

FUTURE PROSPECTS FOR FISH AND FISHERY PRODUCTS

4. Fish consumption in the European Union in 2015 and 2030

Part 2. Country projections



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FUTURE PROSPECTS FOR FISH AND FISHERY PRODUCTS
4. Fish consumption in the European Union in 2015 and 2030
Part 2. Country projections

by

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ISBN 978-92-5-106050-6

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PREPARATION OF THIS DOCUMENT

At the end of the 1990s, the FAO Fisheries Department initiated a project aimed at projecting world fish consumption by 2015/2020. A number of component studies were initiated. They included geographically limited studies (North America, Europe, Japan, China) and a review of analytical work undertaken on fish consumption and demand for fish. However, it was not feasible to integrate these studies because of difficulties encountered in reconciling assumptions and methodologies. It has therefore been decided to publish the completed component studies.

The present study, *Fish consumption in the European Union in 2015 and 2030 – Part 2. Country projections*, is the fourth of a series of papers (still in preparation) intended to be published under the main title *Future prospects for fish and fishery products*. This document was written by Mr Pierre Failler in December 2003 and is the companion study to *Fish consumption in the European Union in 2015 and 2030 – Part 1. European overview* by the same author.

ACKNOWLEDGEMENTS

I would like to thank first Ulf Wijkström, former Chief of the Development and Planning Service (FIEP), in the Fisheries and Aquaculture Department at the Food and Agriculture Organization (FAO), Rome, for his patience and kindness throughout the completion of this study.

Gilles Van de Walle, Nicolas Lecrivain, Amber Himbes, Roger Lewins have contributed at various stages of the study. David Sampson, actual Director of the Centre for the Economics and Management of Aquatic Resources (CEMARE), has provided many good comments and advice on the contents and the structure of the report. Nicola Waterman has done a tremendous job by improving the English language. Simon Mardle, Sean Pascoe and Trond Bjondal significantly contributed to improving the methodology presentation. Thank you to all of them.

At last, I would like to thank all the people from the various fishery or agriculture ministries in Europe who gave the data I requested. Special thanks to Philippe Paquette from OFRIMER, France, and Sophie Girard from the French Research Institute for Exploitation of the Sea (IFREMER), France, who gave me a lot of information on fish consumption in Europe.

Failler, P.

Future prospects for fish and fishery products. 4. Fish consumption in the European Union in 2015 and 2030. Part 2. Country projections.

FAO Fisheries Circular. No. 972/4, Part 2. Rome, FAO. 2008. 392p.

ABSTRACT

This report presents the major results by country for fish consumption (consumption per capita and apparent consumption), production (captures and aquaculture and commodities) and fish trade (exports and imports) estimations and projections for 28 countries in Europe from 1989 to 2030.

The increasing demand of ready-to-eat products are projected for everywhere in Europe in 2030 but with a more marked trend in the western countries because of high purchasing power in the region. Changes in consumption are mainly changes in commodities rather than species: the same species will be consumed in 2030 but in a different form. Eastern European countries will progressively catch up and conform to the consumption pattern of the Western countries. The improvement of their economies and changing consumption habits will slowly allow Eastern countries to develop a demand-driven market rather than the current supply-driven one. But, behind the apparent standardisation of consumption, regional differences will still exist: a Spanish consumer will not have the same consumption pattern as a Swedish or a Romanian one. National preferences will be conditioned through the net supply of commodities that respect historical tastes and habits but also integrate modern living conditions.

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FOREWORD

In 2000, when this study was launched, the European Union was made up of 15 Member States: Germany, Austria, Belgium, Denmark, Spain, Finland, France, Greece, Italy, Ireland, Luxembourg, Netherlands, Portugal, United Kingdom and Sweden. At that time, the prospects for European Union (EU) enlargement in the coming years was of concern to several countries that were due to join, some of which were likely to become members in 2004. The first wave would likely consist of Cyprus, the Czech Republic, Estonia, Hungary and Poland. The second wave, in 2008, would add seven others: Bulgaria, Lithuania, Latvia, Malta, Slovakia, Slovenia and Romania. In addition to these countries, Norway, a Member State of the European Economic Area¹ (EEA) might become a member of the European Union before 2010. On the whole, within the framework of this work, there were 13 additional countries that could be considered future members of the European Union alongside the 15 States already members in 2000.

The choice and timing of membership of the EU for these countries has been made according to the prospects indicated by the European Commission at the end of 2000. However, they do not constitute anything like a formal engagement on behalf of the Commission or of any other institution like FAO. The present work, and in fact the membership or not of certain countries, remains an exercise in futurology with all the risks that that comprises. Thus, certain countries not mentioned in this work may just as easily become members whereas others pre-identified may not yet be members in 2030². The possible date of adhesion doesn't affect the presentation of the results since data and results are presented for the set of 28 countries from 1989 to 2030 (except for some countries when the data start in 1991 or 1992).

The term EU-15 in the text refers to the European Union in its current 15-member form. EUR-21 and EUR-28 refer to the possible 21-member and thereafter 28-member union of the future, following the adhesion of first six new countries (EUR-6 NC) and then a further seven (EUR-7 NC). The terminology "Europe" was selected in the place of "European Union" in order to avoid any misunderstandings on the political direction of the term.

¹ Together with Liechtenstein and Iceland. The EEA and the EU are bound through several agreements and co-operations generally relating to trade, environmental protection, social security, education, research and public statistics.

² In fact, at the time this work is going to print, the enlargement process concerns 10 countries that will join the EU in May 2004. The countries are Czech Republic, Estonia, Cyprus, Latvia, Lithuania, Hungary, Malta, Poland, Slovenia and Slovakia.