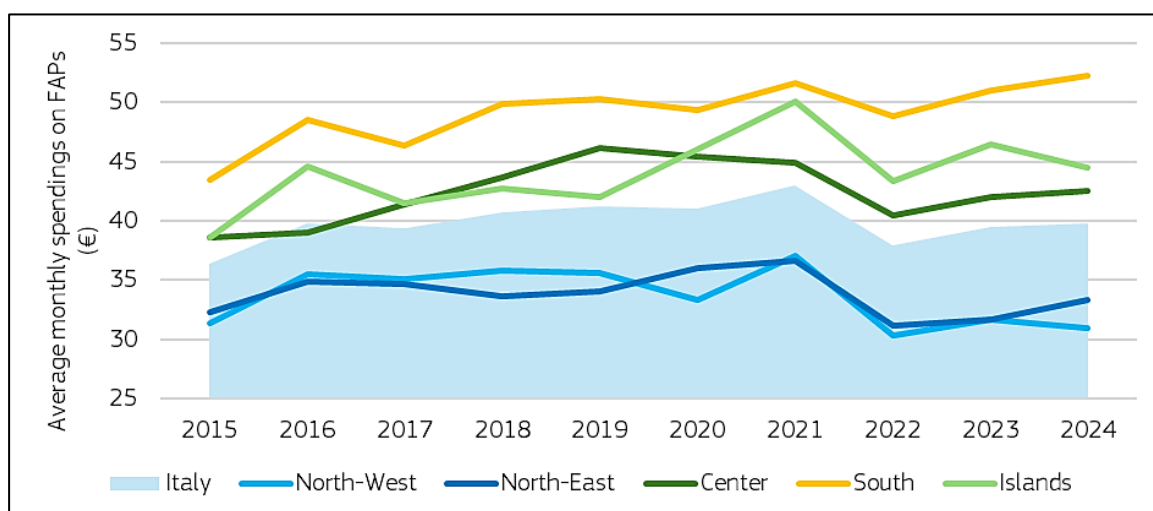
Source: ISTAT

FAPs consumption roots deep in national and regional traditions, especially in Southern Italy.

The following graph (Figure 38) illustrates the difference in spendings on FAPs per large Italian regions. FAPs consumption, in nominal value, is constantly highest in the South, followed by the Center and the islands (Sicily and Sardegna). On the contrary, FAPs consumption in the North, either West or East, is constantly under the Italian average.

Over the 2015-2024 decade, spendings in the South rose by 20%, and in the islands by 15%. However, spendings on FAPs in the North were relatively stable, evolving by -1,5% (North-West) and 3% (North-East), creating more gap between the North and the South of Italy.

Figure 34: Evolution of average household spendings on FAPs, per Italian area (EUR per month per household)



Source: ISTAT

3.3 Economic drivers for consumption

3.3.1 Availability of products that meet consumer demand and expectation

The results of the Eurobarometer presented in the chapter 3.2.3 are fully aligned with the qualitative data gathered during the interviews. The main key factors regarding demand and expectations of consumers are nutritional and health benefits, origin and convenience.

According to stakeholders, the overall stability of FAPs consumption volumes since 2014 is mainly due to consumers' desire for a healthy diet. This view is supported by a scientific article on consumer preferences and willingness to pay, which analysed a sample of species in five European countries. The findings show that Italian consumers stand out as placing the greatest interest to nutrition and health claims¹⁰.

In addition, stakeholders all agree on the fact that consumers are very demanding on label information, in particular regarding the product origin and the production method (farmed or wild products). National origin product is highly favoured over imported products, and it is even more so the case with local productions. While some of the most consumed such as salmon, tuna and cod are imported), Italian consumers show a clear willingness to pay more for local products¹¹. Stakeholders from the production sector pointed out the importance of and the consumer information, in particular the origin which is often promoted by local producers and by large retailers actively involved in short value chains.

There is also an increased demand for convenient products, such as frozen fillets, ready-to-cook, zero-waste and portioned FAPs. In the context of increased fish prices, frozen fillets provided consumers the ability to buy affordable healthy alternatives. According to stakeholders, these products are particularly popular among younger consumers and families allocating little time to cook.

Stakeholders also consider that consumers attach greater attention to sustainability, in particular young generations. It should be noticed that the findings from the Eurobarometer survey do not support this finding, as environmental, social and ethical impacts appears only as the sixth factor considered by consumers when buying FAPs, with a small increase since 2016.

In response to these trends, large retailers and processors are adapting their offer to meet consumer demand and expectations. This includes the development of more convenient products and innovative recipes, such as ready-to-cook products (such as pasta sauces with molluscs and crustaceans, which were traditionally home-made), ready-to-eat products (e.g. Poke bowl) and transformed products (e.g. tuna and salmon products).

¹⁰ [Consumers' Preferences and Willingness to Pay for Fish Products with Health and Environmental Labels: Evidence from Five European Countries - PMC](#)

¹¹ [Ibidem](#)

3.3.2 Availability of the supply

Insights from the interviews indicate that the development of aquaculture is a key driver of FAP consumption. It is also considered as a good alternative to species that may face some supply challenges which could result in shortage in supply or increased retail prices for consumers.

Aquaculture products also offer greater price stability which makes them attractive, particularly for the HORECA sector. According to a producer organisation, the HORECA sector is more sensitive to price variations than households. Depending on available supplies and corresponding prices, the sector tends to easily and rapidly adapt the species served to their clients, sometimes by substituting with comparable imported species when domestic production declines (Portuguese clams as substitute to Italian farmed clams which suffered from the impacts of predation by the blue crab for example).

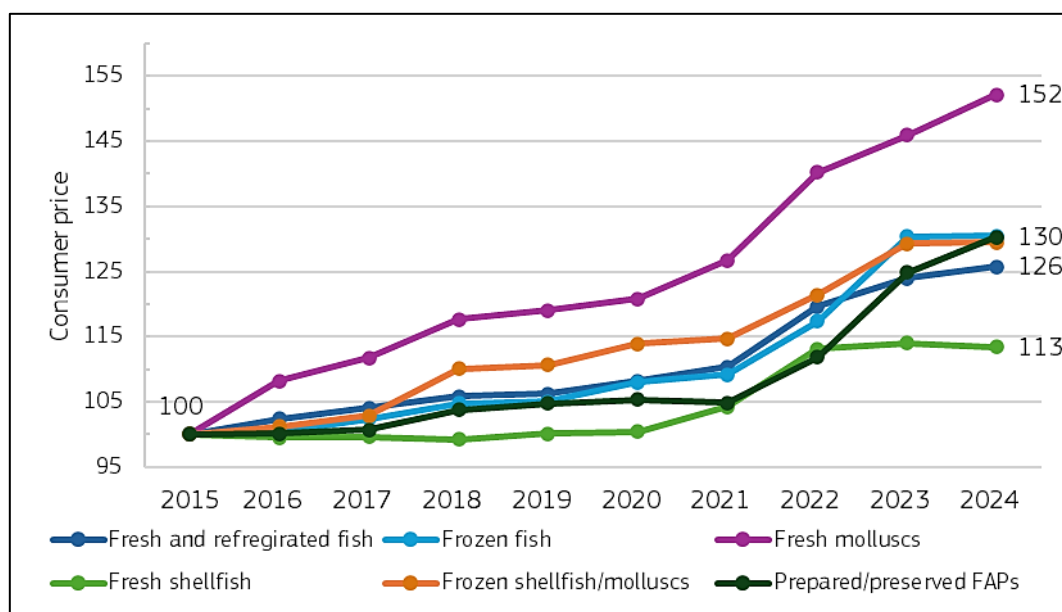
Additionally, operators in the supply chain and consumers may adjust their supply or consumption depending on the availability of the species. For example, reduced fishing quotas and catch volumes, particularly for cod, have contributed to prices increases (see chapter 2.3). In response to this trend, consumers shifted their consumption to more affordable options, such as Alaska pollock, and frozen hake coated fish fingers.

3.3.3 Price evolution and comparison with other food products

Overall, nominal FAPs consumer prices have increased over 2015–2024, by 13% to 52% depending on the product category (Figure 35). According to stakeholders, price is the main driver for FAPs purchase. Households balance FAPs quality depending on prices, in order to maintain purchased volumes. Additionally, the FAPs offer is highly segmented and prices fluctuate significantly depending on the preservation and preservation types, as follows:

- For all FAPs, consumer price has risen the most between 2021 and 2022, pushed by high inflation (+7,5% between 2021 and 2022, according to ISTAT). A smaller rate of inflation between 2022 and 2023 (+5,1% according to ISTAT) explains the continuity of price rise until 2023 for most FAPs categories. Since 2023, prices have stabilized for almost all FAP categories, benefitting from a decrease in fish feed and energy prices.
- Of all FAPs, fresh molluscs prices stand out as having experienced the greatest increase since 2016, contrasting with the slow price evolution of fresh shellfish.
- Frozen FAPs and prepared and prepared FAPs' consumer prices have grown at a higher rate than fresh fish over the period, in line with growing consumer preference for ready-to-eat and convenient products. Their prices were also pushed by rising energy prices from 2022 to April 2023. This increase was slowed down in 2024 in relation to inflation reduction (BMTI, 2024).
- While consumers turned to canned FAPs for their lower prices until 2021, this category has since seen its prices rise (Figure 16 and stakeholder interviews). Volumes are thus presently decreasing, in favour of fresh and frozen FAPs.

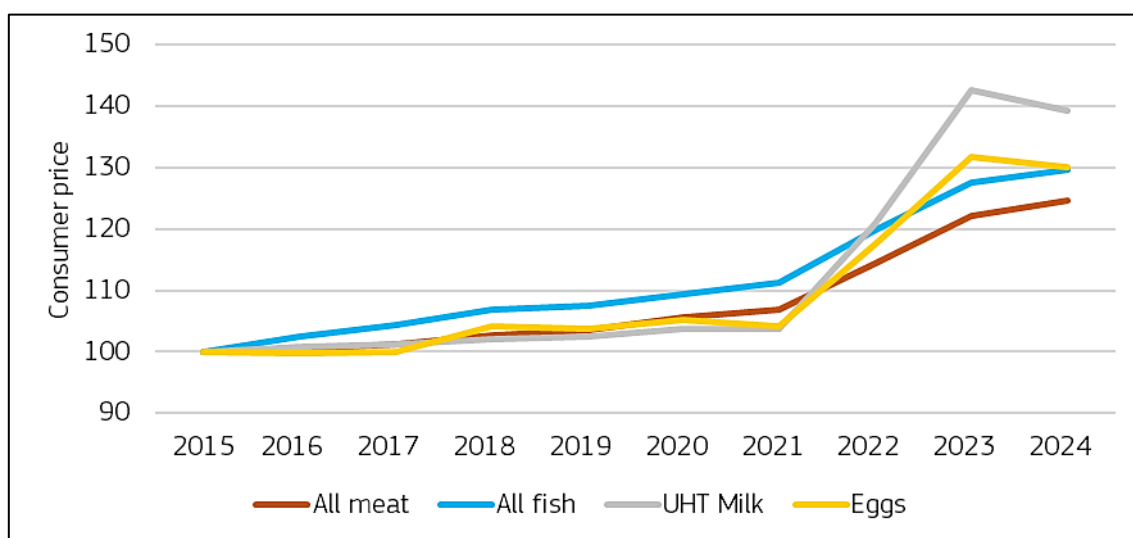
Figure 35: Price evolution of FAPs by category over the 2015-2024 period (index 100=2015)



Source : Elaboration from ISTAT

According to stakeholders, FAPs prices have risen faster than some other animal proteins, notably red meat. Figure 36 confirms these overall trends: prices for all animal proteins, fish included, rose between 2015 and 2023. The rise was significantly pronounced for all proteins between 2021 and 2023 before stabilising. However, over the decade, fish prices rose by 30%, more than meat prices (+25%), but similarly to eggs (+30%), and less than long-conservation milk (+39%). This trend maintained FAPs prices higher than all meat prices throughout the past decade.

Figure 36: Consumer price evolution (index 100=2015)



Source: ISTAT

Food price inflation as well as a diminishing purchasing power are the main factors influencing FAPs consumption. Families with low incomes, young people living alone and inland areas are the populations most exposed to FAPs inflation, according to ISTAT.

However, as explained by stakeholders, households do not substitute FAPs by other animal proteins so much, but prefer turning to less expensive FAPs:

- other species in the same category (for fish, species like anchovies, sardines and mackerel for example, or mussels instead of clams).
- the same species from other categories (frozen or canned products until 2022 and 2023, before the rise of energy prices, resulting in increased prices for canned products).

3.4 Strategies implemented to enhance consumption

- **Enhancing consumption with communication campaigns**

To face consumer reluctance and prejudice towards aquaculture, large retailers are investing in communication campaigns to raise consumer trust in the benefits of farmed FAPs. Among other topics, national and international meetings, such as the AquaFarm annual symposium, gather aquaculture operators to address consumer communication, and stakeholders from the aquaculture sector seek for political measures further attesting to the reliability of farmed FAPs.

Large retails also communicate on the quality they require for products under private label: for example, one large retail banned red coloring¹² in farmed salmon feed, for the salmon products it buys and distributes, ensuring consumers' trust in this private label's salmon quality.

- **Enhancing consumption with promotions and marketing campaigns**

As explained in chapter 3.2.2, in large retail, consumers mostly purchase FAPs during large promotions and offers. Stakeholders from both the production and distribution sectors agree on the efficiency of such campaigns to increase sales for a diversity of FAPs, such as canned fish, but also fresh fish and molluscs, as well as for salmon.

- **Enhancing consumption thanks to medias**

Specialized press magazines work on enhancing FAPs image through highlighting transparent and innovative processes implemented by FAPs companies. In order to encourage FAPs consumption and production, they communicate studies and research on sustainability, outline innovative products and processes, and promote seasonal and domestically produced species through press articles.

¹² To impart the pink-red color in farmed salmon, synthetically produced astaxanthin is added to their feed. The more astaxanthin, the redder the flesh becomes.

3.5 Annexes

3.5.1 Annex I: Apparent consumption of the main species

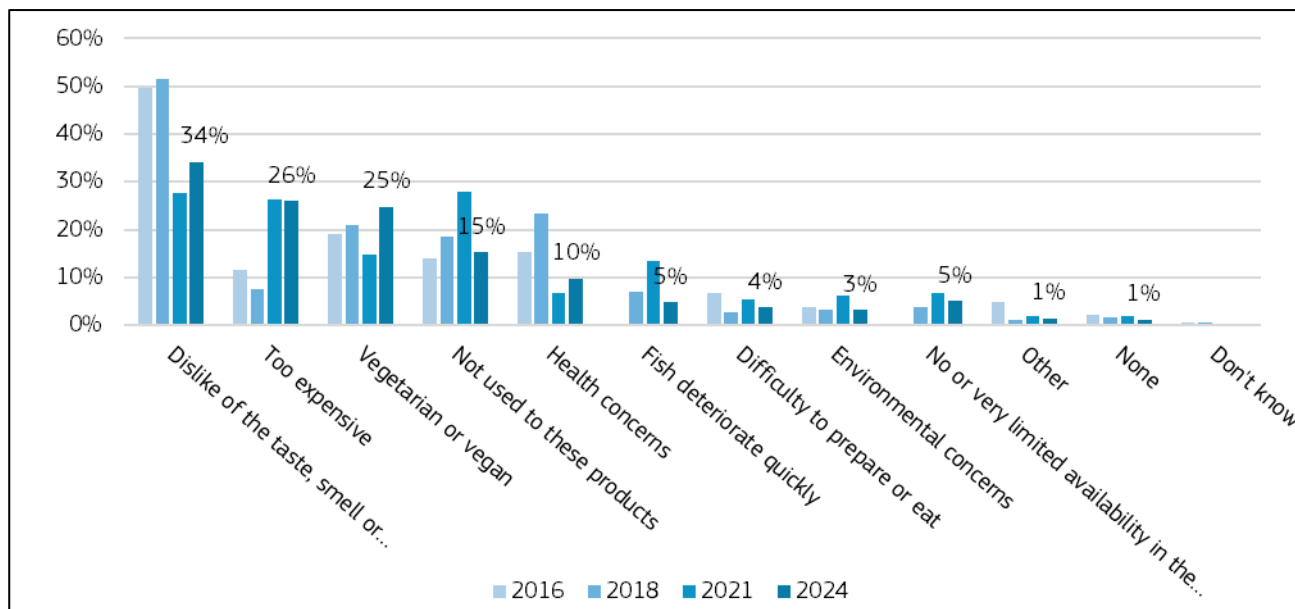
Table 8: Production, trade and apparent consumption evolution of the 10 most consumed species in Italy between 2014 and 2023 (in tonnes LWE)

	Aquaculture + Catches		Imports		Export		Apparent consumption	
	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14
Other marine fish	8.249	-34%	147.396	14%	9.080	-23%	146.564	13%
Salmon	-	n.d.	146.645	48%	4.363	12%	142.283	49%
Tuna, yellowfin	3.762	n.d.	171.233	84.768%	52.024	18.193%	122.972	-148.931%
Squid	144	n.d.	133.884	392%	12.144	19.495%	121.884	349%
Tuna, skipjack	2.120	-48%	110.782	-16%	3.831	-30%	109.070	-17%
Mussel Mytilus spp	57.279	-10%	43.290	7%	4.973	-65%	95.596	6%
Cod	-	Nd	78.882	-11%	3.206	251%	75.676	-14%
Hake	6.745	-23%	64.511	-9%	1.930	190%	69.326	-12%
Clam	4.922	-31%	60.394	-9%	4.424	-14%	60.891	-11%
Octopus	39.916	-24%	25.709	75%	7.831	-31%	57.795	3%

Source: EUMOFA Supply Balance

3.5.2 Annex II: Complementary Eurobarometer results

Figure 37: Evolution of main reasons for never consuming FAPs in Italy



Source : Eurobarometer survey – Question: ‘Which of the following are the main reasons why you never eat any fishery or aquaculture products?’ (n= 1.029, 2024)

4 Poland

4.1 Consumption trends of FAPs

4.1.1 General remarks for understanding the consumption of FAPs in Poland

Fish consumption in Poland is dominated by imported species. The share of domestically produced fish is low and has declined further over the past decade. Only carp, trout, sprat and Baltic herring and negligible quantities of other freshwater fish and fish from coastal marine fisheries are of domestic origin, together accounting for around 2,2 kg per capita (live weight equivalent) according to the Institute of Agricultural and Food Economics. This means that roughly 20% of total consumption is based on national production.

A second characteristic of the Polish market is the limited product diversity. The small domestic supply means that the range of fresh fish available in most retail outlets is limited to just two or three species, typically salmon, trout, thawed white fish, and seasonally carp.

The third distinctive feature is the high share of processed products, particularly chilled processed fish products (as marinades, salted fish in oil or sauces, salads etc) and canned fish.

Finally, out-of-home consumption remains limited. Household consumption dominates, with retail being by far the main supply channel.

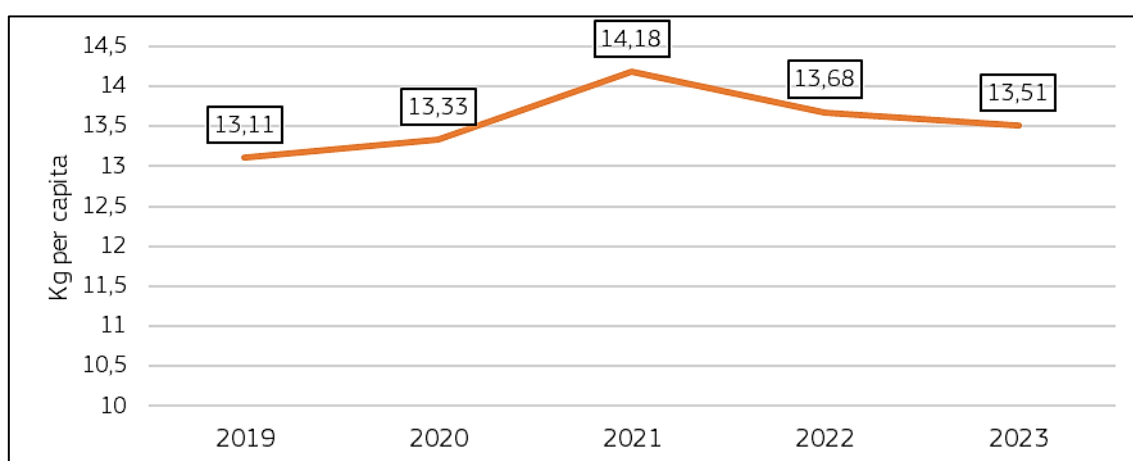
4.1.2 Evolution of per capita consumption

National statistics indicate that for many years (2010–2019) FAP consumption in Poland followed a fluctuating downward trend (from around 13 kg per capita towards approximately 12 kg and below). Around 2020, a clear upward step-change occurred, bringing consumption close to 14,0 kg per capita. This rise reflected primarily a methodological change in the way consumption was estimated, but it also likely captured a real (behavioural) increase in consumption in the same period. After reaching the highest level around 2020–2021, consumption has remained broadly stable, and the year-to-year movements observed since then should be treated as minor fluctuations rather than statistically meaningful shifts.

It should be noted that consumption figures are calculated in relation to the population size reported by Statistics Poland (GUS), which is not constant and declined from 38,53 million people in 2010 to 37,64 million in 2023 (a decrease of nearly 3,5%, i.e. almost 1 million people). As a result, even if per capita consumption remains unchanged, total consumption expressed in absolute terms declines.

At the same time, official statistics do not account for the presence in Poland of approximately 0,8–1,0 million people from Ukraine in the 2022–2025 period. If these residents – who also consume FAPs – were included, average per capita consumption would need to be adjusted downward by around 3%. Importantly, such an adjustment would not alter the overall conclusion, as it still confirms a declining trend in per capita fish consumption after 2021.

Figure 38 – Per capita consumption of FAPs in Poland (kg LWE)



Source: Warsaw: Institute of Agricultural and Food Economics¹³

4.1.3 Evolution at species level

Over the period 2014–2023, structural changes by species have been more significant than changes in total consumption volume. The Polish market has shifted away from cod and pangasius towards Alaska pollock, salmon and alternative whitefish, while maintaining stable consumption of carp, trout and tuna. These developments indicate that adaptation through species substitution, rather than sustained growth in overall quantities, has been the defining feature of fish consumption in Poland over the last decade.

Alaska pollock has remained the single most important volume species in Polish fish consumption throughout the period. Between 2014 and 2019, per-capita consumption declined gradually from around 2,9 kg to about 2,0 kg. Following the methodological break in 2019, Alaska pollock consumption increased markedly, peaking in 2022 at 3,30 kg before easing slightly in 2023 to 2,80 kg. Alaska pollock increasingly functions as a substitute for more expensive whitefish, particularly cod whose consumption declined by 34% between 2019 and 2023 due to price increase and supply constraints (0,50 kg per capita in 2023). Data of Alaska pollock consumption confirms its stabilising role in the market. Pangasius consumption also experienced a structural decline linked to changing quality perceptions and competition from other low-priced species. Other substitution species became increasingly important over the past years. Hake and grenadier have gained importance since 2019, reflecting substitution effects driven by reduced availability and rising prices of cod. Although these species remain secondary in volume terms, their structural role in the market has strengthened.

Consumption of traditional species like herring or sprat experienced fluctuations with an overall long-term decline, reflecting a structural rebalancing demand away from traditional small pelagic species towards alternative formats and species. Consumption of herring has been volatile, with a pronounced drop in 2022 (1,78 kg) and a rebound in 2023 (2,50 kg). This pattern highlights the high sensitivity to price changes and product formats, especially in marinated and chilled products. Sprat consumption fell from approximately 1,0 kg per capita in 2018 to around 0,58-0,68 kg per capita in 2023. However, it remains an important raw material for processed and canned products.

¹³ Hryszko, K. (Ed.). (2024). *Rynek ryb* (No. 35/2024). Warsaw: Institute of Agricultural and Food Economics – National Research Institute (IERiGŻ-PIB). ISSN 1732-5889)

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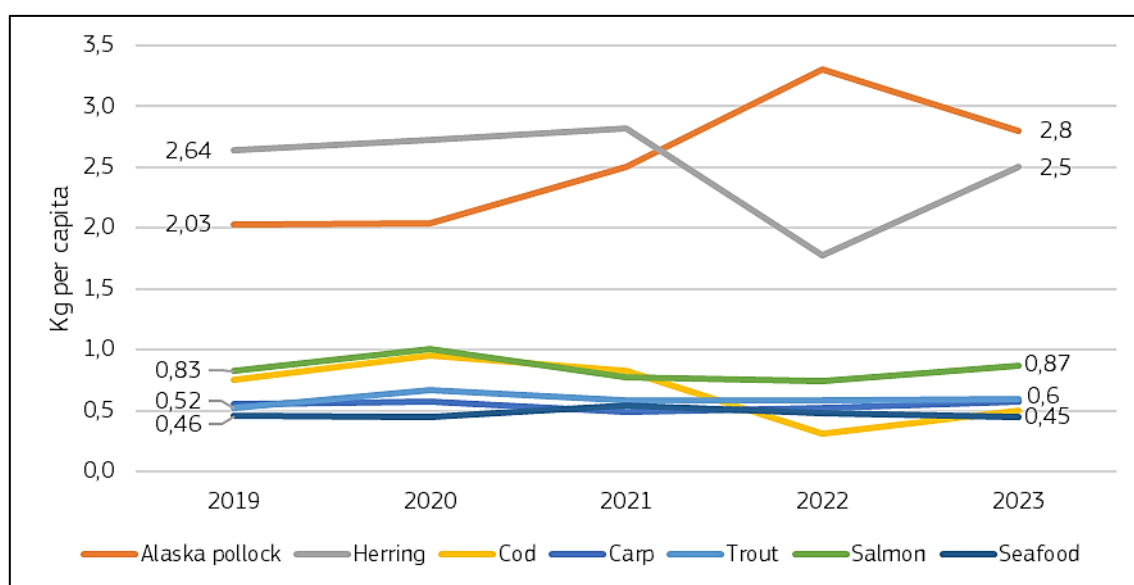
Mackerel data suggests competition from alternative species and price pressure, resulting in a decreasing consumption.

Salmon shows the most consistent strengthening among major species. After some weakening between 2016 and 2019, consumption rose sharply around 2020 to approximately 1,0 kg per capita and has since remained stable at a relatively high level (0,74–0,87 kg). Salmon acts as a value and volume anchor for the market and is the main driver of growth in fresh, smoked and sushi categories.

Carp and tuna consumptions remained stable over the period, fluctuating both between 0,5 and 0,65 kg per capita. While this data confirms that carp is resilient but non-growing category, despite being strongly shaped by seasonality, with a pronounced peak in December, and sensitive to changes in retail practices such as the withdrawal of live carp sales. Consumption data for tuna suggests that it is a mature and resilient segment in the Polish consumption. Rainbow trout displays a similar trend, with stable volumes since 2019 (around 0,59-0,60 kg per capita), indicating a consolidated and resilient market position, particularly in the fresh and locally sourced segment.

Seafood consumption (mostly farmed shrimps) increased slowly from a low base up to 2019 and has since stabilised at approximately 0,45–0,55 kg per capita. Despite growing interest in seafood products, this category remains niche within the Polish diet.

Figure 39 – Per capita consumption by species in Poland (kg LWE)



Source: Warsaw Institute of Agricultural and Food Economics¹⁴

4.2 Consumption behaviour: analysis based on Eurobarometer survey

Consumption of fishery and aquaculture products in Poland is shaped by a combination of strong economic drivers and longer-term structural and behavioural factors. Feedback from interviews indicates that recent developments have not fundamentally changed the role of these drivers but have significantly intensified their impact and altered the way consumers respond to them.

¹⁴ Hryszko, K. (Ed.). (2024). *Rynek ryb* (No. 35/2024). Warsaw Institute of Agricultural and Food Economics – National Research Institute (IERiGŻ-PIB). ISSN 1732-5889)

Combining national statistics with stakeholder perspectives, 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) and through format substitution (towards fillets, MAP, sushi and convenience-oriented products). Inflation in 2022–2023 acted as an accelerator of these trends, strengthening the role of price, discounters, and convenience – while December seasonality (especially for carp) remains a defining feature of the market.

4.2.1 *Changes in distribution channels*

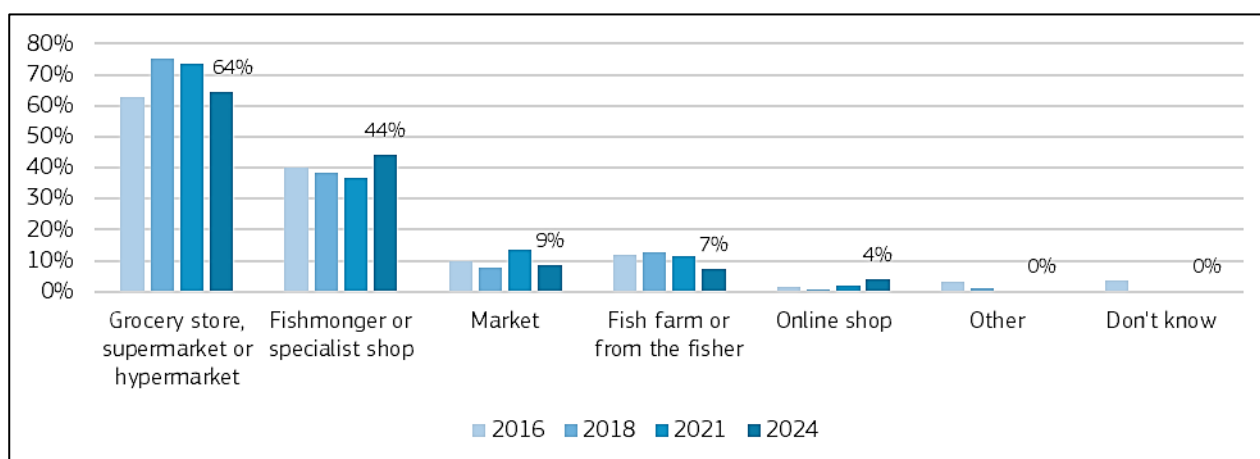
Structural changes in retail are consistently identified as a major consumption driver. The expansion of discounters and convenience-oriented formats has favoured packaged fish, re-fresh products in modified atmosphere packaging, sushi and simplified assortments with clear price signalling. In parallel, hypermarkets have gradually lost their former role as everyday volume drivers for fish purchases, although they remain important during seasonal peaks, especially in December. From both retail and producer perspectives, limited year-round availability is a major constraint on consumption growth for certain species, notably carp. These developments are widely regarded as structural, reflecting long-term changes in retail organisation rather than temporary market fluctuations.

Across responses there is strong agreement that the last decade brought major channel rebalancing, which also influences what consumers buy and how often:

- Discounters (e.g., Biedronka, Lidl, Dino, Aldi) have strengthened and concentrate large volumes in frozen, canned, chilled processed products (marinades, salted herrings, salads, etc), and packaged fresh/MAP products, as well as packaged sushi.
- While the number of small specialised fishmongers is reported to be declining in urban areas, this channel remains crucial for fresh fish sales, with a simultaneous increase in direct sales outlets located at fish farms.
- Hypermarkets are no longer expanding and have not been a growth driver (with Tesco's exit noted), while medium supermarket formats are growing.
- Online sales are expanding, but interviewees stress that its total market impact is still hard to quantify due to limited data.

These findings are supported by results of the Eurobarometer survey to some extent. Grocery stores and large retailers are the favoured purchase locations of FAPs with a penetration rate reaching 64,5% in 2024, and 44,3% for fishmongers. As mentioned by the stakeholders, online purchases have developed 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. Digital media function as a “decision gate”, influencing what consumers consider buying later offline, through recipes, short videos, influencers and promotional content.

Figure 40 - Evolution of purchase location of FAPs in Poland



Source: Eurobarometer survey – Question: ‘Where do you buy your FAPs?’ (n= 1.018, 2024)

4.2.2 Changes in consumption habits

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 decrease overall and clear year-to-year volatility, consumption habits and frequency have evolved.

Lifestyle and convenience constraints are commonly highlighted. A faster pace of life and limited time for cooking increasingly influence consumer choices, contributing to the declining importance of whole fish and the gradual growth of ready meals and easy-to-prepare fish products. The strong performance of sushi and re-fresh fillets is often cited as a direct response to these constraints. Most respondents view these changes as durable, as they align with broader societal trends rather than short-term shocks.

- Polarisation of consumers

Stakeholders interviewed reported an increasing polarisation between consumers, with a group of “core” fish consumers continuing to purchase FAPs (and sometimes even increasing their purchases), while occasional/light consumers buy FAPs less frequently than before.

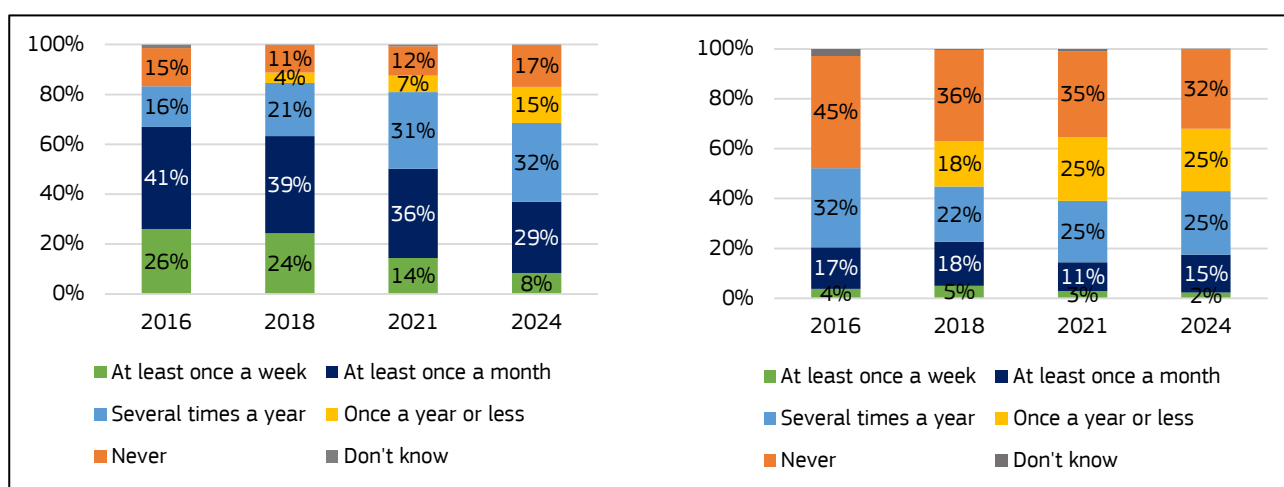
- Seasonal and occasional consumption

Seasonality and cultural patterns remain an important contextual factor, particularly in Poland. Fish consumption continues to be highly seasonal, with December and Christmas carp playing a unique and persistent role. Several respondents emphasised that in December fish counters in large-format stores can temporarily outperform meat counters in turnover, while outside the season fish competes strongly with cheaper proteins. This seasonality amplifies volatility in demand and limits structural volume growth outside peak periods. Most respondents expect this pattern to remain, even if efforts are made to extend consumption through new product formats.

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Stakeholders, supported by analysis of the results of the Eurobarometer survey revealed a shift from frequent to occasional consumption of FAPs. The traditional weekly habit of fish consumption (e.g., “Friday fish”) is weakening, contributing to lower regularity. At the same time, some retail observations suggest fish purchases have shifted towards weekend peaks and more flexible meal planning. 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. Results from the Eurobarometer also suggest that out-of-home consumption of FAPs is not frequent among Polish consumers, with decreasing weekly and monthly consumption.

Figure 41: 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)

4.2.3 Changes in consumers preferences

According to interviews, Polish FAP consumption is clearly driven by convenience. The demand is shifting away from whole fish towards cuts, portions and fillets – reflecting convenience needs and reduced time for cooking. In addition, convenience-driven formats are growing, but at different speeds:

- Sushi (especially pre-packed retail sushi) is consistently described as the most dynamic growth phenomenon of the last decade, driven by younger consumers and “no-cooking” consumption occasions (typical ingredients mentioned: salmon, surimi, shrimp). Some stakeholders also pointed out adjacent trends (e.g., Korean style kimbap).
- Ready-to-eat/ready-to-prepare products (e.g., fish burgers, simple ready meals) are increasing but at a lower rate.

While fresh and chilled fish are seen as most price-sensitive and most exposed during inflation spikes, canned products are repeatedly described as stable and resilient, functioning as a “safe” category in times of price pressure (even if not necessarily growing). Consumption pattern regarding frozen products is less clear, with some stakeholders considering that frozen FAPs are stable overall, benefiting from stable price and long shelf life, and others considering that

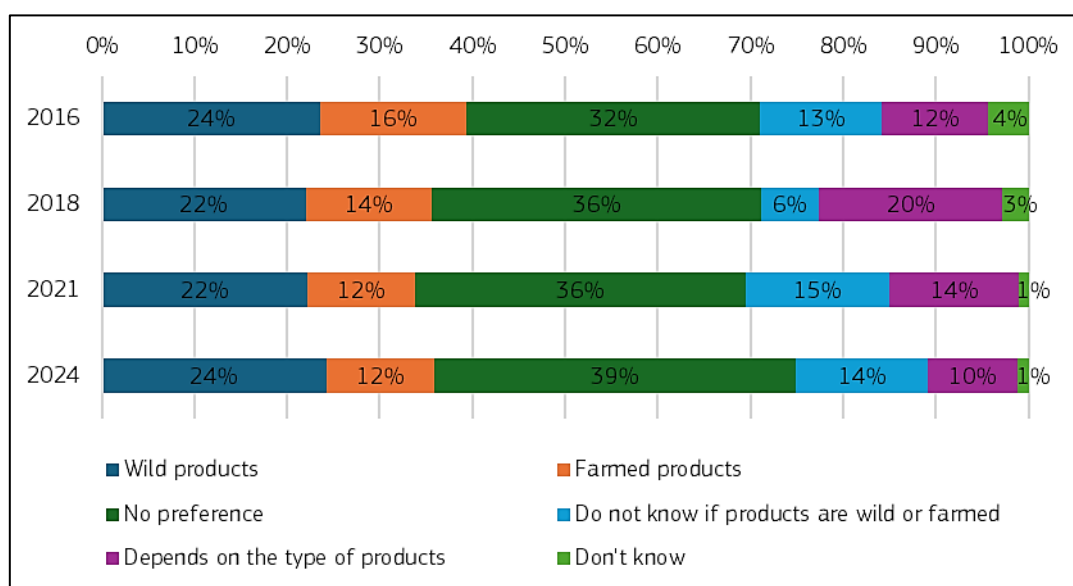
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consumption is decreasing, with growth concentrated mainly in specific segments such as shrimp and grenadier.

Regarding the species preferences of Polish consumers, stakeholders agreed that salmon has strengthened its position over the decade and is widely seen as a category driver (standardised taste, “safe choice”, strong presence in modern product formats). Domestic freshwater species (carp, trout) are described as stable and resilient rather than growing. This is consistent with the consumption statistics showing only small changes for carp (consumption around 0,5 kg per capita) and trout (moderate growth to around 0,6 kg per capita in recent years). Substitution within fish species is a key adaptation mechanism when relative prices change. When traditional whitefish becomes expensive or less available, consumers shift towards alternatives.

There is no clear preferred type of FAPs in Poland. Results from the Eurobarometer survey suggest that the share of consumers preferring wild products is relatively stable since 2016, with a quarter of the respondents preferring wild products. The share of consumers preferring farmed products is decreasing (-4 points between 2016 and 2014), while there is an increasing number of consumers that do not have any preference (38,9% in 2024).

Figure 42: Evolution of preference type of FAPs in Poland



Source: Eurobarometer survey – Question: ‘Would you say that you prefer...’ (n= 1.018, 2024)

Qualitative evidence indicates that recent changes in the consumption of fishery and aquaculture products are driven by a combination of economic, structural and behavioural factors. Respondents broadly agree that these drivers interact and reinforce one another, rather than acting independently.

The acknowledged structure of the Polish market for FAPs is a segmentation in 3 splits:

- strongly price-oriented consumers;
- value-for-money 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

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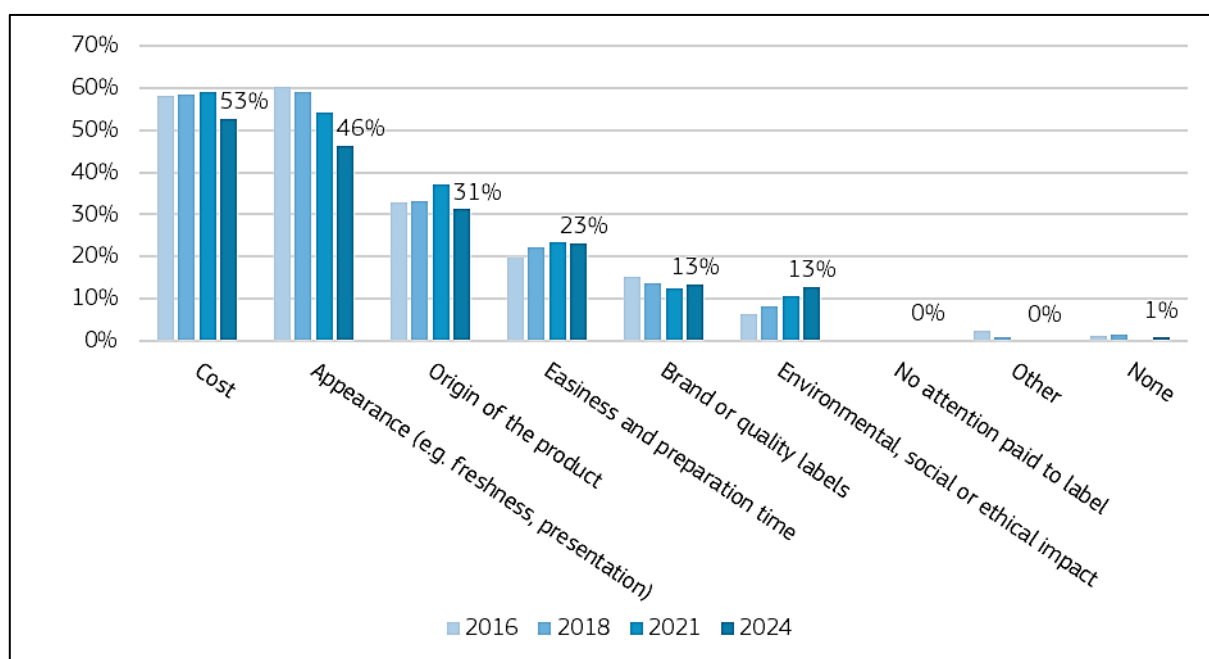
are also strong drivers, considered important aspects for respectively 46,3% and 31,4% of the consumers.

Changing consumer expectations further shape demand. There is considerable agreement that consumers increasingly expect fish products to offer clear and easily understandable benefits, such as health, protein content, omega-3, freshness and credible origin, while avoiding complexity. At the same time, trust issues and fatigue with overly complex sustainability claims mean that simple, transparent communication tends to be more effective than elaborate certification narratives.

Findings from stakeholder interviews regarding consumer expectations are supported by Eurobarometer data. 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. Easiness and preparation time is an increasingly important aspects when buying FAPs (+4 points between 2016 and 2024).

Stakeholder also mentioned a growing preference for domestic (and even local) origin, particularly for national aquaculture products (carp frequently mentioned). This point is not confirmed by 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 43: Evolution of main important aspects when buying FAPs in the Netherlands



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

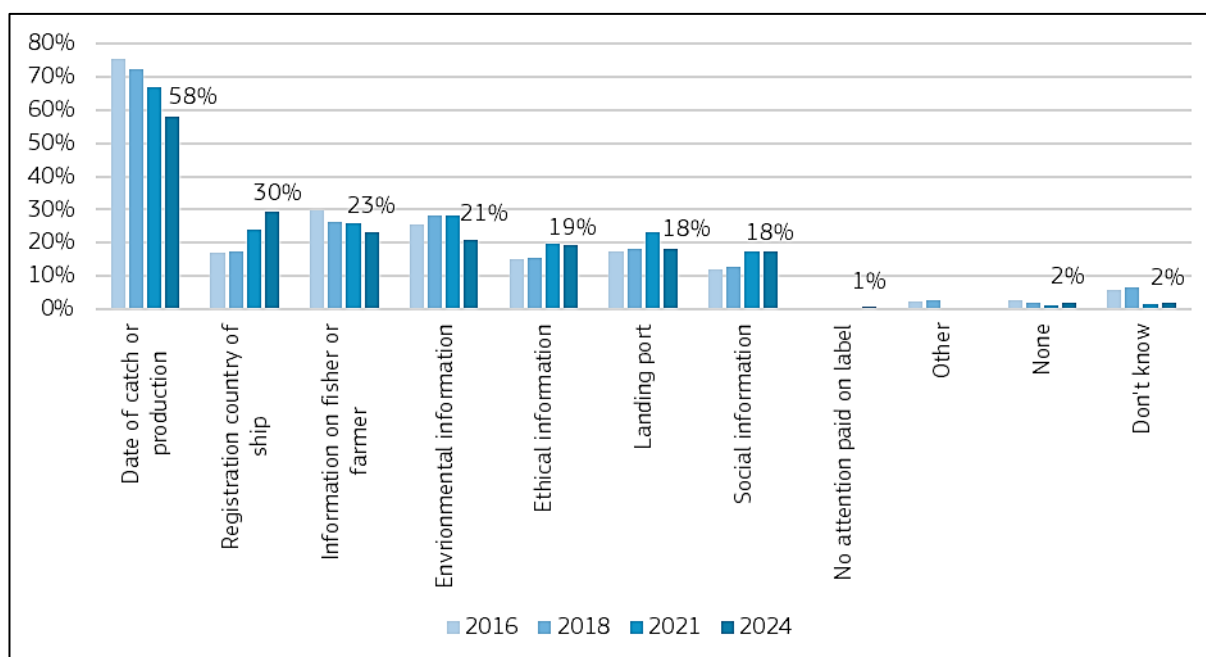
Analysis of the Eurobarometer survey suggests a relatively low demand for information on FAP labels. Date of catch and production is the most important and expected information for consumers. Other aspects and information on FAPs are expected by less than a third of the Polish consumers (registration country of the ship; 29,6%), or less than a fifth of the consumers (information on fishers or farmers: 23,3%; environmental information: 21,1%). Stakeholders repeatedly highlight an **attitude–behaviour gap**:

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- declaratively, consumers express strong demand for transparency (origin, methods, nutritional value);
- but at the shelf, actual behaviour is more mixed and strongly moderated by price, habits, and simple cues.

Stakeholders reported that consumers are increasingly sceptical of complex claims and sensitive to greenwashing risks – therefore short, credible, understandable messages often work better than sophisticated narratives.

Figure 44: Information that should be mentioned on the label of all FAPs according to Polish consumers



Source: Eurobarometer survey – Question: ‘Which of the following information do you think should be mentioned on the label of fresh, frozen, smoked and dried FAPs?’ (n= 1.018, 2024)

Overall, the prevailing assessment is that most of the observed changes are likely to persist over time, even if their intensity fluctuates with the economic cycle. Inflation effects are expected to ease, but the shift towards discounters, packaged fish, convenience formats and health- and value-driven purchasing is widely seen as structural. What may vary in the shorter term is the pace of recovery and the balance between value and premium segments, depending on income growth and price stability. A return to pre-2020 consumption patterns dominated by whole fish, strong hypermarket volumes and stable weekly purchase routines is generally considered unlikely. Current developments represent a structural transformation of fish consumption, shaped by inflation shocks, retail restructuring, lifestyle changes, digitalisation of information and a broader environment of uncertainty related to COVID-19, war and economic instability. In this perspective, recent crises did not create new behaviours but rather reinforced and stabilised existing ones.

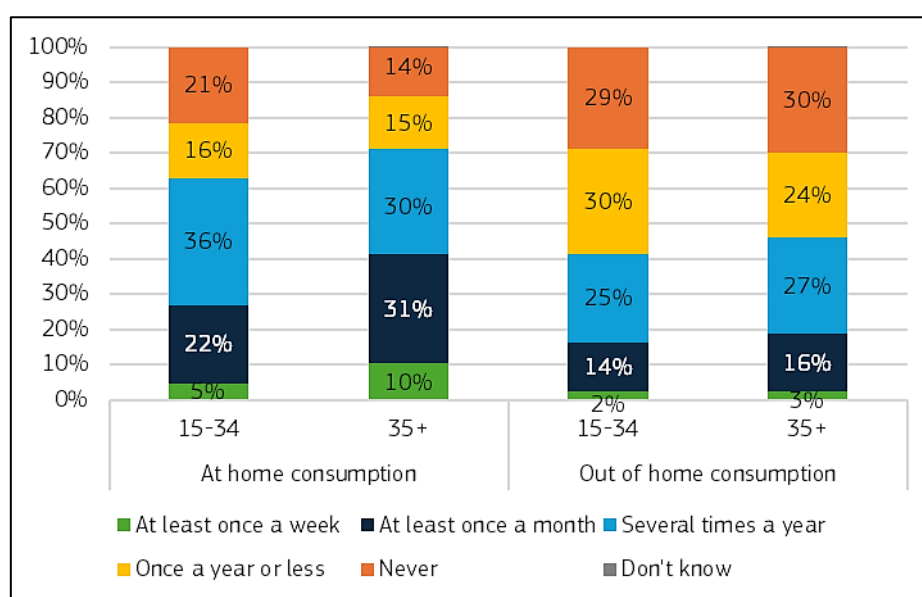
4.2.4 Changes of consumers' profiles of fisheries and aquaculture products

Analysis of the Eurobarometer survey shows a **clear relation between age and FAP consumption with younger generation consuming FAPs more occasionally**. At home

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consumption is significantly higher among consumers that are 35 years old and more than among consumers that are between 15 and 34 years old. In 2024, 10% and 31% of the respondents aged 35 and older declared consuming FAPs at home on a weekly or on a monthly basis, against respectively 5% and 22% for consumers between 15 and 34. In addition to increased frequency of consumption among older consumers, the share of respondents never consuming FAPs is lower among consumers aged of 35 and more (14% in 2024) than among younger consumers (21%). When considering out-of-home consumption, the generational gradient is less significant. Polish consumers, regardless of their age do not frequently eat FAPs in restaurants and other food outlets.

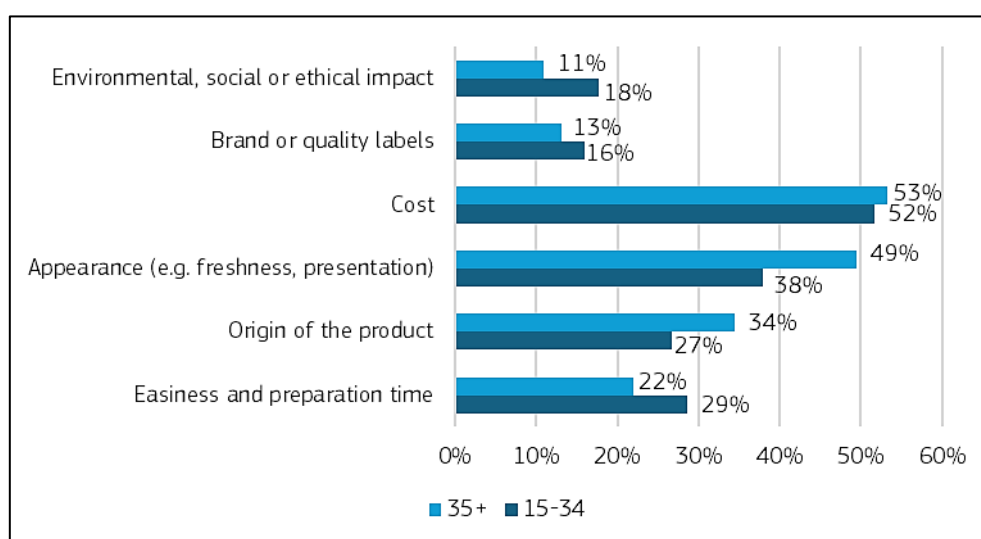
Figure 45: Frequency of FAP consumption by age category in Poland in 2024



Source: Eurobarometer survey – Question: ‘How frequently do you eat FAPs at home/ at restaurants and other food outlets (bars, canteens, market stands, etc.?’ (n= 1.018, 2024)

When looking at the main drivers of FAP purchase by generation, cost is by far the most important aspect considered by consumers, regardless of their age. The second criterion considered is the product appearance for both age categories, though in different proportions: important aspects for 38% of the consumers that are between 15 and 34 years old, and for 49% for consumers that are 35 years old and more. While the **third criterion driving FAP purchase for older consumers is the product origin**, the **easiness and preparation time is the third most important aspect for young consumers, confirming the convenience trend** and demand for easy and ready-to-eat products. The Results from the Eurobarometer survey also indicate that **younger generations show more concerns towards the environmental, social and ethical impacts** (18% of young consumers against 11% of older consumers), and towards brand or quality labels (16% against 13%) than the older generations, though these aspects are the least considered upon FAP purchase.

Figure 46: Important purchasing aspects by age category in Poland in 2024



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

4.3 Economic drivers for consumption

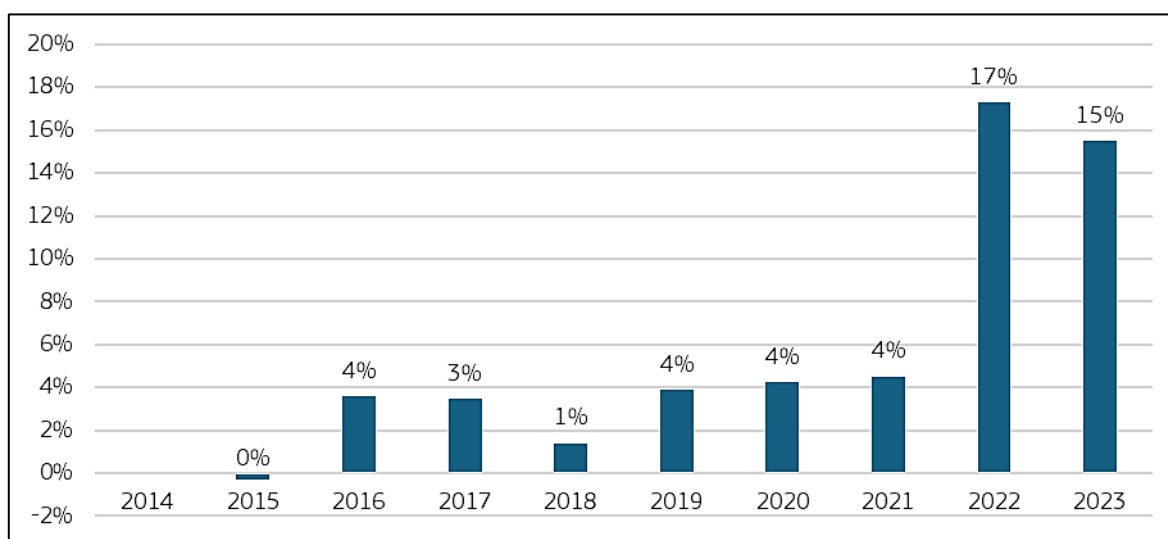
Inflation in food commodities has had a very strong influence on fish consumption. The sharp increase in food prices in 2022–2023 coincided directly with a downturn in fish consumption volumes. Fish, particularly fresh and chilled products, was among the first categories where consumers reduced purchase frequency or quantities. Inflation reduced tolerance for price experimentation and reinforced cautious shopping behaviour. Even after the easing of inflation in 2024–2025, price sensitivity remains elevated, as fish prices are still perceived as high relative to other everyday foods.

Closely linked to inflation, the decrease in purchasing power has had a strong and uneven impact across consumer groups. Households with fixed or limited food budgets reassessed fish as a less frequent choice, especially for everyday meals. Among lower-income households, pensioners and single-person households, fish is often reduced first when budgets tighten, while remaining present mainly during promotions or seasonal occasions. This confirms that purchasing power is one of the most decisive short-term drivers of consumption.

4.3.1 Evolution of retail prices of FAPs in the last ten years

Over the last decade, retail prices of fishery and aquaculture products in Poland have increased strongly, with cumulative growth exceeding 55%, and for some individual products prices have doubled over the period. While price growth was visible throughout the 2010s, the most pronounced increases occurred in the last four to five years, particularly in 2022–2023, when fish prices became one of the most visible and socially perceived components of food inflation.

Figure 47: Evolution of fish retail price in Poland between 2014 and 2023 (%)



Source: Warsaw Institute of Agricultural and Food Economics¹⁵

In nominal terms, fish prices increased faster than many food categories and, due to their relatively high starting price level, became particularly salient in consumer perception. Interviews consistently highlight that **fish increasingly crossed the threshold of what consumers consider a “mentally acceptable” everyday price.**

By category, **the strongest increases were recorded for fresh and chilled fish**, which are highly sensitive to transport, energy and labour costs, as well as for frozen fish, including fillets. Processed chilled products also experienced strong cumulative increases, as cost inflation accumulated along the entire value chain. Molluscs and crustaceans, largely based on imported and farmed products, showed more moderate but still noticeable price growth.

Looking at selected products, carp displayed the largest price fluctuations according to reports of the Institute of Agricultural and Food Economics – National Research Institute (IERiGŻ-PIB). For many years, its retail price was deliberately kept low by retail chains, particularly during the Christmas season. In 2022, carp prices increased sharply, by around 60%, which met with limited consumer acceptance and resulted in an estimated 10–15% decline in sales volumes. In subsequent years, prices were partially corrected downward. Salmon has been characterised by high price volatility, closely linked to global supply conditions and feed costs. At moderate prices, salmon acts as a strong volume driver, but during periods of sharp price increases, sales volumes decline in a predictable manner. Canned fish products, including tuna and mackerel, experienced a gradual and sustained price increase, which constrained their potential for volume growth. Smoked sprat recorded a particularly strong price increase over the decade, driven by labour intensity, effectively shifting it from a low-price staple to a premium product and leading to significant volume declines.

Recent official data confirm these trends. In 2023, retail fish prices increased by around 15,5%, broadly in line with overall food inflation. Fresh and chilled fish prices increased by nearly 20%, frozen fish by almost 19%, while crustaceans and molluscs recorded smaller but still significant

¹⁵ 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)

increases. In 2024, price dynamics moderated substantially, with fish prices increasing only slightly year on year, apart from a temporary bump linked to the reinstatement of VAT on food¹⁶.

4.3.2 Reasons behind these changes

The observed price evolution reflects both structural and short-term factors. Structural drivers include strong dependence on imports, exposure to global commodity markets, rising labour costs, and increasing energy and logistics costs, all of which disproportionately affect fish products, especially fresh and chilled ones. For certain species, such as cod, long-term supply constraints and availability issues further intensified price pressure.

More recent circumstances amplified these structural pressures. The COVID-19 pandemic disrupted logistics and processing, while the war in Ukraine led to sharp increases in fuel and energy prices and added volatility to international trade. These shocks translated rapidly into higher wholesale and retail prices, particularly in 2022–2023. In contrast, the easing of inflationary pressures in 2024 led to a clear slowdown in fish price growth, although from an already elevated level.

4.3.3 Comparison between prices for FAPs and other animal products

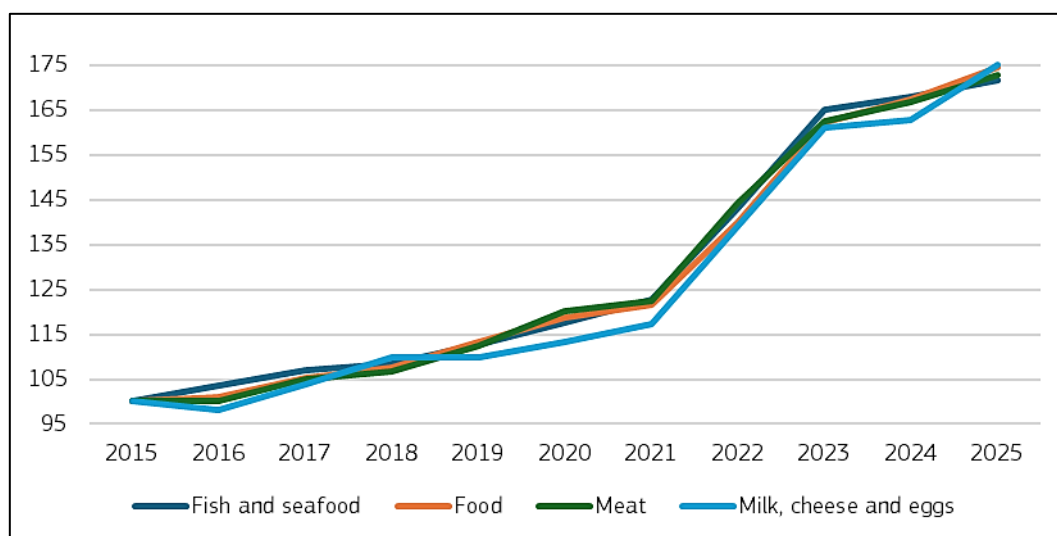
From a purely statistical perspective, FAPs were not an outlier in terms of cumulative inflation over the last ten years. Poultry, pork, eggs and dairy products all recorded strong price increases, in some cases exceeding those of fish. Eggs, in particular, experienced very high cumulative price growth. These findings are supported by Eurostat data with milk, cheese, and egg prices experiencing a slightly higher rise (+75%) than prices of FAPs (+72%) and meat (+73%).

However, the key difference lies in the starting price level. FAPs entered the inflationary period from a much higher base than the other animal proteins. As a result, even similar percentage increases translated into much higher absolute prices on the shelf. In practical terms, **fish and beef are currently perceived as the most expensive sources of animal protein**, while poultry remains the key price benchmark due to its low and predictable price level. Eggs, despite strong price growth, are still not perceived as a premium protein.

Current promotional prices illustrate this gap clearly. Even under aggressive discounting, salmon fillets remain several times more expensive per kilogram than chicken or pork. Consequently, although inflation affected all protein categories, consumers experience fish prices as having increased “more”, reinforcing the perception of fish as a premium and increasingly restrictive choice in everyday diets.

¹⁶ Until January 31st 2022: The standard VAT rate for most food products was 5%. Between February 1st 2022 and March 31st 2022, a zero VAT rate was applied to basic food products under the Government's Anti-Inflation Shields. Since April 1st 2022, the VAT rate is the 5% standard one for food products. The preferential VAT rate does not apply to products classified as “delicatessen”, such as caviar and seafood (crustaceans and molluscs), which are subject to the standard 23% VAT rate.

Figure 48: Evolution of consumer price index for fish and seafood, meat, milk, cheese and milk, and food products in Poland (price index, 2015=100)



Source: EUROSTAT consumer price index

4.3.4 Extent to which price evolution has led to shifts in consumption

Price changes have clearly contributed to shifts in consumption, although not in a simple or uniform way. **Among price-sensitive households, the frequency of fish consumption has declined, and substitution towards cheaper protein sources**, particularly poultry and pork, is widespread. When households operate within a fixed budget for preparing meals, fish is often the first protein category to be reduced.

At the same time, interviews reveal a clear paradox. While consumers frequently complain about high fish prices, the share of premium products such as salmon, shrimp 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.

Within the fish category, price evolution has also reinforced substitution between species. Rising prices and limited availability of cod, for example, have encouraged shifts towards Alaska pollock, hake and grenadier. These substitution patterns confirm that consumers adapt rather than exit the category entirely, provided that acceptable alternatives are available.

4.3.5 Identification of consumer groups most impacted

Price increases have had a highly differentiated social impact. Low-income consumers have been disproportionately affected, particularly pensioners and disability benefit recipients, single-person households and households with high fixed costs and limited budget flexibility. In these groups, higher fish prices often lead to reduced purchase frequency, substitution towards cheaper proteins and concentration of fish consumption around seasonal or promotional occasions.

In contrast, higher-income and urban consumers, especially those with strong health and nutrition awareness, appear less sensitive to price increases. In some cases, fish consumption in these groups has remained stable or even increased, with a focus on selected premium categories. **Overall, rising prices have contributed to growing social differentiation in fish consumption, reinforcing polarisation between budget-constrained households and consumers for whom fish remains an integral and valued part of the diet.**

4.4 Strategies implemented to stimulate consumption

From the perspective of operators, the most effective strategies to stimulate consumption have been pragmatic and closely aligned with observed consumer behaviour. **Price and promotion management**, particularly around key species and seasonal peaks, remains essential. An assortment shift towards convenience, including re-fresh fillets, packaged fish in MAP, sushi and selected ready meals, has helped maintain relevance in everyday shopping missions. **Simplified communication at the shelf, focusing on clear pricing, basic nutritional benefits and origin**, has proven more effective than complex sustainability narratives.

Seasonal focus continues to be critical, especially in December, when fish can temporarily outperform meat in turnover. Category rationalisation, involving the reduction of underperforming and highly price-sensitive Stock Keeping Units and concentration on strong drivers, has improved category efficiency in retail.

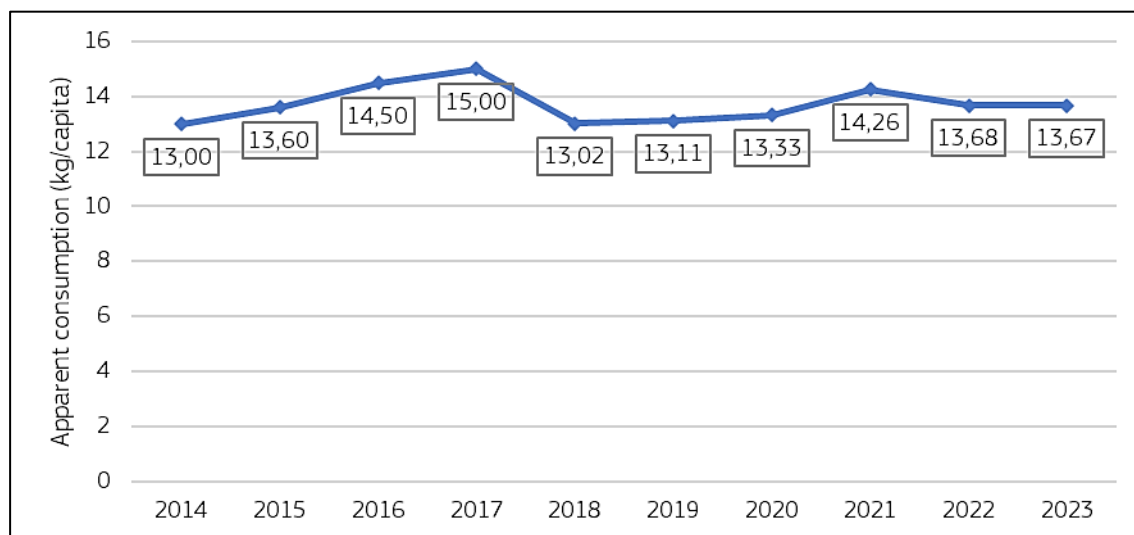
A particularly important best practice identified across interviews and desk research is generic, **category-level promotion**. Campaigns such as “Carp – Healthy from Nature” demonstrate that long-term, non-branded promotion can successfully rebuild positive associations, address myths, and reposition traditional species as healthy and modern. Effective elements include simple, positive messaging, credible storytelling linked to local production, and strong use of visual and recipe-based communication to reduce perceived preparation barriers. These approaches are considered replicable for other species and markets.

Overall, the evidence suggests that fish consumption will not disappear, but it will no longer be automatic. Economic drivers such as prices and purchasing power set clear constraints, while structural factors related to retail, lifestyle and product formats shape how consumers adapt. The most successful strategies are those that accept these realities and work within them, ensuring that fish earns its place on the plate through value, convenience, relevance and clear communication rather than relying on habit alone.

4.5 Annexes

4.5.1 Annex I: Per capita consumption of fisheries and aquaculture products

Figure 49: Evolution of per capita consumption in Poland (kg/capita)



Source: EU Fish Market

4.5.2 Annex II: Apparent consumption of FAPs and by main species

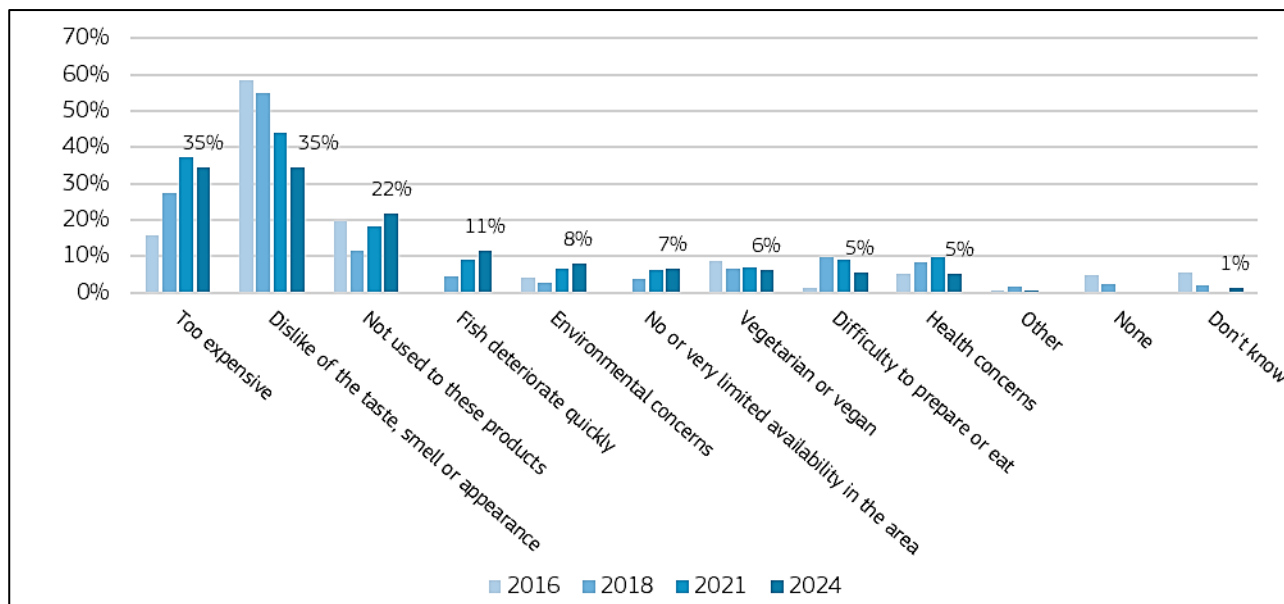
Table 9: Production, trade and apparent consumption evolution of the 10 most consumed species in Poland between 2014 and 2023 (in tonnes LWE)

	Aquaculture + Catches		Imports		Export		Apparent consumption	
	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14
Alaska pollock	-	n.a.	150.700	37%	17.304	29%	133.396	38%
Herring	20.825	-26%	162.458	15%	75.022	-7%	108.260	23%
Sprat	60.178	3%	2.241	-13%	9.173	-40%	53.246	17%
Mackerel	11.099	96%	61.703	52%	25.095	90%	47.706	45%
Salmon	1	-96%	275.842	44%	235.546	58%	40.297	-6%
Saithe	-	-100%	37.196	123%	8.962	175%	28.234	110%
Blue whiting	27.819	n.a.	43	-71%	10	-30%	27.853	20.143%
Horse mackerel, other	24.277	n.a.	75	76%	4	n.a.	24.348	57.202%
Trout	18.626	31%	19.179	20%	15.461	28%	22.344	23%
Skipjack tuna	-	-100%	22.448	5.981.333%	1.150	n.a.	21.298	2.027.691%

Source: EUMOFA Supply Balance

4.5.3 Annex III: Complementary Eurobarometer results

Figure 50: Evolution of main reasons for never consuming FAPs in Poland



Source: Eurobarometer survey – Question: ‘Which of the following are the main reasons why you never eat any FAPs?’ (n= 1.018, 2024)

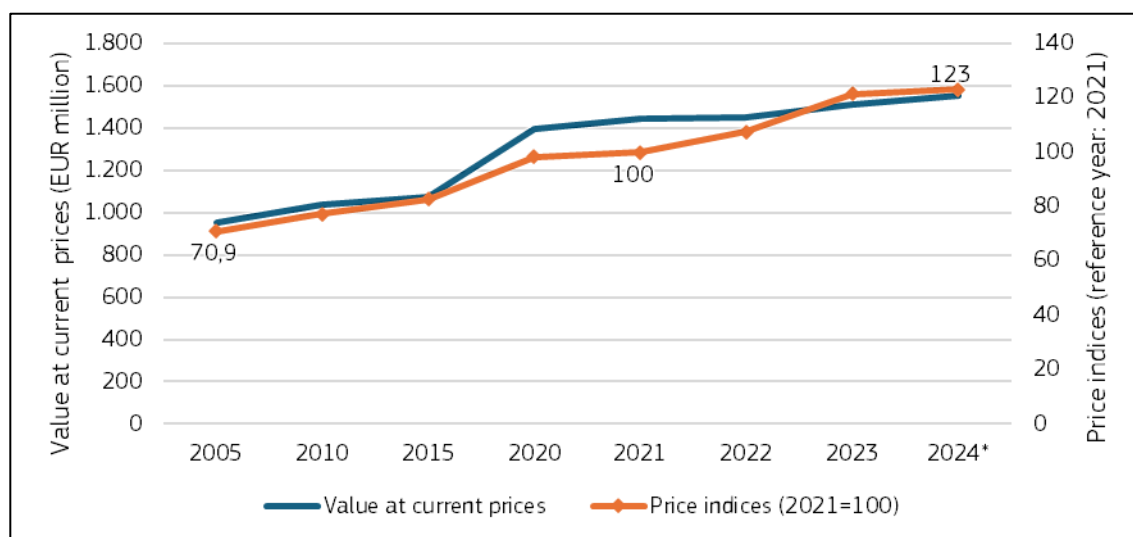
5 Netherlands

5.1 Consumption trends of FAPs

5.1.1 General trends

The consumption of fisheries and aquaculture products (FAPs) among Dutch consumers has progressively decreased over the last decade (2014-2023). Per capita consumption reached its lowest level in 2022, amounting to 18,88 kg per capita before rebounding slightly in 2023 to 19,90 kg per capita. Overall, it has experienced a 12% decline since 2014. On the contrary, annual expenditure on fish has significantly increased over the same period, from 58 EUR/capita in 2014 to 92 EUR/capita in 2023. This opposite trend reflects significant inflation across all FAPs, as emphasised by interviewed stakeholders. To compensate for price inflation, retailers have implemented shrinkflation strategies which resulted in a decrease in the volume of FAPs sold, while maintaining or increasing the unit prices and consequently the overall value of the FAP market. The increase of the value of FAP market is also illustrated by the increase in the value of Dutch at-home consumption of fish products, which increased from EUR 1.075 million in 2015 to 1.555 million in 2024, marking a 45% increase since 2015 and 62% increase since 2005).

Figure 51: Evolution of the domestic consumption of fish products in the Netherlands between 2005 and 2024 (2021=100)



Source: CBS – Statistics Netherlands

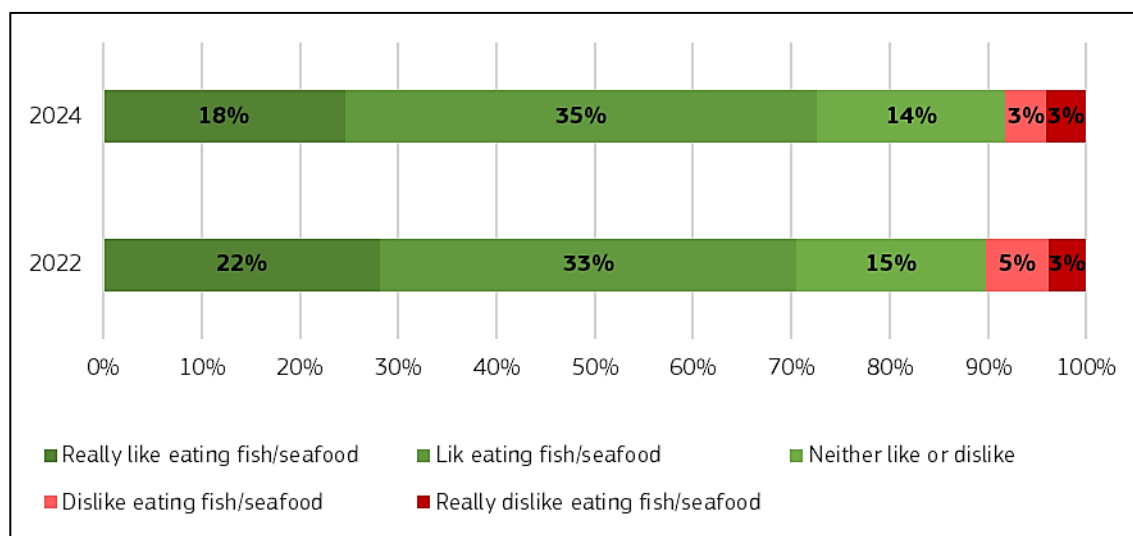
The market appears also to be highly price-sensitive. However, Dutch consumption of FAPs is mainly driven by environmental and sustainability aspects, to which consumers attach a greater importance. Awareness about environmental issues of animal proteins and the increasing popularity of vegetarian and vegan diets, especially among younger generations, continue to have strong impacts on the consumption of FAPs.

Results from the MSC Globescan report presented on the Figure 52 show that consumer interest for fisheries and aquaculture products has slightly decreased between 2022 and 2024 (from

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22% to 18%). This result reinforces the stakeholders feedback concerning the decreasing popularity of FAPs among Dutch consumers.

Figure 52: Dutch consumers enjoyment of FAPs in 2024



Source: MSC Globescan study – Consumer insights 2024, Netherlands Report – Question: ‘How much would you say you personally enjoy eating fish and seafood?’ (n=1.490)

5.1.2 Evolution of per capita consumption

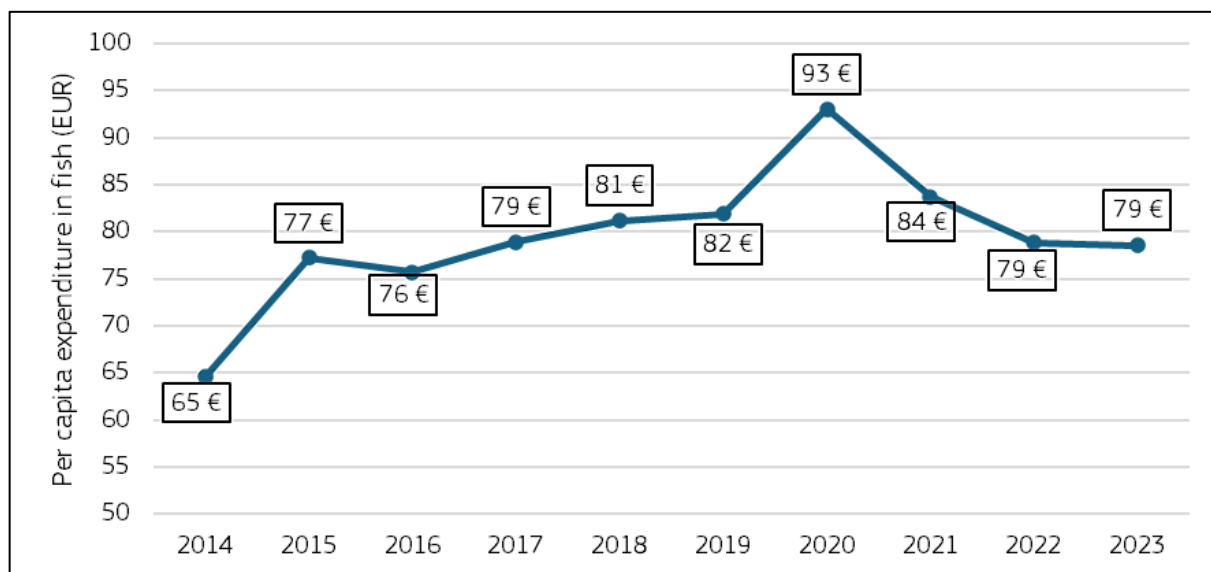
As mentioned in the general trends, **per capita consumption of FAPs has progressively declined since 2014** (Annex 5.4.1). Consumption reached its lowest level in 2022, reaching 18,88 kg per capita in live weight equivalent (LWE), before rising to reach 19,90 kg LWE per capita in 2023. Overall, only 7% of the Dutch respondents to the MSC Globescan report on consumption in the Netherlands¹⁷ reported consuming two or more portions of fish or seafood per week (the recommended amount according to the World Health Organization), and 31% reported consuming the recommended amount by the Food-Based Dietary Guidelines for fish¹⁸ (one portion per week).

Over the same period, **per capita expenditure on FAP has gradually increased** (+21% between 2014 and 2023). It peaked in 2020, year of the COVID pandemic, at 93 EUR/capita. After stabilising at 86 EUR/capita during the two following years, expenditures by Dutch consumers on FAPs rose again to 92 EUR/capita in 2023.

¹⁷ Consumer insights 2024, Netherlands Report. The MSC Consumer insight is carried biannually by Globescan Incorporated and provides data on consumer behaviours and awareness on fishery products and MSC certification.

¹⁸ https://knowledge4policy.ec.europa.eu/health-promotion-knowledge-gateway/food-based-dietary-guidelines-europe-table-9_en

Figure 53: Per capita expenditure on fish per year in the Netherlands (real terms in EUR)



Source: EUMOFA based on Eurostat

According to interviews, the opposite trends of per capita consumption in volume and per capita expenditures are mainly explained by increasing prices of FAPs due to **global market inflation, and new consumption habits (less time to cook, lack of knowledge, convenience trend), especially among younger generations**. In addition, this increasing trend in the overall expenditure on FAPs could also be explained by the shrinkflation strategies implemented by retailers to offset higher costs. These strategies consisted in reducing the product volumes, while maintaining or increasing the unit prices.

5.1.3 Evolution at species level

Stakeholders interviewed pointed out that consumer choice and interest for FAPs are closely related to their availability in large retailers as it is the main purchasing channel.

According to data from the Visfederatie (Dutch Fish Federation), the most consumed species by Dutch consumers in 2024 were by far salmon and mussel (1,11 kg of salmon and 0,81 kg of mussels per capita in 2024). Tuna species, cod, and herring followed. Alaska pollock, that does not appear as one of the most consumed species based on statistics from GFK, is considered by stakeholders as one of the most popular specie, typically consumed fried (like 'kibbeling', 'lekkerbek' and fish fingers).

**Table 10: Apparent consumption of the sixth most consumed species in the in 2024
(in tonnes LWE)**

Species	Apparent consumption in 2024 (tonnes LWE)	Per capita consumption (kg LWE)
Salmon	20.000	1,11
Mussels	14.600	0,81
Tuna	9.300	0,52
Cod	9.000	0,50
Herring	8.800	0,49
Shrimps	6.200	0,35

Source: GFK data

In terms of evolution of species consumed, EUMOFA data presented on Table 11 shows increases of apparent consumption for only two species over the 2014-2023 period. Warmwater shrimp consumption increased significantly (+132%), while seabream' apparent consumption rose, but at a much lower rate (+5%). All the other most consumed species experienced consumption decrease over the last decade, from -19% for Alaska pollock, to -44% for cod, and -67% for tuna (all species combined). Evolutions of salmon and herring apparent consumptions could not be calculated, however, national supply¹⁹ analysis shows a very significant rise of salmon supply since 2014 (+167%), whereas supply of herring has been declining over the last decade (-20%).

According to stakeholders, consumption of traditional species, originating from the North Sea and the Northern Atlantic, is decreasing. Herring, which was very popular and traditionally consumed, is becoming less popular to Dutch consumers, as illustrated by the EUMOFA data. On the contrary, **consumption of salmon and tuna is increasing, boosted by culinary and healthy trends**, typically associated to the consumption of sushi. Consumption of shrimps is also increasing, alongside newly consumed species, such as seabass and seabream. This growth is driven by their availability in the international market and by the increased interest of restaurants, and specialised shops to these species. Even though the general trends is in favour of the increased **consumption of aquaculture products**, illustrated by the rise in the consumption of shrimps, mussels, seabass and seabream, this does not necessarily reflect an increased interest for aquaculture products. Rather, it reflects an interest to the economic assets that they offer, mainly the certification schemes such as Aquaculture Stewardship Council (ASC), which are considered as a key factor in purchasing decisions.

¹⁹ National supply is the sum of the national production and the imports, it does not include the exported volumes, therefore it must be interpreted carefully.

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Table 11: Evolution of supply and apparent consumption for the most consumed species in the Netherlands (tonnes LWE)

Species	Supply in 2023	Supply in 2014	Evolution of supply 2023/2014	Evolution of apparent consumption 2023/2014
Shrimp warmwater	52 351	30 667	71% ↑	132% ↑
Seabream	9 106	2 521	261% ↑	5% ↑
Seabass	9 034	5 398	67% ↑	-4% ↓
Alaska pollock	106 976	59 235	81% ↑	-19% ↓
Cod	318 393	313 284	2% ↑	-44% ↓
Mussels	53 943	69 491	-22% ↓	-50% ↓
Tuna	141 233	109 185	29% ↑	-67% ↓
Salmon	114 247	42 838	167% ↑	n.a*
Herring	159 546	200 548	-20% ↓	n.a*

Source: EUMOFA

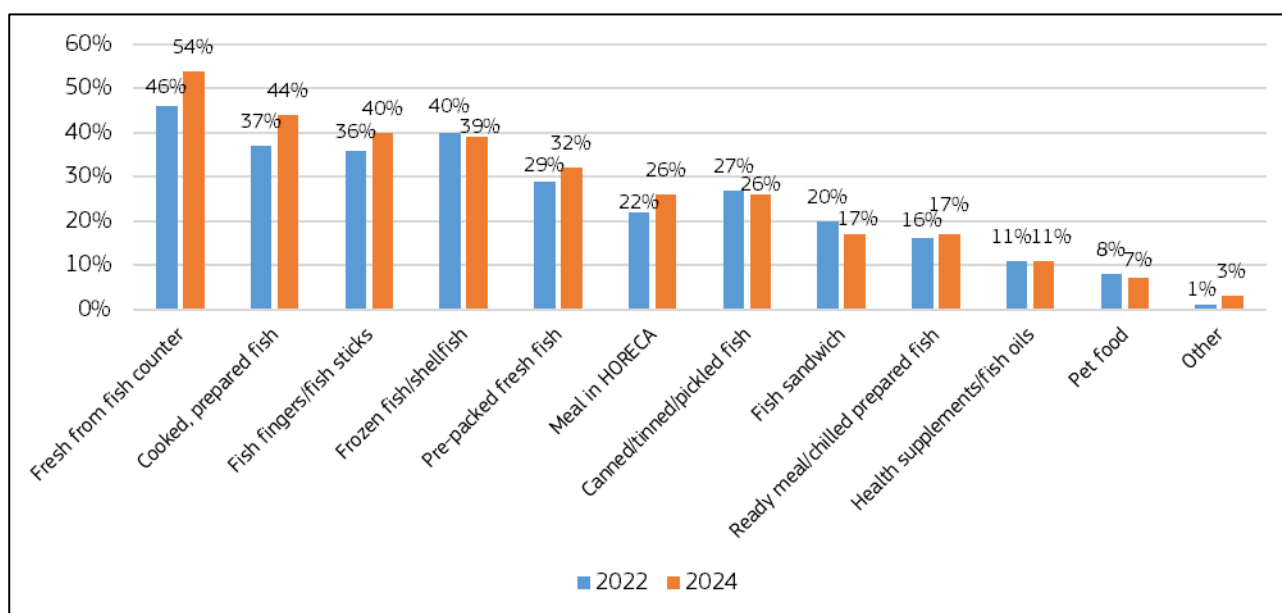
*Evolution of apparent consumption for salmon and herring could not be calculated due to negative data

Stakeholders also mentioned shifts in the product category consumed. They suggest that fresh products are less popular, and their consumption is decreasing as they are difficult and require time to be prepared. On the contrary, **preserved and prepared fish, filleted products, and ready meals are increasingly popular**, and their consumption is on the rise. Ready meals are easily found in supermarkets, but also at fishmongers and fish stalls²⁰ where consumers would buy prepared products such as ‘kibbeling’, ‘lekkerbek’, and fish fingers rather than fresh fish. This **convenience trend** is especially true among younger generation that spend less time cooking and consider that fish requires specific preparation skills.

Results from the MSC Globescan study on consumption in the Netherlands (Figure 54) confirm the increase of consumption of the following categories: fresh FAPs from counters (+8% between 2022 and 2024), cooked, prepared fish (+7%), fish fingers (+4%), prepacked fresh fish (+3) and meals in Horeca (+4%). These results confirm the increased popularity for convenient (prepacked fish) and even cooked, prepared fish and fish fingers. The increase of fresh products, illustrated in this report, could be explained by the increase of consumption of some fresh products, such as mussels or salmon. The study also reported consumption decrease of frozen fish/shellfish, canned/tinned/pickled fish, sandwich fish, and pet food, over the same period (2022-2024).

²⁰ Stalls in food markets or in the street selling fried fish and fish fingers

Figure 54: Type of FAPs purchased in the Netherlands in 2022 and 2024



Source: MSC Globescan study – Consumer insights 2024, Netherlands Report – Question: ‘Which types of fish or seafood do you purchase frequently?’ (n=1.000)

5.2 Consumption behaviour: analysis based on Eurobarometer survey

5.2.1 Change in distribution channels

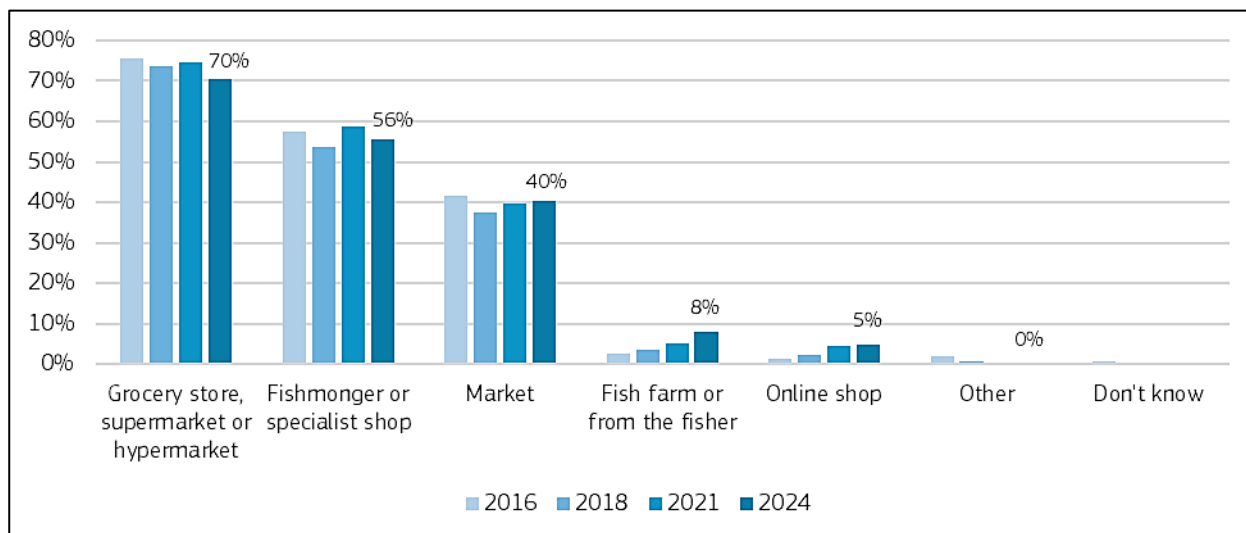
The distribution of sale channels remained fairly stable over the last years according to the results of the Eurobarometer survey, despite the overall decrease of FAP consumption. Supermarkets and large retailers are the most important distribution channels for FAPs in the Netherlands, with a penetration rate reaching 70,3% in 2024. Fishmongers and markets follow with penetration rates of 55,7% and 40,4% respectively. Penetration rates of other distribution channels are significantly lower: 8,11% for purchase directly at the fish farm or from the fisher and 5,0% for online shop which accounted for the smallest share of FAP distribution in 2024. Over the eight-year period presented (2016-2024), penetration for FAPs remained relatively stable in fishmongers (-1,8 point) and markets (-1,2 point), however it declined by 5,1 points in grocery stores, supermarkets and hypermarkets, while purchases directly from the farm or the fisher increased by 5,4%. Ordering seafood online is very limited according to interviews, though purchase through this channel increased by 3,6 points in one year.

Consumption patterns of FAPs in the Netherlands depends a lot on the product available on supermarkets, which are the main purchasing channels. Consumer may turn to other distribution channels such as fishmongers for specific species. **Dutch supermarkets implement a sourcing policy based on sustainability, influencing product availability for consumers.** Almost all seafood products sold are certified, and none of the species sold are sourced from red rated stocks. Mackerel is a popular species in the Netherlands and was traditionally fished. However, it lost the MSC certification a few years ago, but the species was still available in supermarkets. In 2025 mackerel stock rating dropped to ‘red’ and was no longer

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available in supermarkets. Consumer can turn to other distribution channel to purchase mackerel, such as fishmongers, however, due to decreasing volumes the price is going up.

Figure 55: FAP purchase locations in the Netherlands



Source: Eurobarometer survey -Question: 'Where do you buy your FAPs?' (n= 1.086, 2024)

5.2.2 Changes in consumption habits

FAP consumption habits in the Netherlands have significantly changed during the last decade. Economic factors such as the price increase of FAPs is one of the main explanations to this trend, however the Eurobarometer survey sheds light to other parameters of consumption habits.

- Convenience trend

Stakeholders interviewed reported that Dutch consumers have less time to cook or want to spend less time cooking. **They are looking for easy products like ready-to-cook fish (filleted fish, prepared fish, etc.) or even prepared meals.** This trend is confirmed by the Eurobarometer survey (Annex 5.4.3), with an increasing number of respondents not consuming FAPs because of the difficulty to prepare or to eat FAPs (4% of the respondents in 2024, against 1% in 2016).

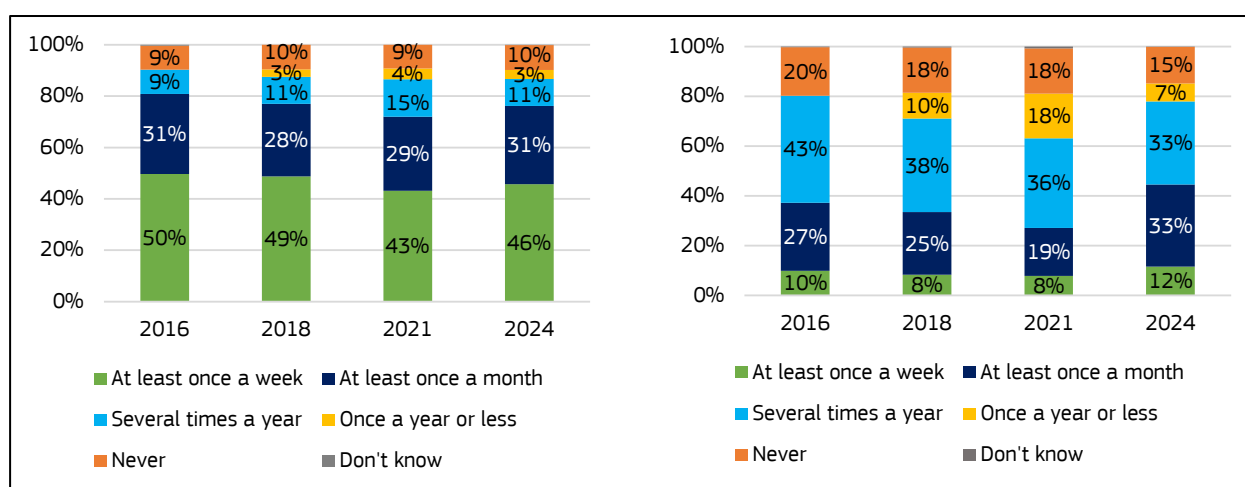
- Out of home consumption

At home consumption of FAPs in the Netherlands is decreasing, with a shift from frequent to occasional consumption. Results from the Eurobarometer survey show that the number of Dutch people consuming FAPs at home every week or every month has decreased between 2016 and 2024 (from 49,7% to 45,7% for the weekly consumption and from 31,2% to 30,5% for the monthly consumption). At the same time, occasional consumption has decreased: the share of respondents consuming several times a year increased from 9,4% in 2016 to 10,5% in 2024) and those declaring consuming once a year or less increased from 2,9% to 3,4%, over the same period.

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Additionally, there is a **shift from at home consumption to out-of-home consumption** (in restaurants or other food outlets). Over the last decade, the share of consumers declaring consuming FAPs out-of-home on a weekly basis has increased from 9,9% in 2016 to 11,5% in 2024, and those declaring consuming on a monthly basis increased from 27,3% to 33,1%, over the same period. In the meantime, the share of consumers declaring consuming FAPs in restaurants and other food outlets several times a year has decreased from 43,0% to 33,3%, those declaring doing so less than once a year decreased from 10,4% in 2018 to 7,3% in 2024), and those declaring never consuming FAPs in restaurants decreased from 19,5% in 2016 to 14,6% in 2024. This reinforces the shift towards more regular patterns of out-of-home consumption.

Figure 56: Evolution of frequency of “at-home” and “out-of-home” consumption in the Netherlands



Source: Eurobarometer – Question: ‘How frequently do you eat FAPs at home/ at restaurants and other food outlets (canteens, bars, market stands, etc.)?’ (n= 1.086, 2024)

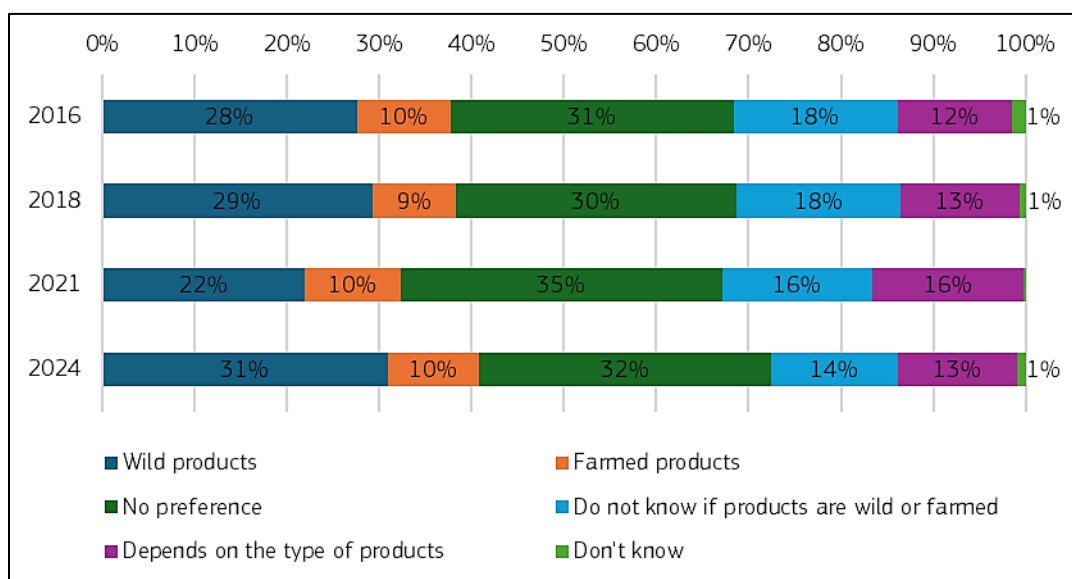
5.2.3 Changes in consumers preferences

According to the interviews, the production method (wild versus farmed) is not a key factor that Dutch consumers consider when buying FAPs. Results from the Eurobarometer survey on preference type of FAPs presented below support this statement to some extent. In 2024, the majority of **Dutch respondents (32%) did not have any preference regarding the production method of FAPs**. Stakeholders mentioned that the production method is not a major driver for consumer choice. According to stakeholders, purchasing decisions tend to be

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driven by other factors such as the species, the sustainability aspects rather than the production method.

Figure 57: Evolution of preference type of FAPs in the Netherlands



Source: Eurobarometer survey – Question: ‘Would you say that you prefer...’ (n= 1.086, 2024)

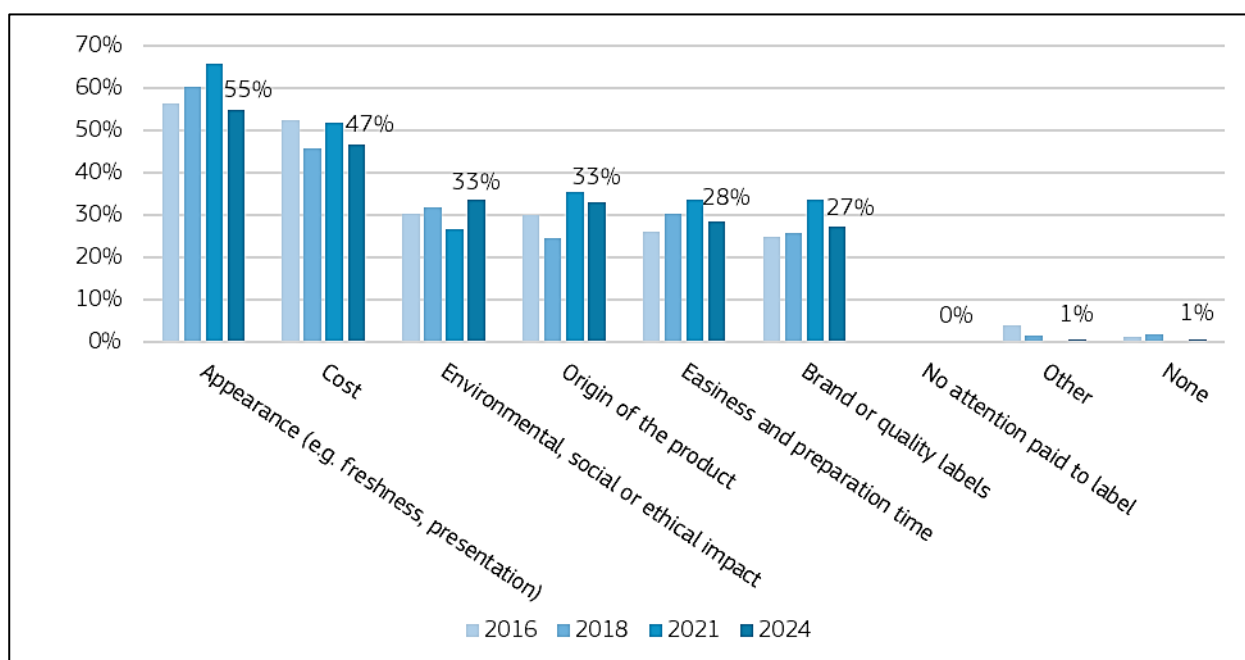
According to the Eurobarometer survey, the product **appearance (freshness, presentation, etc.) and the cost are the main important aspects** for Dutch consumers when buying FAPs. This was also confirmed by the interviewed stakeholders and by findings from the MSC Globescan report, which also classified taste, safeness to eat and freshness as the first purchase drivers for FAPs, followed by cost.

Other aspects were mentioned by almost a third of the consumers in the Eurobarometer survey: the environmental, social or ethical aspects of FAPs, the origin of the products, the easiness and preparation time, and the brand or quality labels of products.

Over the decade (2016 to 2024), the relative importance of certain criteria has shifted, as illustrated in the figure below. The relative importance of cost declined from 52,5% in 2016 to 46,5% in 2024, whereas the importance of other criteria increased:

- The criteria on environmental, social or ethical impacts increased from 30,1% to 33,5%
- The relative importance of the origin increased from 30,1% to 32,9%
- The easiness and preparation time increased from 25,9% in 2016 to 28,5% in 2024 have tended to increase, as illustrated in the figure below. This aspect confirms the stakeholder feedback regarding the evolution of consumption habits and the need for more convenient products.

Figure 58: Evolution of main important aspects when buying FAPs in the Netherlands

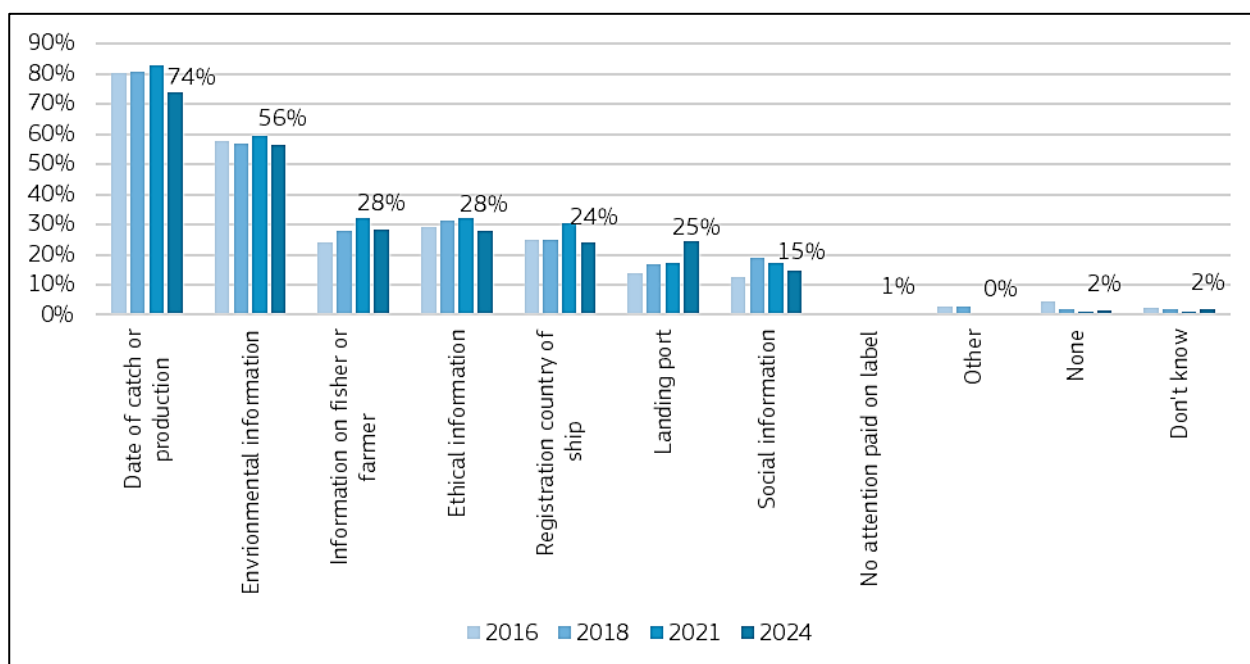


Source: Eurobarometer survey – Question: ‘When you buy FAPs, which of the following aspects are the most important for you?’ (n=1.086, 2024)

Stakeholders indicate limited additional demand for information and transparency. On contrary, the Eurobarometer results show that there is still interest from consumers for greater transparency on the date of catch or production and environmental information. While, the MSC Globescan study reported a decreased interest for sustainability-related information between 2020 and 2024, stakeholders highlighted that this aspect is addressed in the Netherlands through retailers’ sourcing policies. Many retailers typically use sustainability guidelines implemented by Mr. Goodfish (VISwijzer list²¹) to align their sourcing strategies with defined sustainability objectives, namely by sourcing only from species classified under the green and orange lists.

²¹ <https://www.goodfish.nl/en/search/>

Figure 59: Information that should be mentioned on the label of all FAPs in the Netherlands

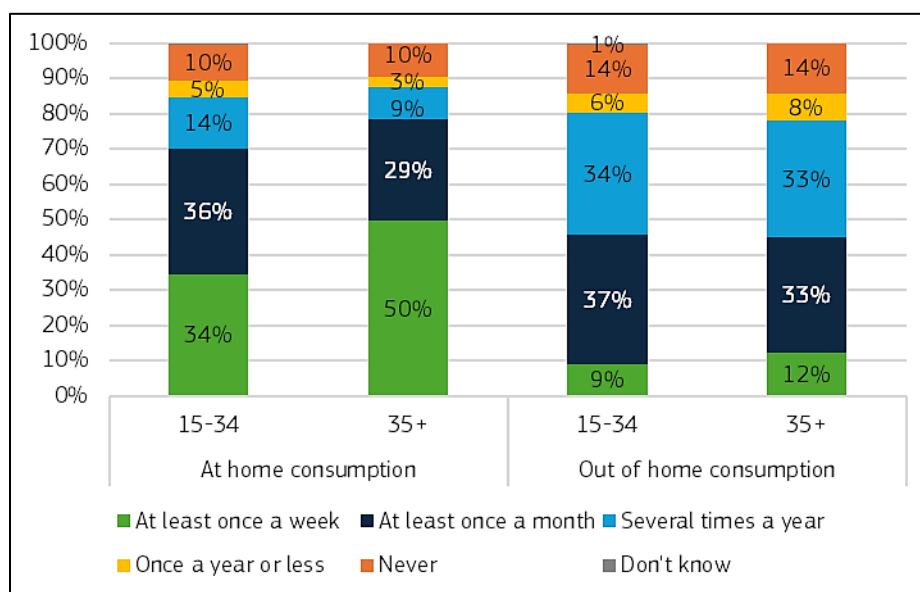


Source: Eurobarometer survey – Question: ‘Which of the following information do you think should be mentioned on the label of fresh, frozen, smoked and dried FAPs?’ (n= 1.086, 2024)

5.2.4 Changes of consumer profiles of fisheries and aquaculture products

Results from the Eurobarometer survey show that consumption of FAPs, both at home and out of home, is more frequent among consumer that are 35 years old and more than younger consumers. Almost half of the respondents (49,6%) aged 35 and older declared consuming FAPs on a weekly basis (against 34,4% for Dutch people under 35). **Younger generations tend to consume FAP more occasionally:** 35,8% on a monthly basis and 14,4% several times a year (against respectively 29% and 8,9% for respondent for consumers over 35). Similarly, weekly consumption of FAPs in restaurants and other food outlets was higher among people of 35 and more (12,4%) than for consumer under 35 (8,9%). FAP consumption is closely related to generational gradient, with younger generations consuming less FAPs than older ones. This, alongside with other factors, could explain the overall decrease of FAP consumption. Stakeholders highlighted during the interviews that encouraging younger generations to consume seafood is a real concern and a challenge.

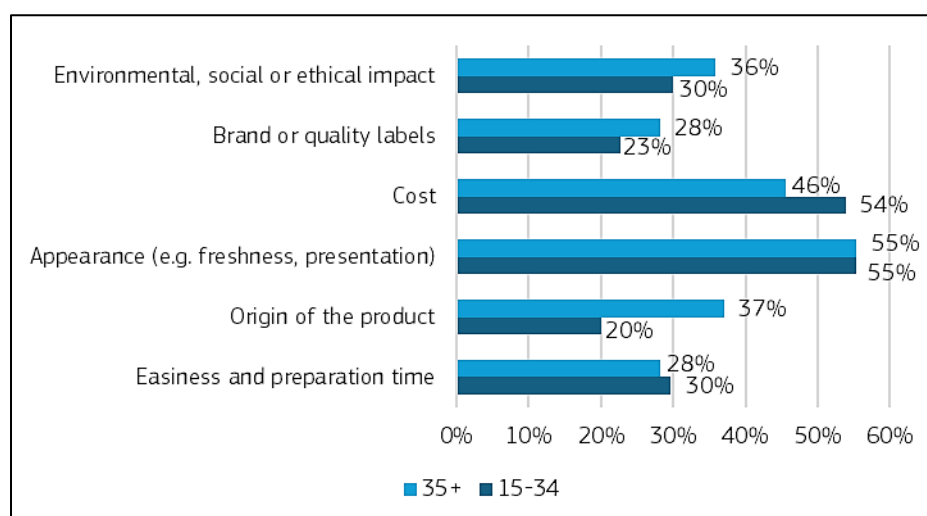
Figure 60: ‘At-home’ and ‘out-of-home’ consumption in the Netherlands by age in 2024



Source: Eurobarometer survey – Question ‘How frequently do you eat FAPs at-home/ at restaurants and other food outlets (canteens, bars, market stands, etc.)?’ (n=1.086, 2024)

When looking at the most important aspects when buying FAPs, **appearance** is the main driver for both age categories. The second most important aspect mentioned is the **cost** for both categories, however, it is **more of a concern for younger generations** (mentioned by 53,9% of respondents under 35, against 45,5% for 35 and more). Interestingly, results from the Eurobarometer indicate that consumers of 35 and more show more concerns regarding **the origin of the product**, the **environmental, social or ethical impact**, and the **brand or quality schemes** of the products than younger consumers.

Figure 61: Main important aspects when buying FAPs by age category (2024)



Source: Eurobarometer survey – Question ‘When you buy FAPs, which of the following aspects are the most important for you?’ (n= 1.086, 2024)

5.3 Key factors impacting consumption

5.3.1 Availability of the supply

One of the main factors impacting consumption in the Netherlands is the availability of the supply. Stakeholders interviewed reported that **consumer choices are closely related to product availability in retail stores**. Products sold in supermarkets are closely aligned with environmental and sustainability factors thanks to the retailers' sourcing policies outlined earlier, even when the species is traditionally consumed and popular in the Dutch culture.

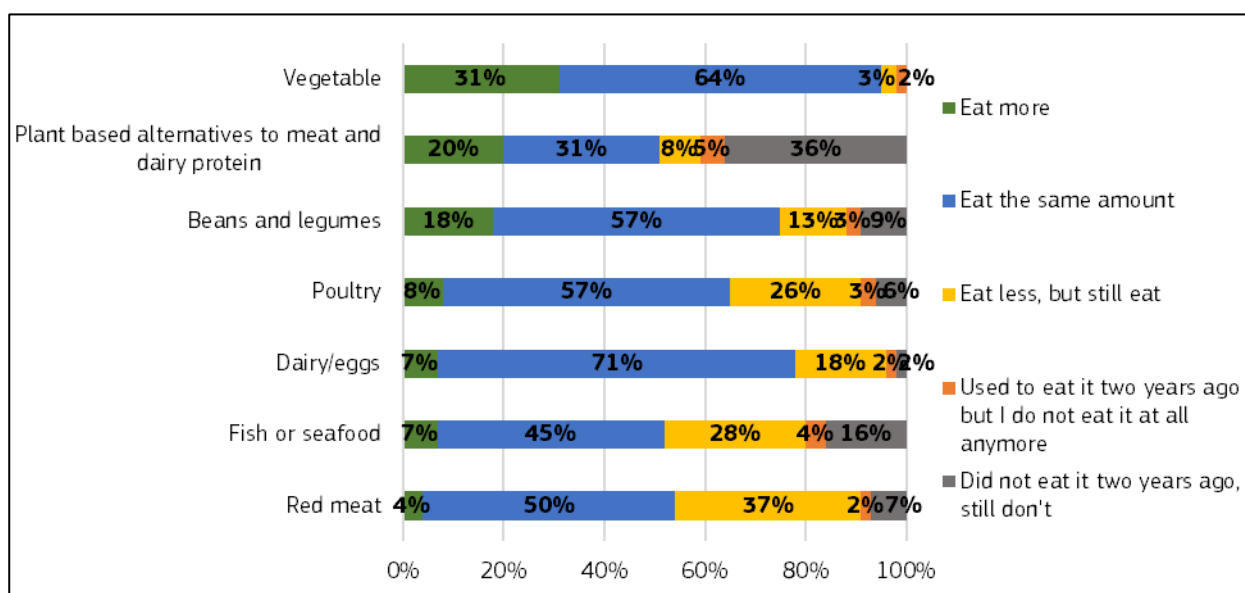
As several species from the North Sea are on the red list, they are no longer sold in large retailers, which contributed to the decline of their consumption. When commonly consumed species are not offered for sale for sustainability reasons, such as Atlantic mackerel, retailers may look for substitute species. At the same time, consumers can shift to other distribution channels, with less restrictive sustainability policies, such as fishmongers, offering different product range than retailers, possibly less convenient, not packed and prepared the same way, etc. In the case of mackerel, the Chilean Jack mackerel is a substitute due to its similar taste. However, its fat content is four times lower and might not be a viable substitute for the canning and smoking industry according to interviewees.

5.3.2 Awareness about environmental issues

In the recent years, consumption patterns **shifted from meat to plant-based food, especially among young generations**, driven by increased awareness to the environmental impacts of animal protein production. According to stakeholders, consumers and some communication campaigns usually associate seafood to other meat production, without distinguishing their respective environmental impacts. These campaigns also promote the health assets and benefits associated to plant-based proteins. This shift is also encouraged by the national food guidelines, such as, the national health advisory board which recommends eating a maximum of 2 portions of red meat per week, 1 portion of seafood, and a minimum of 2,5 portions of plant-based proteins.

This dietary transition is confirmed by the MSC Globescan report (Figure 62), with fish and seafood experiencing the second biggest consumption decline after red meat. In 2024, 28% of the respondents declared eating less seafood than two years before, and 4% declared that they used to consume FAPs, but do not anymore. On the contrary, more than one third of the respondents eat more vegetables, and 20% eat more plant-based alternatives to animal proteins.

Figure 62: Dietary changes of Dutch consumers in two years (2024)



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)

The dietary transition observed is largely driven by environmental reasons as illustrated by results of the MSC Globescan study. In 2024, 44% of the Dutch respondents have changed their diet for environmental reasons (3 points decline compared to 2022):

- To protect the environment (26% of the respondents);
- To reduce climate change impact (25%);
- To eat better quality food (22%);
- To protect the oceans (11%).

Dietary changes among Dutch consumers are increasingly driven by health reasons (61% of the respondents in 2024, against 51% in 2022), and cost (30% in 2024, 24% in 2022).

5.3.3 Price evolution and comparison with other food products

5.3.3.1 Online retail prices

Online nominal retail prices available on EUMOFA include products and online shops that are representative of the national market:

- Fresh salmon fillets;
- Fresh surimi sticks;
- Frozen Alaska pollock fillets;
- Frozen salmon fillets;
- Frozen squid rings;
- Prepared/preserved tuna in olive oil;
- Prepared/preserved herring fillets in tomato sauce;

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- Prepared/preserved mackerel fillets in tomato sauce;
- Smoked mackerel fillets;
- Smoked salmon in slices;
- Smoked trout fillets.

The evolution of FAP prices in real terms in the last years indicates a **general increase in prices**. According to online prices of a selection of products for which price data is available in the Netherlands, prices in real terms have increased by 5% over the period 2021-2025. This rise is confirmed by stakeholders who mentioned market global inflation due to several world crisis (sanitary crisis, wars, fuel price increase, etc.). Prices of **frozen products increased by 15% in real terms** and those of **prepared/preserved products by 6%** while fresh and smoked products remained stable (-1% in real terms). Frozen salmon fillets experienced the sharpest price increase over the period (+70% in real terms), followed by tuna in olive oil (+22% in real terms), and smoked mackerel fillets (+17%). In contrast, the price of Alaska pollock frozen fillets fell by 35% in real terms over the same period and the price of fresh surimi stick decreased by 13%.

As presented in the section 2.3, salmon is the most consumed species in the Netherlands. When looking at salmon products, prices are on the rise since 2021 for frozen salmon fillets (+70% in real terms) and for fresh salmon fillets (+4%), while smoked salmon in slices experienced a slight decrease (-5% in real terms). These findings suggest that **price alone is not the only consumption driver, as the species continue to be highly consumed, despite its high price**. Similarly, tuna is the third most consumed species by Dutch, retail prices monitored show significant increases of products made of these species.

Alaska pollock is one of the less expensive species in the Netherlands. This explains why it is among the most consumed species according to the interviewees. This whitefish is commonly consumed fried and is a cheaper substitute to cod. Fresh mackerel presents the highest price increase (+15% in real terms between 2016 and 2025) according to EUMOFA data on household consumption (Table 8). This rise is due to decrease of mackerel volumes, resulting in the species apparition in the red list of the [VlSwijzer](#) as previously mentioned, leading Dutch supermarkets to stop selling mackerel. Prices were relatively stable or slightly increasing between 2016 and 2021 before experiencing more significant increases starting in 2021 in relation to the conflict in Ukraine. In the case of mackerel, commonly consumed whole smoked, the price increase and the supply decrease led stakeholders to find alternatives. While fresh mackerel can be easily replaced by Chilean Jack mackerel, the latter is not the favored alternative to smoked mackerel. Operators try to find other substitutes to smoked mackerel, such as fried whole trout with the skin.

Table 12: Household consumption of fresh products for the main consumed FAPs in the Netherlands (nominal prices in EUR/kg, evolution in real terms)

Species	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Evol. 2025/2016 (real terms)
Mackerel	9,68	9,45	9,38	10,79	11,53	11,17	12,67	13,95	14,02	15,44	15%
Plaice	12,38	12,13	12,65	13,24	15,63	15,55	19,37	18,06	21,52	19,05	11%
Salmon	18,83	23,79	23,29	22,67	21,70	21,02	23,53	26,61	26,23	26,59	2%
Trout	15,69	16,92	15,98	15,59	16,84	16,12	17,49	20,38	21,36	22,15	2%
Herring	14,98	13,79	13,71	14,53	15,25	15,90	18,52	18,96	19,08	19,42	-7%
Cod	16,02	16,13	15,75	16,62	16,65	17,32	18,83	20,55	20,91	21,11	-5%
Shrimp Crangon spp	37,31	34,97	31,99	27,26	31,84	31,10	38,16	36,15	44,28	46,42	-10%
Shrimp, miscellaneous	21,91	22,13	21,61	21,68	21,86	21,19	22,40	23,71	24,53	23,35	-24%

Source: Household consumption EUMOFA

* from January to October 2025

Even though there are some examples in the market, illustrating the fact that the price is not a major driver for consumption (such as salmon and other expensive species that continue to be purchased by consumers despite their high prices), the general feedback from stakeholders tend to emphasise the strong impact of price increase on consumption of FAPs. Following the price increase, stakeholders observed a clear shift of consumers, **from premium products to promotions, and from private labels to discount products**. It is worth noticing that seafood prices experienced significant increases because FAPs usually consist of high value and processed products, therefore they are more affected by inflation.

5.3.3.2 Other animal protein sources

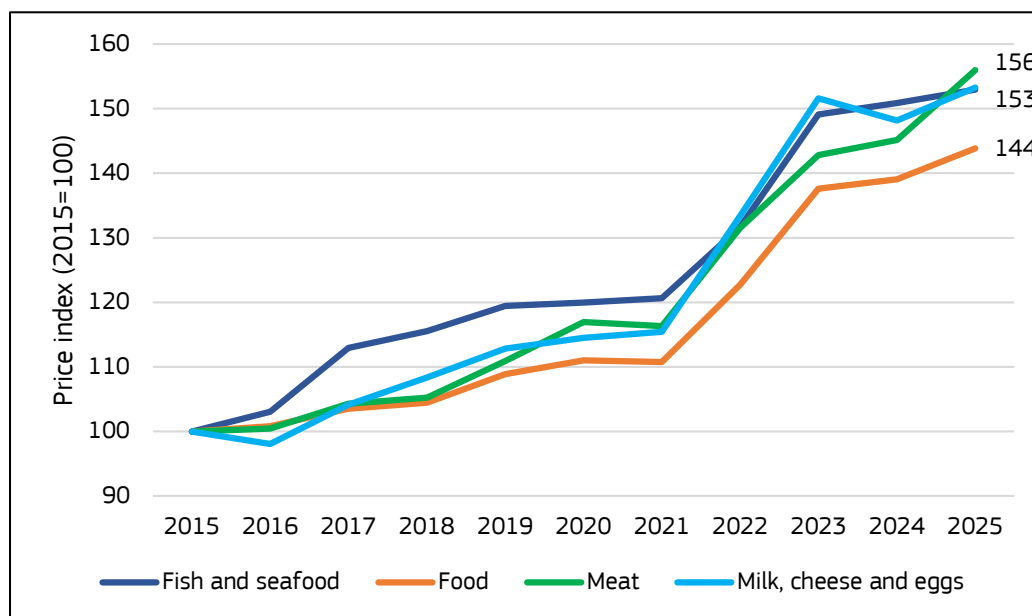
Stakeholders interviewed reported that **all food prices experienced increase during the last years**. Other sources of animal protein face the same challenges; however, seafood may be more affected due to relatively high valued products. According to Eurostat data, FAP consumer prices experienced a similar increase than milk, cheese and egg (+53%) between 2015 and 2024 (Figure 63). Consumer prices of meat products (all meat included) experienced a slightly stronger increase (+56%) over the same period, while consumer prices of food products overall increased by 44%, confirming the statement of the interviewees. Analysis of consumption trends in the Netherlands do not indicate any substitution of FAPs by other animal products. However, meat consumption was less impacted by the inflation and the evolving consumption behaviour than FAPs. Data from the Wageningen Social and Economic Research²² indicates a 3% decrease of total meat consumption per capita over the 2014-2023 period against a 12% decrease for FAPs. More in detail, pork is the most consumed meat, followed by

²² <https://www.greenqueen.com.hk/netherlands-meat-consumption-per-capita-dutch-low-decrease/>

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poultry and beef. Poultry consumption experienced a slightly more important decrease (-4%) than pork and beef consumption over the same period (-2% each).

Figure 63: Evolution of consumer price index for fish and seafood, meat, milk, cheese and milk, and food products in the Netherlands (price index, 2015=100)



Source: EUROSTAT consumer price index Strategies implemented to stimulate consumption

5.3.4 Enhancing consumption with communication campaigns

All stakeholders agreed on the **need of informing consumers and stimulating FAPs consumption** in the Netherlands. According to the Netherlands Visbureau (Dutch Fish Marketing Organisation), in the context of protein transition and increasing sustainability awareness, one of the key challenges is to **explain to consumers, especially younger generation, the health benefit of FAPs and the efforts implemented by producers to mitigate the impacts of the production.**

Offer must be adapted to the emerging needs, in the supermarkets, the restaurants or the canteens, in terms of both the species and the types of products. In addition, the Netherlands Visbureau aims at increase communication not only towards consumers but all stakeholders, including retailers, caterers or other food services that are key operators in FAP consumption and protein transition. To address these challenges, the Netherlands Visbureau launched in 2025 the **SeaNext project 2025-2027 ("Seafood Through the Eyes of the Young Consumer")**²³, co-funded by the EU. This project aims at giving FAP consumption a logical place in the protein transition through information and promotion and focuses especially on young generations. The project will include research projects, a digital platform and events to promote seafood and make it part of the protein transition by gathering all parties of fishery and aquaculture sectors (pelagic to shellfish, fish federation, processing, trading, etc.).

²³ <https://visbureau.nl/nieuws/2025-10/eerste-seanext-evenement-zet-vissector-beweging-dit-pas-het-begin>

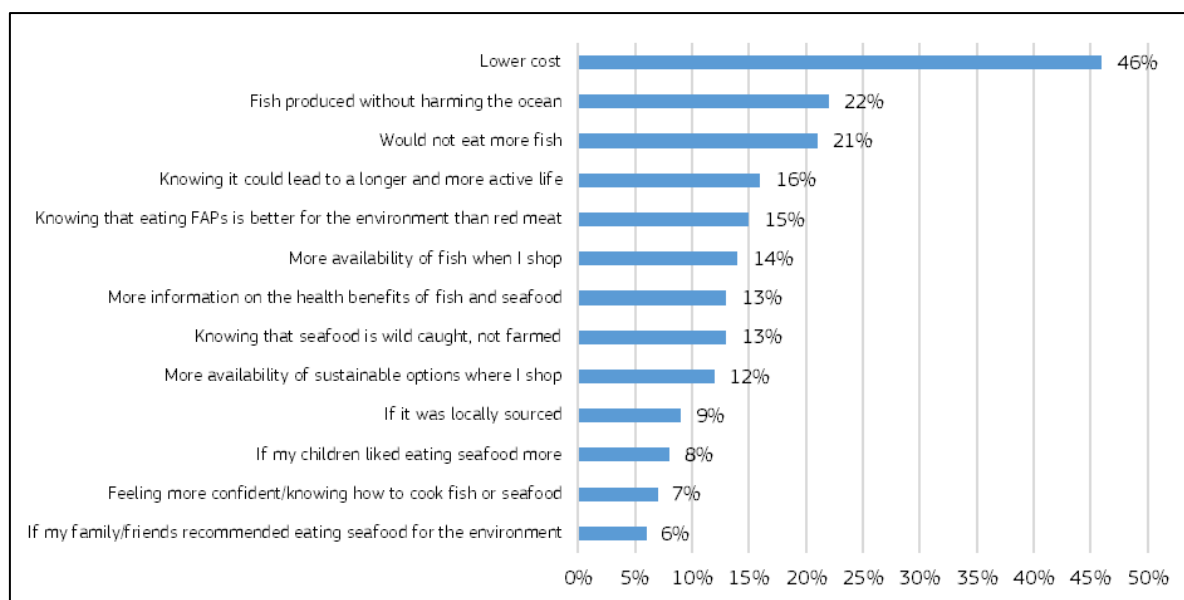
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As part of the European initiative Mr.Goodfish²⁴, an **online tool was developed in the Netherlands providing consumers with sustainability information on species, enabling them to make informed decisions and to purchase FAPs more consciously**. The [Viswizer](https://www.mrgoodfish.com/)²⁵ rates the species (green, yellow or red) depending on the stock status and can provide consumers with alternative species²⁶. This rating scheme is based on 3 levels:

- Green: the stock is not overfished, or the species is responsibly farmed, with minimal impact on the environment;
- Yellow: the species is a second choice. There are still some improvements to be made in this fishery or fish farm;
- Red: species to avoid. The stock is overfished or the aquaculture production of the species is negatively impacting the environment.

In addition to the colour rating, the Viswizer provides certification information regarding the species (MSC, ASC, organic, GlobalG.A.P., Welfare). It was introduced in 2004 in the Netherlands and was then used by WWF to make seafood guide²⁷ by country. However, it is worth noticing that results from the MSC Globescan study revealed that **more than one fifth of the respondents (21%) declared that they would not increase their FAP consumption despite encouragement** (Figure 64). When asked about the ways to encourage FAP consumption, 46% of the Dutch respondents mentioned **lowering the cost of FAPs**. The second lever mentioned was the **sustainable production** of fish, namely ‘fish produced without harming the ocean’. These results confirm the trends mentioned in the section 5.2.3 on consumers preferences and section 5.3.1 on availability of the supply.

Figure 64: Ways to encourage FAP consumption in the Netherlands



Source: MSC Globescan study – Consumer insights 2024, Netherlands Report – Question: ‘Which of the following reasons would encourage you to eat more fish/seafood per week?’ (n=1.000)

²⁴ <https://www.mrgoodfish.com/>

²⁵ <https://www.goodfish.nl/en/search/>

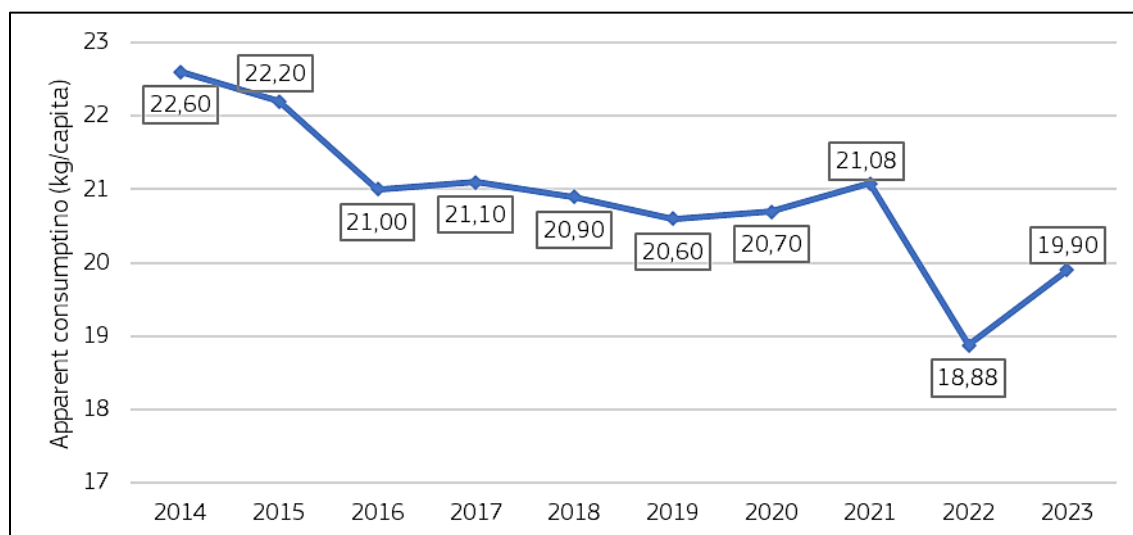
²⁶ <https://www.goodfish.nl/en/fish-to-avoid/>

²⁷ https://wwf.panda.org/act/live_green/out_shopping/seafood_guides/

5.4 Annexes

5.4.1 Annex I: Per capita consumption

Figure 65: Evolution of per capita consumption in the Netherlands (kg/capita; LWE)



Source: EU Fish Market

5.4.2 Annex II: Apparent consumption

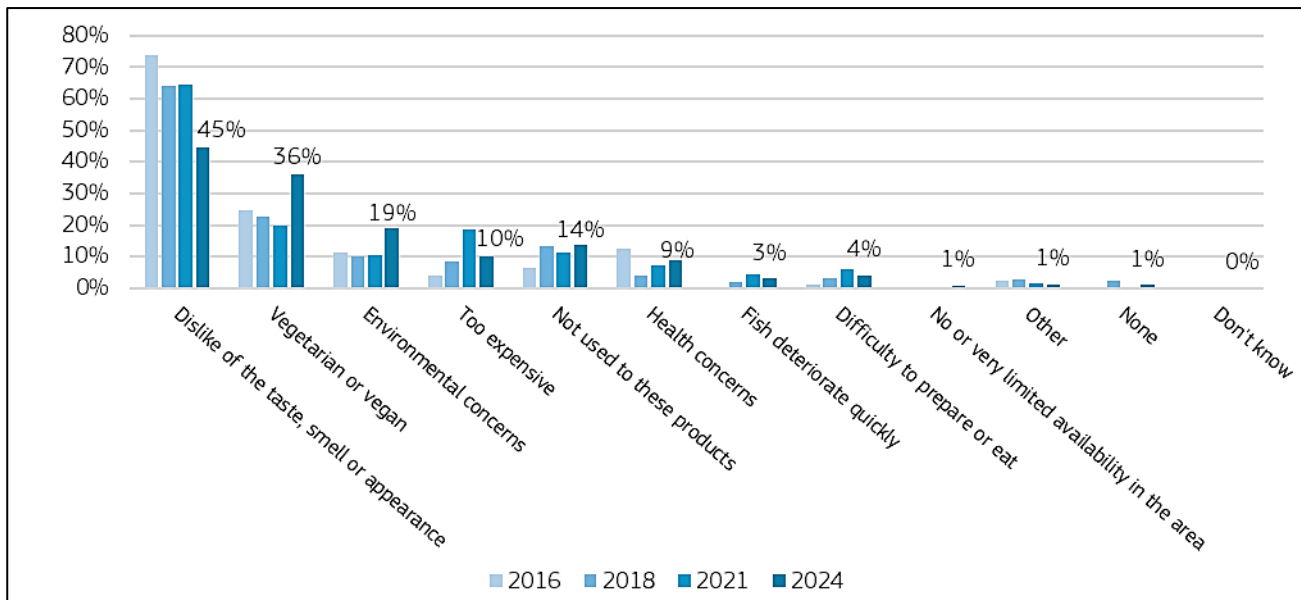
Table 13: Production, trade and apparent consumption evolution of the 10 most consumed species in the Netherlands between 2014 and 2023 (in tonnes LWE)

	Aquaculture + Catches (net weight)		Imports (LWE)		Export (LWE)		Apparent consumption (LWE)	
	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14
Horse mackerel, other	-	-100%	83.731	2.474%	20.638	678%	63.093	n.a.
Cod	692	-48%	317.701	2%	274.106	17%	44.287	-44%
Alaska pollock	-	n.a.	106.976	81%	75.744	266%	31.233	-19%
Mackerel	26.998	-47%	99.584	-10%	105.911	-27%	20.671	32%
Other flatfish	-	n.a.	38.972	43%	21.281	-12%	17.691	490%
Hake	164	-66%	27.205	51%	11.609	54%	15.760	43%
Shrimp, warmwater	-	-100%	52.351	71%	36.850	54%	15.501	132%
Freshwater catfish	-	-100%	34.974	-25%	20.356	64%	14.618	-60%
Mussel Mytilus spp	32.501	-40%	21.442	39%	42.542	-9%	11.400	-50%
Freshwater crayfish	-	n.a.	11.472	5.520%	2.086	186%	9.386	-1.883%

Source: EUMOFA Supply Balance

5.4.3 Annex III: Complementary Eurobarometer results

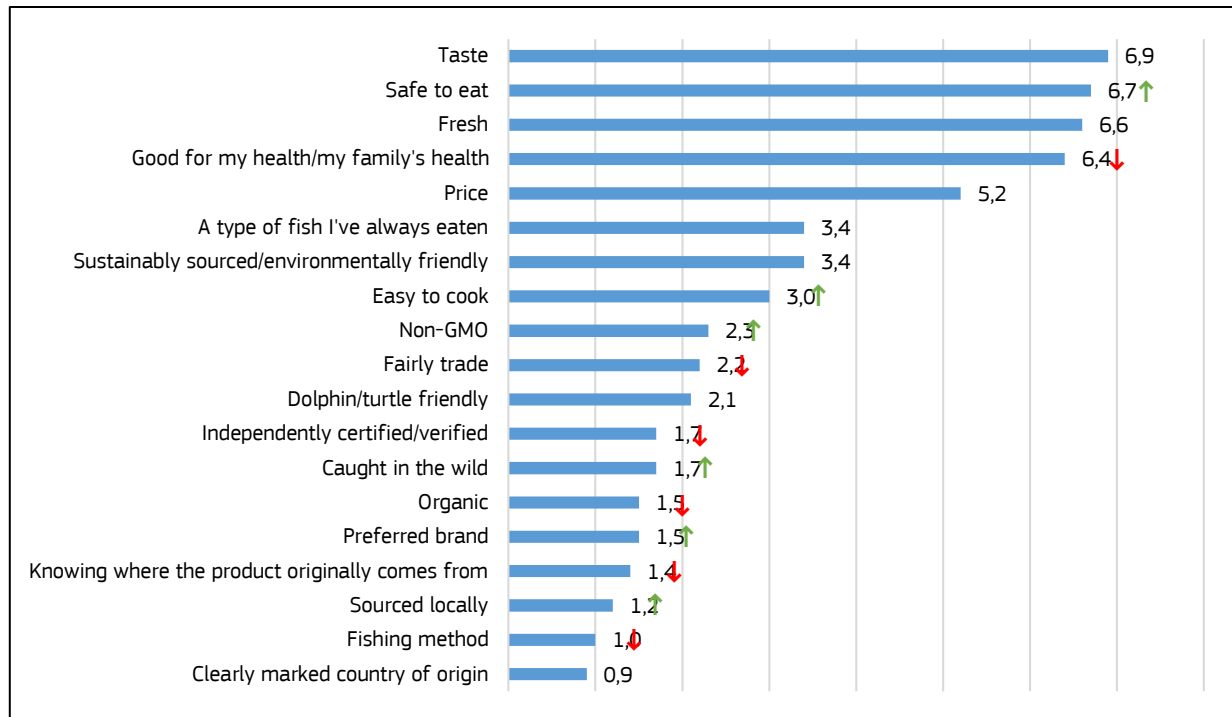
Figure 66: Evolution of main reasons for never consuming FAPs in the Netherlands



Source: Eurobarometer survey – Question: ‘Which of the following are the main reasons why you never eat any fishery or aquaculture products?’ (n= 1.086, 2024)

5.4.4 Annex IV: Complementary results from the MSC Globescan consumer insight 2024 in the Netherlands

Figure 67: Relative importance of the main drivers in FAP purchase in 2024 and their ranking evolution compared to 2022



Source: MSC Globescan study – Consumer insights 2024, Netherlands Report – Question: ‘Thinking about your recent purchase of FAPs, which of the following five considerations was the most important and which was the least important?’ (n=1.000)

6 Austria

The following case study report template aims to support consistent and comprehensive documentation on the consumption of fishery and aquaculture products in Austria and trends over the last decade.

The report is based on quantitative data gathered from EU statistics (from EUMOFA, EUROSTAT and Eurobarometer), from national statistics (Austrian Ministry of Agriculture, Statistics Austria), and qualitative data gathered through desk research (studies, academic papers, reports, etc.) and interviews with stakeholders in the supply chain (professional organisation, producer, wholesaler).

The first part of the report presents and explains the state of play, general trends in consumption of FAPs and the changes of the recent years of habits and preferences of consumers. The second part of the report addresses the external economic drivers that affect and/or influence the consumption of FAPs in Austria and the main strategies identified during the field work to enhance and stimulate the consumption.

Apparent consumption of fishery and aquaculture products in Austria reached 106.412 tonnes LWE in 2023, according to EUMOFA estimates. On the Austrian market, fish is sold either fresh or frozen, in filet or other cuts, while sales of whole fish are rare. Imports are mostly done frozen or in can. Domestic production accounts for approximately 7% of national consumption²⁸. Aquaculture products from national production are mainly sold fresh or prepared in jars. The sales volume of fish from domestic aquaculture has increased by 9,6% in 2023, reaching 5.170 tonnes product weight, among which 483 tonnes were organic²⁹. According to recent data from the Austrian Ministry of Agriculture, the trade deficit of Austria for fishery and aquaculture products reached EUR 367 million in 2024.

According to EUMOFA estimates, the main species consumed in Austria in 2023 were salmon (17.176 tonnes LWE in 2023), trout (9.920 tonnes LWE), tuna (5.858 tonnes LWE) and shrimps (5.352 tonnes LWE). Stakeholders confirm the importance of consumption of salmon and trout. They also mention, among the main species both produced and consumed in Austria, carp, trout and African catfish. Regional consumption habits can be observed, notably a traditionally higher consumption of carp in eastern Austria.

6.1 Consumption trends of FAPs

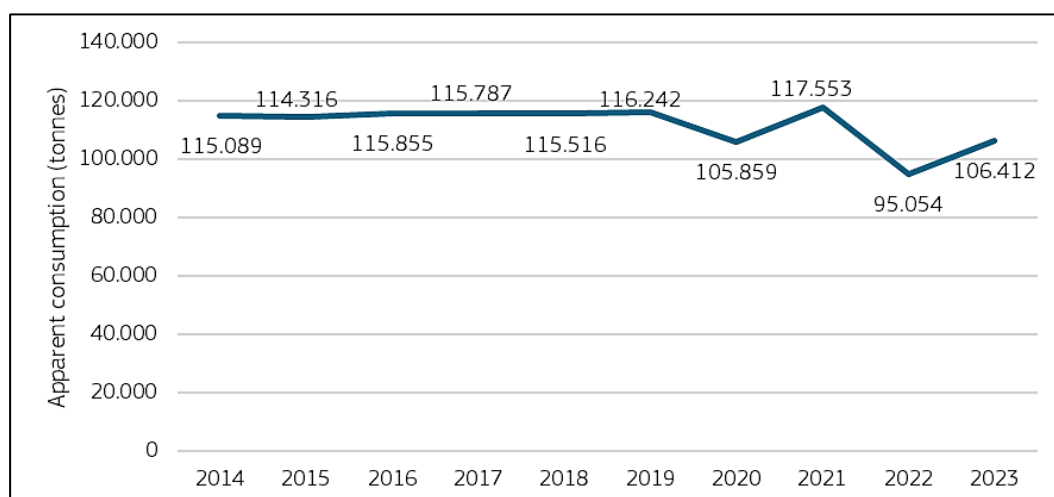
6.1.1 General trends

EUMOFA estimates on apparent consumption of fishery and aquaculture products showed an 8% decrease over the decade between 2014 and 2023. Consumption for FAPs remained relatively stable over the five previous years of the last decade (2014-2019), reaching its lowest volume at 114.316 tonnes in 2015 and its highest volume at 115.849 tonnes in 2019. Over the past five years, apparent consumption faced two years of decline, 2020 (-3%) and 2022 (-6%), and two years of relative stability, in 2021 (+1%) and 2023 (+0%), for an overall decline by 8% between 2019 and 2023.

²⁸https://www.bmluk.gv.at/dam/jcr:d9ce66c7-577f-40f1-92ad-586e9f489d77/Broschuere_Zahlen_und_Fakten_DE_2025_BF.pdf

²⁹ <https://www.statistik.at/fileadmin/announcement/2024/12/20241218Aquakultur2023EN.pdf>

Figure 68 - Apparent consumption of FAPs in Austria (tonnes LWE)



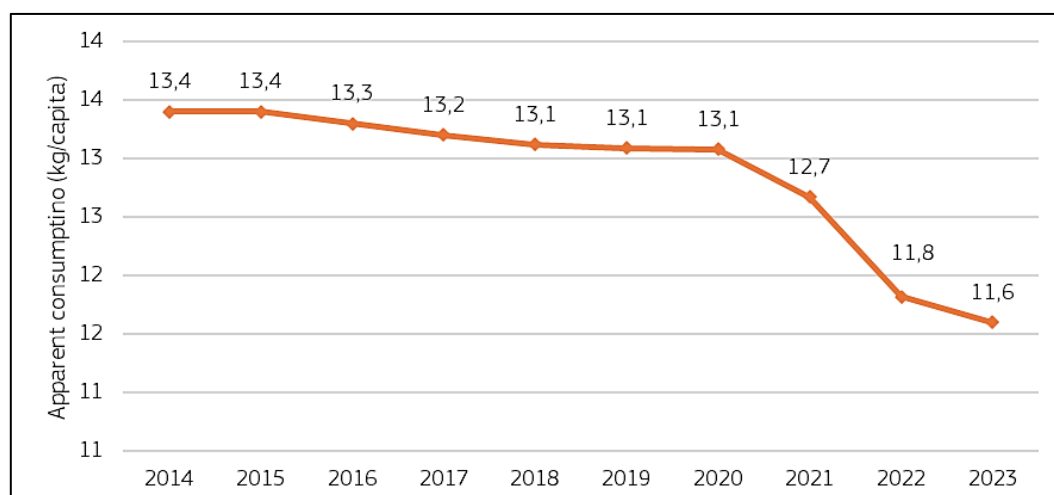
Source: EUMOFA

Over the same period, stakeholders report stability in overall fish consumption. According to stakeholders, retail sales have increased during the **COVID-19 period**, from 2020 to 2023, while at the same time consumption in HORECA decreased significantly. Over the **past few years**, in particular since 2023, the **rise in prices** have severely impacted fish consumption in Austria, in particular the segment of domestically produced fish. Inflation, combined with a return to pre-covid-19 habits in retail sale and only a partial recovery for the HORECA sector, have led to a recent **decline** in consumption.

6.1.2 Evolution of per-capita consumption

According to EUMOFA estimates, per capita apparent decreased by 14% between 2014 and 2023, reaching 11,7 kg per capita live weight equivalent (LWE) in 2023. Consumption collapsed from 12,7 to 11,8 kg per capita between 2021 and 2022 (-7%); it was relatively stable between 2022 and 2023 (-1%).

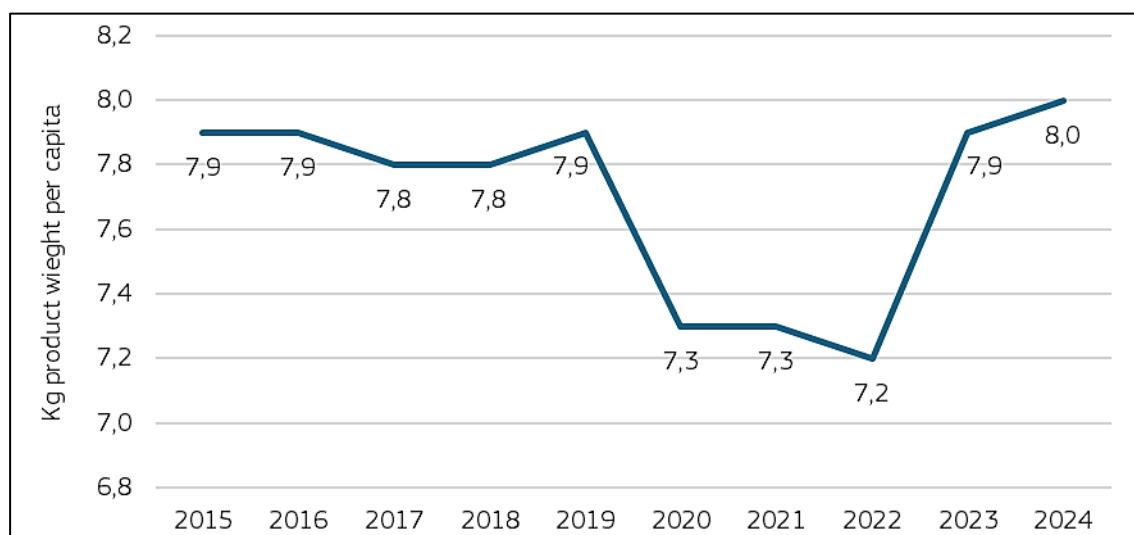
Figure 69 - Per capita apparent consumption of FAPs in Austria (kg LWE/capita)



Source: EUMOFA

National statistics of per capita apparent consumption in product weight show different trends (**Figure 70**), marked by a relative stability between 2015 and 2019, a sharp decrease in 2020 followed by a stability period between 2020 and 2022 and a subsequent recovery, reaching 8,0 kg per capita in 2024.

Figure 70 - Per capita apparent consumption of FAPs in Austria (kg product weight/capita)



Source: Statistik Austria

Both sources witness a stability in the consumption of FAPs in Austria before the covid-19 pandemic, and a fall at the beginning of the period. A difference is observed in 2023: apparent consumption calculated from LWE by EUMOFA keep decreasing while apparent consumption calculated from product weight in national statistics recovers to pre-covid levels. This difference could be due to the decrease in whole fish consumption and the increase in consumption of fillet and processed products, which are also observed by the stakeholders interviewed. However, due to few years available and different estimation methods, quantifying this evolution remain uncertain.

6.1.3 Evolution at species level

According to EUMOFA estimates, there is an increase in apparent consumption for aquaculture species, with **strong rises for salmon (+34%) and trout (+25%)** and an increase for other freshwater fish (+3%) between 2014 and 2025, while 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%).

Table 14: Production, trade and apparent consumption evolution of the 10 most consumed species in Austria between 2014 and 2023 (in tonnes LWE)

	Aquaculture + Catches		Imports		Export		Apparent consumption	
	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14	Volume 2023	Evol 2023/14
Other marine fish	-	-	21.551	-1%	3.280	6%	18.271	-2%
Salmon	10	-28%	18.704	31%	1.538	9%	17.176	34%
Trout	3.163	55%	14.362	16%	7.604	17%	9.920	25%
Tuna, skipjack	-	-	16.296	-	10.575	-	5.720	-
Shrimp, miscellaneous	-	-	5.857	21%	504	56%	5.352	19%
Other groundfish	-	-	5.676	15%	719	518%	4.957	3%
Other freshwater fish	386	4%	4.904	-17%	786	246%	4.504	-25%
Tuna, miscellaneous	-	-	5.851	-72%	1.454	-42%	4.396	-76%
Herring	-	-	4.687	-23%	312	153%	4.375	-26%
Alaska pollock	-	-	3.581	-9%	562	2797%	3.019	-23%

Source: EUMOFA

Over the past decade, these **diverging** trends of consumption among FAPs have also been identified by stakeholders. The main evolution identified, which persisted through the covid-19 period and is still valid for the recent period, is a progression of the consumption **fish from aquaculture over the consumption wild-caught fish**, benefitting mainly to imports of **salmon** from Norway. According to stakeholders, salmon now accounts for 60% to 70% of fish volumes available in large retail in Austria. Stakeholders estimate that the demand for freshwater FAPs also benefitted, to a lesser extent, to domestic production (this trend is very significant for local producers, less significant in terms share of the overall consumption). This is consistent with the increase in the apparent consumption of trout. Among local fish, char is also identified as one of the main consumed species.

According to stakeholders, a rise of **easy-to-prepare/easy-to-eat products** is also observed benefitting notably sushi and baked fish, as well as imported species such as pangasius or Alaska pollock. This trend goes hand in hand with a decrease in species diversity available on the Austrian market.

Another important trend is the **progress of imports from extra-EU origin**, not only for salmon and shrimp but also for species usually produced domestically. According to stakeholders, imports of frozen trout from Turkey are now competing with domestically produced trout.

6.2 Consumption behaviour: analysis based on Eurobarometer survey

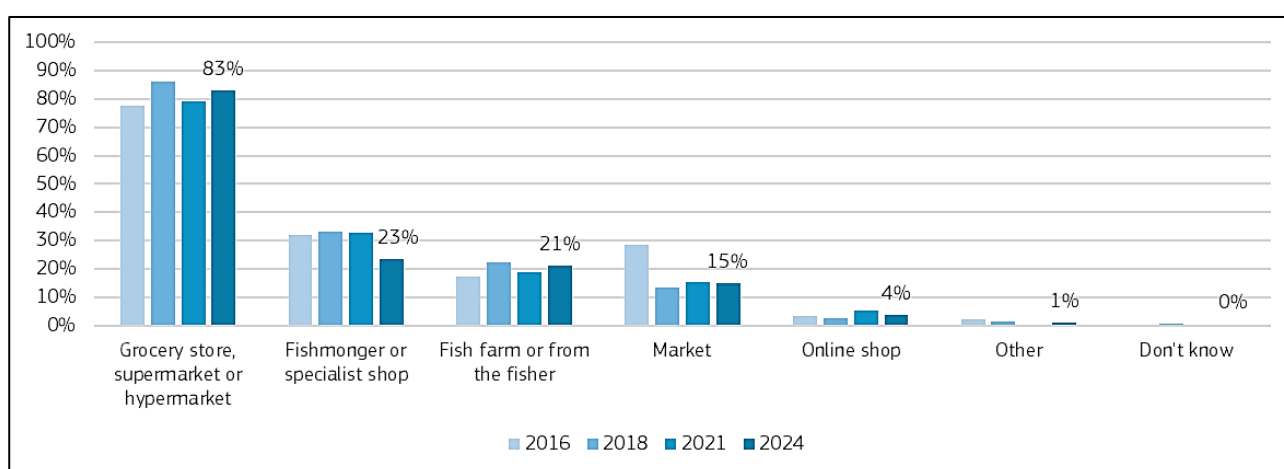
6.2.1 Changes in distribution channels

According to Eurobarometer survey, the **marketing of FAPs in Austria is dominated by large retail** (grocery store, supermarket or hypermarket). The same survey indicates that this channel has strengthened over time, with the share of consumers reporting purchases through large retailers increasing from 77,4% in 2016 to 82,8% in 2024.

Eurobarometer survey results also shows that “fishmongers and specialised shops” is the second most frequently reported purchasing channel for FAPs among Austrian consumers. However, according to interviews, fishmongers are rare in Austria. Instead, a significant share of **Austrian producers** sell part of their production directly to consumers, either on **production site** (the third most frequently purchasing channel as illustrated in the Eurobarometer survey) or in **self-owned specialised shops**, which are likely to be included in this category. According to one stakeholder of large retail, fish sales outside large retail is limited to local production.

According to Eurobarometer and stakeholders, **online sales** are very limited for FAPs, including in comparison with other food products. One stakeholder witnesses that online sales are comparatively more important for smoked products compared to other FAPs.

Figure 71 - Evolution of purchase location of FAPs in Austria



Source: Eurobarometer survey – Question: ‘Where do you buy your FAPs?’ (n= 1.006, 2024)

6.2.2 Changes in consumption habits

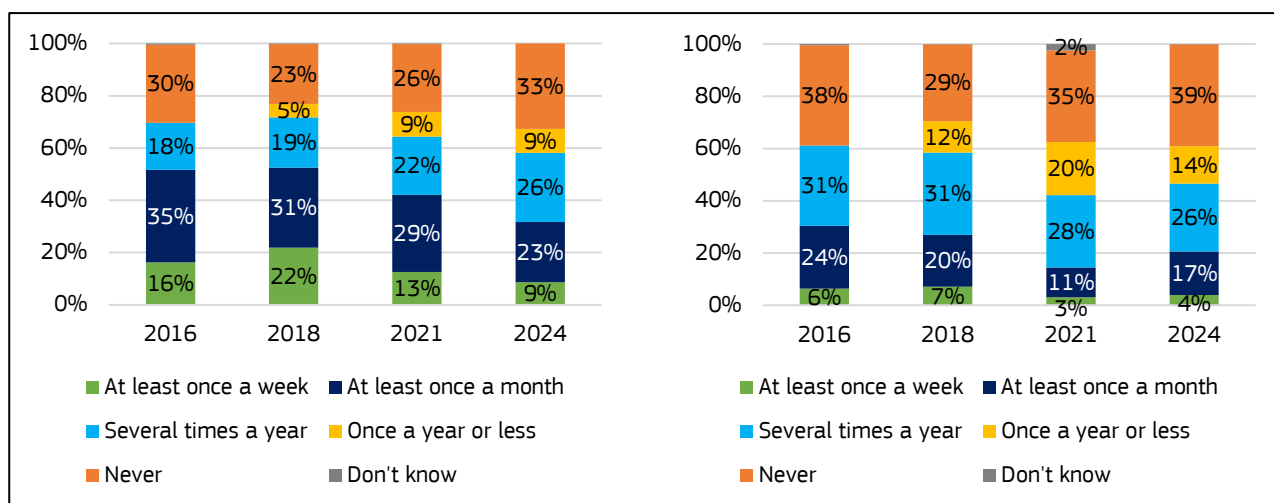
Eurobarometer surveys also show the evolution of frequency of “at home consumption” and consumption of FAPs in HORECA in Austria. The main evolution observed between 2016 and 2024 is **the decline of the declared frequent consumption** (at least once a month + at least once a week) both for “at home consumption” and for consumption in HORECA. In 2016, 52% of the surveyed consumers declared consuming FAPs at least once a month at home, and 30% declared consuming FAPs at least once a month in restaurants and other food outlets. These shares of “frequent consumers” declined by 20 points for “at home consumption” and by 9 points for consumption in HORECA, reaching respectively 32% and 21% in 2024. In contrast, the share of

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consumers never consuming FAPs remained relatively stable, with an increase of 3 points for “at home consumption” and by less than 1% for consumption in HORECA.

One stakeholder of **large retail** noticed a higher frequency of purchasing FAPs while the **average quantity per buy decreases**. Sales are increasingly concentrated on limited periods of temporary discounts. The overall consumption of FAPs in large retail is deemed stable.

Figure 72 : Evolution of the frequency of ‘at home’ (left) and ‘out-of-home’ (right) consumption and consumption of FAPs in HORECA



Source: Eurobarometer survey – Question: ‘How frequently do you eat FAPs?’ (n= 1.006, 2024)

Stakeholders interviewed report a **shift in consumption habits towards easy-to-eat or “convenient” FAPs**. This trend is reflected in a decline in the 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. This is consistent with a decrease in frequency in consumption which is stronger for “at home consumption” than for consumption in HORECA, as witnessed by Eurobarometer surveys mentioned above.

According to stakeholders, these trends have accelerated the **concentration of consumption on a small number of species** that meet consumers expectations, such as salmon. This trend is also reflected in the increase in imports over the past decade, especially for salmon and shrimps (with imported volumes rising respectively by 31% and 21%).

6.2.3 Changes in consumers preferences

The Eurobarometer survey show that across all the years, **appearance** and **costs** consistently rank the most important aspect when buying FAPs, each cited by around 45%-50% of the surveyed consumers. Between 2016 and 2024, appearance remains the most important criteria, while its importance slightly decreased, in comparison to the previous year. Over the same period, the cost criteria increased by 3 points. Stakeholders highlight the **growing importance of price** as the main criteria for consumers.

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 the surveyed period (2016-2024). According to stakeholders, **freshness and**

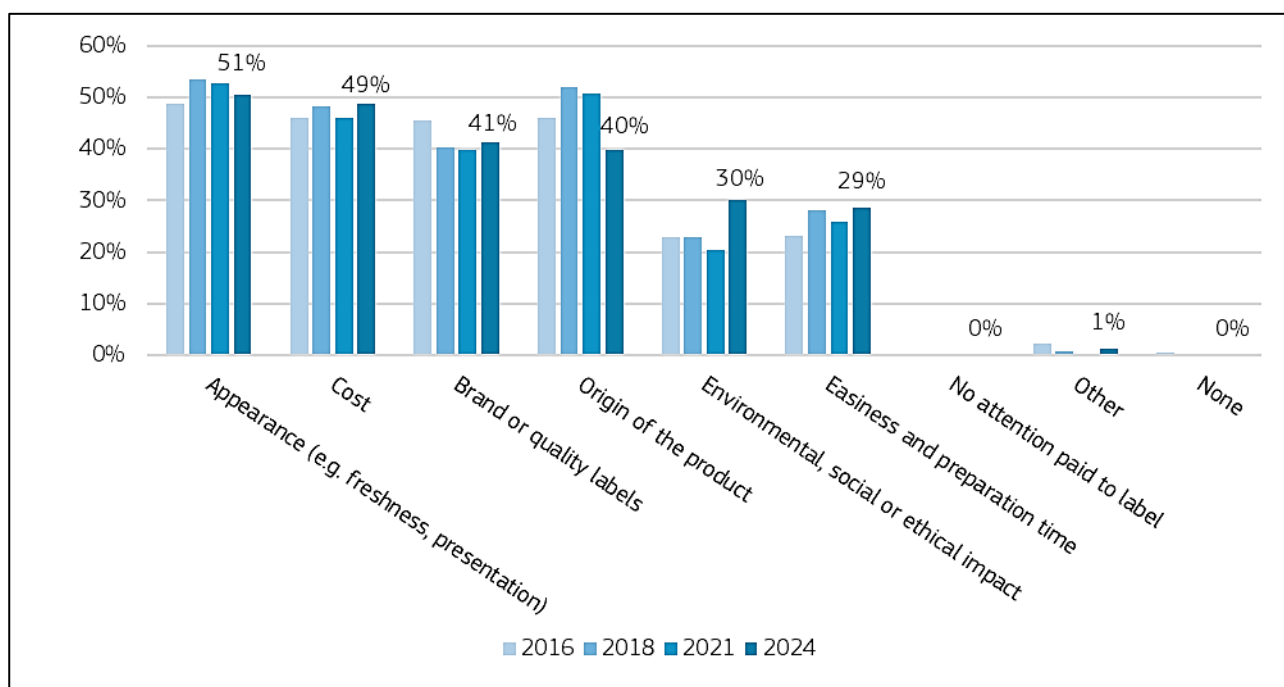
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quality are deemed important to the consumer and are closely associated with **local production and sustainable practices**. Even though the results of the Eurobarometer survey highlighted a decrease in the importance of the origin, stakeholders keep emphasizing it as a crucial driver for the consumption of FAPs. Environmental, social or ethical impact appear less important as such than when associated with freshness and quality.

Easiness and preparation time do not range among the main important aspect driving consumer choice in the Eurobarometer survey but recorded a strong upward trend over the past 10 years. According to stakeholders, the **easiness to prepare/eat** criteria shows the **strongest upward trend** recently, in particular in large retail.

One stakeholder of large retail also pointed out that consumers increasingly expect a high level of advice and expertise from the staff, in particular regarding how to prepare and cook fish.

Figure 73 - Evolution of main important aspects when buying FAPs in Austria

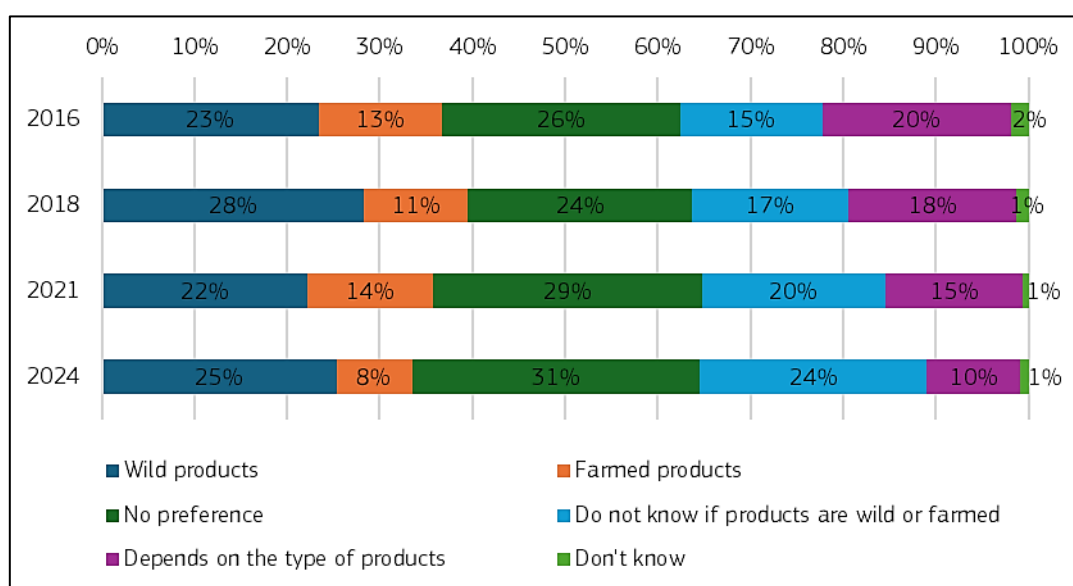


Source: Eurobarometer survey – Question: ‘When you buy FAPs, which of the following aspects are the most important for you?’ (n= 1.006, 2024)

In 2024, the preference of the Austrian consumer by type of FAP (wild versus farmed) is 5 points below the EU average for wild products and 5 points above the EU average for farmed products. However, wild products (25,4%) remain preferred to farmed products (8,1%). According to stakeholders, the **stronger preference of Austrians for farmed products compared to the EU average** is a direct consequence of Austria being a landlocked country, where consumers are more familiar with aquaculture production.

In terms of production mode, the Eurobarometer data show greater preference of Austrian consumers of wild products and the strong increase of the share of consumers having no preference and those who don’t know if products are wild or farmed. These trends indicate reflects possibly a decline of consumer awareness and knowledge about FAPs.

Figure 74 - Evolution of preference type of FAPs in Austria



Source: Eurobarometer survey – Question: ‘Would you say that you prefer...’ (n= 1.006, 2024)

6.2.4 Changes in consumers profiles of fisheries and aquaculture products

According to stakeholders, consumers of FAPs tend to be **older than the average consumer**, with most over 40 years old. However, fish consumption is also observed among younger generations, notably thanks to the growing **interest in healthy food**. Overall, consumers of FAPs have **higher purchasing power than the average consumer**. Consumers with low purchasing power tend to buy fewer fresh fish and prefer protein sources other than fish. Stakeholders highlights that the fish market is highly segmented by revenue, with a premium segment consisting in fresh, domestically produced, and organic FAPs.

During the covid-period, several stakeholders observed an increased consumption of FAPs by younger consumers, focused mainly on affordable products and motivated by healthy habits, while older consumers tend to keep their consumption habits for higher-value products.

Over the recent period, in large retail, **young adults** tend to increasingly choose entry level and self-service products, such as sushi, with a strong emphasis on **easy-to-eat** products. **Families** focus on **discounted and cheap** products such as smoked fish. A segment of **premium buyers** tend to stick to premium products, while increasingly relying on temporary discounts.

6.3 Economic drivers for consumption

6.3.1 Evolution of prices and comparison with other food products

The main driving factor behind recent consumption evolutions is the price, with a very clear impact since 2023.

Stakeholders also report a **stronger increase in the price of FAPs in retail compared to meat**. This difference between the evolution of price for meat and FAPs is quantified by Eurostat’s

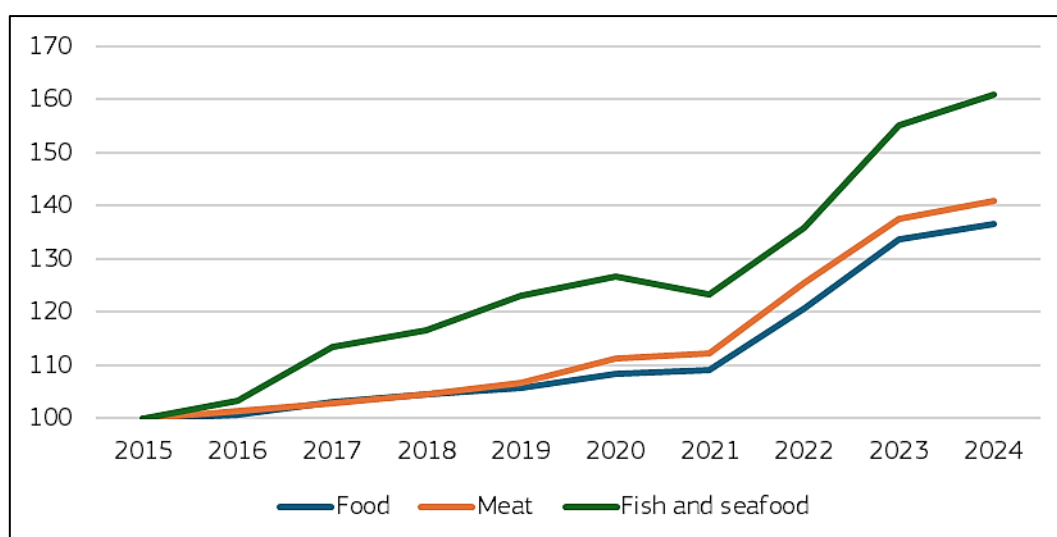
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Harmonised Index of Consumer Prices (HICP). The **HICP³⁰ for fish and seafood in Austria increased by 61% between 2015 and 2024** points. Over the same period, the HICP increased by 41% for meat and 37% for food. It is also worth noting that the progression of HICP for fish and seafood slowed down during the covid-19 period, and accelerated from 2023 on.

According to one stakeholder of large retail, the price of fresh fish has especially strongly risen, reaching now twice the price of pork and more than twice the price of poultry. On the other hand, smoked fish has evolved similarly to poultry and sausages, which are considered as the main substitutes.

Producers and wholesalers interviewed report that the rise in input costs have **increased production costs** of both fish and meat, with fish producers in Austria particularly impacted by the rise in costs for fishmeal and fish oil used in feed. They highlighted that the difference in price evolution between FAPs and meat was more visible on the retail than on the wholesale stage.

Figure 75 - Evolution of HICP for food, meat and fish & seafood in Austria, base of 100 in 2015



Source: Eurostat

Regarding **different FAPs**, stakeholders witness strong rise in trout prices over the past decade (2015-2024) at both wholesale and retail stages, while a strong increase in salmon prices is reported mainly at retail stage. Prices for other imported products such as frozen Alaska pollock have remained relatively stable over the past few years.

According to stakeholders, the recent inflationary context has strongly impacted fish consumption in Austria. Whereas freshness, quality and origin previously dominated purchasing decisions, **price has become in average the most important driver for consumption**. However, stakeholders also point out that Austrian consumers still put a stronger emphasis on freshness, quality and origin than in other EU countries.

³⁰ https://ec.europa.eu/eurostat/databrowser/view/prc_hicp_aind_custom_19511293/default/table

6.3.2 Other key drivers

According to stakeholders, several other factors play a significant role in the purchasing decisions of FAPs. Over the past years, a growing interest for **healthy and sustainable** products was observed. This driver allowed to maintain consumption over the past decade but its influence on purchasing decisions has weakened since the inflationary context, as price considerations have become more dominant.

One stakeholder also identified the **demographic factor**, notably the rise in the number of **small households**, as an important driver of recent consumption trends. In Austria, the consumption of FAPs is indeed closely associated with at-home consumption of family dishes, requiring some time for cooking. An example is the traditional consumption of carp during the Easter and Christmas period. The increasing number of single households or small families can explain part of the stagnation of fish consumption, of the less frequent consumption of FAPs “at home”, and of the increase in the share of easy-to-eat options in the overall consumption of FAPs.

Several stakeholders mention the **lack of time** as a reason behind the rise of **easy-to-eat/convenient** options. One stakeholder mentioned that Austrian consumers had recovered a more traditional way of consuming fish during the covid-19 period due to more time available to cook, which resulted in a visible rise in the sale of less processed products and domestically produced fish. Consumers however quickly went back to pre-covid habits from 2023 on.

6.4 Strategies implemented to stimulate consumption

On production side, the recognition of Lower Austria’s century-old carp ponds as a Globally Important Agricultural Heritage System (GIAHS) by the FAO in May 2025³¹ is identified by stakeholders as an important milestone for the promotion of FAPs from Austrian production, linking FAPs consumption with **authenticity and heritage**. Other initiatives have led to the creation of **local certification schemes**, such as the *Waldviertler Karpfen* label, whose producers received EU fundings from FIGF (2000-2006) and EFF (2007-2013) for processing and marketing. Marketing measures implemented included “celebrations in the fishing season and leaflets on production standards and recipes, as well as active cooperation with local restaurants”³².

Another strategy implemented by stakeholders of the sector to enhance consumption of locally produced FAPs is to **adapt local production to consumer preferences** and expectations. In this context, Austrian producers have developed the production of rainbow trout, betting on the consumer’s interest on a local alternative similar to imported salmon.

On the retail side, several strategies are conducted to boost FAP consumption. Promotional actions with **temporary discounts** are especially important. Discounts can be based on traditional periods for consumption such as Lent, starting with the *Heringsschmaus* on Ash Wednesday, Eastern and Christmas, or can benefit specific products for shorter periods. Communication actions have also led to promote 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.

³¹ <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.>

³² https://oceans-and-fisheries.ec.europa.eu/system/files/2016-09/op-austria-fact-sheet_en.pdf

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

Stakeholders also identify several options to further promote FAPs consumption. Several stakeholders highlight the need to finance and develop **land-based aquaculture** to meet the consumer's demand on the long term, while on the shorter term the demand will be met mainly by extra-EU imports of salmon. The need to further answer the consumer's **demand for convenience** is seen as an important issue. To this respect, sushi is identified as a product with strong potential (small portion, easy-to-eat).

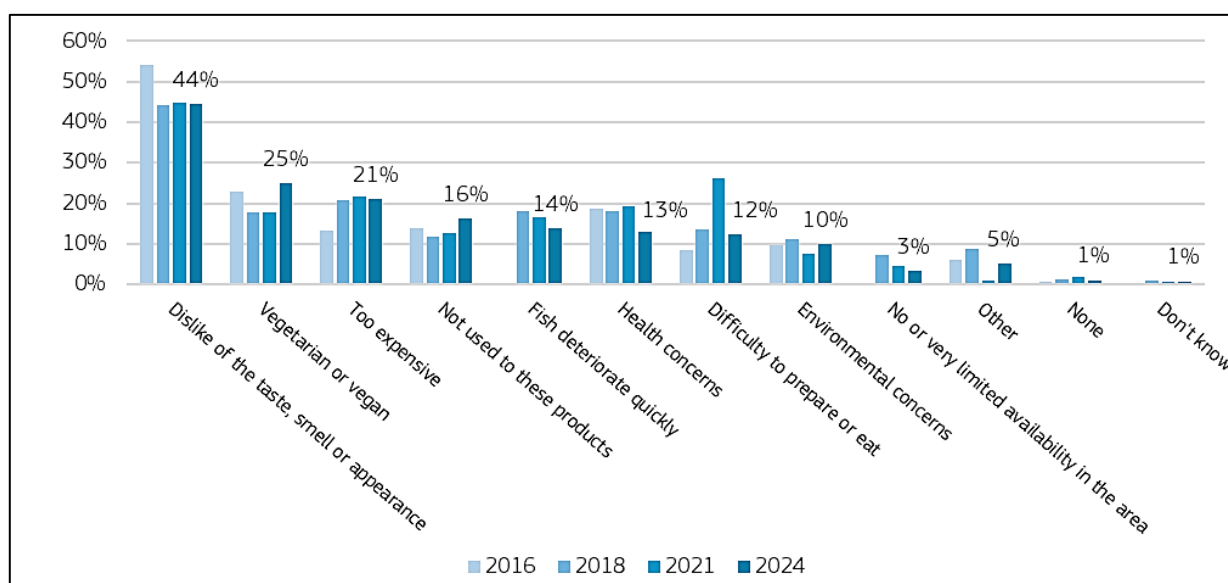
6.5 Annexes

6.5.1 Annex I: Complementary Eurobarometer results

The figures below summarise key trends in:

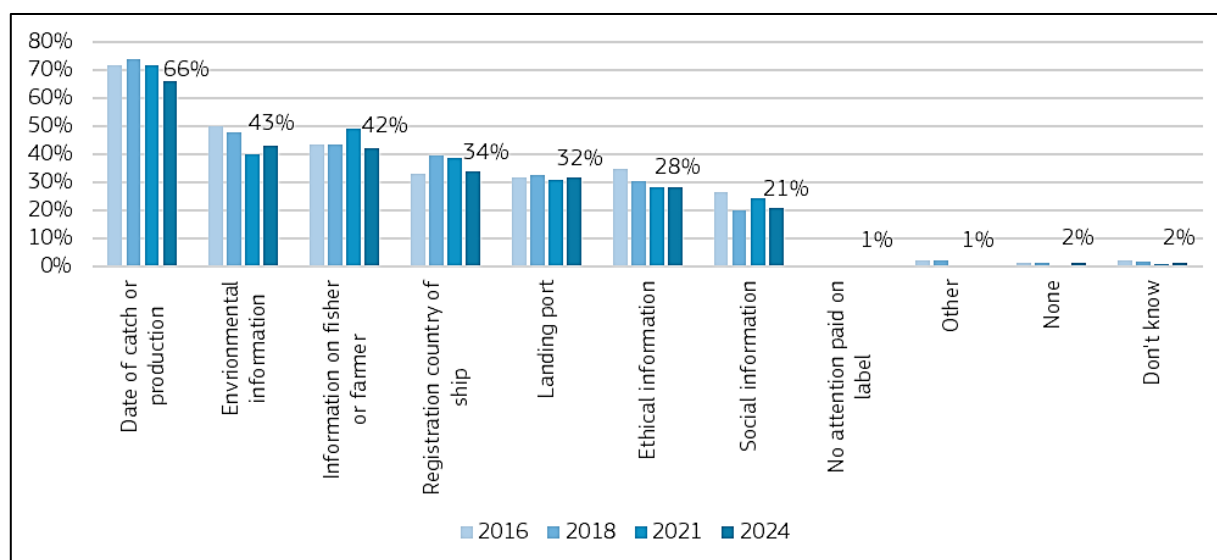
- Main reasons for never consuming FAPs
- Consumer expectations regarding information provided on FAP labels

Figure 76: Evolution of main reasons for never consuming FAPs in Austria



Source: Eurobarometer survey – Question: ‘Which of the following are the main reasons why you never eat FAPs?’ (n= 1.006, 2024)

Figure 77: Information that should be mentioned on the label of all FAPs in Austria



Source: Eurobarometer survey – Question: ‘Which of the following information do you think should be mentioned on the label of fresh, frozen, smoked and dried FAPs?’ (n= 1.006, 2024)

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