The future perspectives for the European seafood processing sector

Challenges and opportunities

Roberto C. Alonso Baptista de Sousa
Secretary General
direccion@anfaco.es

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WHY THE SECTOR MATTERS FOR EUROPE

- Seafood processing as a strategic pillar for food security, employment and coastal cohesion

  – Food security

  Reliable access to healthy and affordable protein

  – Industrial employment

  High added-value manufacturing and processing

  – Coastal cohesion

  Economic activity and employment in coastal regions

  – Strategic autonomy

  A resilient food industry connected to global supply chains

3,245 Companies
111,000 direct employees

A widespread EU industry, anchored in coastal regions and communities.

Led by key producing countries such as Spain, France and Poland, followed by Italy, Denmark and Portugal.

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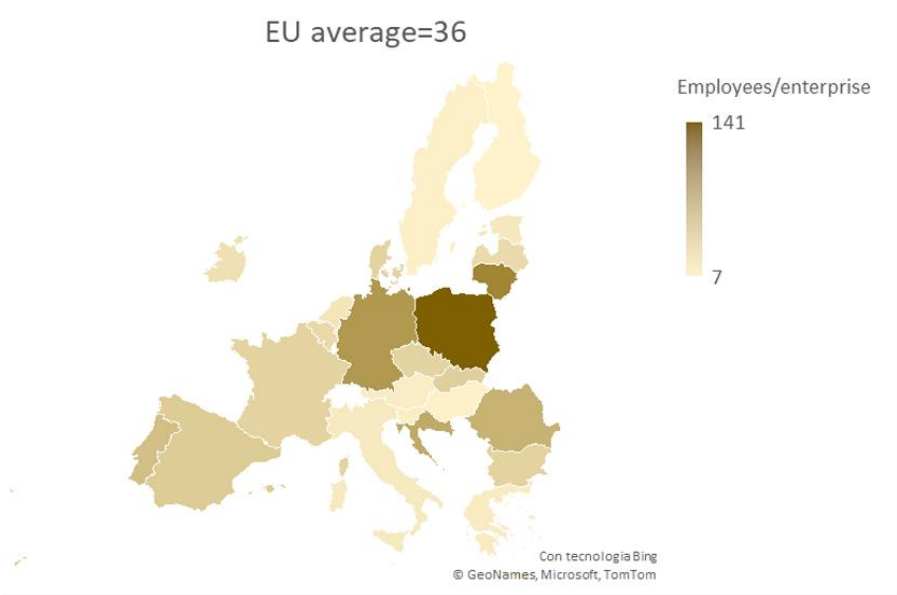
Source: Scientific, Technical and Economic Committee for Fisheries (STECF) –Economic Report on the fish processing industry (STECF 25-15).

EUROPE: A MAJOR SEAFOOD HUB

- Europe is one of the world's largest seafood markets and processing regions
- 10.3 million tonnes
  Seafood consumed annually in the EU
- € 33.5 billion (2023)
  EU seafood processing turnover / market value
- 23 kg per capita
  Average seafood consumption in Europe
- Europe combines high consumption, industrial transformation capacity and global seafood trade integration.
- Europe is both a major seafood consumer and a major processing region.



Source: The EU Fish Market (EUMOFA, 2025) and Scientific, Technical and Economic Committee for Fisheries (STECF) –Economic Report on the fish processing industry (STECF 25-15).

Table 2.2 Number of enterprises, employment and turnover in the fish processing sector by EU countries, 2023

Country	Number of enterprises	enterpises %	Turnover (million €)	turnover %	Total employment	employment %
Belgium	77	2%	1,169	3%	2,227	2%
Bulgaria	66	2%	200	1%	2,346	2%
Croatia	35	1%	169	1%	2,547	2%
Denmark	89	3%	2,398	7%	3,064	3%
Finland	139	4%	407	1%	955	1%
Germany*	204	6%	2,165	6%	4,867	4%
Greece	178	5%	361	1%	2,257	2%
Italy	404	*12%*	2,201	*7%*	6,047	*5%*
Lithuania	47	1%	674	2%	5,020	5%
Malta	9	0%	74	0%	151	0%
Poland	145	4%	5,044	15%	20,514	19%
Romania	16	0%	100	0%	1,042	1%
Slovenia	16	0%	43	0%	179	0%
Spain	604	19%	7,968	24%	25,354	23%
Sweden	166	5%	579	2%	1,439	1%
EU DCF MSs	2,195	67%	23,552	70%	78,009	70%
Austria	16	0%	65	0%	192	0%
Czechia	23	1%	178	1%	785	1%
Estonia	77	2%	238	1%	1,188	1%
France	381	12%	5,285	16%	13,117	12%
Hungary	14	0%	12	0%	111	0%
Ireland	112	3%	609	2%	2,497	2%
Latvia	93	3%	309	1%	2,604	2%
Netherlands	182	6%	1,501	4%	3,438	3%
Portugal	165	5%	1,721	5%	8,786	8%
Slovakia	4	0%	30	0%	152	0%
EU not-DCF MSs	*1,067*	*33%*	*9,946*	*30%*	*32,870*	*30%*
Total EU	**3,262**	**100%**	**33,498**	**100%**	**110,879**	**100%**

Source: elaboration by the EWG on MS data submissions under the 2025 Fish processing data call

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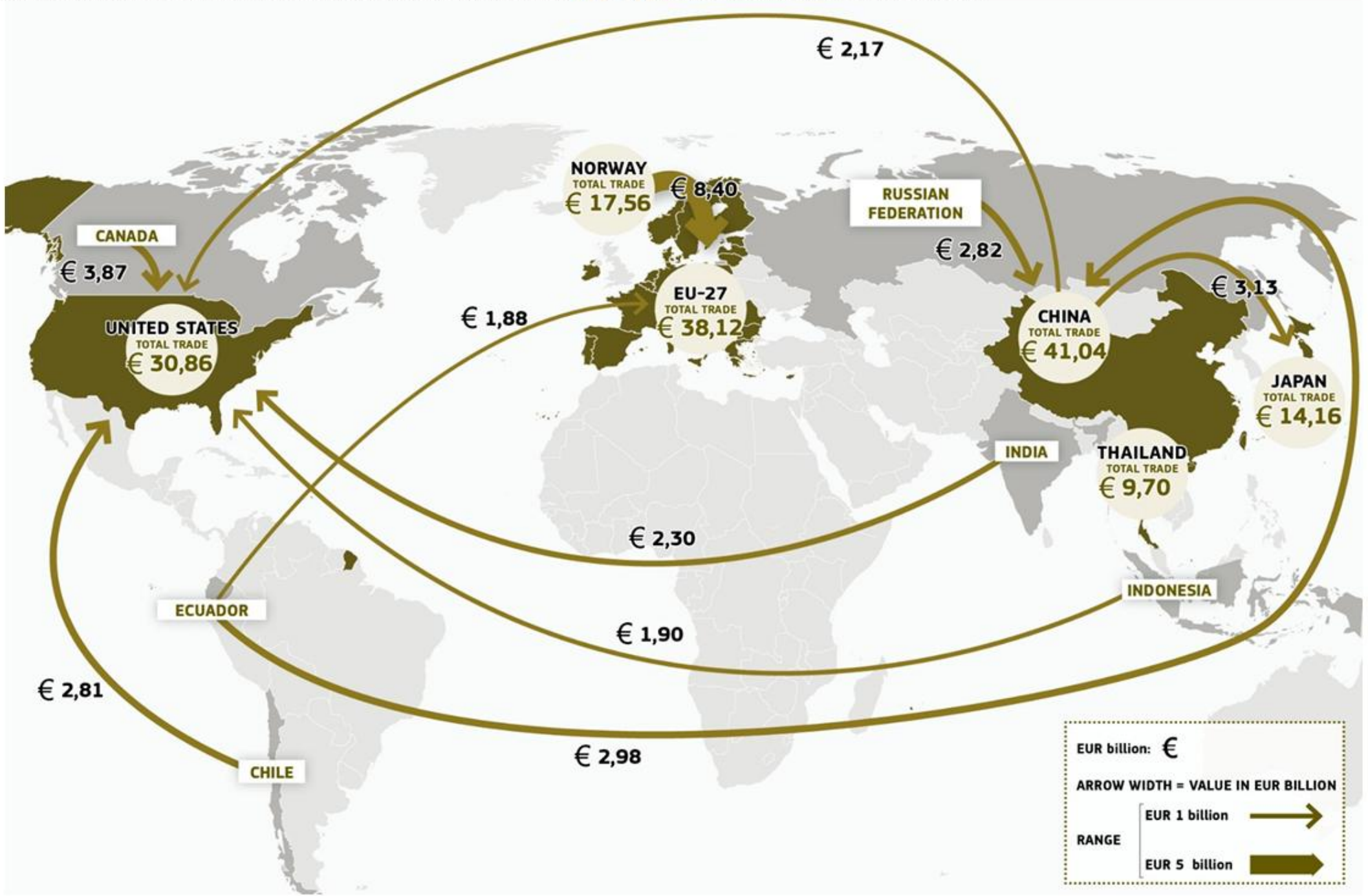
Source: EUMOFA elaboration of data from EUROSTAT (for EU trade flows, online data code DS-045409) and Trade Data Monitor (for non-EU countries).



MAIN CHALLENGES FOR THE SECTOR

Three strategic priorities for the future competitiveness of the industry

RAW MATERIALS ACCESS

ATQs
FTAs
Supply security
Predictability

LEVEL PLAYING FIELD

Traceability
CATCH
IUU
Enforcement

INNOVATION & COMPETITIVENESS

Biotechnology
Circular economy
Efficiency
Added value

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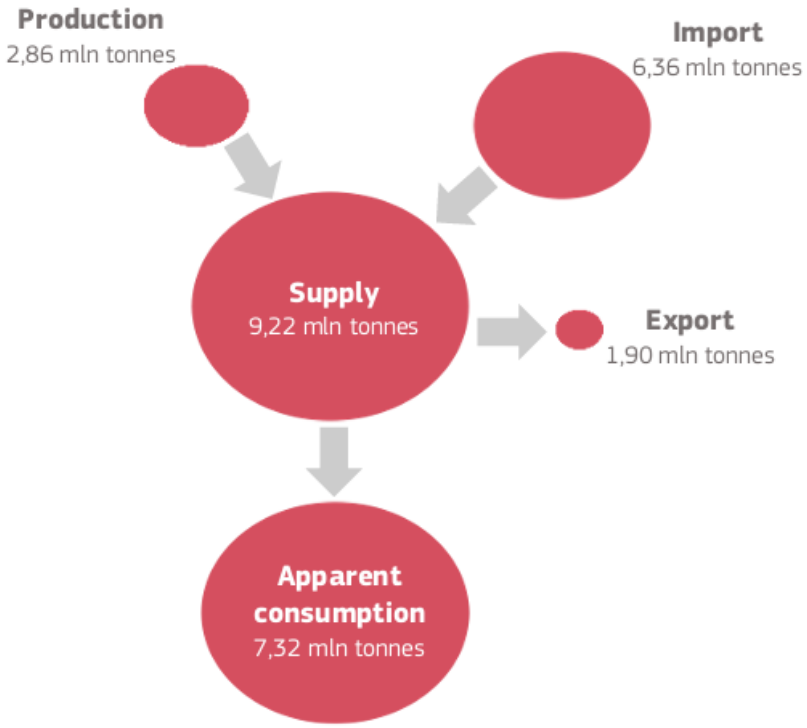
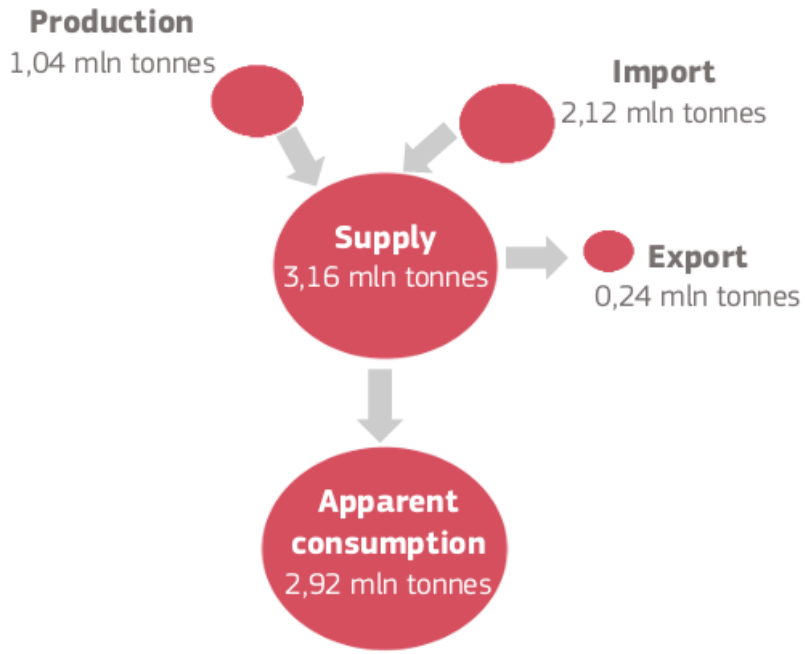
STRUCTURAL DEPENDENCY ON IMPORTED RAW MATERIALS

FISHERY PRODUCTS



AQUACULTURE PRODUCTS



Source: The EU Fish Market (EUMOFA, 2025)

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Commodity groups and share of total apparent consumption in 2023	Self-sufficiency rates									
	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Groundfish (25%)	25%	26%	23%	26%	24%	23%	22%	21%	20%	24%
Salmonids (13%)	18%	17%	19%	18%	18%	17%	17%	16%	15%	15%
Tuna and tuna-like species (12%)	40%	32%	34%	32%	38%	33%	29%	31%	29%	35%
Small pelagics (12%)	124%	115%	103%	104%	101%	98%	96%	95%	95%	86%
Bivalves and other molluscs and aquatic invertebrates (9%)	57%	63%	65%	75%	77%	80%	73%	74%	70%	70%
Crustaceans (8%)	18%	17%	17%	16%	19%	17%	16%	14%	15%	14%
Other marine fish[41] (7%)	71%	68%	66%	65%	61%	60%	59%	60%	58%	60%
Cephalopods (6%)	21%	18%	14%	13%	12%	12%	13%	12%	16%	14%
Freshwater fish (4%)	34%	36%	38%	42%	39%	39%	45%	47%	43%	43%
Miscellaneous aquatic products (3%)	18%	7%	17%	14%	14%	24%	17%	25%	22%	26%
Flatfish (2%)	68%	70%	65%	66%	63%	64%	67%	62%	57%	55%
Total	**46.1%**	**44.6%**	**44.0%**	**44.6%**	**43.4%**	**41.7%**	**38.9%**	**38.2%**	**37.4%**	**38.1%**

TABLE 8

SELF-SUFFICIENCY RATES OF TOP-15 MOST CONSUMED PRODUCTS IN THE EU (2023)

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources used can be found in the Methodological background.

Products[42] and share of total apparent consumption	Per capita consumption (kg, live weight equivalent)	Self-sufficiency rate
Tuna (12%)	2,68	34%
Salmon (10%)	2,39	1%
Alaska pollock (8%)	1,78	0%
Shrimps (7%)	1,59	11%
Cod (7%)	1,53	5%
Mussel (5%)	1,14	74%
Hake (4%)	1,01	40%
Herring (4%)	0,98	67%
Squid (3%)	0,61	15%
Surimi[43] (2%)	0,54	n.a.
Mackerel (2%)	0,50	87%
Sardine (2%)	0,49	67%
Trout (2%)	0,46	84%
Saithe (=Coalfish) (2%)	0,36	11%
Gilthead seabream (1%)	0,33	74%

ACCESS TO RAW MATERIALS

Ensuring sustainable and competitive access to fish raw materials – Main cost driver of a seafood product.

🌎 Global sourcing
↓
🏭 European processing industry
↓
➕ Added value, jobs and food supply
↓
🍽️ European consumers

- Cooperate with national producers
- Internationalization
  cross investments – Origin presence
- FTAs
  Secure diversified sourcing
- ATQs
  Support industrial continuity
- Aquaculture
  Important, but insufficient alone

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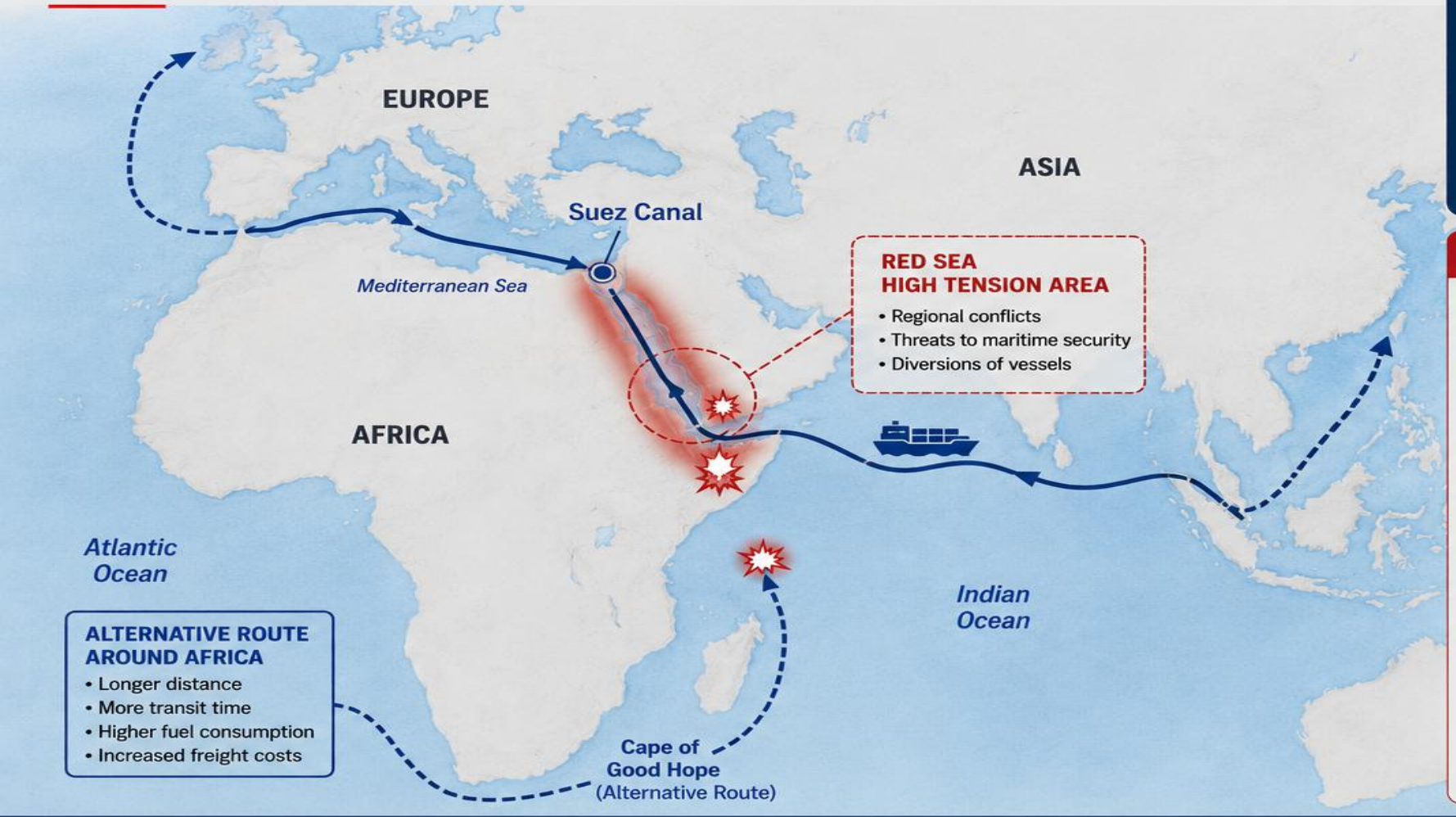
TRADE & GEOPOLITICS

Seafood supply chains are increasingly exposed to geopolitical instability



80–90%

Global seafood trade transported by sea

80–90%

- Significant increases in freight and fuel costs
- Additional transit time during major disruptions

KEY RISKS:

Maritime transport
Disruptions on key sea lanes affect the continuity of global seafood trade.

Red Sea
Regional instability and threats to maritime security increase operational risk.

Fuel costs
Rising fuel prices impact operating costs and overall supply chain expenses.

Freight delays
Diversions and congestion lead to delays and pressure across supply chains.

TAKEAWAY: The Suez Canal is a critical artery of global seafood trade. Tensions in the Red Sea are driving diversions, higher costs, and delays that directly impact the movement and reliability of seafood supply chains worldwide.

LEVEL PLAYING FIELD

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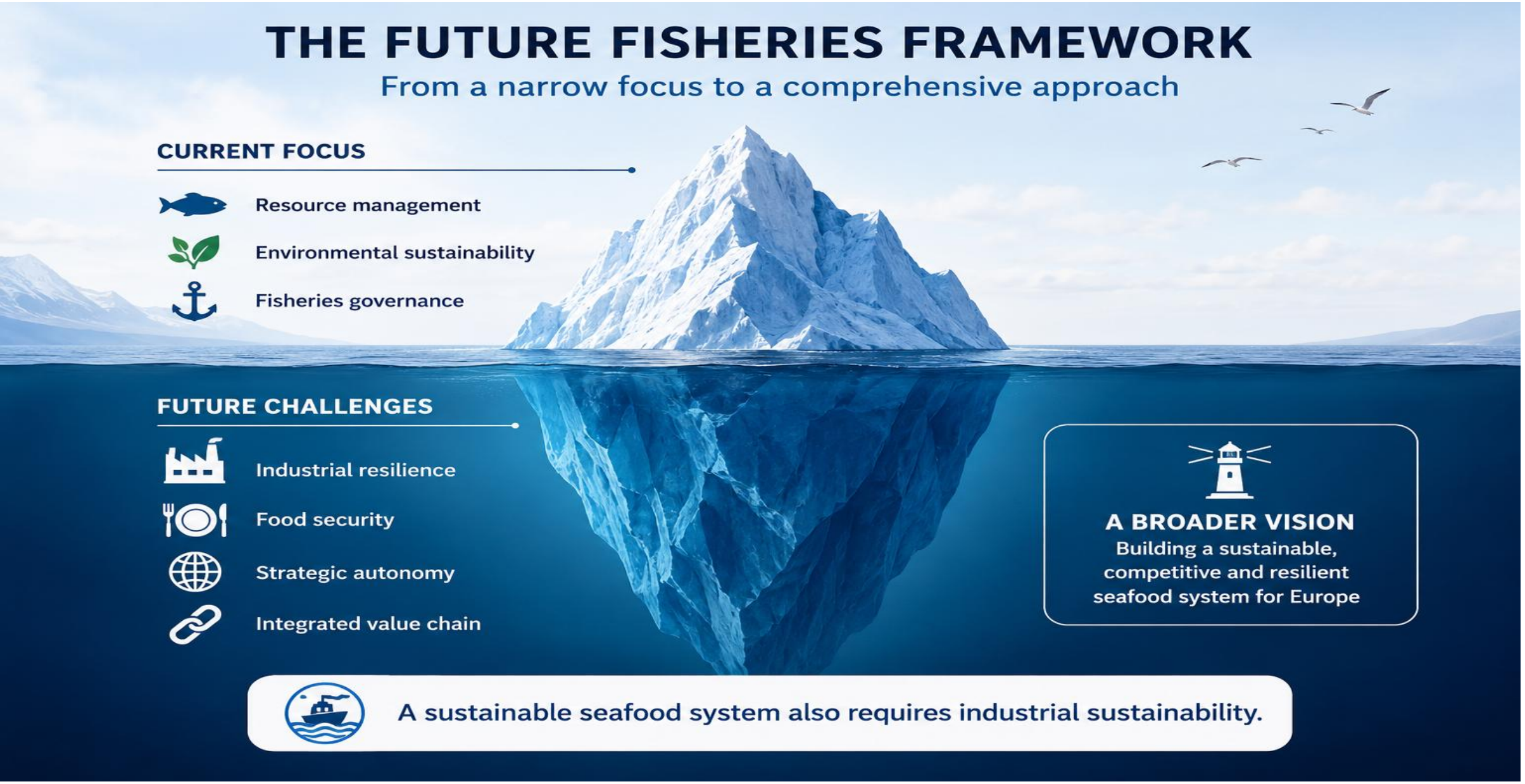
LEVEL PLAYING FIELD

- IUU REGULATION AS A CRITICAL ELEMENT – Cost product
  - Catch IT
  - EU Customs Union
  - Electronic traceability transmission
- Forced labour regulation
- Food-safety requirements - Contaminants

CFP UNDER REVISION



INNOVATION & COMPETITIVENESS

TABLE 9

APPARENT CONSUMPTION OF TOP 15 MOST CONSUMED PRODUCTS (2023)

Source: EUMOFA, based on EUROSTAT (online data codes: fish_ca_main, fish_aq2a and DS-045409) and FAO data. Details on the sources and on the methodological approach used for assessing the production method of imports and exports and the destination use of catches can be found in the Methodological background.

Products	Per capita consumption (kg, LWE)	Consumption evolution 2023/2022	% wild	% farmed
Tuna	2,68	-9%	98,2%	1,8%
Salmon	2,39	-5%	5,7%	94,3%
Alaska pollock	1,78	+7%	100%	0%
Shrimps	1,59	-6%	42,0%	58,0%
Cod	1,53	-6%	99,9%	0,1%
Mussel	1,14	-6%	7,1%	92,9%
Hake	1,01	-2%	100%	0%
Herring	0,98	+12%	100%	0%
Squid	0,61	-16%	100%	0%
Surimi	0,54	-10%	100%	0%
Mackerel	0,50	-9%	100%	0%
Sardine	0,49	-10%	100%	0%
Trout	0,46	-1%	0,9%	99,1%
Saithe (=Coalfish)	0,36	-3%	100%	0%
Gilthead seabream	0,33	+2%	2,4%	97,6%
Other products	6,48	+2%	77,4%	22,6%
Total	**22,89**	**-3%**	**71,5%**	**28,5%**

ANALYSIS

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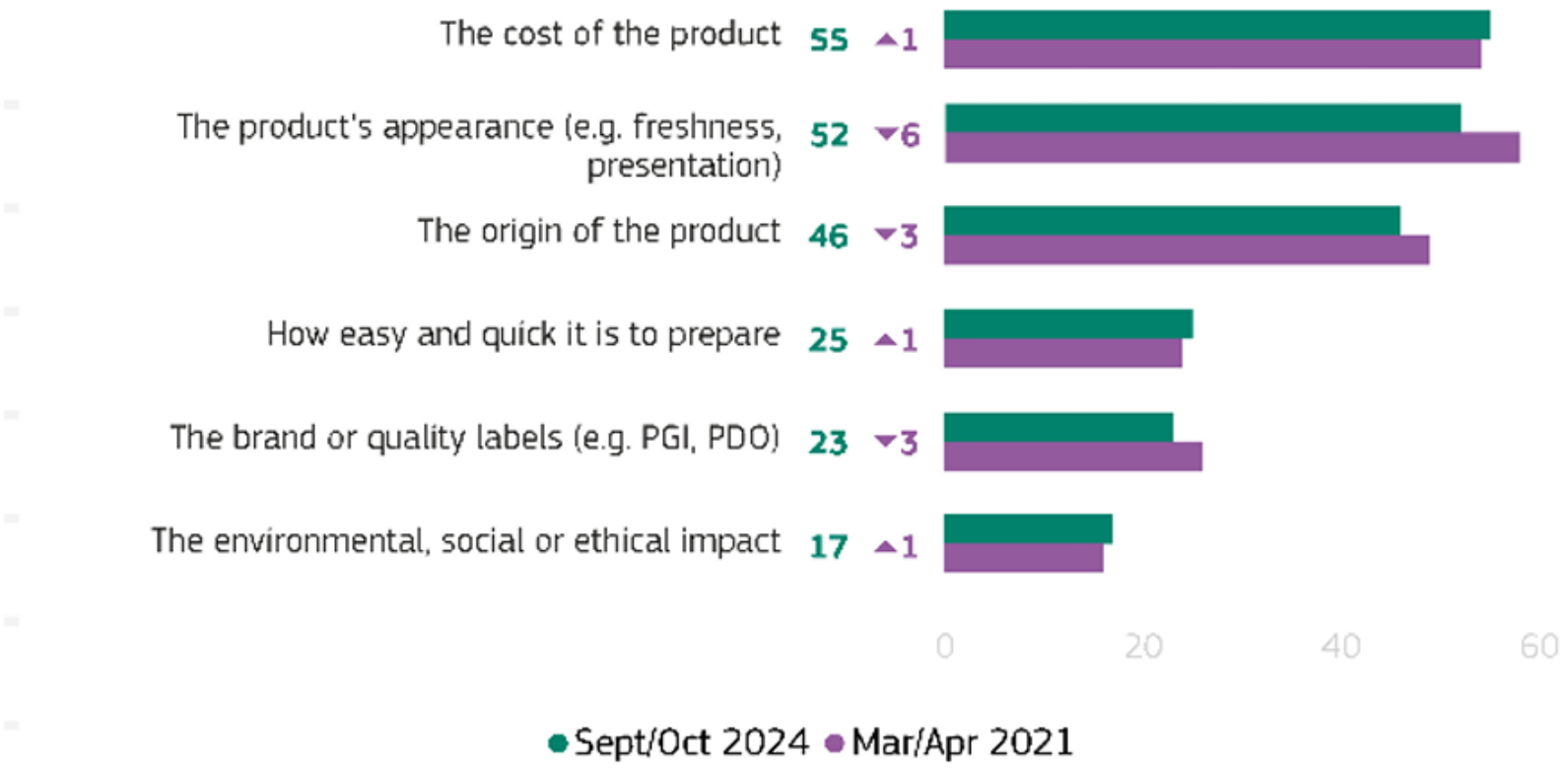
INNOVATION & COMPETITIVENESS

QB8. When you buy fishery and aquaculture products, which of the following aspects are the most important for you? (MAX. 3 ANSWERS) (EU27) (%)



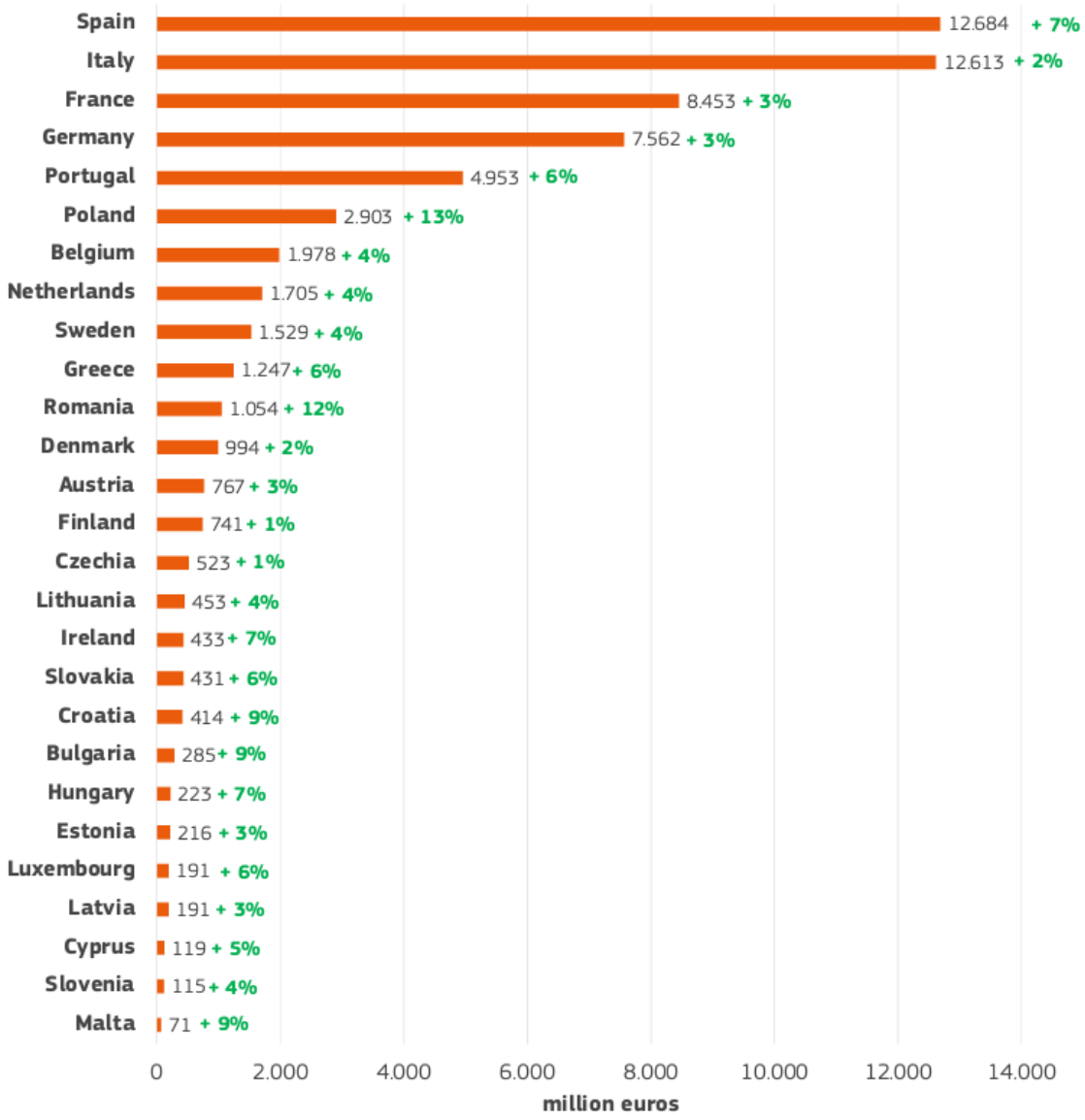
Sept/Oct 2024

INNOVATION & COMPETITIVENESS

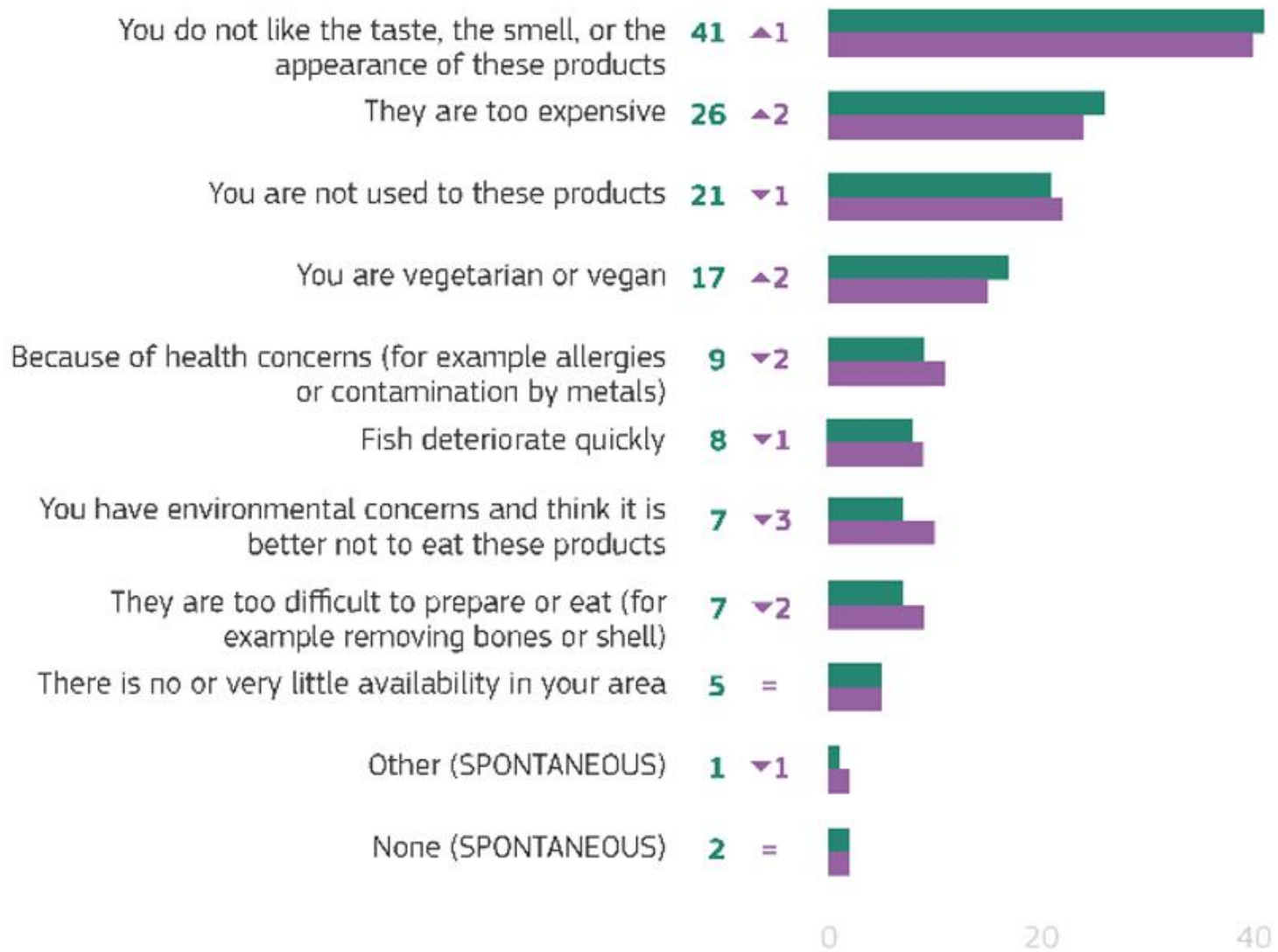
CHART 18

HOUSEHOLD NOMINAL EXPENDITURE ON FISHERY AND AQUACULTURE PRODUCTS IN 2024 AND % VARIATION 2024/2023 (out-of-home consumption is excluded)

Source: EUROSTAT
(online data code: prc_ppp_ind)
Purchasing Power Parities
PPPs – nominal expenditure



QB2. Which of the following are the main reasons why you never or almost never eat fishery or aquaculture products? (MULTIPLE ANSWERS POSSIBLE) (EU27) (%)



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ELSEVIER

Advances in Nutrition

Volume 3, Issue 1, January 2012, Pages 1-7

Omega-3 Fatty Acids EPA and DHA: Health Benefits Throughout Life

Omega-3 lo

Danielle Swanson [1], Robert Block [2], Shaker A. Mousa [1 3]

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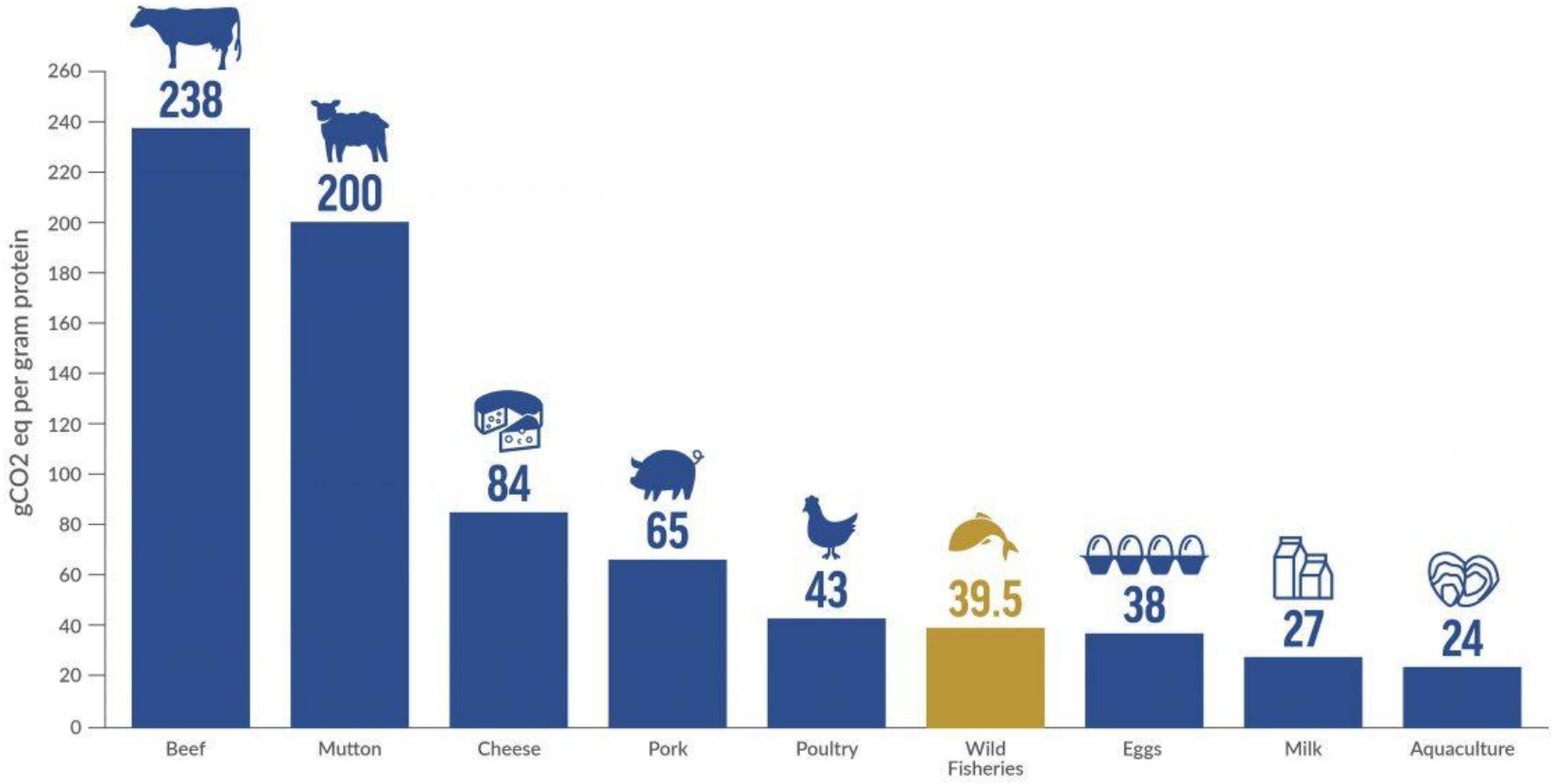
ANFACO CECOPESCA

CO_2e Emissions of Protein Sources



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INNOVATION & COMPETITIVENESS

INNOVATION AS A STRATEGIC LEVER

Innovation and biotechnology can strengthen Europe's competitiveness and sustainability

INNOVATION AREAS

- By-product valorisation
- New ingredients
- Functional ingredients
- Shelf-life innovation
- Sustainable packaging
- Marine biotechnology

INNOVATION CAN TRANSFORM SUSTAINABILITY CHALLENGES INTO INDUSTRIAL OPPORTUNITIES.

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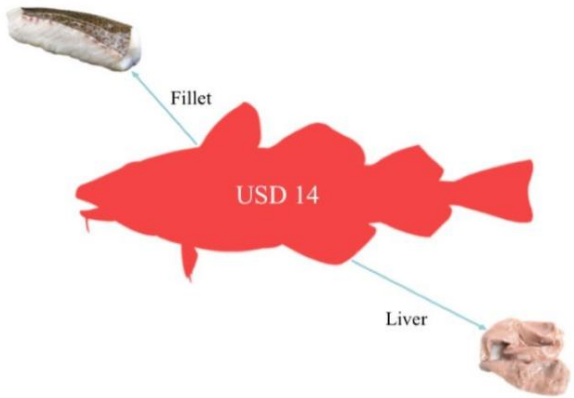
The traditional way



The 100% Fish

Validación solida, eficiente, alineada con la regulación y directamente aplicable en la industria

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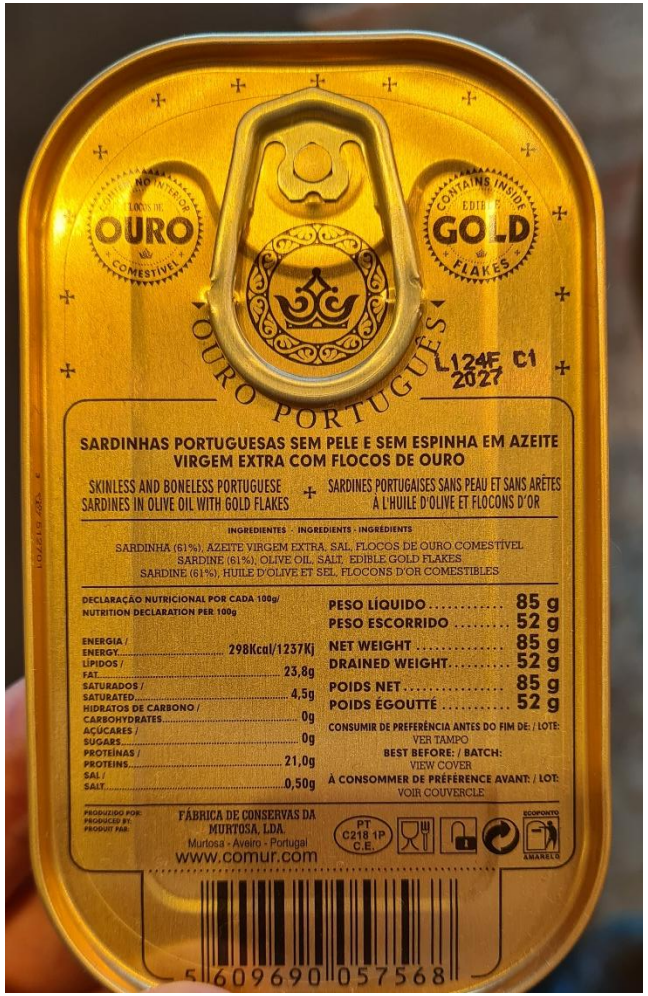
OURO
PORTUGUÊS
1942
OURO
PORTUGUÊS
1942
OURO
PORTUGUÊS
PORTUGUESE GOLD
SARDINES
100164


OURO
COMESTÍVEL
CONTAINS INSIDE
EDIBLE
GOLD
FLAKES
OURO PORTUGUÊS
L124E C1
2027
SARDINHAS PORTUGUESAS SEM PELE E SEM ESPINHA EM AZEITE VIRGEM EXTRA COM FLOCOS DE OURO
SKINLESS AND BONELESS PORTUGUESE SARDINES IN OLIVE OIL WITH GOLD FLAKES
SARDINES PORTUGAISES SANS PEAU ET SANS ARÊTES À L'HUILE D'OLIVE ET FLOCONS D'OR
INGREDIENTES · INGREDIENTS · INGRÉDIENTS
SARDINHA (61%), AZEITE VIRGEM EXTRA, SAL, FLOCOS DE OURO COMESTÍVEL
SARDINE (61%), OLIVE OIL, SALT, EDIBLE GOLD FLAKES
SARDINE (61%), HUILE D'OLIVE ET SEL, FLOCONS D'OR COMESTIBLES
DECLARAÇÃO NUTRICIONAL POR CADA 100g/ NUTRITION DECLARATION PER 100g
ENERGIA / ENERGY 298Kcal/1237Kj
LÍPIDOS / FAT 23,8g
SATURADOS / SATURATED 4,5g
HIDRATOS DE CARBONO / CARBOHYDRATES 0g
AÇÚCARES / SUGARS 0g
PROTEÍNAS / PROTEINS 21,0g
SAL / SALT 0,50g
PESO LÍQUIDO 85 g
PESO ESCORRIDO 52 g
NET WEIGHT 85 g
DRAINED WEIGHT 52 g
POIDS NET 85 g
POIDS ÉGOUTTÉ 52 g
CONSUMIR DE PREFERÊNCIA ANTES DO FIM DE: / LOTE: VER TAMPO
BEST BEFORE: / BATCH: VIEW COVER
À CONSOMMER DE PRÉFÉRENCE AVANT: / LOTE: VOIR COUVERCLE
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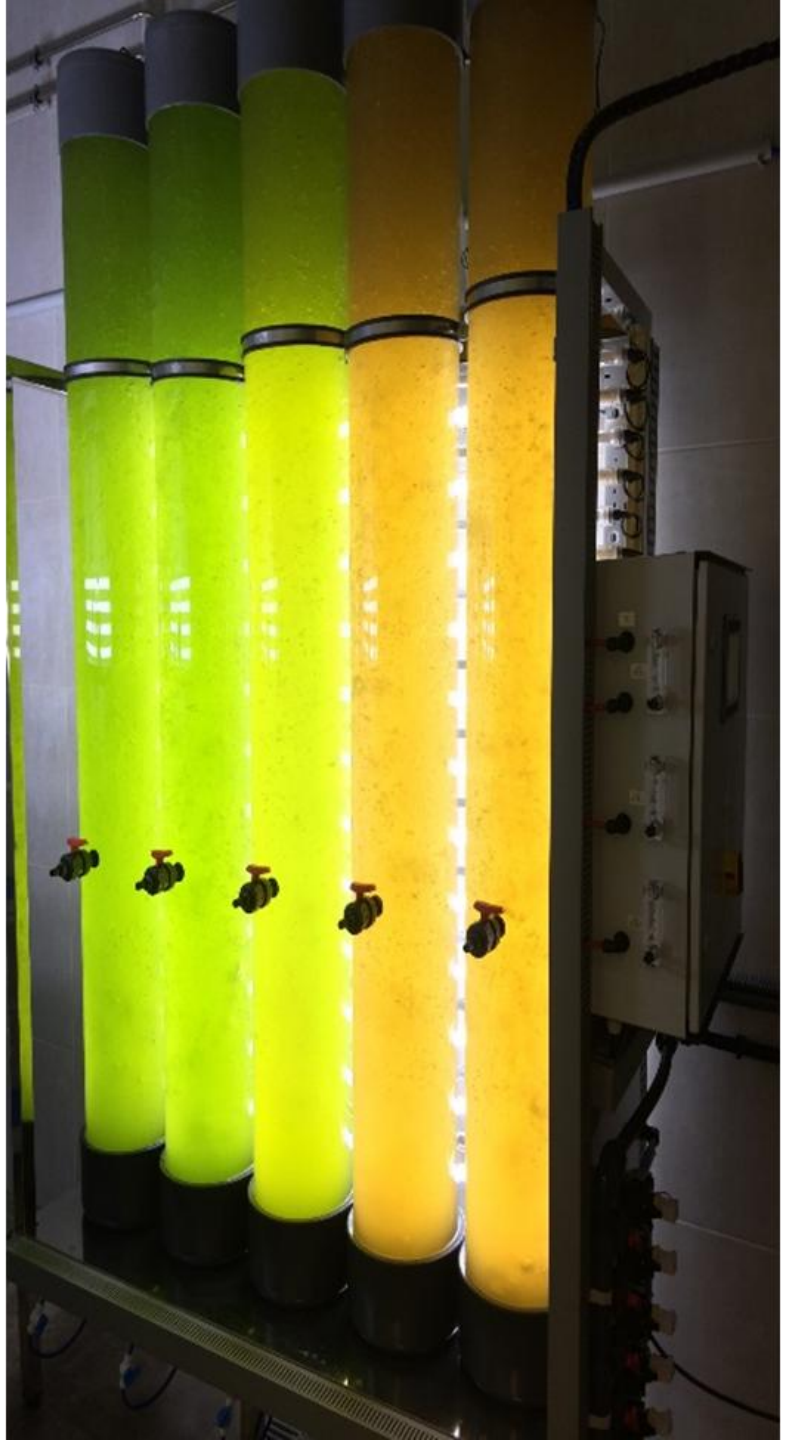



T G R


SpecTUNA

CASE STUDY: ANFACO-CYTMA

A regional ecosystem supporting Europe's seafood competitiveness

255+
Associated companies

100+
Employees and specialists

100+
International R&D projects

INDUSTRY REPRESENTATION

Connecting and defending the seafood value chain

TECHNOLOGY & INNOVATION

Applied research, technology development and transfer

CIRCULAR ECONOMY

Valorisation of marine resources and commitment to sustainability

ANFACO CYTMA

Industry • Innovation • Policy

REGULATORY & PUBLIC AFFAIRS

Bridging industry, science and policy. Advocating for fair and evidence-based regulation

EUROPEAN PROJECTS

Leading and participating in international R&D and innovation projects

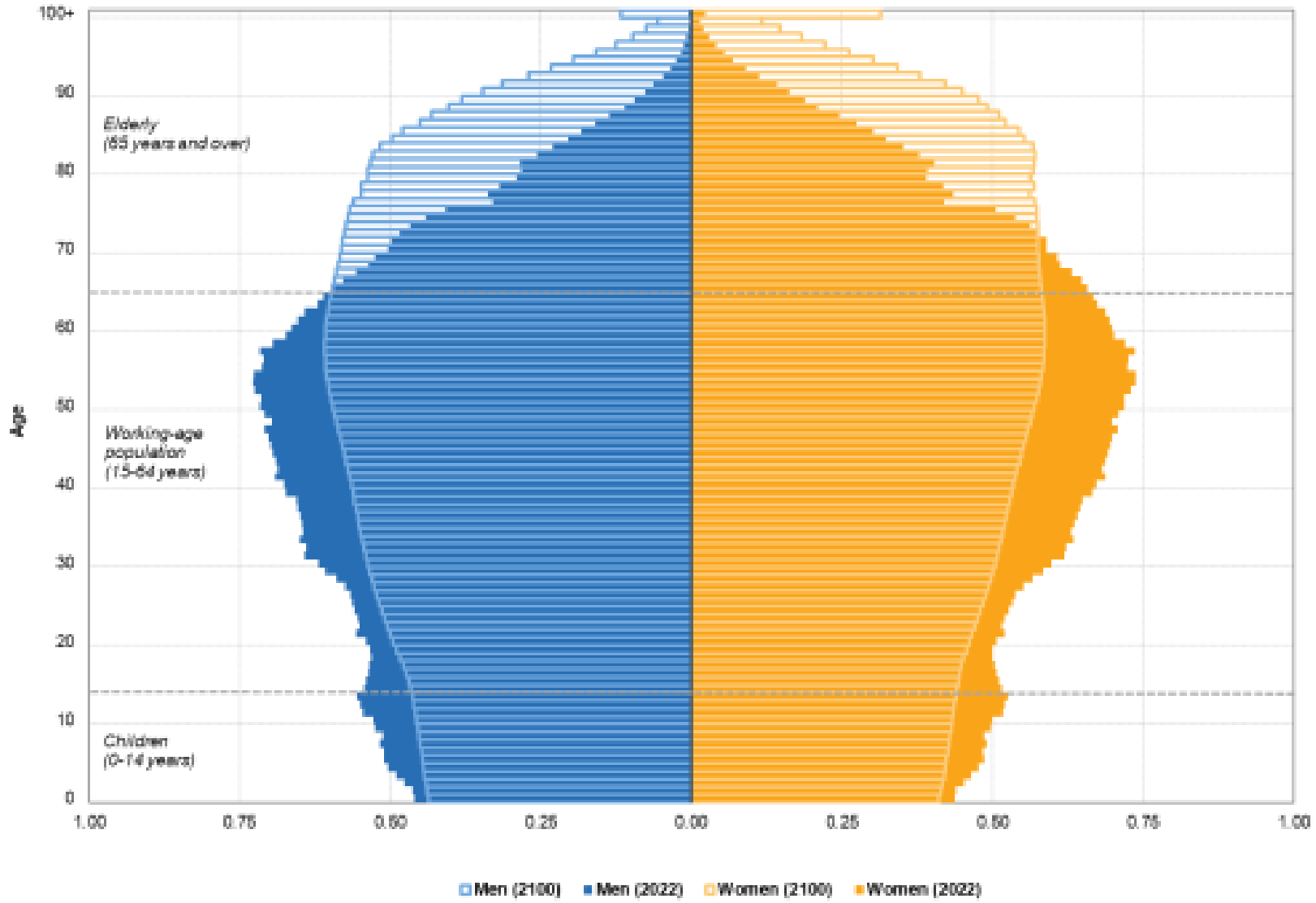
FOOD & NUTRITION

Developing healthy, safe and high-quality seafood products

Regional innovation ecosystems can strengthen Europe's competitiveness, resilience and food security.

Competitiveness • Innovation • Sustainability

Population pyramids, EU, 2022 and 2100
(% of total population)



Source: Eurostat (online data code: proj_23np)

eurostat

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Challenges and opportunities

Roberto C. Alonso Baptista de Sousa
Secretary General
direccion@anfaco.es

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