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UNICOP

INDUSTRY REPORT

Sardine outlook 2025: Challenging Supply, Uncertain Prospects

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Sardine size in a stock monitored by INRH from 2010 to 2023

As ANUGA 2025 approaches, it is important to establish a shared understanding of the availability and quality of landed fish. The industry is currently facing a combination of environmental and climatic factors that undermine its ability to guarantee steady and reliable supplies to international clients. These challenges make short-term market visibility particularly uncertain.

The first 8 months of 2025 confirm the ongoing challenges faced by the canned fish sector, marked by a decline in landed volumes and sustained pressure on prices.
By the end of August 2025, total landings of small pelagic fish had contracted to approximately 469,052 tons, compared to about 558,846 tons during the same period in 2024 — a decrease of around 16%.
Sardine, the main species harvested, was particularly affected, with only 229,283 tons landed, reflecting a sharp drop of 20% compared to 2024 and 30% compared to 2023. This trend is closely linked to rising sea temperatures.
Mackerel, another key species for the industry, also recorded lower landings. Atlantic chub mackerel volumes fell by nearly 18%, from around 200,000 tons in 2024 to just 164,552 tons in 2025.

Feedback from canning operators and National Institute of Fisheries Research varies from port to port, yet several consistent patterns emerge :

- **Seasonality**: the traditional cycle between “summer fat sardine” (July–October) and “winter sardine” (November–June/July) is becoming increasingly irregular, due to the impacts of climate change and rising sea temperatures.
- **Fat content (FC)**: Delayed evolution of the 10% fat content threshold, which is only reached from mid-June in certain fishing areas and not until after mid-July in others.
- **Size**: a gradual reduction in average size is limiting production of specific product lines such as Skinless and Boneless, which require larger fish with higher fat content.

IN THIS CONTEXT OF UNSTABLE PROSPECTS, SCIENTISTS AT THE NATIONAL INSTITUTE OF FISHERIES RESEARCH REMAIN OPTIMISTIC ABOUT THE OCTOBER–NOVEMBER SEASON, WHICH IS EXPECTED TO BRING IMPROVED CATCHES — ALTHOUGH CHALLENGES RELATED TO FISH SIZE ARE LIKELY TO PERSIST.