

Europe Seafood - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Europe Seafood Market size is estimated at 69.19 billion USD in 2025, and is expected to reach 71.62 billion USD by 2030, growing at a CAGR of 0.69% during the forecast period (2025-2030).

The expansion of aquaculture farms and processing facilities is propelling domestic seafood production in the region

- The majority of seafood consumed in the region is fish, and some of the most popularly consumed species are tuna, cod, salmon, and Alaska pollock. Tuna is the most consumed seafood species in Europe, which is further increasing with the rise of Asian cuisine restaurants in the region. In 2021, tuna consumption in the European Union reached 3.07 kg per capita, from 2.78 kg per capita in 2018. Fish is primarily consumed in the frozen form in Europe, making up more than 45% of total consumption in 2022. The European canned seafood processing sector is mostly concentrated in Southern Europe, where Spain, Italy, France, and Portugal are the key players. Europe still imports canned fish from non-European nations to meet the domestic demand due to its high consumption.
- Shrimps are projected to register the highest growth, with the sales value recording a growth of 3.13% during 2017-2022. Although quite small, organic shrimp consumption is predicted to increase as consumers become more socially and ecologically conscious. The European Union estimates that 62% of that shrimp comes from the wild and 38% from aquaculture, of which approximately 85% to 90% consists of Pacific white shrimp and about 10% black tiger shrimp.
- France was observed to dominate the market, occupying a share of 14.03% by value in 2022. The increasing demand for seafood in France is mainly due to consumers' taste preferences - 50% of people consumed seafood once or twice a week in 2021. Around 97% of the French population consumes seafood, and 32% said that they intend to consume more seafood products. Among seafood, fish occupied a market share of around 70%, followed by shrimp and other seafood like crabs and oysters.

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Growing health consciousness is primarily driving the seafood market across Europe

- Even though a few countries, such as Norway and Russia, produce significant quantities of seafood, Europe is a net importer of seafood. Value-added shrimp and canned fish products have the greatest potential in European markets. With large appetites for seafood, countries in southern Europe are the major consumers of seafood products in the region. France accounted for the major market share of seafood in Europe in 2022. Seafood sales in France increased by 11.89%, by value, from 2017 to 2022. The country's fish consumption is high owing to increasing consumer inclination in line with growing health consciousness. The growth in the seafood industry in France is anticipated to influence the European seafood market during the forecast period.
- The Netherlands is expected to be the fastest-growing country, registering a CAGR of 1.17% during the forecast period, owing to the fact that Dutch consumers are increasingly considering fish as a healthy, fresh, and natural alternative to red meat and poultry products. Moreover, processors are also developing and introducing innovative frozen and fresh meals and meal components containing fish. Due to its location in the North Sea, the Netherlands has a long tradition of catching and farming fish.
- Spain, France, Denmark, the Netherlands, Italy, Germany, and Belgium were the top importers in the past few years. Shrimp is the most imported species in the region. Shrimp sales in the region are experiencing significant growth compared to other seafood types and are expected to register a CAGR of 0.96% by value during the forecast period. Shrimp enters the market raw or cooked and has a wide range of forms, such as head-on shell-on (HOSO), headless shell-on (HLSO), and peeled.

Europe Seafood Market Trends

The region is focusing on sustainability and broadening the species' concentration

- The EU is the fifth-largest fishery and aquaculture producer worldwide, accounting for about 3% of global production. Around 78% of this production comes from fisheries and 22% from aquaculture. Spain, Denmark, and France are the largest producers in terms of volume in the EU. With growing global environmental concerns, the sustainable development of aquaculture is one of the main objectives of the common fisheries policy in the region. The European Green Deal also recognizes aquaculture production as a source of "low carbon" protein for food and feed.
- Aquaculture production in the region is very diverse in terms of species, farming, and methods of production, such as sea cages, ponds, raceways, and on-land recirculating aquaculture systems. In the EU, more than 45% of aquaculture production is shellfish, more than 30% is marine fish, and more than 20% is freshwater fish. Despite the diversity of fishes, EU fish production is largely concentrated on a few species, like salmon, sea bream, rainbow trout, and seabass.
- Russia accounted for about 20.36% share of the overall fish produced in the region in 2022. It is also one of the world's top producers of cod, making it a key market for the European market. However, due to the Russia-Ukraine War, the overall region is facing a shortage of fish as restrictions paused Russia's export of fish and other seafood. The long-restricted access to foreign markets for Russia's seafood industry, which is still highly dependent on exports despite recent efforts to promote domestically caught fish, creates an unpredictable future for the industry.

Boost in local production and growing expenditure on seafood will help in stabilizing the prices

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- In 2021, household expenditure on fish and seafood in Europe grew by 7% from 2020, continuing the upward trend between 2019 and 2020. This was much higher than the 1.5% inflation of prices for fishery and aquaculture products, suggesting that the region's households had spent more money on fish products.
- The market is heavily dependent on imports. In 2022, Europe imported fresh fish worth USD 25 billion. However, more products from local fisheries are finding their way to the European market. Various European countries encourage consumers to buy and consume regional seafood products to sell surpluses of locally produced seafood. For instance, in the Netherlands, initiatives such as Project Dichtbijvangst are involving Dutch youth and foodservice entrepreneurs to increase enthusiasm for North Sea fish. This will help the retailers and processors hold on to their prices by reducing the costs, which will lead to the availability of better-quality products at a cheaper price. The price demand has significant effects on the market price of the fish. Since the fisherman, middleman, and fish vendors have no fixed prices on the catch of the fish, some of them adjust their prices depending on the factors they have experienced.
- Salmons were the most priced fish species in the region during the first half of 2023 at USD 41.29 per kg, followed by red seabream and common sole priced at around USD 34.77 and USD 30.70, respectively. The prices of species also vary with their production conditions and packaging. For instance, fish labeled as organic and vacuum packed are considered premium and sold at a higher price in the market.

Europe Seafood Industry Overview

The Europe Seafood Market is fragmented, with the top five companies occupying 9.68%. The major players in this market are Austevoll Seafood ASA, Bolton Group SRL, Grieg Seafood ASA, Mowi ASA and Thai Union Group PCL (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 INTRODUCTION

2.1 Study Assumptions & Market Definition

2.2 Scope of the Study?

2.3 Research Methodology

3 KEY INDUSTRY TRENDS

3.1 Price Trends

3.1.1 Fish

3.1.2 Shrimp

3.2 Production Trends

3.2.1 Fish

3.2.2 Shrimp

3.3 Regulatory Framework

3.3.1 France

3.3.2 Germany

3.3.3 Italy

3.3.4 United Kingdom

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3.4 Value Chain & Distribution Channel Analysis

4 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

4.1 Type

4.1.1 Fish

4.1.2 Shrimp

4.1.3 Other Seafood

4.2 Form

4.2.1 Canned

4.2.2 Fresh / Chilled

4.2.3 Frozen

4.2.4 Processed

4.3 Distribution Channel

4.3.1 Off-Trade

4.3.1.1 Convenience Stores

4.3.1.2 Online Channel

4.3.1.3 Supermarkets and Hypermarkets

4.3.1.4 Others

4.3.2 On-Trade

4.4 Country

4.4.1 France

4.4.2 Germany

4.4.3 Italy

4.4.4 Netherlands

4.4.5 Russia

4.4.6 Spain

4.4.7 United Kingdom

4.4.8 Rest of Europe

5 COMPETITIVE LANDSCAPE

5.1 Key Strategic Moves

5.2 Market Share Analysis

5.3 Company Landscape

5.4 Company Profiles (includes Global level Overview, Market level overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and analysis of Recent Developments)

5.4.1 Associated Seafoods Limited

5.4.2 Austevoll Seafood ASA

5.4.3 Bolton Group SRL

5.4.4 Grieg Seafood ASA

5.4.5 Iceland Seafood International hf

5.4.6 Kilic Seafood Co.

5.4.7 Mowi ASA

5.4.8 Nomad Foods Limited

5.4.9 Nordic Seafood AS

5.4.10 Royal Greenland AS

5.4.11 Seafood King EU BV

5.4.12 Sofina Foods

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- 5.4.13 Sykes Seafood Ltd
- 5.4.14 Thai Union Group PCL

6 KEY STRATEGIC QUESTIONS FOR SEAFOOD INDUSTRY CEOS

7 APPENDIX

- 7.1 Global Overview
 - 7.1.1 Overview
 - 7.1.2 Porter's Five Forces Framework
 - 7.1.3 Global Value Chain Analysis
 - 7.1.4 Market Dynamics (DROs)
- 7.2 Sources & References
- 7.3 List of Tables & Figures
- 7.4 Primary Insights
- 7.5 Data Pack
- 7.6 Glossary of Terms

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