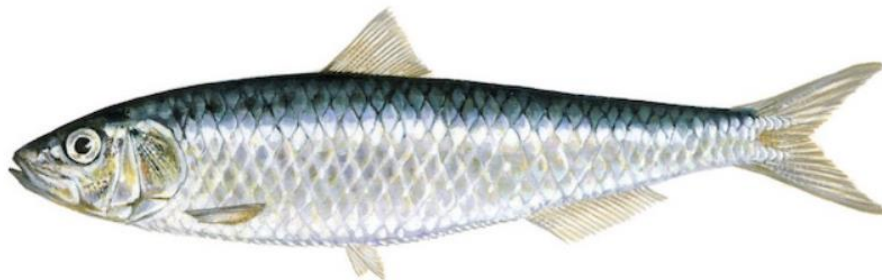




SARDINE (*SARDINA PILCHARDUS*)



© Scandinavian Fishing Year Book

BIOLOGY AND HABITAT

- **Species description** ([Read more](#))

The Sardine belongs to the family of *Clupeidae*.

- **Geographical distribution and habitat** ([Read more](#))

The European sardine (*Sardina pilchardus*) is broadly distributed in the NE Atlantic and the Mediterranean Sea, representing an important fishery resource for several countries.

RESOURCE, EXPLOITATION AND MANAGEMENT

- **Stock and resource status/conservation measures** ([Read more](#))

Minimum conservation size is set at 11 cm of total length in all the fishing areas.

- **Production methods and fishing gears** ([Read more](#))

The main fishing gears used are gillnets and similar nets, pots and traps, seines, and trawls.

Source: [Information system on commercial designations](#)

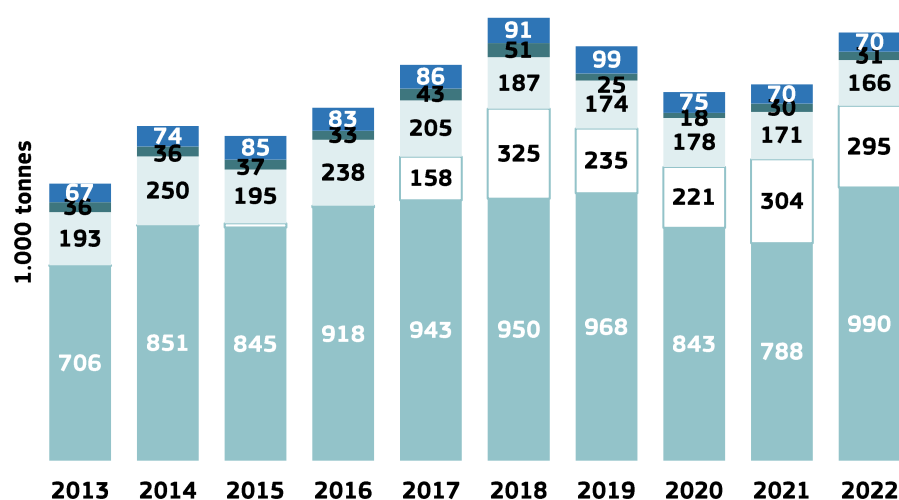


CATCHES

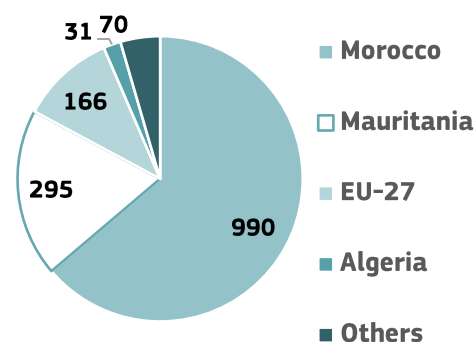
Evolution of world catches

- Sardine catches reached over 1.550.000 tonnes in 2022, i.e. **1,66%** of the global catches. The majority of this is caught by the Moroccan fleet (64% of the global catches), as well as by the Mauritanian (19%) and the EU fleet (11%). During the last decade (2013-2022), sardine catches have increased by 55% at global level in relation to the increase of the Moroccan and Mauritanian captures (+40% and +16.699% respectively).

■ Others ■ Algeria ■ EU-27 ■ Mauritania ■ Morocco



Catches (2022, 1.000 tonnes)

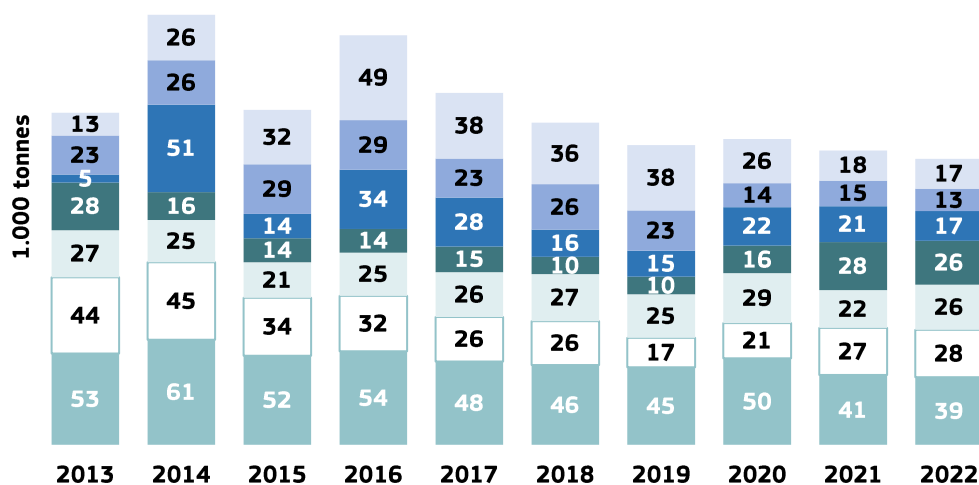


Source: FAO

Evolution of EU catches

- In 2022, the EU catches of sardine reached over 166.000 tonnes. The EU catches have decreased by 14% during the last decades. Croatia was the main EU producer reaching 39.194 tonnes in 2022 (24% of EU volume), followed by Spain, France and Portugal (respectively 17%, 16% and 15% of the EU catches), the Netherlands and Italy (respectively 10% and 8% of the EU catches).

■ Others ■ Italy ■ Netherlands ■ Portugal ■ France ■ Spain ■ Croatia



Source: FAO



Sardine

AQUACULTURE PRODUCTION

- There are no farming activities of sardine (related to low prices of the fish).

PROCESSING

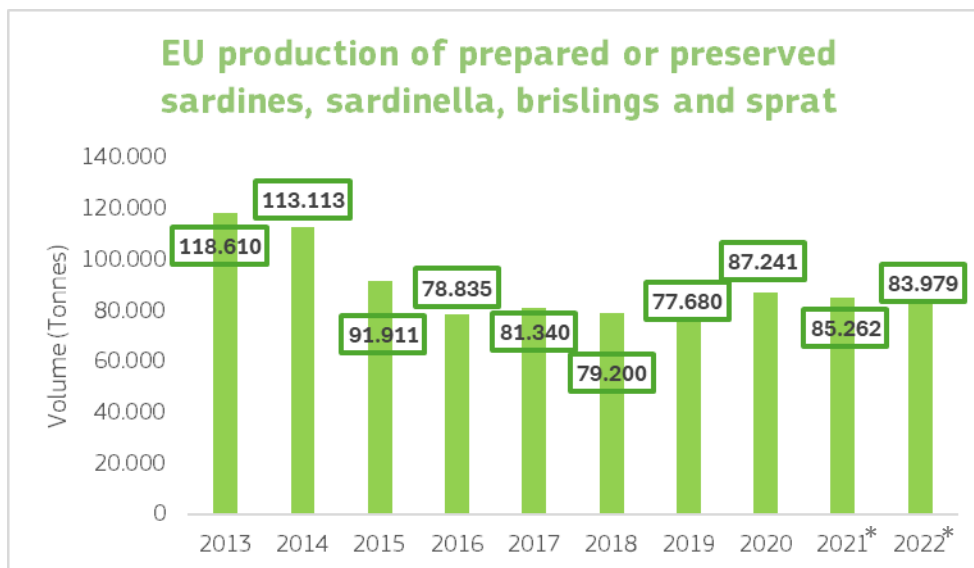
Canned sardine products are among the most consumed preserved fish products in EU. These products can actually include several different species other than the European sardine (*Sardina pilchardus*), which are still marketed as 'sardines' under specific conditions.

- In Eurostat-Prodcom data, canned products of sardine, sprat and sardinella are aggregated together in one single category. The corresponding [PRODCOM](#) code is the following:
 - 10202530: prepared or preserved sardines, sardinella, brisling and sprat

- Prepared/preserved sardine, sardinella, brisling and sprat**

The EU production of canned sprat, sardines and sardinellas totaled 83.979 tonnes in 2022 (most recent data available for the whole EU). The EU production has decreased by 26% over the period between 2013 and 2022.

If we assume that the main product of the processing activities in Poland and Latvia is sprat, the main producing countries of canned sardine are Spain, Portugal and France. Sardine production has increase in Spain and France since 2013 (by 6% and 10% respectively) but has decreased in Portugal (by -20%).



Source: EUROSTAT/PRODCOM

*) data for 2022 and 2021 was incomplete for France, Spain and Latvia. Values from the previous available year were used to estimate the EU production.



TRADE

- [Combined nomenclature](#)

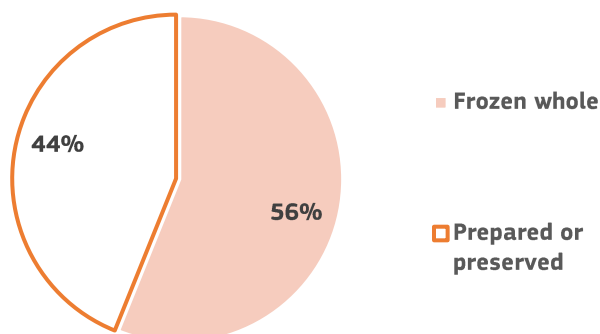
EU trade of sardine products (tonnes – 2023)

Data concern *Sardina pilchardus* *Sardinops spp* and *Sardinella spp*

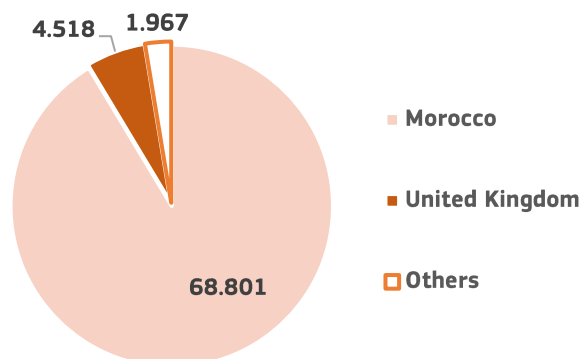
CN code	Product	EU imports	EU exports
03024310	Fresh or chilled sardines "Sardina pilchardus"	316	790
03024330	Fresh or chilled sardines "Sardinops spp." and sardinella "Sardinella spp."	3	335
03035310	Frozen sardines "Sardina pilchardus"	41.655	21.274
03035330	Frozen sardines "Sardinops spp." and sardinella "Sardinella spp."	407	339
16041311	Sardines, prepared or preserved, whole or in pieces, in olive oil (excl. minced sardines)	5.107	2.841
16041319	Sardines, prepared or preserved, whole or in pieces (excl. minced sardines and sardines in olive oil)	27.798	11.197
Total		75.286	36.776

- Extra-EU imports** reached over 75.200 tonnes in 2023, of which 56% were frozen and 44% were prepared or preserved sardine. In 2023, EU imports originated mostly from Morocco (91% of the volume imported) and to a lesser extent from the United Kingdom (6% of the volume imported). The main importing countries within the EU in 2023 were Spain, France, Germany, and Malta, which together imported 71% of the imported volumes. Other importers were the Netherlands (8% of the imported volumes) and Portugal (6%).

Imports by product type (2023, % in volume)



Main EU suppliers (2023, tonnes)





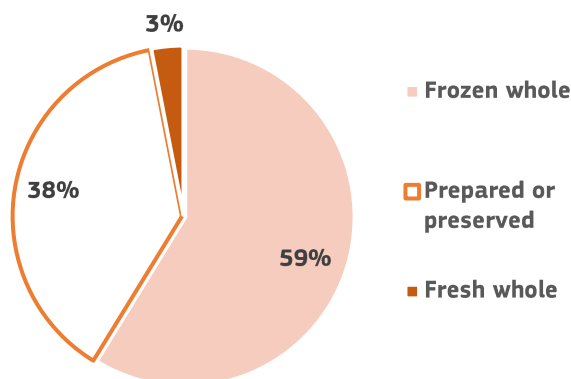
Sardine

TRADE

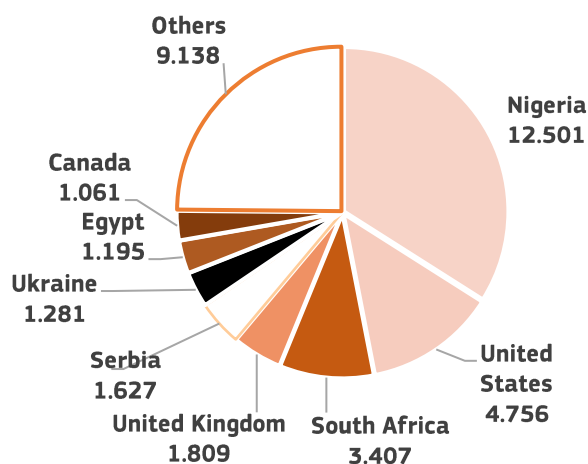
- Extra-EU exports:**

In 2023, export volumes of sardines totaled over 36.700 tonnes. The majority of sardines (59%) were exported frozen and 38% of the sardines were exported prepared or preserved. The Netherlands were the first EU exporters, representing 36% of the exported volume, followed by Spain (21%), and to a lesser extent Portugal and Poland representing 13% and 10% respectively. In 2023, Nigeria and the United States were the main destination markets, representing 47% of EU exports.

Exports by product type (2023, % in volume)



Main destinations (2023, tonnes)



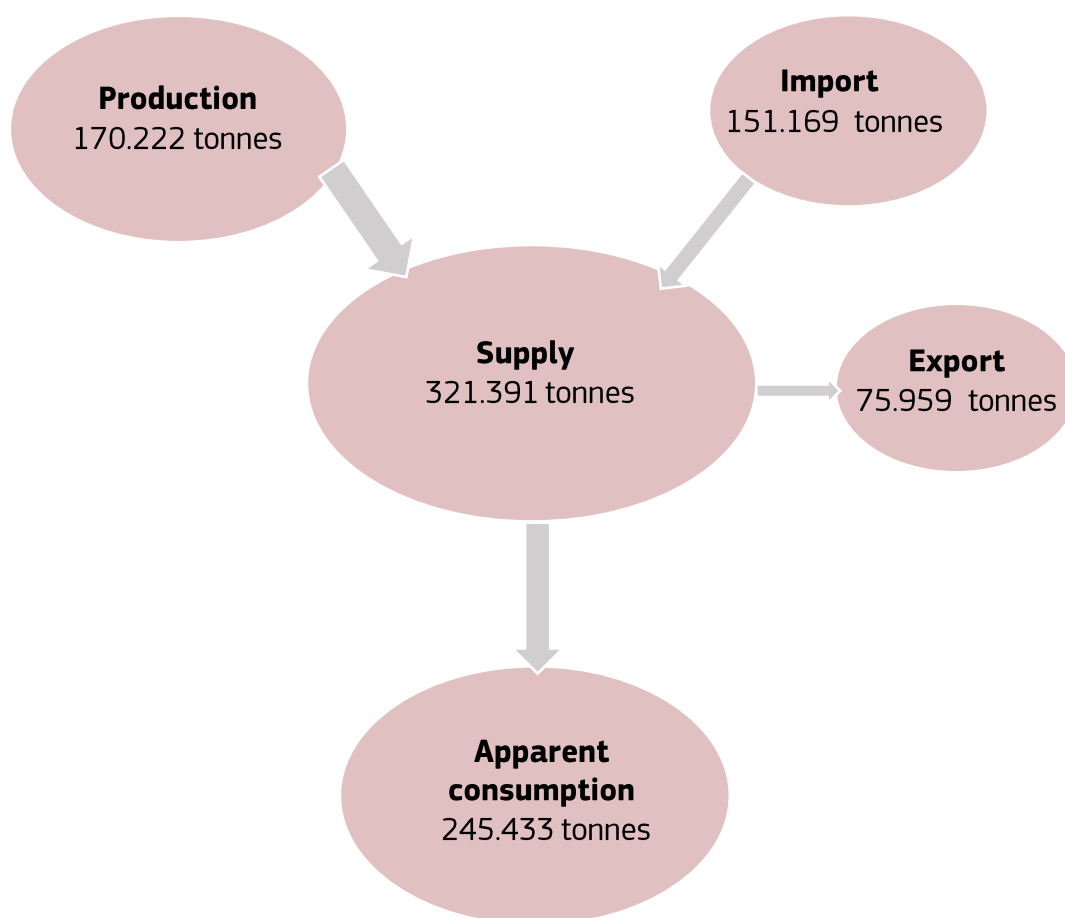
Source: EUROSTAT-COMEXT



Sardine

Supply balance

EU supply balance (2022¹) – Tonnes of live weight equivalent² – Sardine:



Source: FAO/ EUROSTAT-COMEXT

¹ Supply balance is provided for the year 2022 (trade data for 2022 were taken into account). Detailed trade data provided in the slides 4 and 5 concern the year 2023.

² The [conversion factors](#) were used to convert net weight of imports and exports of fishery and aquaculture products into live weight equivalents.



Sardine

PRICES ALONG THE SUPPLY CHAIN (EUR/kg)

First-sale (fresh whole)

First-sale prices are provided for the main EU producers (Portugal and Spain).

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	Source
Spain	1,85	1,54	1,69	1,80	1,97	1,82	1,66	1,62	1,68	1,56	EUMOFA
France	1,45	1,36	1,23	1,34	1,27	1,33	1,32	1,25	1,35	1,44	EUMOFA
Portugal	1,69	1,78	1,50	1,88	1,68	1,44	1,34	1,36	1,43	1,67	EUMOFA

(*) From January to November 2024

Wholesale (fresh)

Wholesale prices are reported for Mercamadrid (Madrid, Spain) and Rungis (France).

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	Source
Spain	3,28	3,09	3,1	3,36	3,28	3,07	3,04	2,87	2,76	2,90	Mercamadrid
France - fresh, Origin Brittany	2,53	2,88	2,96	2,58	2,28	2,57	2,75	2,91	2,97	3,02	Rungis (RNM)
France - fresh, Mediterranean	2,56	2,9	3,06	2,93	2,64	2,61	2,73	3,2	3,06	3,01	Rungis (RNM)

(*) From January to November 2024

Retail/Consumption

Retail prices are reported for Spain and France.

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	Source
Spain - fresh household consumption	4,53	4,61	4,86	4,69	5,09	5,32	6,31	5,95	6,39	6,32	EUMOFA
Spain - fresh	4,29	4,23	4,49	4,69	4,98	5,07	6,02	5,47	5,57	n.a.	MAPA
Spain - canned	7,8	7,81	7,83	7,83	7,93	8,28	8,18	9,21	10,15	n.a.	
France - fresh	n.a.	6,5	6,7	6,4	6,0	6,3	6,2	6,2	6,3	n.a.	FranceAgriMer
France - canned	n.a.	10,0	10,4	10,0	8,7	9,2	9,2	10,4	11,0	n.a.	FranceAgriMer

(*) From January to November 2024



Sardine

PRICES ALONG THE SUPPLY CHAIN (EUR/kg)

Import (frozen whole)

EU imports from third countries concern mainly frozen whole sardine and prepared or preserved sardine. Main importers were Spain, Malta, and France in 2023.

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	Source
Spain, frozen whole	0,88	0,8	0,82	0,87	0,78	0,81	0,89	0,99	0,91	0,90	EUMOFA
Spain, prepared/pre served	2,96	3,27	3,84	3,87	3,73	5,48	4,52	4,79	7,80	7,35	EUMOFA
France, frozen whole	0,95	0,85	0,93	0,89	0,83	1,02	1,09	1,12	1,16	1,16	EUMOFA
France, prepared/preserved	3,37	3,42	3,46	3,66	3,64	5,00	3,53	4,39	5,78	8,00	EUMOFA
Malta, frozen whole	0,51	0,58	0,6	0,63	0,68	0,72	0,67	0,85	0,73	1,15	EUMOFA
Malta, prepared/pre served	n.a.	n.a.	2,75	n.a.	n.a.	5,67	9,28	7,40	3,91	3,75	EUMOFA

(*) From January to August 2024

Export (frozen whole)

Spain and the Netherlands were the main EU exporter of sardines. EU exports are mainly composed of frozen whole sardines and prepared or preserved sardines.

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024*	Source
Spain, frozen whole	0,61	0,73	0,66	1,82	0,66	2,49	1,95	2,41	2,00	2,49	EUMOFA
Spain, canned	6,82	6,64	6,36	6,64	6,91	8,71	9,03	10,48	10,81	11,46	EUMOFA
Netherlands, frozen whole	0,57	0,75	0,62	0,57	0,91	1,48	1,32	1,70	1,88	1,50	EUMOFA
Netherlands, canned	5,59	5,7	4,09	3,96	3,91	3,86	5,58	6,48	n.a.	6,33	EUMOFA

(*) From January to August 2024



Sardines

MARKETING

- National lists of commercial designations ([Read more](#))
- Information system on commercial designations and scientific names in all EU languages ([Read more](#))
- Applicable marketing standard ([Read more](#))
- There is one name protected under **Protected Geographical Indication** (PGI) and for sardine:
 - PGI “**Cornish Sardines**” in the United Kingdom.

CONSUMPTION

- 11th most consumed species in the EU (source: [The EU Fish Market – 2023 edition](#), EUMOFA)
- Apparent consumption per capita in 2022: **0,55 kg** live weight equivalent (source: [Supply balance - 2022](#) EUMOFA)
- Nutritional value (Sardine, nutrition values per serving 100g) ([Read more](#))

Nutrition values	Sardine
Energy (kcal)	236
Total fat (g)	15,50
Saturates (g)	3,90
Carbohydrate (g)	0
Sugars (g)	0
Protein (g)	23,30
Salt (mg)	-