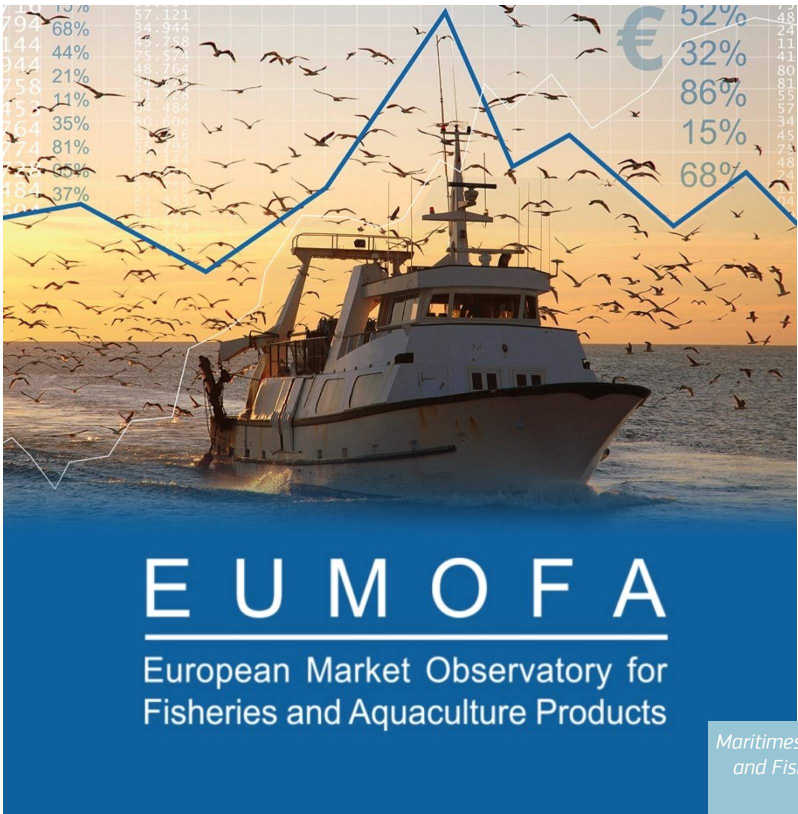
CASE STUDY

WHOLESALE IN THE EU



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List of acronyms

B2B	Business to Business
B2C	Business to Consumer
EU	European Union
FAO	Food and Agriculture Organisation of the United Nations
FAPs	Fisheries and Aquaculture Products
HoReCa	Hotels, Restaurants and Cafés/Catering
MS	Member States
NACE	Statistical Classification of Economic Activities in the European Community
SME	Small and Medium Enterprises

Summary

The study analyses the wholesale sector in fisheries and aquaculture products (FAPs) in the EU, with a focus on a selection of Member States.

Wholesalers are B2B operators who play a crucial role in the fisheries and aquaculture sectors by aggregating and distributing products from various producers to buyers such as restaurants and retailers, effectively connecting sellers with buyers. They facilitate market access both domestically and internationally and are essential for logistics and cold chain management. Wholesalers also handle traceability and compliance to meet regulatory and customer demands for transparency and sustainability.

While there is a shared understanding of the term wholesalers across the countries analysed in this study, differences exist regarding their roles within the supply chain (e.g., types of suppliers and customers) and the scope of their activities (e.g., strictly wholesaling versus including activities such as processing or distribution).

There is a strong network of wholesalers in Spain, Italy and France, predominantly micro and small enterprises, especially in Italy and Spain. Along with Germany, these countries are characterised by the presence of well-established wholesale markets, which play a crucial role in the fisheries sector, in terms of logistics, quality, transparency, etc.

In contrast, in countries such as Denmark, the Netherlands and Sweden, wholesalers in the strict sense of the term are less present, due to a strong vertical integration and the dominance of larger companies covering multiple supply chain stages. Wholesale markets are not present in these countries (except one wholesale market in Denmark).

Across Member States, wholesalers are increasingly diversifying their operations. Even in countries where small enterprises are predominant such as Italy, Spain and France, wholesalers are integrating processing activities such as filleting, cooking, and freezing to meet the growing demand for ready-to-cook and ready-to-eat products, leading to an overlap with other operators and activities within the supply chain.

The evolution of the sector from highly specialised companies focused on a single activity to multi-activity companies combining various operations makes the definition of a specific NACE[1] code for wholesaling activities less meaningful. Consequently, the number of enterprises recorded under the NACE code for wholesalers often fails to provide an accurate overview of the wholesale sector.

Additionally, there is a strong trend towards sector concentration with larger companies optimising costs and increasing bargaining power.

[1] Statistical Classification of Economic Activities in the European Community

1. SCOPE AND CONTENT

This study aims to provide an overview of the wholesale sector for fisheries and aquaculture value chains in the EU. The objectives are to:

- provide a description of the sector, including the definition and activities covered;
- provide an overview of the types of companies concerned in the different MS;
- provide an overview of the role of wholesale markets in the fisheries and aquaculture sector;
- identify the sources of information related to the wholesale stage.

The study covers wholesale activities, in particular companies involved in the wholesaling of FAPs (recorded in official registers under the NACE Code 48.36).

The report is based on desk research (national studies and statistics) and interviews targeting primarily wholesalers in the following Member Stated:

- Denmark;
- France;
- Germany;
- Italy;
- Sweden;
- Spain;
- The Netherlands.

These Member States have been selected to provide an overview of the wholesale in the EU, by taking into account different situations, in terms of the role and place of wholesalers in the supply chains.

2. DEFINITIONS AND ACTIVITIES COVERED

2.1. Definitions and classifications of wholesalers across Member States

Eurostat considers the definition of the Organisation for Economic Co-operation and Development (OECD), according to which wholesale trade refers to the sale of goods in bulk to resellers, professional users or groups, who then sell the products to final consumers[2]. There are different types of wholesalers that are recorded in the official records under specific NACE codes. Two of them may deal with FAPs:

- 4836: Wholesale of other food, including fish, crustaceans and molluscs
- 4639: Non-specialised wholesale of food, beverages and tobacco

Wholesalers' operations typically include the following activities:

- **Aggregation and distribution:** Wholesalers act as intermediaries who collect products from multiple producers and distribute them to various buyers, including restaurants, retailers, etc. Their key role is to connect sellers with buyers. Buyers often have diverse needs, in terms of the type of products, quality, certifications and labelling. Thanks to their network, wholesalers fulfil these requirements, supplying their customers with the desired product volumes and quality.
- **Market access:** they facilitate access to domestic and international markets, often acting as intermediaries.
- **Logistics and cold chain management:** Wholesalers are responsible for maintaining product quality through cold storage, efficient transport, and handling, which is crucial for the FAPs.
- **Traceability and compliance:** Wholesalers must track product information (e.g. origin, quality, species name, fishing area, etc.) to meet regulatory and customers' requirements for transparency and sustainability.

Additionally, wholesalers have increasingly integrated **processing activities**, such as filleting, cooking, and freezing, to their operations. This shift aims to meet the customer demands for products that are ready to cook or ready to eat. As a result, there is a growing overlap between traditional wholesale roles and other roles within the supply chain, as outlined in the section below.

The analysis of terms and definitions used in the Member States covered by the study indicates that, while there is a shared understanding of the term of wholesalers across these countries, differences exist regarding their place in the supply chain (e.g., their suppliers and customers) and the scope of their activities (e.g., strictly wholesaling versus including activities such as processing or distribution). These variations are further detailed in Section 5, which provides Member State-specific insights.

One of the hypotheses of this study was that some Member States use the term "trader" to refer to wholesalers. The findings indicate that the term "trader" is rather generic and includes different types of activities, including both B2B and B2C operators. In Denmark, trader typically refers to B2C operators, unlike wholesalers. In Italy, trader refers to any type of merchant, whether operating at the wholesale or retail level, with an important difference according to which trader can facilitate deals between buyers and sellers but without necessarily undertaking physical processing of goods. In contrast, wholesalers typically have physical storage facilities and may also be involved in processing or packaging.

[2] https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Glossary:Wholesale_trade#:~:text=Wholesale%20trade%20refers%20to%20the,the%20products%20to%20final%20consumers.

2.2. Overlaps with other activities

The section below analyses the overlap between wholesalers of FAPs (i.e. recorded under the NACE code 48.36) and the following activities:

- 10.20[3] - Processing and preserving of fish, crustaceans and molluscs
- 47.23[4] - Retail sale of fish, crustaceans and molluscs in specialised stores
- 46.39 - Non-specialised wholesale of food, beverages and tobacco

Insights from Member States indicate that, in countries with a traditional network of wholesalers (e.g. Italy, Spain, France, Germany), the wholesale sector is increasingly integrating processing activities, largely driven by the evolution of consumer demand and the need for value-added services. This trend makes it difficult to clearly differentiate wholesaling and other activities.

For instance, in France, the strong trend to integrate processing activities has blurred the distinction between wholesalers and *mareyeurs*[5] (i.e. mareyeurs refer to first buyers and processors) who traditionally supply wholesalers. The distinction is further complicated when *mareyeurs* bypass wholesalers to sell directly to retailers, restaurants, and fishmongers. In Spain, *mayoristas en destino*[6] have significantly diversified their activities, incorporating other activities such as filleting, cooking, preserving, smoking, and distribution.

In other countries, like Sweden and the Netherlands, vertically integrated companies highlight the presence of multi-activity businesses that combine wholesaling with other roles across the supply chain.

While wholesalers, recorded under the NACE code 48.36 can be involved in other activities (as illustrated above), other operators in the supply chain, recorded under different NACE codes, can also participate in wholesaling:

- Non-specialised wholesalers contribute significantly to the fisheries and aquaculture sectors, often serving the HoReCa sector with a smaller range of products in comparison to fisheries-specialised wholesalers. This is particularly pronounced in Denmark, Italy and France.
- Specialised retailers generally focus on retail, although in Italy and the Netherlands, fishmongers occasionally engage in wholesale activities.
- Seafood processors frequently overlap with wholesale activities, particularly within vertically integrated companies.

This overlap shows that NACE codes, which are based on specific activities, no longer fully reflect how companies operate (becoming increasingly multi-activity). As a result, the number of enterprises listed under a particular NACE code may not accurately represent their actual activities.

[3] NACE code 10.20 includes preparation and preservation of fish, crustaceans and molluscs: freezing, deep-freezing, drying, cooking, smoking, salting, immersing in brine, canning etc.

[4] NACE code 47.23 includes retail sale of fish, other seafood and products thereof.

[5] *Mareyeurs* (present in France): are operators within the seafood supply chain who specialize in the purchase, processing, and distribution of fish and aquaculture products. They typically buy products directly from auctions or fishing vessels, undertake tasks such as cleaning, filleting, and packaging, and then sell these processed products to wholesalers, retailers, or food service providers. *Mareyeurs* play a critical role in adding value to raw fish and aquaculture products by preparing it for further distribution while ensuring product quality and meeting market demands.

[6] *Mayoristas en destino* (present in Spain)*:* One type of wholesalers (there are two in Spain). They are based in the consumption areas. They buy products from the other type of wholesalers and sell to fishmongers, retailers ant to lesser extent to HoReCa services.

3. STRUCTURE AND EVOLUTION OF THE WHOLESALE SECTOR

The definitions provided above indicate a significant overlap between processing, wholesaling and other related activities in most Member States. Consequently, the number of enterprises recorded under the NACE code 48.36 (see Annex 1) often fails to provide an accurate overview of the wholesale sector. In fact, the fisheries and aquaculture sector has evolved from highly specialised companies focused on a single activity to multi-activity companies combining various operations.

The wholesale sector in Spain and Italy is predominantly composed of micro and medium-sized enterprises. Whereas, it is mainly dominated by larger companies in Denmark, the Netherlands, Sweden and to a lesser extent in Germany. In France, the sector was dominated by small companies, but there has been a strong concentration trend in recent years.

The most notable evolution of the wholesale sector across Member States covered by this study is the **diversification of activities**. Wholesale companies have expanded into activities such as processing, freezing, storage, and distribution to meet the growing and changing demands of the fisheries and aquaculture markets. Additionally, there is a growing need to reduce intermediaries in the value chain and to add value to products, particularly by offering ready-to-cook or ready-to-eat products.

The sector has also experienced significant **consolidation** in recent years, particularly in response to crises affecting the fisheries and aquaculture industries. These challenges, in addition to supply difficulties, have weakened smaller companies, accelerating the concentration trend. A strong consolidation trend has been observed in France, Spain and Denmark, while a slower trend is observed in Italy.

The **vertical integration** is also an increasing trend, but in different degrees depending on the Member States. In Italy, based on interviews, it is estimated that 30-35% of the major wholesalers have significant integration with other parts of the value chain. This integration is more common with processing and retail activities than with fishing operations. On the contrary, in Denmark, vertical integration is seen within the fishing sector. In Sweden, this integration is illustrated by several companies being owned by Norwegian companies with activity in the fish and aquaculture sector. In the Netherlands, vertically integrated companies are well established in both the fisheries and aquaculture sectors. In France, while some companies demonstrate vertical integration, the overall trend remains limited.

4. ROLE AND OVERVIEW OF THE WHOLESALE MARKETS

According to Food and Agriculture Organisation (FAO), the primary objective of wholesale markets is to improve efficiency within the food distribution system. By centralising transactions in one location, streamlining the transaction processes, simplifying logistics, and separating wholesale and retail functions in the distribution system, wholesale markets promote greater transparency and better price formation through a clearer alignment of supply and demand. Additionally, improved storage and handling practices significantly reduce post-harvest losses, especially in the case of perishable products[7].

In the fisheries and aquaculture supply chains, wholesaler markets play a crucial role in serving as a hub where FAPs are aggregated and distributed to various downstream channels. In urban centres, wholesale markets provide a focal point for the sale and redistribution of FAPs, ensuring both coastal and inland regions have access to a diverse range of FAPs. They also provide essential services such as handling and storage facilities, which help to maintain product quality. In theory, bulk purchasing and centralised logistics reduce costs for both suppliers and buyers, enabling economies of scale and making products more affordable. However, wholesale market fees in some Member States have become very high, making these costs more difficult to bear.

In the Member States included in this survey, wholesale market networks are present in Spain, France, Germany and Italy. Although precise data is unavailable and challenging to collect, it is estimated that wholesale markets continue to play a significant role in the supply chain in these countries. For instance, 149.540 tonnes of FAPs were sold at Mercamadrid in Spain in 2024, and 80.000 tonnes are sold each year at the wholesale market in Rome. Denmark has one wholesale market, while there is no wholesale market in the remaining Member States analysed. Annex 2 provides a comprehensive list of wholesale markets in these Member States and links to their websites.

There are different situations in the different Member States: in France, wholesalers benefit from wholesale markets for logistics and transport but face high fees, which represent a burden for smaller operators. In Italy, wholesale markets are home to smaller, family-run businesses focusing on fresh, local products, while larger wholesalers outside these markets offer a broader range, including processed goods, and target national retail chains. In Germany, wholesalers for FAPs largely operate outside traditional wholesale markets, reflecting a preference for independent operations.

[7] Source: https://www.fao.org/4/ab790e/ab790e05.htm

5. DETAILS BY MEMBER STATE

Table 1: Summary of the characteristics and evolution of the wholesale sector by Member State

	Characteristics of the wholesale sector			Evolution of the wholesale sector		
	Type of enterprises[8]	Type of clients	Presence of wholesale market	Processing	Concentration level	Integration level
DK	Five of the largest companies made up to 42% of the sector's turnover) but presence of smaller enterprises	Mainly retail sector	+	+++	+++	+++
FR	Increasing trend for larger companies (i.e. concentration trends)	Mainly fishmongers, HoReCa	+++	+++	+++	+
DE	-	Processors, retailers, food service companies	+++	+++	+++	+++
IT	Mainly small enterprises (micro and small enterprises)	Retailers, HoReCa, other wholesalers or distributors, processing companies, and export.	+++	+	+	++
NL	Larger, vertically integrated companies	Retailers, restaurants, and food processors	No	+++	-	+++
ES	Mainly small enterprises (micro and small enterprises)	*Mayoristas en destino* are the primary customers of *Mayoristas en origen.* They sell to fishmongers, retailers and HoReCa	+++	+++ (only *mayoristas en destino)*	++	+
SE	Mainly big companies, including vertically integrated companies (some of them owned by Norwegian companies)	-	No	+++	+++	+++

Source: Own elaboration, based on interviews and desk research

Legend: grey: no information available, + (very light green) refers to small positive trends, ++ (light green) refers to a visible positive trend, +++ (dark green) refers to a significant positive trend.

[8] Type of enterprises provides an indication to the size of enterprises, based on the Eurostat definition: micro (fewer than 10 persons), small (10 to 49), medium-sized (50 to 249) and large (250 or more).

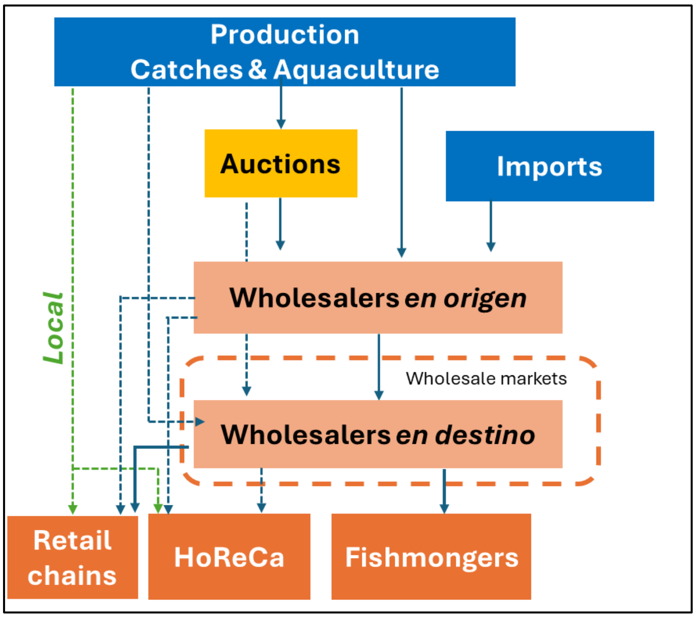
5.1. Spain

5.1.1. Definition and role of wholesalers

In Spain, the following national terms indicate wholesalers:

- ***Mayoristas en origen:*** Wholesalers specialised in the supply of FAPs both within Spain and abroad. They are usually located in production areas (in particular near auctions) where they source their products. They play an important role in importing and exporting products and can source their products directly from fishing companies and aquaculture farms through contracts between both parties. Their primary customers are *mayoristas en destino*, although some also sell directly to retailers and to a lesser extent to HoReCa.
- ***Mayoristas en destino*:** These wholesalers are located near consumption areas. In particular, they are based in large wholesale markets, such as Mercamadrid and Mercabarna. They primarily purchase FAPs from *mayoristas en origen*, with a smaller share sourced directly from vessel owners and/or in auctions. Their main clients include fishmongers, retailers and to a lesser extent HoReCa services.

Figure 1: Place of wholesalers in the fisheries and aquaculture supply chains in Spain



Source: based on EUMOFA country profile, updated following interviews with wholesalers

Legend: dotted lines represent occasional or less important exchanges

Wholesalers carrying out other activities

Over the past decade, *mayoristas en destino* have significantly diversified their activities, incorporating processing activities such as filleting, cooking, preserving, smoking, as well as distribution. Some have specialised in frozen FAPs, while others have expanded their product range to include non-seafood products. Additionally, certain wholesalers have also diversified their activities through the purchase of restaurants serving FAPs. In contrast, *mayoristas en origen* remain primarily focused on sourcing and selling activities.

Other operators carrying out wholesaling activities

Fishmongers do not conduct wholesale activities, and non-specialised wholesalers are not significant in the wholesale market for FAPs.

5.1.2. Wholesale markets in Spain

Spain has 24 wholesale markets, 20 of which include fisheries wholesale activities.

Mercamadrid wholesale market (Madrid - Spain) is the main wholesale market for FAPs in Spain and the largest wholesale market in Europe. Covering 222 hectares, it hosts more than 800 companies and over 9.000 employees overall[9]. The fish market covers 33.000 m2, it is the second largest fish market worldwide, with 149.540 tonnes sold in 2024[10]. Wholesalers of FAPs operating in the 156 market stalls offer a wide range of species. Salmon was the most important species sold in volume in 2024 (16% of the volume), followed by hake (10%), seabass (8%), and seabream (8%)[11].

5.1.3. Structure and evolution of the wholesale sector

The wholesale sector in Spain is predominantly composed of micro and small enterprises.

As already mentioned, the main evolution of the sector concerns the diversification of activities, mainly in relation to incorporating operations such as filleting, cooking, smoking, etc. Interviews also highlighted a notable concentration trend within the wholesale sector.

5.2. Italy

5.2.1. Definition and role of wholesalers

The following terms are used in the national context to designate wholesalers:

- *Grossista* is the most common and direct translation of wholesaler. It refers to a business that buys goods in large quantities from producers or importers and sells them to retailers or other businesses.
- *Commerciante all'ingrosso* literally translates to "wholesale trader" or "wholesale merchant". It is often used in more formal or legal contexts.
- *Distributore*: While this term can refer to distributors in general, it is sometimes used interchangeably with "wholesaler", especially in the context of large-scale operations.

The Italian wholesalers of FAPs serve several clients. Key clients include retail chains and supermarkets, the food service industry (e.g. restaurants, hotels, and catering services), other wholesalers or distributors, processing companies, and export markets.

Wholesalers carrying out other activities

Italian wholesalers of FAPs have diversified their activities to include value-added services such as processing, packaging, quality control, logistics, and transportation. The degree of diversification and specialisation varies by company and region, influenced by market demand, regulatory environments, and company's strategic decisions.

Other operators carrying out wholesaling activities

- **Seafood processors**: Some of Italy's largest processing companies also engage in wholesale activities. This trend has been reinforced by a movement toward vertical integration by some companies, which manage the entire supply chain from fishing to distribution.
- **Fishmongers:** While the NACE code for fishmongers covers retail activities, some larger operators may engage in wholesale to supply restaurants or smaller retailers.
- **Non-specialised wholesalers**: They play a significant role in the fisheries and aquaculture sector in Italy.

[9] https://www.mercamadrid.es/que-es-mercamadrid/
[10] https://www.mercamadrid.es/mercado-central-de-pescados/
[11] Estadisticas Mercamadrid: https://www.mercamadrid.es/estadisticas/

5.2.2. Wholesale markets in Italy

Italy has five wholesale markets that also include seafood wholesale activities. There are notable differences between wholesalers operating within wholesale markets and those operating outside of them. Operators in wholesale markets tend to be smaller, often family-run businesses, whereas larger companies usually operate independently with their own distribution networks. Wholesale markets primarily focus on fresh and local products, while wholesalers outside the markets often offer a broader range, including processed and imported goods. The activities carried out also differ; wholesalers in the market primarily focus on trading, while those outside markets may engage in additional operations like processing and packaging. Furthermore, the markets targeted by these companies vary significantly: operators in wholesale markets typically target local fishmongers and restaurants, while larger wholesalers based outside of wholesale markets often target national retail chains and foodservice operators.

Centro Agroalimentare Rome (CAR) - Rome wholesale market (Rome – Italy): is one of the largest wholesale markets in Italy, hosting 153 wholesalers over a surface of 140 hectares. The fish market covers 19.000 m^2, and with 49 specialised stalls[12]. It is the most important in volume terms in Italy with around 80.000 tonnes of FAOs. sold each year[13]. The most important products sold include squid, prawns, octopus, clams, and red mullet.

5.2.3. Structure and evolution of the wholesale sector

Even though there is no publicly available and reliable data on the wholesale sector's structure in Italy, the qualitative feedback indicates that the sector remains largely dominated by micro and small enterprises. However, in the last decade, the sector has seen a gradual increase in concentration. Additionally, vertical integration is increasingly common in the Italian fisheries and aquaculture sector. It is estimated that 30-35% of major wholesalers have significant integration with other parts of the value chain. Integration is more common with processing and retail than with fishing operations.

5.3. France

5.3.1. Definition and role of wholesalers

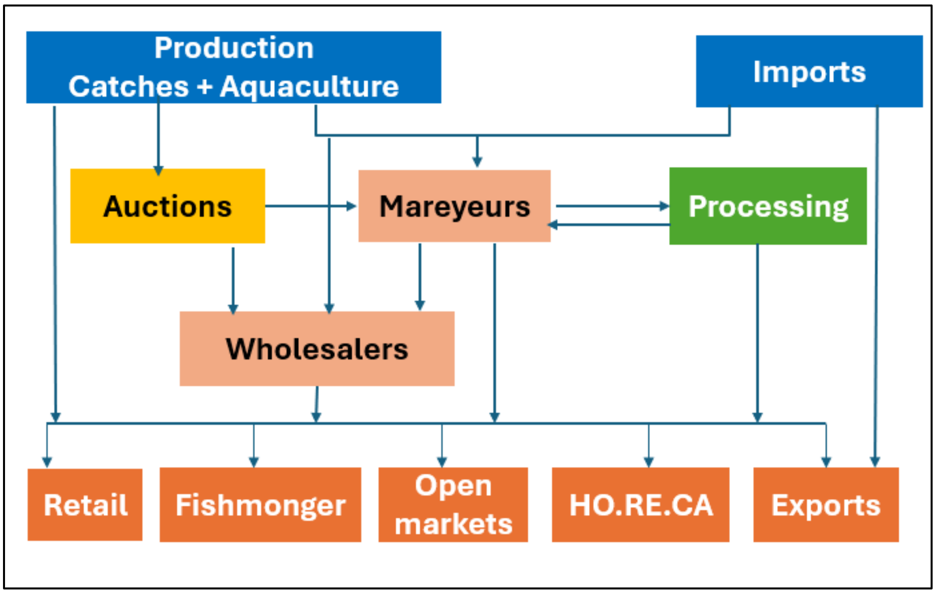
Grossiste is the national term to designate wholesalers. Wholesalers in France can be located in wholesale markets or not. They buy fish from different fishing companies, auctions, aquaculture farms or *mareyeurs* and sell it to fishmongers, HoReCa sector and to a lesser extent to retailers. The French wholesale segment focused primarily on fresh products, but sales of frozen products have grown in recent years due to considerations of cost, volume regularity and supply forecasting.

Wholesalers play a crucial role in the fisheries and aquaculture sector in France by linking the upstream and downstream segments of the supply chain. Recent developments in wholesale activities have further enhanced their importance in aligning supply with consumer demands. While wholesalers traditionally source exclusively from *mareyeurs*, they have since diversified both their product range and supply channels. Today, wholesalers may source directly from auctions, fish farms and other operators in France and abroad.

[12] https://www.italmercati.it/2024/12/06/roma-il-mercato-ittico-del-car-apre-al-pubblico-pesce-fresco-sicurezza-e-filiera-corta-per-un-natale-allinsegna-della-qualita/

[13] Ibidem

Figure 2: Place of wholesalers in the fisheries and aquaculture supply chains in France



Source: based on EUMOFA country profile, updated following interviews with wholesalers

Wholesalers carrying out other activities

The sector has known significant changes over the years. Previously, there was a clear distinction between the activities of wholesale, processing and distribution. Wholesalers were primarily focused on purchasing from *mareyeurs* and selling to fishmongers and restaurants. However, with the opening of auctions to actors beyond *mareyeurs*, wholesalers gained the ability to purchase directly from auctions. Simultaneously, *mareyeurs* began selling directly to retailers, restaurants and fishmongers without going through wholesalers. This change has been driven by evolving customers' demand in terms of the type of products and by increasing market concentration, which has resulted in larger operators with substantial processing capacities.

Currently, the distinction between wholesalers and wholesaler-processors (*mareyeurs*) lies in their processing approach. A *mareyeur* typically processes products before offering them for sale, whereas a wholesaler processes products based on specific requests from customers. This approach allows wholesalers to adapt the preparation to meet specific customer requirements.

Other operators carrying out wholesaling activities

- **Seafood processors:** Mareyeurs in France are recorded under the NACE code for processors of FAPs. Currently, many of them play a role at the wholesale stage.
- **Fishmongers:** Fishmongers do not conduct wholesale activities.
- **Non-specialised wholesalers:** There are major non-specialised wholesalers who operate in the fisheries and aquaculture sector. They typically include cash and carry stores which supply operators of the HoReCa sector with a basic offer focused on a small range of products (i.e. the most commonly consumed species and product types).

5.3.2. Wholesale markets in France

In France, there are 19 wholesale markets, 11 of which include seafood wholesale activities. Operators tend to prefer to establish their companies in the wholesale market to benefit from the logistic and transport networks. However, the rising costs of wholesale fees have become a considerable burden, making it increasingly challenging for wholesalers, especially the small ones, to afford these expenses. Larger companies are well established in the wholesale markets, especially in Rungis (largest wholesale market in France). In terms of types of activities and clients, there is no distinction between operators operating in the wholesale markets and those operating outside markets. Both are targeting primarily fishmongers and operators in the HoReCa sector.

Rungis wholesale market (Paris - France)[14]: is the largest wholesale market in France, particularly for FAPs. It hosts 47 wholesale companies and employs 815 employees which operate in FAPs. Most of these companies offer a wide range of products, while a few focus on specific products such as shrimps, oysters, scallops, lobsters, etc. Many of them also offer a wide range of certified products, such as organic, Aquaculture Stewardship Council, Marine Stewardship Council, Mr. Goodfish, etc. According to interviews, the number of companies has decreased due to a concentration trend, which is expected to be reinforced in the coming years. Salmon is the most sold species at Rungis, accounting for a quarter of the total production sold in 2023. Seabream and seabass followed, accounting for 9% and 8% of sales, respectively during the same year. According to interviews, Rungis which was a physical marketplace where professionals would visit to select and complete their purchase transactions on-site, has evolved into a sales platform. Today, professionals place orders via phone, SMS or e-mails and either collect them by lorry or opt for delivery.

5.3.3. Structure and evolution of the wholesale sector

In France, feedback from interviewed wholesalers and their associations suggests that Eurostat data on the number of enterprises recorded under NACE code 48.36 is not accurate. While Eurostat data indicate 3.032 enterprises involved in wholesaling in France, a national study[15] estimates only 725 enterprises. This study appears to align with the scope of this analysis, focusing on enterprises primarily involved in the wholesale of FAPs and excluding generalist food wholesalers who may supply FAPs but not as a primary activity. According to this same study, the number of enterprises decreased by 4% between 2002 and 2017, while the number of employees increased by 20% over the same period. This reflects a trend of concentration in the sector in favour of larger players, with the objective of optimising operating costs and strengthening bargaining power. While most wholesalers offer a broad product range, smaller companies tend to be more focused on one or two species.

There is a strong trend towards diversification in the wholesale sector in France. All wholesalers, including small companies, now engage in at least in filleting activities. Additionally, a significant decline in the number of wholesalers, particularly within wholesale markets such as Rungis, has been reported in the last decade. This trend is expected to continue due to ongoing supply challenges, according to interviews. Regarding vertical integration, while some companies demonstrate vertical integration, the overall trend remains limited.

[14] https://cms.rungisinternational.com/uploads/RUNGIS_RAPPORT_ANNUEL_2023_FR_WEB_2_e2f10580e5.pdf

[15] FranceAgriMer. Etude sur la situation économique et financière des entreprises de gros de la poissonnerie. https://www.franceagrimer.fr/fam/content/download/75705/document/ETU-MER-Barom%C3%A8tre_%C3%A9conomique_gros_poissonnerie_2022.pdf?version=1

5.4. Denmark

5.4.1. Definition and role of wholesalers

The national term to designate wholesalers is *Engrohandler*. Most Danish wholesale companies' clients are in the retail sector. Some companies may focus more on food services.

Wholesalers carrying out other activities

Danish wholesalers frequently combine their wholesale operations with processing, especially among medium and small-sized companies. This is less common among micro-sized enterprises.

Other operators carrying out wholesaling activities

- **Seafood processors:** There are 60-65 Danish companies with significant wholesale activities of FAPs based on information from the Danish national statistic bank.
- **Non-specialised wholesalers:** In Denmark, several non-specialised wholesalers engage significantly in the wholesale of FAPs. While it is challenging to determine the exact number, a conservative estimate suggests that 2-3% of the 3.535 companies listed under this business category are actively involved in substantial wholesale operations for FAPs.

5.4.2. Wholesale markets in Denmark

There is only one wholesale market in Denmark.

5.4.3. Structure and evolution of the wholesale sector

In Denmark, out of the 30 biggest companies in the sector, the top five companies constitute 42% of the total gross profit of the group. However, a considerable number of small companies still hold a significant market share. In terms of evolution, there is a strong trend towards consolidation and vertical integration (especially with the fishing sector).

5.5. Germany

5.5.1. Definition and role of wholesalers

The national term to designate a wholesaler is *Großhändler*. In Germany, wholesalers buy FAPs, fresh, frozen or processed, from producers or imports and resell them primarily to processors, retailers, food service companies and smokehouses. This includes both specialised fish wholesalers and non-specialised wholesalers that handle fish as part of a wider product range. Historically, most fresh fish landed in Germany were sold through auctions in the major fishing ports. However, auctions have lost their importance. Currently, most of this fish is sold directly to wholesalers and processors, or processed and sold by fishers' cooperative units[16].

5.5.2. Wholesale markets in Germany

Germany has 17 wholesale markets[17], 12 of which include seafood wholesale activities. The majority of German wholesalers for FAPs operate independently of these traditional wholesale markets.

[16] https://www.europarl.europa.eu/RegData/etudes/note/join/2014/514010/IPOL-PECH_NT%282014%29514010_EN.pdf

[17] http://grossmaerkte.org/pdf_presse/gfiguide_e_web.pdf

5.5.3. Structure and evolution of the wholesale sector

The evolution of the sector is difficult to evaluate in Germany due to the diversity of actors and the significant number of non-specialised wholesalers.

5.6. The Netherlands

5.6.1. Definition and role of wholesalers

The national term used to designate wholesalers is *Groothandel*. There are not many wholesalers in the Netherlands, as the fisheries and aquaculture supply chains are rather short, due to the presence of verticually integrated companies (especially in the supply chain of pelagic species) or direct supply of processing companies from boats or auctions (i.e. large part of the FAPs sold at auctions or imported go straight to the processing plants, situated mostly in and around the auctions).

5.6.2. Wholesale markets in the Netherlands

There are no wholesale markets in the Netherlands.

5.6.3. Structure and evolution of the wholesale sector

In the Netherlands, vertical integration is significant among wholesalers of FAPs, with many owned by companies involved in other stages of the value chain, such as fishing, processing, or retail. There are a few small companies that are serving local markets, while larger ones handle national and international clients.

5.7. Sweden

5.7.1. Definition and role of wholesalers

The national term used to designate wholesalers is *Partihandel*.

5.7.2. Wholesale markets in Sweden

There is no wholesale market.

5.7.3. Structure and evolution of the wholesale sector

There is little data on the sector, but it seems to be represented by large companies, focusing on wholesaling and distribution, as well as other vertically integrated companies, some of which are owned by Norwegian companies. The latter category are companies with processing capacities both in Norway and Sweden.

However, some SMEs remain active in the market. Wholesalers of FAPs are located on the west coast, where a major source of FAPs is from *Gøteborg Fiskeauktion* (Gothenburg Fish Auction), in the south of Sweden and on the east coast – Stockholm area. FAPs offered by wholesalers originating from regional auctions, from Norway (especially for Norwegian owned vertically integrated companies) and from other imports.

Most of the wholesalers for FAPs are situated in coastal areas, many of which are in densely populated areas. Some small wholesalers of FAPs have their own outlets, and some offer the opportunity to purchase products online.

In terms of evolution, there has been a trend towards consolidation and vertical integration over the last decades, especially in regard to consolidations by Norwegian owners, but also by others.

6. MAPPING OF THE DATA AVAILABLE ON THE WHOLESALE STAGE

Socio-economic data of the wholesale sector are available for certain Member States as illustrated in the table below. These data primarily cover the number of companies, the number of employees and turnover. Information on wholesale prices and volume is available in Member States with a well-established network of wholesale markets, namely France, Spain and Italy. In these countries, the presence of dedicated entities managing wholesale markets enables the collection of precise data for this segment.

Table 2: Available data on the structure of the wholesale sector in the fisheries and aquaculture supply chains

MS	Source	Available data	Update frequency
DE	Fisch Information Zentrum[18]	• Number of companies • Turnover • Number of employees	Yearly
DK	Estatistik[19]	• Number of employees • Turnover	Yearly
NL	Kamer van Koophandel[20] (KvK - Chamber of Commerce)	• Number of companies • Company size • Industry structure	Yearly

Source: based on interviews

The table below provides an overview of the data available for products marketed at the wholesale stage in France, Spain and Italy.

[18] https://www.fischinfo.de/index.php/markt/datenfakten
[19] https://estatistik.dk/branche/engroshandel-med-fisk-og-fiskeprodukter/463810
[20] https://www.kvk.nl/

Table 3: Available data on products marketed through wholesalers in the fisheries and aquaculture supply chains

MS	Source	Available data	Update frequency	Comment
FR	Réseau des nouvelles des marchés[21] (RNM)	Prices: data is available by species, production method (fisheries versus aquaculture), product preservation type (fresh, frozen, processed), product format (whole, fillets, etc.), origin (Member States versus import) and by wholesale market.	Daily	The query database provides a user-friendly interface for easy searching, including access to historical records. Only data on prices exists. Lack of data on volumes hinders the ability to have an overview of the volumes traded through the market. This limitation poses challenges in accurately interpreting price trends, particularly during extreme scenarios such as unusually high or low prices. Data extracted in Excel format.
ES	Mercamadrid[22]	Prices and volumes: data is available by species, product form (fresh, frozen? processed)	Daily	The query database provides a user-friendly interface for easy searching, including access to historical records. Data on prices and volumes are available, allowing for an overview of the volumes traded through the market. Data extracted in Excel format.
	Mercabarna[23]	Prices and volumes: data is available by species and by product preservation type (fresh, frozen).	Daily	The database provides a user-friendly interface for easy access to historical records.
IT	Borsa Merci Telematica Italiana[24] (BMTI)	Prices are available by species and products (size, origin)	Weekly	Only prices are available (minimum, maximum, as well as the variation compared to the previous week and the previous year), hindering the ability to have an overview of the volumes traded through the market. Data is provided in PDF format, which requires some formatting from users.

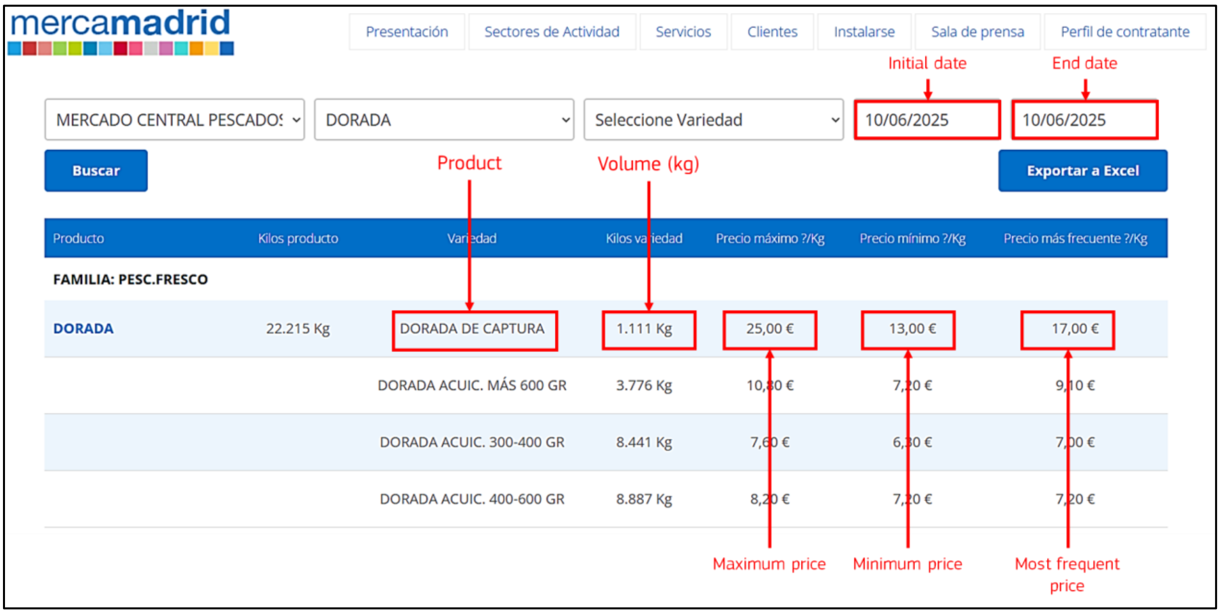
Source: based on interviews and desk research

[21] https://rnm.franceagrimer.fr/
[22] https://www.mercamadrid.es/estadisticas/
[23] https://www.mercabarna.es/serveis/estadistiques-productes/?sector=2#tabsNav
[24] https://ittico.bmti.it/

To illustrate the use of these databases, below are provided two examples of data searches from the *Réseau des Nouvelles des Marchés (RNM)*, which is the French source for wholesale data covering all wholesale markets in France and *Mercamadrid*, which is the Spanish source for wholesale data in Madrid, Spain. Both platforms offer access to data across various wholesale markets (fruits, FAPs, meat, and others), with the option to export data as an Excel file.

The figure below provides an example of wholesale data for seabream products sold in Mercamadrid, on the 10 June 2025. It shows the volumes and prices (minimum, maximum and most frequent price) for four products, one from fisheries and the three others from aquaculture. On that date, 1.111 kg of seabream from fisheries were marketed through Mercamadrid, for a maximum price of 25,00 EUR/kg, a minimum price of 13,00 EUR/kg, and the most frequent price of 17,00 EUR/kg. The query also allows to cover a period of time, by indicating initial and end dates.

Figure 3: Extraction of wholesale data from Mercamadrid (Spain) for seabream for Tuesday 10th of June, 2025.



Source: Mercamadrid, data extraction on 11 June 2025

The RNM database functions in a similar manner. It provides daily prices of different products sold at the wholesale stage in France, by taking into account factors such as product size, origin (national, imported), production method (fishery, aquaculture), and, in some instances, fishing gears. RNM database provides the detailed monthly prices for the 12 months preceding the selected date, as illustrated in the figure below.

Figure 4: Extraction of wholesale monthly prices from RNM (France) for seabream over the last 12 months

DORADE

prix moyens mensuels du 01-06-2024 au 31-05-2025

autre date de fin [ ] OK Imprimer

(date quelconque dans le mois) JJ-MM-AA ou JJMMAA

- Voir dans un tableur : moyennes mensuelles
- Voir dans un tableur : moyennes hebdomadaires
- Les dernières cotations

Le système calcule des moyennes arithmétiques : attention, sur la période considérée, une seule cotation est suffisante pour obtenir la moyenne de la période. Lorsqu'un produit a de fortes variations saisonnières, la signification d'un prix moyen sur une périodicité mensuelle peut être faible. Vous pouvez cliquer sur le libellé pour vérifier les cotations prises en compte dans le calcul de la moyenne mensuelle.

libellé	Juin 2024	Juil. 2024	Août 2024	Septe. 2024	Octo. 2024	Nove. 2024	Déce. 2024	Janv. 2025	Févr. 2025	Mars 2025	Avril 2025	Mai 2025
MIN de Rungis : marée (cours Grossistes en *€ HT*)												
DORADE grise 300-400g France (le kg)	5.70	5.89	6.22	6.30	8.01	9.17	9.00	7.45	6.00	6.43	7.02	7.50
DORADE grise 500-800g France (le kg)	6.70	6.97	7.55	7.70	9.91	11.62	11.50	8.90	7.00	8.03	10.19	9.85
DORADE grise 800-1000g France (le kg)	8.00	8.36	9.05	9.05	11.12	11.51	12.50	10.00	8.00	8.44	9.60	11.20
DORADE rose 1 kg et + Import (le kg)	15.12	15.50	15.50	15.50	15.50	15.50	15.50	13.97	13.50	14.57	16.14	18.30
DORADE rose 500-800g Import (le kg)	13.62	14.00	14.00	14.00	14.00	14.00	14.00	12.95	12.50	12.50	12.50	12.95

Source: RNM (Réseau des nouvelles des marchés), data extraction on 11/06/2025

7. ANNEXES

Annex 1: Economic indicators of the fish sector by economic activity for the studied MS

	Wholesale			Processing			Retail			Number of wholesalers based on desk research
	Enterprises	Employees	Turnover (1.000 EUR)	Enterprises	Employees	Turnover (1.000 EUR)	Enterprises	Employees	Turnover (1.000 EUR)	
BE	**1.122**	6.552	4.604	55	1.268	13.432	339	899	490	-
DE	**3.430**	73.236	12.885	193	7.785	12.701	1.392	8.598	567	-
DK	**521**	4.446	10.611	85	2.697	25.432	170	998	652	**230 wholesaler companies**, including 24 with processing and preservation activities (Eurofish[25])
ES**	**7.371**	47.133	3.545	578	26.324	13.489	9.809	17.380	175	-
FR	**3.032**	22.207	3.974	385	14.857	14.977	1.934	5.525	487	**752 wholesalers** and 7.577 employees (FranceAgriMer[26])
IT	**7.015**	41.747	4.137	432	6.692	7.453	5.194	12.528	250	-
NL	**2.746**	21.624	6.096	173	1.634	6.096	797	4.643	625	**206 enterprises active in the fish processing and fish wholesale** industry in the Netherlands in 2021 (source: Visbureau[27])
SE	**985**	3.459	2.430	173	1.634	3.686	283	1.276	574*	-

Source : Eurostat, expert estimations, desk research

*data for 2021 (last year available)

** For Spain, *Mayoristas en destino* and *Mayoristas en origen* are covered by the same NACE code.

[25] Eurofish. Manual screening of the wholesaler sector based on data from the Proof.dk segmentation tool

[26] FranceAgriMer. Etude sur la situation économique et financière des entreprises de gros de la poissonnerie. https://www.franceagrimer.fr/fam/content/download/75705/document/ETU-MER-Barom%C3%A8tre_%C3%A9conomique_gros_poissonnerie_2022.pdf?version=1

[27] Visbureau. Facts & Figures 2022/2023. https://visbureau.nl/feiten-en-cijfers-2023

Annex 2: List of wholesale markets in a selection of EU Member States

MS	List of wholesale markets
ES	The wholesale distribution in Spain is mainly structured through the Food Units of the Mercasa network: 24 wholesale markets, out of which 20 include a fish wholesale market Mercamadrid: https://www.mercamadrid.es/ Mercabarna: https://www.mercabarna.es/es/ Mercavalencia Mercabilbao Mercasevilla Mercatenerife (no fish market) Mercazaragoza Mercalgeciras Mercalicante Mercasturias (no fish market) Mercabadajoz Mercacordoba Mercagalicia (no fish market) Mercagranada Mercairuna Mercajerez Mercalaspalmas Mercaleon Mercamalaga Mercamurcia Mercaolid Mercapalma Mercasalamanca Mercasantander (no fish market)
FR	In France, there are 19 wholesale markets, 11 of which include seafood wholesale activities: MIN de Lille (no fish market) MIN de Rouen MIN de Rungis MIN de Nantes MIN d'Angers

MS	List of wholesale markets
	MIN de Tours MIN de Bordeaux MIN d'Agen (no fish market) MIN de Toulouse MIN de Montpellier (no fish market) MIN de Perpignan (no fish market) MIN de Marseille MIN de Saint-Etienne du Grès (no fish market) MIN d'Avignon MIN de Lyon (no fish market) MIN de Grenoble (no fish market) MIN de Châteaurenard (no fish market) MIN de Nice MIN de Strasbourg
IT	There are 5 wholesale markets, including fisheries and aquaculture activities: 1. Mercato Ittico di Milano (Milan Fish Market) Website: Il Mercato Ittico all'Ingrosso di Milano. (sogemispa.it) 2. Mercato Ittico all'Ingrosso di Roma (Rome Wholesale Fish Market) Website: Homepage - Centro Agroalimentare Roma (agroalimroma.it) 3. Mercato Ittico di Napoli (Naples Fish Market) Website: https://sitoweb.caan.it/ 4. Mercato Ittico di Genova (Genoa Fish Market) Website: Mercato Ortofrutticolo di Genova (mercatogenova.it) 5. Mercato Ittico di Chioggia (Chioggia Fish Market) Website: https://www.mercatoitticochioggia.it/
DE	Among the main wholesale markets in Germany (http://grossmaerkte.org/pdf_presse/gfiguide_e_web.pdf), the following include fish wholesale activities: • Kölner Großmarkt – founded in 1940, 1 200 000 t/year of products (https://www.koelner-grossmarkt.de/themen/koelner-grossmarkt/) • Berliner Großmarkt - 1965, 330 000 m2 market surface, 580 000 t/year, EUR 1 billion/year of GVA, (https://www.berliner-grossmarkt-gmbh.de/dt/daten.asp?site=daten) • Großmarkt Stuttgart - 1957, 197 000 m2, 400 000 t/year, EUR 600 million/year (https://www.grossmarkt-stuttgart.de/) • Frischzentrum Frankfurt-am-Main - 2004, 133 000 m2, 300 000 t/year (https://www.frische-zentrum-frankfurt.de/unser-gro%C3%9Fmarkt) • Großmarkt Dortmund - 1952, 250 000 t/year (https://grossmarkt-dortmund.de/zahlen-und-fakten/#:~:text=Auf%20dem%20Gro%C3%9Fmarkt%20Dortmund%20wird,bedeutender%20Umschlagsplatz%20f%C3%BCr%20frischen%20Fisch.) • Großmarkt Bremen - 2002, 157 000 m2, 250 000 t/year, EUR 300 million/year, (https://www.grossmarkt-bremen.de/unternehmen/)

MS	List of wholesale markets
	• Großmarkt Mannheim - 1961, 147 000 m2 (https://gmm.de/) • Großmarkt Düsseldorf - 1936, closure announced (https://www.nrz.de/staedte/duesseldorf/article241577108/Grossmarkt-Duesseldorf-1000-Arbeitsplaetze-sind-akut-in-Gefahr.html) • Duisburg Kontor - 1927 (https://www.duisburgkontor.de/) • Frischzentrum Essen - 1981 (https://www.fze.de/) • Großmarkt Karlsruhe - 1967 (https://www.karlsruhe.de/kultur-freizeit/maerkte/grossmarkt) • Großmarkthalle München - 1912 (https://stadt.muenchen.de/infos/grossmarkt.html)

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