

## INTRODUCTION

### Objectives

The FAO is currently preparing a document called *Agriculture Horizon 2015/2030*. This work aims to describe the current situation of agriculture, sylviculture and fisheries at the time horizons of 2015 and 2030. In this document, a chapter will present what fisheries and aquaculture could be, taking into account plausible evolutions for landings and production, and trends in consumption. In order to write this chapter, the FAO Fisheries Department is undertaking studies of long-term projections for fish consumption in China, Japan, North America and Europe.

In this report, current demand, supply and consumption of major seafood products and species in Europe are analysed for the period 1989-1998 in order to define trends and a basis for assumptions up to 2030. Then, future characteristics of fish consumption are presented for the period 2005-2030.

### Scope of the study

The enlargement of the European Union is taken into account in this study (for a history of the European Union construction, refer to Annex 1). The map below presents the evolution of the enlargement process that seems reasonable to envisage today. The first six countries most likely to be part of the EU before 2005 are Cyprus, the Czech Republic, Estonia, Hungary, Poland, and Slovenia. The second group of countries that could reasonably join the EU before 2010 is Bulgaria, Latvia, Lithuania, Malta, Romania and Slovakia. In addition to these countries, it seemed appropriate to consider Norway becoming a member state before 2010 even if this Scandinavian country has not currently initiated a process of adhesion.

Within the framework of this study the size of the EU is thus: 15 Member States in 2000 (EU-15), 21 in 2005 (EU-21), and 28 in 2010 (EU-28). The process of EU enlargement after 2010 is not taken in the account because of the absence of other countries within the process of negotiation<sup>3</sup> at the time of the realization of this study.

### Novelty of the method

The method developed here has never been used in previous attempts to measure the current and future per capita fish consumption. The novelty of the method used here is the creation of a link between the two traditional methods used to assess present and past fish consumption<sup>4</sup>. The first method derives the human fish consumption from the net supply, which is itself the sum of production (capture + aquaculture) and imports less exports. It is a supply side consumption function that expresses the consumption in terms of quantities of fish by species group. The second method, in contrast, is a demand side consumption function that assesses the fish consumption through some consumption panels and focuses on consumption habits and changes. The consumption is here expressed in terms of fish commodities rather than species.

The first method is used for the purpose of food security and other macro policies and the second one for the industry and marketing sectors. Up to now no one has attempted to link the two methods due to important data requirements and data standardization. The work presented hereafter developed a new approach to define fish consumption both from the supply and demand sides and express consumption both in terms of species and commodities.

### Contents of the report

The report is organized in four main parts. The methodology part explains in detail how the projections were made. Part 2 shows the projections for consumption, net supply, capture, aquaculture, imports and exports up to 2030 for the former EU-15 countries (Austria, Belgium, Denmark, Finland, France, Germany, Greece, Ireland, Italy, Luxembourg, Netherlands, Portugal, Spain, Sweden and

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<sup>3</sup> Among other petitioning countries, Turkey does not currently fulfil the adherence criteria.

<sup>4</sup> A third method is used to estimate future fish consumption (see the Methodology chapter).

United Kingdom). Part 3 presents results for the EUR-6 NC countries that should join the EU in 2004 (Cyprus, the Czech Republic, Estonia, Hungary, Poland, and Slovenia) and part 4 for the EUR-7 NC countries (Bulgaria, Latvia, Lithuania, Malta, Romania and Slovakia) and Norway that should join the EU respectively by 2008 and 2010.

### EU 2000



### EU 2005



### EU 2010



### EU 2030



Figure 1: Enlargement of the European Union