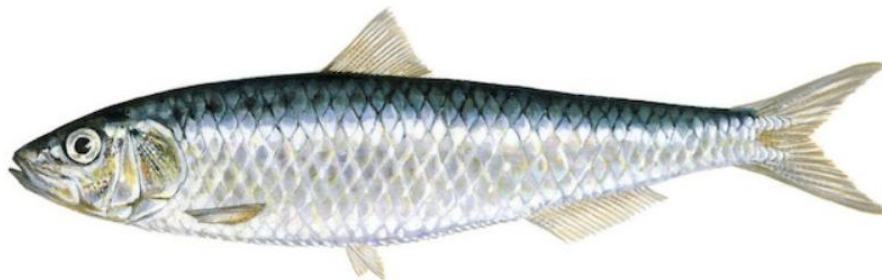




## SARDINE (*SARDINA PILCHARDUS*)



© 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](#)

# Sardine



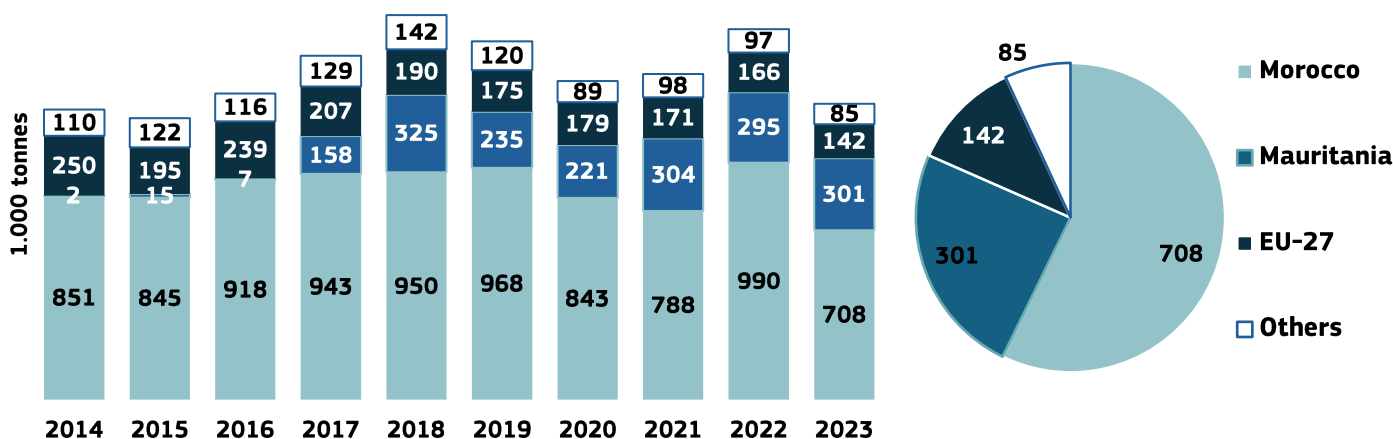
## CATCHES

### Evolution of world catches

- Sardine catches reached over 1.236.000 tonnes in 2023, i.e. **1,3%** of the global catches. The majority of this was caught by the Moroccan fleet, as Morocco has the largest stock in the world (57% of the global catches). The same year, Morocco was followed by the Mauritania (24%) and the EU (12%). During the last decade (2014-2023), sardine catches have fluctuated but recorded an overall stability over the period. Looking at the trends by country, Mauritania has recorded a significant upward trend, while Moroccan catches have decreased by -17%.

■ Others 
 ■ EU-27 
 ■ Mauritania 
 ■ Morocco

Catches (2023, 1.000 tonnes)

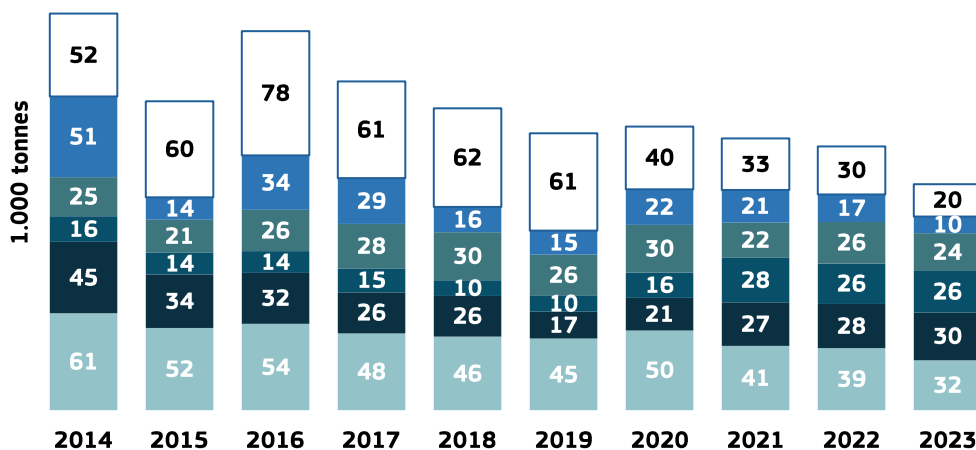


Source: FAO

### Evolution of EU catches

- In 2023, the EU catches of sardine reached over 142.200 tonnes. The EU catches have decreased by 43% during the last decade. Croatia was the main EU producer reaching 31.525 tonnes in 2023 (22% of EU volume), followed by Spain (21%), Portugal (18%), and France (17%). All fleets recorded a decrease in sardine catches (-48% for Croatia; -33% for Spain; -3% for France), except for Portugal which recorded a significant increase by 63% between 2014 and 2023.

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



Source: FAO



## 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.

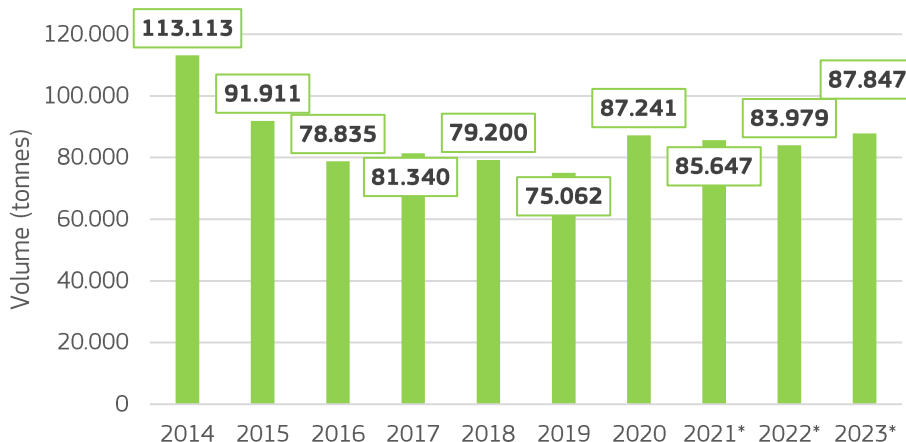
- In Eurostat-Prodcom data, canned products of sardine, sprat and sardinella are aggregated together in one single category. The corresponding [PRODCOM](#) code is the following:
  - 10202530: prepared or preserved sardines, sardinella, brisling and sprat

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

The EU production of canned sprat, sardines and sardinellas totaled 87.847 tonnes in 2023, marking a decrease of 22% in comparison to 2013.

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 Portugal and France since 2014 (by 22% and 16% respectively) and remained stable in Spain.

### EU production of prepared or preserved sardines, sardinella, brislings and sprat



Source: EUROSTAT/PRODCOM

\*) data for 2023, 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](#)

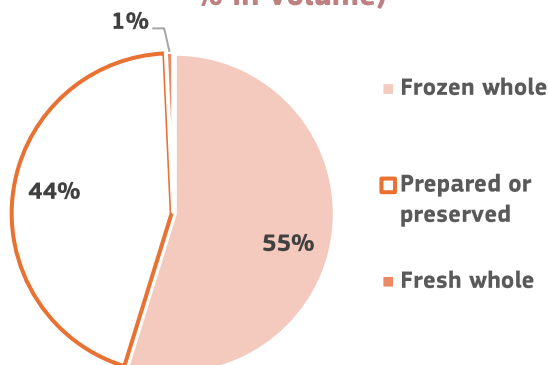
### EU trade of sardine products (tonnes – 2024)

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

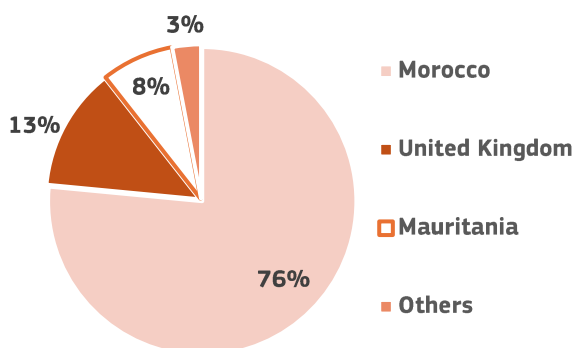
CN code	Product	EU imports	EU exports
03 02 43 10	Fresh or chilled sardines "Sardina pilchardus"	432	387
03 02 43 30	Fresh or chilled sardines "Sardinops spp." and sardinella "Sardinella spp."	3	373
03 03 53 10	Frozen sardines "Sardina pilchardus"	31.288	9.402
03 03 53 30	Frozen sardines "Sardinops spp." and sardinella "Sardinella spp."	1.411	250
16 04 13 11	Sardines, prepared or preserved, whole or in pieces, in olive oil (excl. minced sardines)	3.848	3.568
16 04 13 19	Sardines, prepared or preserved, whole or in pieces (excl. minced sardines and sardines in olive oil)	22.711	11.137
<b>Total</b>		<b>59.694</b>	<b>25.116</b>

- Extra-EU imports** reached over 59.600 tonnes in 2024, of which 55% were frozen and 44% were prepared or preserved sardine. In 2024, EU imports originated mostly from Morocco (91% of the volume imported; 45.674 tonnes) and to a lesser extent from the United Kingdom (6% of the volume imported). The main importing countries within the EU in 2024 were Spain, France, and the Netherlands, which together imported 73% of the volumes. Other importers were Germany (6% of the imported volumes) and Portugal (5%).

Imports by product type (2024, % in volume)



Main EU suppliers (2024, % in volume)



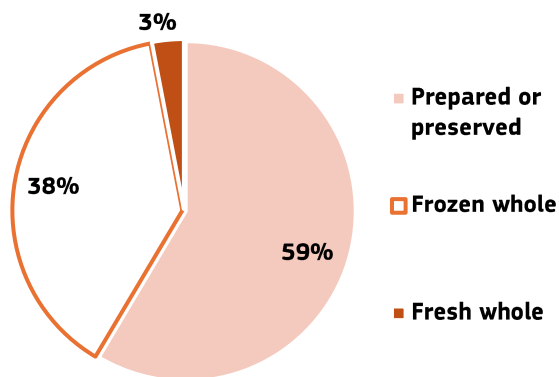


## TRADE

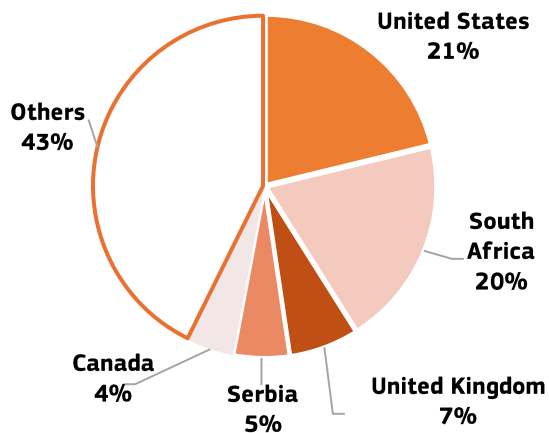
- Extra-EU exports:**

In 2024, export volumes totaled over 25.100 tonnes. The majority of sardines (59%) were exported prepared or preserved and 38% of the sardines were exported frozen. The Netherlands were the first EU exporters, representing 19% of the exported volume, followed by Spain (18%), Portugal and Poland representing 17% each, and to a lesser extent by Croatia (10%) and Latvia (9%). In 2024, the United States and South Africa were the main destination markets, representing 41% of EU exports (respectively 5.369 tonnes and 5.027 tonnes).

Exports by product type (2024, % in volume)



Main destinations (2024, % in volume)

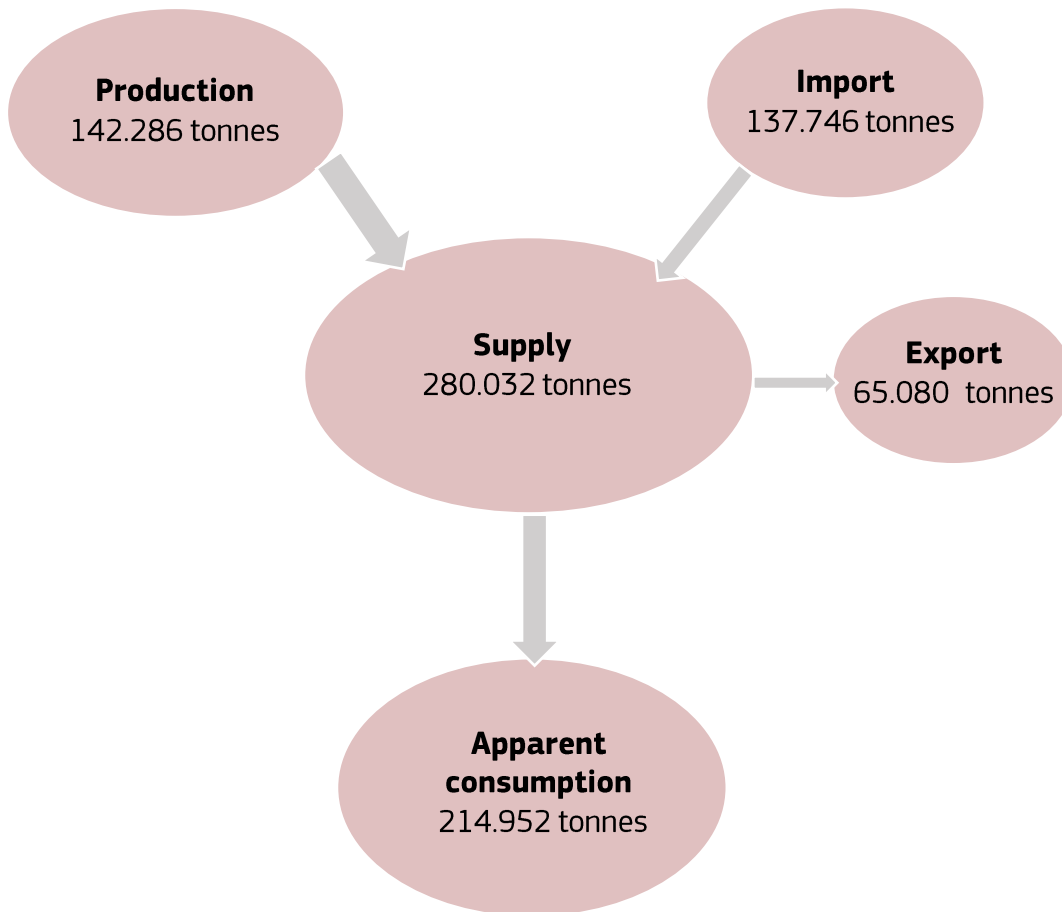


Source: EUROSTAT-COMEXT



## Supply balance

### EU supply balance (2023<sup>1</sup>) – Tonnes of live weight equivalent<sup>2</sup> – Sardine:



Source: FAO/ EUROSTAT-COMEXT

<sup>1</sup> Supply balance is provided for the year 2023 (trade data for 2023 were taken into account). Detailed trade data provided in the slides 4 and 5 concern the year 2024.

<sup>2</sup> 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 (Croatia, Spain, Portugal, and France).

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Source
<b>Croatia</b>	n.a.	0,57	0,61	0,60	0,65	0,67	0,86	0,89	0,93	1,06	EUMOFA
<b>Spain</b>	1,54	1,69	1,81	1,97	1,81	1,65	1,61	1,66	1,53	1,70	EUMOFA
<b>Portugal</b>	1,78	1,50	1,88	1,68	1,44	1,34	1,36	1,43	1,37	1,48	EUMOFA
<b>France</b>	1,36	1,23	1,34	1,27	1,33	1,32	1,25	1,35	1,44	1,72	EUMOFA

(\* From January to October 2025)

### Wholesale (fresh)

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Source
<b>Spain</b>	3,09	3,1	3,36	3,28	3,07	3,04	2,87	2,76	2,99	3,03	Mercamadrid
<b>France - fresh, Origin Brittany</b>	2,88	2,96	2,58	2,28	2,57	2,75	2,91	2,97	3,02	5,06	Rungis (RNM)
<b>France - fresh, Mediterranean</b>	2,9	3,06	2,93	2,64	2,61	2,73	3,2	3,06	2,99	4,90	Rungis (RNM)

(\* From January to October 2025)

### Retail/Consumption

Retail prices are reported for Spain and France.

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Source
<b>Spain - fresh</b>	4,23	4,49	4,69	4,98	5,07	6,02	5,47	5,57	5,67	n.a.	MAPA
<b>Spain - canned</b>	7,81	7,83	7,83	7,93	8,28	8,18	9,21	10,15	10,74	n.a.	
<b>France - fresh</b>	6,5	6,7	6,4	6,0	6,3	6,2	6,2	6,3	6,5	n.a.	FranceAgriMer
<b>France - canned</b>	10,0	10,4	10,0	8,7	9,2	9,2	10,4	11,0	12,5	n.a.	FranceAgriMer

(\* From January to September 2025)

## 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, France, and the Netherlands in 2024.

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Source
<b>Spain, frozen whole</b>	0,8	0,82	0,87	0,78	0,81	0,89	0,99	0,91	0,96	0,96	EUMOFA
<b>Spain, prepared/pre served</b>	3,27	3,84	3,87	3,73	5,48	4,52	4,79	7,80	6,95	9,01	EUMOFA
<b>France, frozen whole</b>	0,85	0,93	0,89	0,83	1,02	1,09	1,12	1,16	1,18	1,25	EUMOFA
<b>France, prepared/preserved</b>	3,42	3,46	3,66	3,64	5,00	3,53	4,39	5,78	11,18	6,55	EUMOFA
<b>Netherland, frozen whole</b>	n.a.	n.a.	n.a.	n.a.	0,88	0,88	1,15	0,99	1,00	1,05	EUMOFA
<b>Netherlands, prepared/pre served</b>	n.a.	n.a.	n.a.	n.a.	3,09	3,45	6,15	5,56	4,03	3,83	EUMOFA

(\* ) From January to September 2025

### Export (frozen whole)

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Source
<b>Spain, frozen whole</b>	0,73	0,66	1,82	0,66	2,49	1,95	2,41	2,00	2,64	2,41	EUMOFA
<b>Spain, prepared/preserved</b>	6,64	6,36	6,64	6,91	8,71	9,03	10,48	10,81	17,32	13,23	EUMOFA
<b>Netherlands, frozen whole</b>	0,75	0,62	0,57	0,91	1,48	1,32	1,70	1,88	1,49	1,97	EUMOFA
<b>Netherlands, prepared/preserved</b>	5,7	4,09	3,96	3,91	3,86	5,58	6,48	n.a.	5,61	5,88	EUMOFA

(\* ) From January to September 2025



## 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

- 12<sup>th</sup> most consumed species in the EU (source: [The EU Fish Market – 2025 edition](#), EUMOFA)
- Apparent consumption per capita in 2023: **0,49 kg** live weight equivalent (source: [Supply balance - 2023](#) 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)	-