

Monthly Highlights

No. 10 / 2024

EUMOPA

European Market Observatory for
Fisheries and Aquaculture Products

Between weeks 40/2021 and 39/2024, prices of fresh or chilled swordfish from Morocco fluctuated between 4,90 EUR/kg (week 35/2024) and 13,72 EUR/kg (week 49/2021), while 48% of weekly prices were between 8,00 EUR/kg and 10,00 EUR/kg.

Over the 36-month observation period (October 2021 to September 2024), the weighted average first-sales price of yellowfin tuna in France was 7,40 EUR/kg, 199% higher than in Portugal (2,47 EUR/kg) and 162% higher compared to Spain (2,82 EUR/kg).

In September 2024, the average monthly household consumption of fresh carp was 41 tonnes in Germany and 16 tonnes in Poland, where households paid on average 10,79 and 8,27 EUR per kg.

Marine production experienced a substantial increase in Türkiye, particularly from the early 2000s, with volumes rising from 2.525 tonnes in 1992 to 368.721 tonnes in 2022.

In 2023, the EU imported 17.026 tonnes (net weight) of Pacific salmon from third countries for a value of EUR 103 million.

On 18 November 2024, the European Commission released the 2024 Annual Economic Report on the European Union fishing fleet.



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Pacific salmon in the EU



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Marine fuel, consumer prices and exchange rates



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1. First sales in Europe

During **January–September 2024**, 16 EU Member States (MS), Norway and the United Kingdom reported first-sales data for 10 commodity groups. First-sales data are based on sales notes and data collected from auction markets. First-sales data analysed in the section “*First sales in Europe*” are extracted from EUMOFA¹.

1.1. January–September 2024 compared to the same period in 2023

Increases in value and volume: Bulgaria recorded an increase in both first-sales value and volume due mainly to sprat and clam.

Decreases in value and volume: Belgium, Cyprus, Denmark, France, Germany, Italy, Portugal, Spain, and Sweden recorded decreases in first-sales value and volume. Sweden stood out with the most significant drops due to lower first sales of sprat, herring and coldwater shrimp.

Table 1. **JANUARY–SEPTEMBER OVERVIEW OF FIRST SALES FROM THE REPORTING COUNTRIES**
(volume in tonnes and value in million EUR) *

Country	January – September 2022		January – September 2023		January – September 2024		Change from January – September 2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	10.285	65,55	10.632	65,90	8.446	51,32	-21%	-22%
Bulgaria	1.852	1,22	2.338	1,16	2.721	1,74	16%	50%
Cyprus	576	2,49	578	2,67	501	2,40	-13%	-10%
Denmark	516.966	355,76	610.782	405,41	592.564	390,74	-3%	-4%
Estonia	43.755	12,26	49.682	18,56	44.858	22,25	-10%	20%
Finland	39.912	9,56	43.480	12,58	35.190	13,29	-19%	6%
France	214.902	562,61	192.823	526,40	189.597	509,72	-2%	-3%
Germany	23.974	69,50	23.324	44,43	22.278	42,37	-4%	-5%
Italy	60.853	276,61	54.870	247,01	43.941	200,61	-20%	-19%
Latvia	28.735	6,18	30.474	8,44	27.523	9,72	-10%	15%
Netherlands	74.651	141,39	46.618	102,53	18.104	114,57	-61%	12%
Poland	53.609	13,31	52.870	20,80	44.459	23,22	-16%	12%
Portugal	88.898	233,88	94.251	231,88	82.510	213,03	-12%	-8%
Spain	352.515	1.211,47	334.648	1.097,55	317.157	1.080,79	-5%	-2%
Sweden	111.324	69,93	91.595	59,85	39.487	43,11	-57%	-28%
Norway	2.261.415	2.623,36	2.278.427	2.363,67	2.222.368	2.352,53	-2%	0%
United Kingdom	224.084	475,31	250.772	492,65	253.260	465,40	1%	-6%

Possible discrepancies in % changes are due to rounding.

* Volumes are reported in net weight for EU Member States, and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (without VAT). For Norway, prices are reported in EUR/kg of live weight. Data for Denmark are subject to confidentiality measures, so they do not fully correspond to total first sales in the country.

¹ First sales data updated on 18. 11. 2024



1.2. September 2024 compared to September 2023

Increases in value and volume: First sales increased in Bulgaria, the Netherlands, Sweden and Norway. In relative terms the highest increase was observed in Norway, due mainly to mackerel and herring.

Decreases in value and volume: First sales decreased in Belgium, Cyprus, Denmark, Estonia, Finland, Italy, Latvia, Poland and Portugal. Finland and Estonia experienced the most significant falls in relative terms in volume and value. The decrease was mainly due to falls in first sales of herring and sprat in both Finland and Estonia.

Table 2. **SEPTEMBER OVERVIEW OF FIRST SALES FROM THE REPORTING COUNTRIES**
(volume in tonnes and value in million EUR) *

	September 2022		September 2023		September 2024		Change from September 2023	
Country	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Belgium	1.294	8,4	942	6,2	791	4,7	-16%	-24%
Bulgaria	99	0,1	138	0,136	141	0,246	2%	81%
Cyprus	37	0,2	31	0,2	26	0,2	-16%	-15%
Denmark	33.613	42,5	59.433	54,9	54.454	52,1	-8%	-5%
Estonia	4.422	1,6	5.839	3,3	4.131	1,9	-29%	-43%
Finland	475	0,1	839	0,2	543	0,2	-35%	-29%
France	25.654	65,0	22.085	56,0	21.971	55,9	-1%	0%
Germany	4.510	13,4	1.050	6,2	1.271	4,5	21%	-27%
Italy	7.370	27,2	7.645	29,8	5.523	22,3	-28%	-25%
Latvia	3.824	0,8	3.657	1,1	3.155	1,1	-14%	-6%
Netherlands	21.941	22,0	2.091	12,7	2.982	16,4	43%	29%
Poland	1.061	0,4	5.733	3,150	5.248	2,8	-8%	-12%
Portugal	12.838	25,1	15.396	28,6	12.351	26,6	-20%	-7%
Spain	40.101	133,4	32.079	101,7	27.554	107,7	-14%	6%
Sweden	5.535	8,0	2.960	5,6	3.104	6,0	5%	7%
Norway	251.553	328,5	200.737	254,0	260.880	356,9	30%	41%
United Kingdom	36.699	63,2	32.094	56,7	34.987	52,4	9%	-8%

Possible discrepancies in % changes are due to rounding.

* Volumes are reported in net weight for EU Member States and the UK, and in live weight equivalent (LWE) for Norway. Prices are reported in EUR/kg (without VAT). For Norway, prices are reported in EUR/kg of live weight. Data for Denmark are subject to confidentiality measures, so they do not fully correspond to total first sales in the country.

The most recent weekly first-sales data are available via the EUMOFA website and can be accessed [here](#).

The most recent monthly first-sales data are available via the EUMOFA website and can be accessed [here](#).

1.3. First sales in selected countries

First-sales data analysed in this section are extracted from EUMOFA.²

Table 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM**


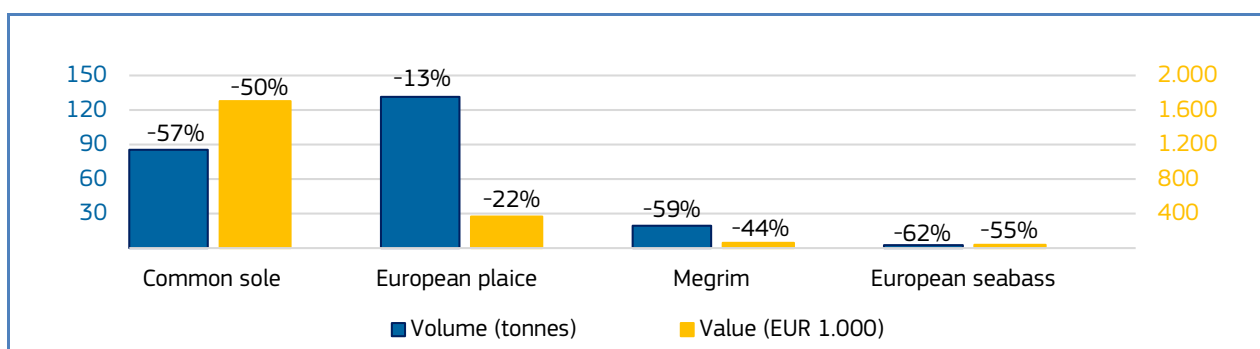

 Belgium	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 51,3 million, -22%	8.446 tonnes, -21%	Common sole, squid, European plaice, ray.
Sep 2024 vs Sep 2023	EUR 4,7 million, -24%	791 tonnes, -16%	Common sole, European plaice, megrim, European seabass.

Figure 1. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BELGIUM, SEPTEMBER 2024**

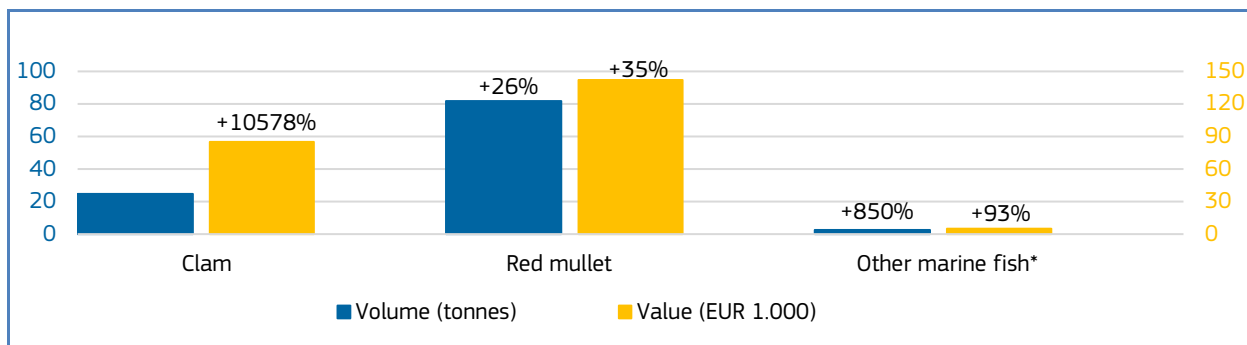


Percentages show change from the previous year.

Table 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA**

 Bulgaria	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Sep 2024 vs Jan-Sep 2023	EUR 1,7 million, +50%	2.721 tonnes, +16%	Sprat, clam, other molluscs and aquatic invertebrates*.	In September 2024, there was an increase in first sales of clam compared to September 2023. In Bulgaria clam fishing only occurs in coastal areas of the Black Sea and is conducted by small-scale fisheries. It is not covered by TAC and catches are therefore not regulated. In July, August and September 2024 higher catches of clams were observed and supplied to the market compared with the same months in 2023. In September 2024, unusually high sea temperature was observed, which might have affected the fishing activities.
Sep 2024 vs Sep 2023	EUR 0,2 million, +81%	141 tonnes, +2%	Clam, red mullet, other marine fish*.	

² First-sales data updated on 18. 11. 2024.

Figure 2. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN BULGARIA, SEPTEMBER 2024**

Percentages show change from the previous year. *EUMOFA aggregation for species (see Metadata 2, Annex 3: <https://eumofa.eu/supply-balance-and-other-methodologies>).

Table 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS**


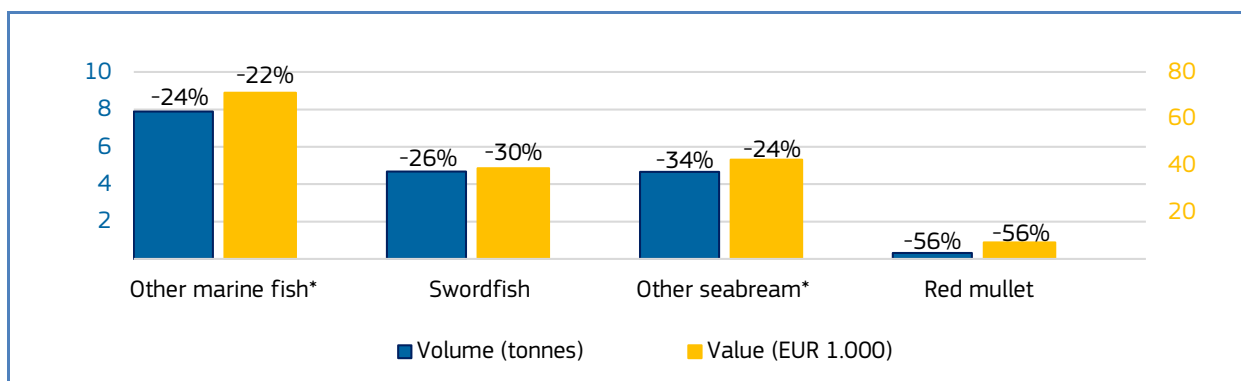
 Cyprus	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 2,4 million, -10%	501 tonnes, -13%	Albacore tuna, picarel, swordfish, red mullet
Sep 2024 vs Sep 2023	EUR 0,2 million, -15%	26 tonnes, -16%	Other marine fish*, swordfish, other seabream*, red mullet.

Figure 3. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN CYPRUS, SEPTEMBER 2024**

Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK**


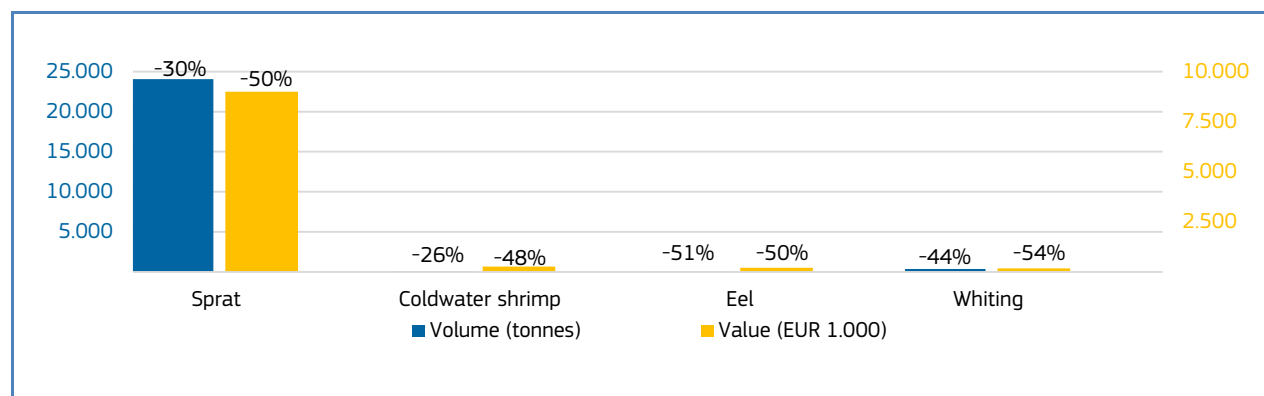
 Denmark	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 390,7 million, -4%	592.564 tonnes, -3%	Other groundfish*, sprat, European plaice, coldwater shrimp.
Sep 2024 vs Sep 2023	EUR 52,1 million, -5%	54.454 tonnes, -8%	Sprat, cold water shrimps, eel, whiting.

Figure 4. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN DENMARK, SEPTEMBER 2024**

Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA**


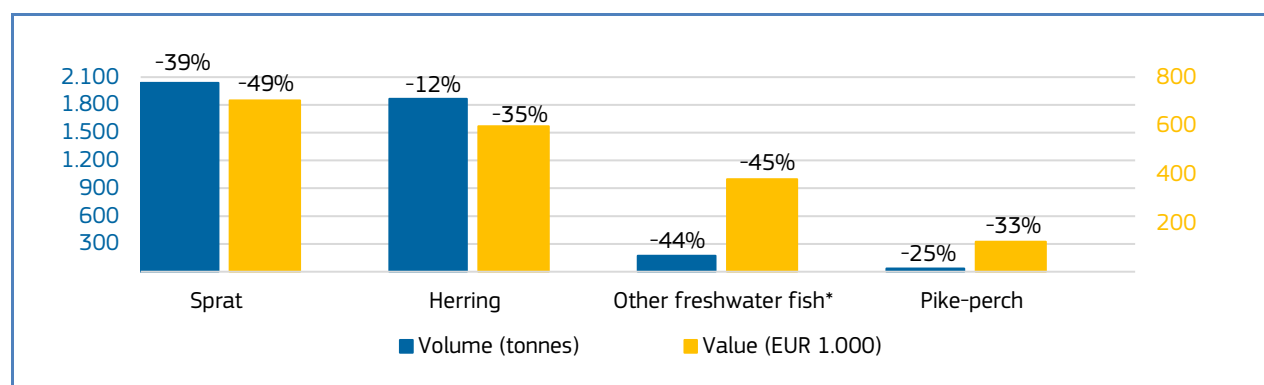
 Estonia	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 22,3 million, +20%	44.858 tonnes, -10%	Value: sprat, herring, smelt. Volume: herring, sprat, seaweed and other algae*.
Sep 2024 vs Sep 2023	EUR 1,9 million, -43%	4.131 tonnes, -29%	Sprat, herring, other freshwater fish*, pike-perch.

Figure 5. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ESTONIA, SEPTEMBER 2024**

Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND**


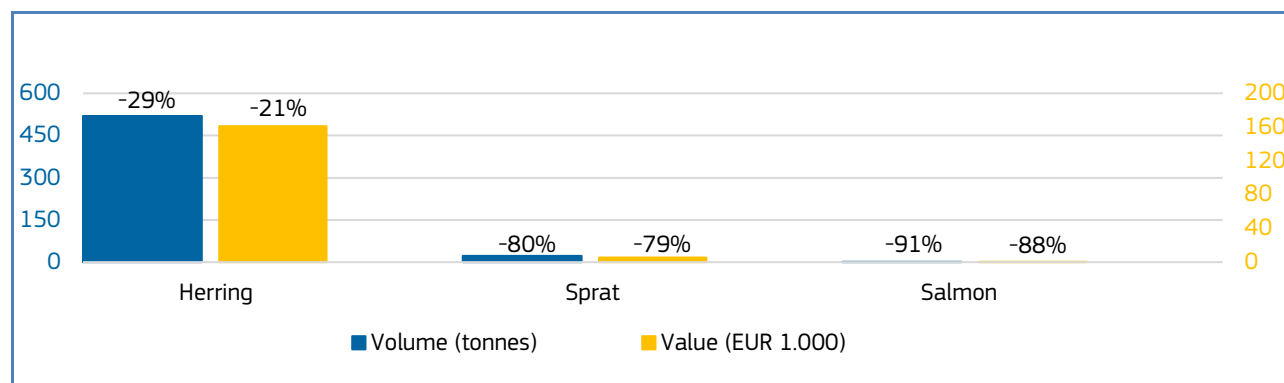
 Finland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 13,3 million, +6%	35.190 tonnes, -19%	Herring, sprat.
Sep 2024 vs Sep 2023	EUR 0,02 million, -29%	543 tonnes, -35%	

Figure 6. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FINLAND, SEPTEMBER 2024**

Percentages show change from the previous year.

Table 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE**


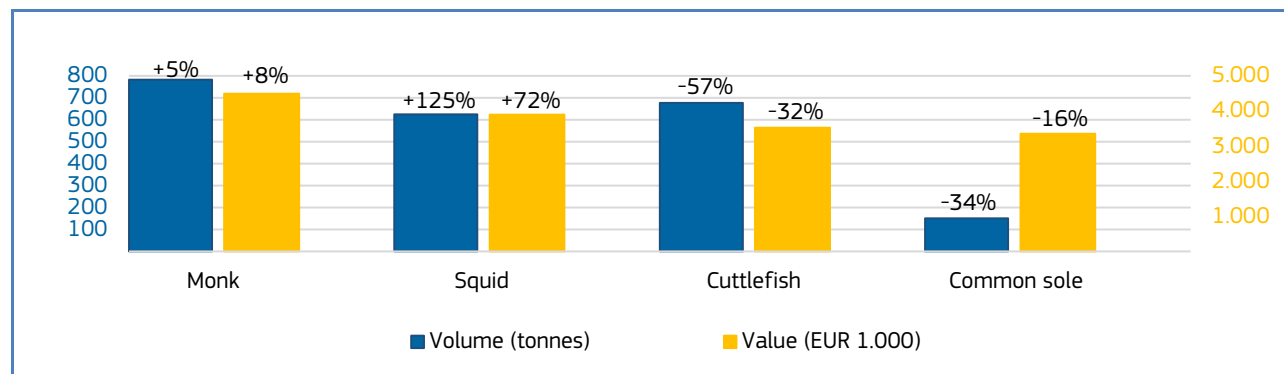
 France	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Sep 2024 vs Jan-Sep 2023	EUR 509,7 million, -3%	189.597 tonnes, -2%	Other molluscs and aquatic invertebrates*, octopus, eel, sardine.	In September 2024, there was a noticeable increase in first sales of squid compared to September 2023. Most of the increase observed came from the Celtic Seas. The squid fishery is highly seasonal, with the high season typically occurring in Brittany and Normandy between September and January, followed by a low season from February to August. Due to changes in oceanic conditions, this seasonal pattern evolved slightly in 2024, with a low catch level in January 2024 (426 tonnes) compared to January 2023 (1.030 tonnes). Conversely, the fishing season started a bit earlier, with an increase of 152 tonnes in August 2024 compared to August 2023 as well as the increase of 347 tonnes analysed here. No apparent reason for the increase in first sales volume has been detected. However, extremely rapid growth rates of individuals and rapid turnover rates at population level mean that squid can respond quickly to environmental or ecosystem changes.
Sep 2024 vs Sep 2023	EUR 55,9 million, 0%	21.971 tonnes, -1%	Value: monk, squid, cuttlefish Volume: cuttlefish, sardine, albacore tuna.	

Figure 7. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN FRANCE, SEPTEMBER 2024**

Percentages show change from the previous year. *EUMOFA aggregation for species.

Overview | 1. First sales in Europe | 2. Extra-EU imports | 3. Consumption

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Table 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY**


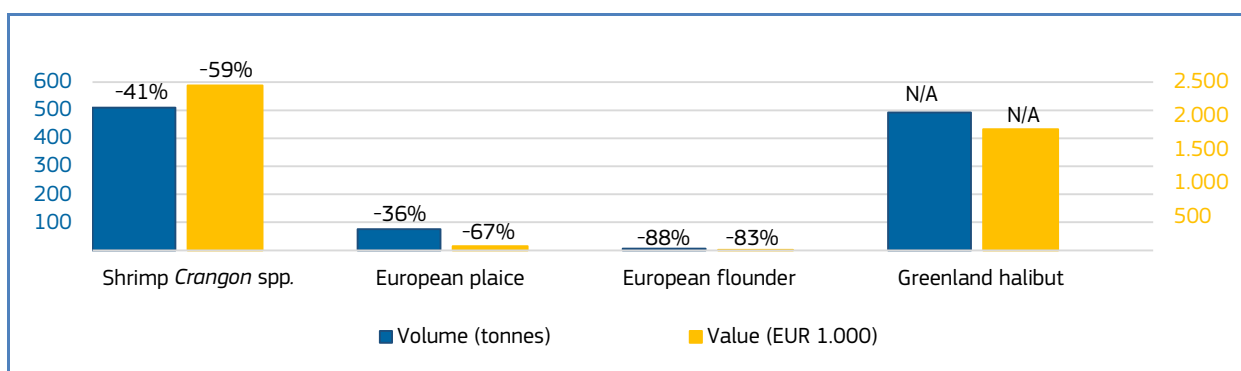
 Germany	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 42,4 million, -5%	22.278 tonnes, -4%	Greenland halibut, cod, mackerel, shrimp <i>Crangon</i> spp.
Sep 2024 vs Sep 2023	EUR 4,5 million, -27%	1.271 tonnes, +21%	Shrimp <i>Crangon</i> spp., European plaice, European flounder, Greenland halibut.

Figure 8. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN GERMANY, SEPTEMBER 2024**

Percentages show change from the previous year.

Table 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY**


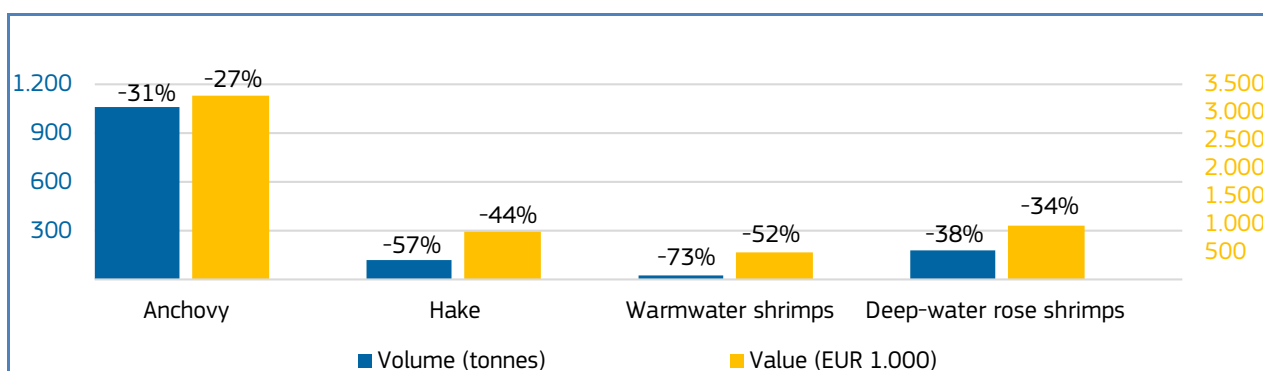
 Italy	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 200,6 million, -19%	43.491 tonnes, -20%	Hake, anchovy, deep-water rose shrimps, miscellaneous shrimps.
Sep 2024 vs Sep 2023	EUR 22,3 million, -25%	5.523 tonnes, -28%	Anchovy, hake, warmwater shrimps, deep-water rose shrimps.

Figure 9. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN ITALY, SEPTEMBER 2024**

Percentages show change from the previous year.

Table 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA**


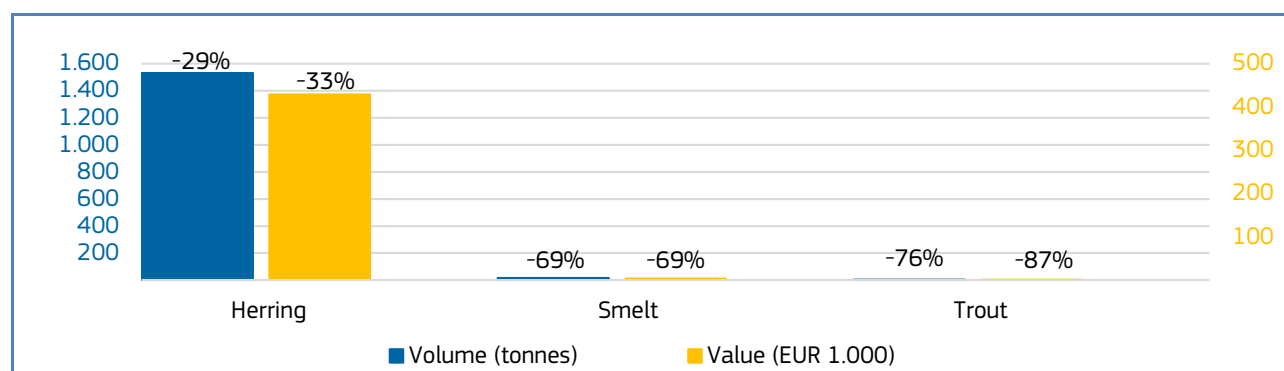

 Latvia	First-sales value / trend %	First-sales volume/ trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 9,7 million, +15%	27.523 tonnes, -10%	Value: sprat, other freshwater fish*, herring. Volume: sprat, herring, smelt.
Sep 2024 vs Sep 2023	1,1 million, -6%	3.155 tonnes, -14%	Herring, smelt, trout.

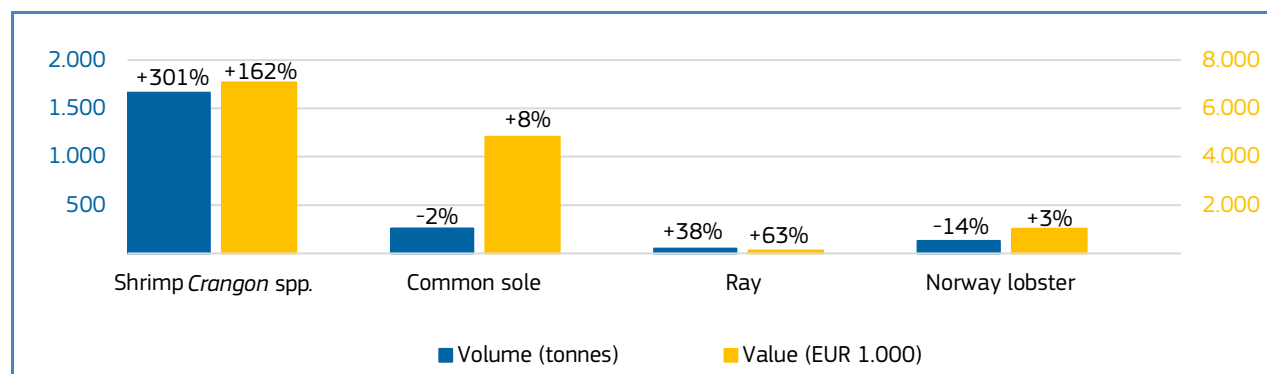
Figure 10. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN LATVIA, SEPTEMBER 2024**

Percentages show change from the previous year. *EUMOFA aggregation for species

Table 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS**

 the Netherlands	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Notes
Jan-Sep 2024 vs Jan-Sep 2023	EUR 114,6 million, +12%	18.104 tonnes, -61%	Value: shrimp <i>Crangon</i> spp., squid, cod, mackerel Volume: European plaice, gumard, Norway lobster.	In September 2024, there was a significant increase in first sales of shrimp <i>Crangon</i> spp. compared to September 2023. Analyzing the historical data, the production of 415 tonnes recorded in September 2023 appears to be the exception since production in 2022, 2021, 2020 and 2019 was respectively 1.666 tonnes, 2.500 tonnes, 1.900 tonnes and 1.671 tonnes. The North Sea "brown" shrimp stock (<i>Crangon crangon</i>) appears to be trending above lower reference limits or proxies and has shown a tendency to recover quickly from periods of lower abundance ³ . This development is mostly due to external factors in September 2023, such as less favourable weather conditions and higher fuel costs.
Sep 2024 vs Sep 2023	EUR 16,4 million, +29%	2.982 tonnes, +43%	Shrimp <i>Crangon</i> spp, common sole, red mullet, Norway lobster.	

³ https://www.fishsource.org/stock_page/1207

Figure 11. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE NETHERLANDS, SEPTEMBER 2024**

Percentages show change from the previous year.

Table 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND**


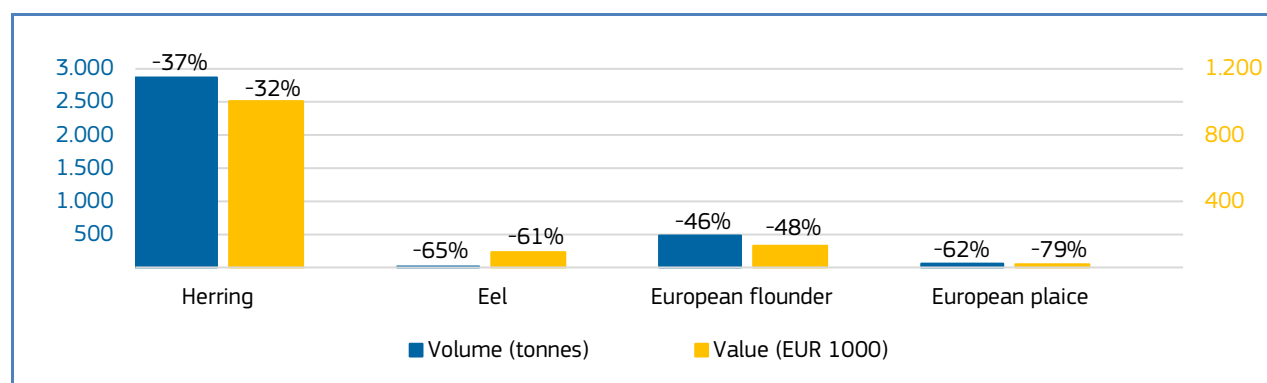
 Poland	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 23,2 million, +12%	44.459 tonnes, -16%	Value: sprat, other freshwater fish*, pike-perch, eel. Volume: herring, sprat, European flounder, European plaice.
Sep 2024 vs Sep 2023	EUR 2,8 million, -12%	5.248 tonnes, -8%	Herring, eel, European flounder, European plaice.

Figure 12. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN POLAND, SEPTEMBER 2024**

Percentages show change from the previous year. *EUMOFA aggregation for species.

Table 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL**


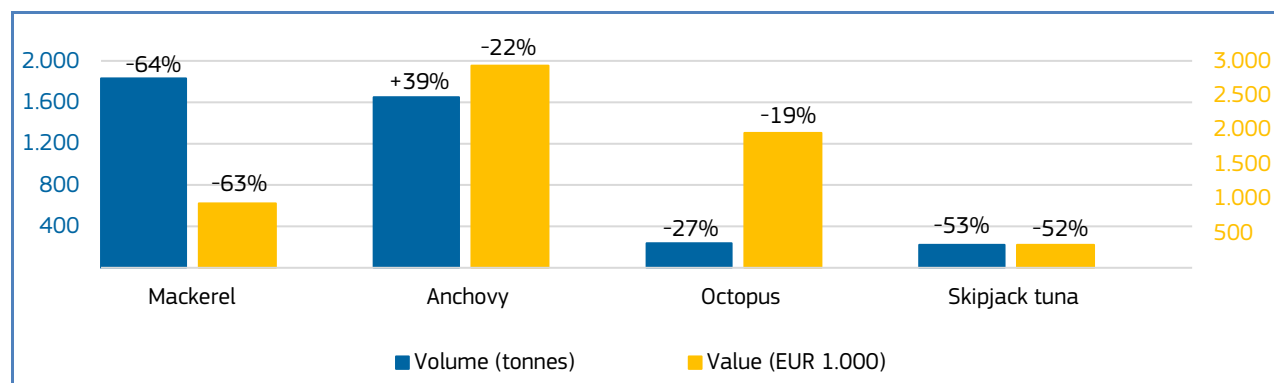
 Portugal	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 213,0 million, -8%	82.510 tonnes, -12%	Octopus, anchovy, mackerel, Atlantic horse mackerel.
Sep 2024 vs Sep 2023	EUR 26,6 million, -7%	12.351 tonnes, -20%	Anchovy, skipjack tuna, octopus, mackerel.

Figure 13. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN PORTUGAL, SEPTEMBER 2024**

Percentages show change from the previous year.

Table 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN**


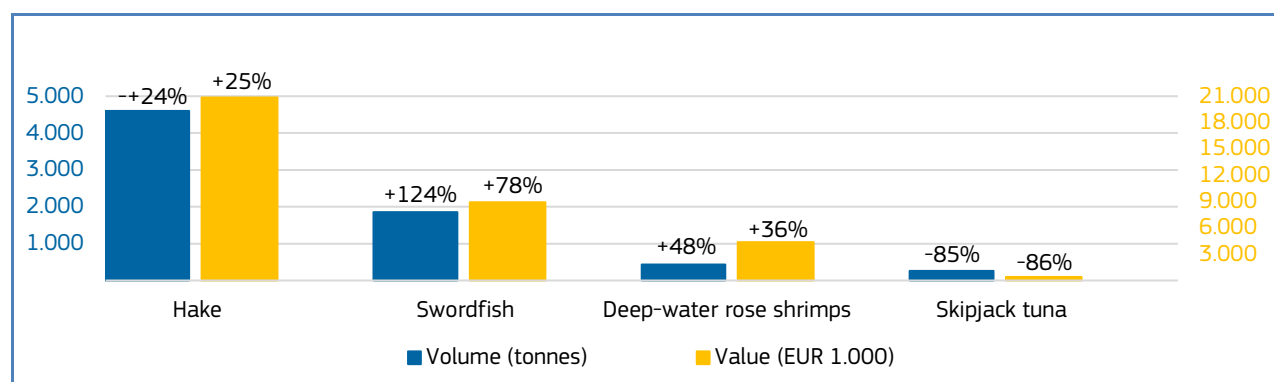
 Spain	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Sep 2024 vs Jan-Sep 2023	EUR 1.080,8 million, -2%	317.157 tonnes, -5%	Clam, skipjack tuna, bigeye tuna, mackerel, hake.	In September 2024, there was a moderate increase in first sales of swordfish compared to September 2023. The EU accounts for more than 50% of the quota for all North Atlantic swordfish caught, with Spain being one of the most prominent players in this fishery. During the 24 th Special Meeting of ICCAT, available catches by the Spanish fleet were increased by approximately 6.400 tonnes. The positive status of swordfish is the primary reason for this significant increase in volume. In September 2023 the lowest monthly catch since 2017 was recorded, despite annual catches remaining within typical ranges. However, the economic value of the fishery has not increased significantly because of the low market price of swordfish. This is directly related to a decline in demand for swordfish. As a result, in the past year, Spain has experienced requests to withdraw 35% of its fleet.
Sep 2024 vs Sep 2023	EUR 107,7 million, +6%	27.554 tonnes, -14%	Value: Hake, swordfish, deep-water rose shrimps. Volume: skipjack tuna, blue whiting, Atlantic horse mackerel.	

Figure 14. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SPAIN, SEPTEMBER 2024**

Percentages show change from the previous year.

Overview | 1. First sales in Europe | 2. Extra-EU imports | 3. Consumption

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Table 17. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN**


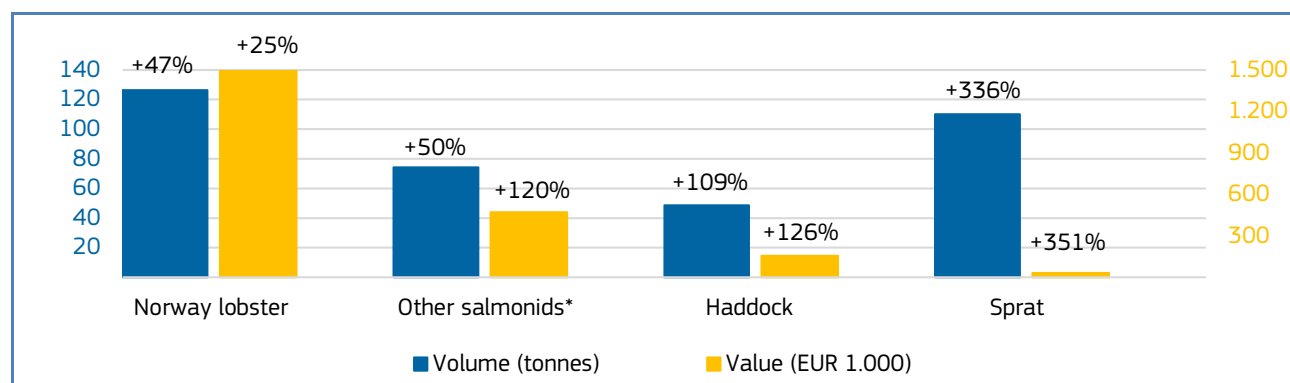
 Sweden	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Sep 2024 vs Jan-Sep 2023	EUR 43,1 million, -28%	39.487 tonnes, -57%	Sprat, herring, coldwater shrimp, monk.	<p>In September 2024, there was an increase in first sales of haddock compared to September 2023. In September 2024, the sales quantities of haddock were 62% of Swedish fleet landings in Sweden, compared to 72% in 2023. In September 2024 the sales volume was 109% higher and the price was 8% higher compared to September 2023, and around 31% higher compared to the average price in 2024. This might indicate that market demand was higher than supply. Landings of haddock of the Swedish fleet in Sweden were 144% higher when comparing September 2024 with September 2023. One of the reasons for increasing sales may be market demand. In September 2024, unusually high sea temperature was observed, which might have positively affected the fishing activities.</p> <p>In September 2024, there was a slight increase in first sales of salmonids⁴ compared to September 2023. One of the reasons for the high increases in value was increased supply of vendace to the market, where the price was 49% higher in September 2024 compared to September 2023. In September 2024 only around 1% of other salmonids landings by the Swedish fleet were sold in Sweden. It might show that the species is not popular in the Swedish market for local consumption. Vendace and whitefish are not covered by TAC and catches are not regulated.</p> <p>In September 2024, there was a sustained increase in first sales of crab compared to September 2023. In 2024 the supply of crab increased compared to 2023 due to increases in stock. Catches of crab are not covered by TAC and are not regulated. Crab catches increased by 129% comparing September 2024 with September 2023. However, the quantities were not significant. High sea temperature, fishing capacity and resources enable an increase in fishing effort to raise the supply to the market in September 2024.</p>
Sep 2024 vs Sep 2023	EUR 6,0 million, +7%	3.104 tonnes, +5%	Norway lobster, other salmonids*, haddock, sprat.	

Figure 15. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN SWEDEN, SEPTEMBER 2024**

Percentages show change from the previous year. *EUMOFA aggregation for species.

⁴ The decrease refers to the EUMOFA MCS "Other salmonids" which encompasses salmonids other than salmon and trout.

Table 18. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY**


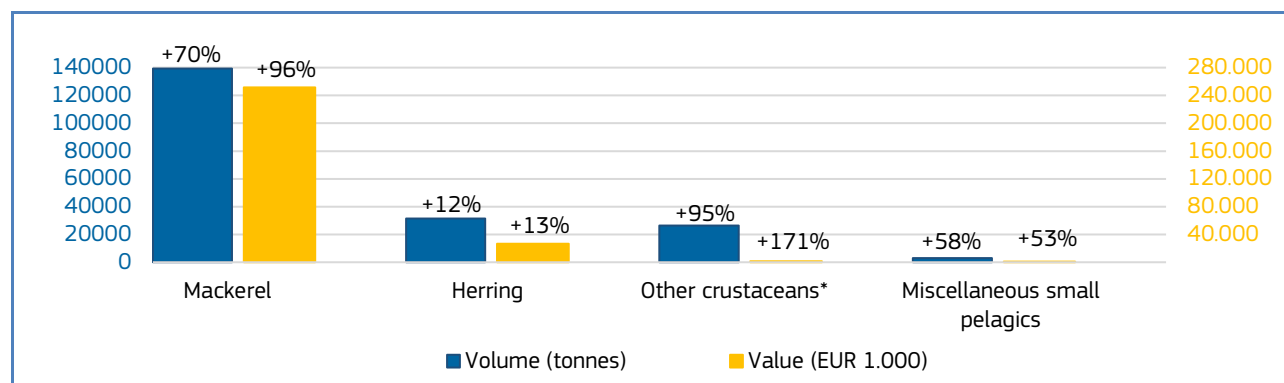
 Norway	First-sales value / trend %	First-sales volume / trend %	Main contributing species	Note
Jan-Sep 2024 vs Jan-Sep 2023	EUR 2.352,5 million, 0%	2,2 million tonnes, -2%	Cod, mackerel, herring, saithe.	In September 2024, there was a steep increase in first sales of Atlantic krill , which is included in the EUMOFA MCS "Other crustaceans". The increase is due mainly to an increase in the species. The Antarctic krill fishery is managed by the RFMO CCAMLR ⁵ , and the Total Allowable Catch (TAC) for 2024 remains unchanged at 620.000 tonnes compared to 2023. Antarctic krill is caught by the Norwegian and other fleets, mostly in the Antarctic regulatory Area 48. Krill has a strong inter-annual variability, with cycles of 5-6 years, and with peaks and low periods. September and October are regarded as being at the tail end of the krill season. In 2023, very limited amounts of krill were caught in September while 2024 was a good year in terms of fishing aggregations and krill size, resulting in good catches. The Norwegian production, which globally accounts for around 60% of the TAC, increased from 13.500 tonnes to 26.400 tonnes. With stable catch volumes (and first sales volumes) of around 26.000 tonnes in August and September, and low catches in September 2023, the increase in first-sales volume and value became very strong.
Sep 2024 vs Sep 2023	EUR 356,9 million +41%	260.880 tonnes, +30%	Mackerel, herring, other crustaceans*, miscellaneous small pelagics.	

Figure 16. **FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN NORWAY, SEPTEMBER 2024**

Percentages show change from the previous year. *EUMOFA aggregation for species.

⁵ <https://www.ccamlr.org/>



Table 19. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM


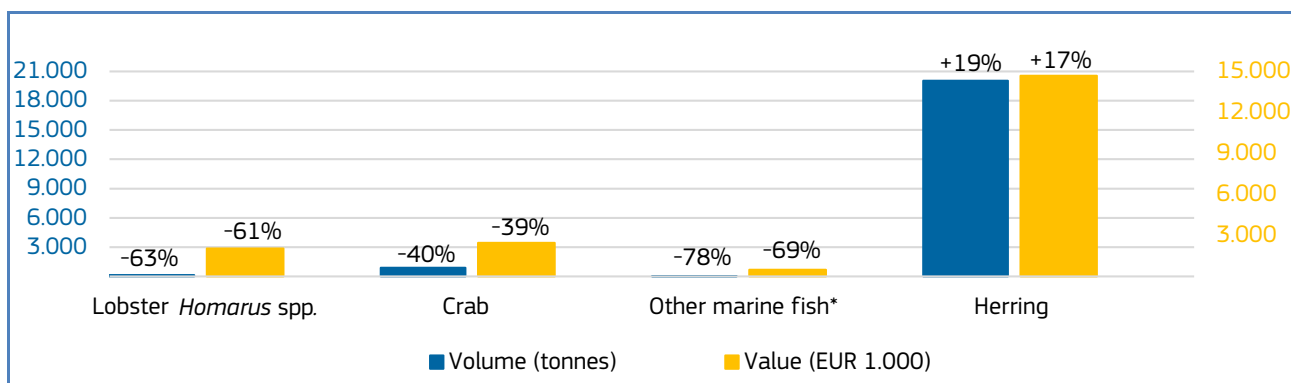
 The United Kingdom	First-sales value / trend %	First-sales volume / trend %	Main contributing species
Jan-Sep 2024 vs Jan-Sep 2023	EUR 465,4 million, -6%	253.260 tonnes, +1%	Value: Lobster <i>Homarus</i> spp., crab, other molluscs and aquatic invertebrates*. Volume: herring, blue whiting, mackerel.
Sep 2024 vs Sep 2023	EUR 52,4 million, -8%	34.987 tonnes, +9%	Value: Lobster <i>Homarus</i> spp., crab, other marine fish*. Volume: herring, haddock, saithe.

Figure 17. FIRST SALES OF THE MAIN COMMERCIAL SPECIES IN THE UNITED KINGDOM, SEPTEMBER 2024

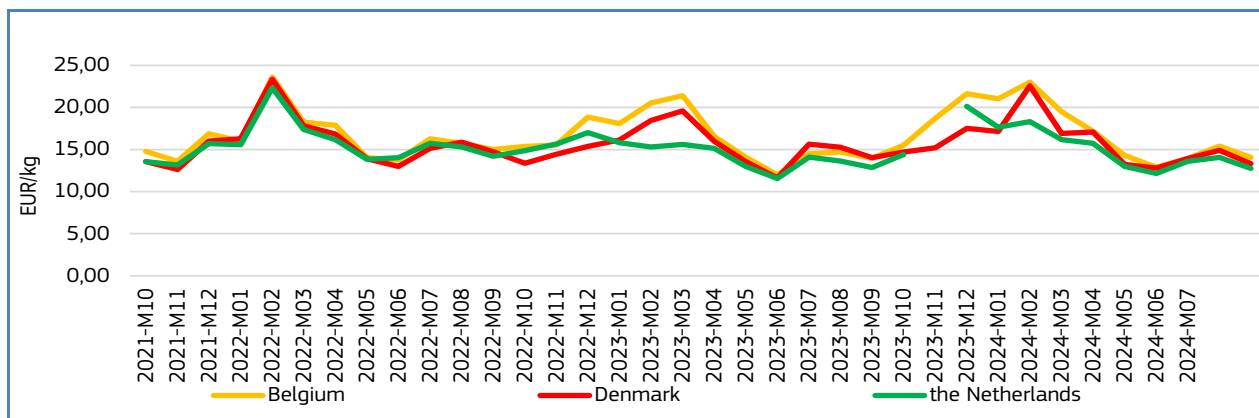


Percentages show change from the previous year.



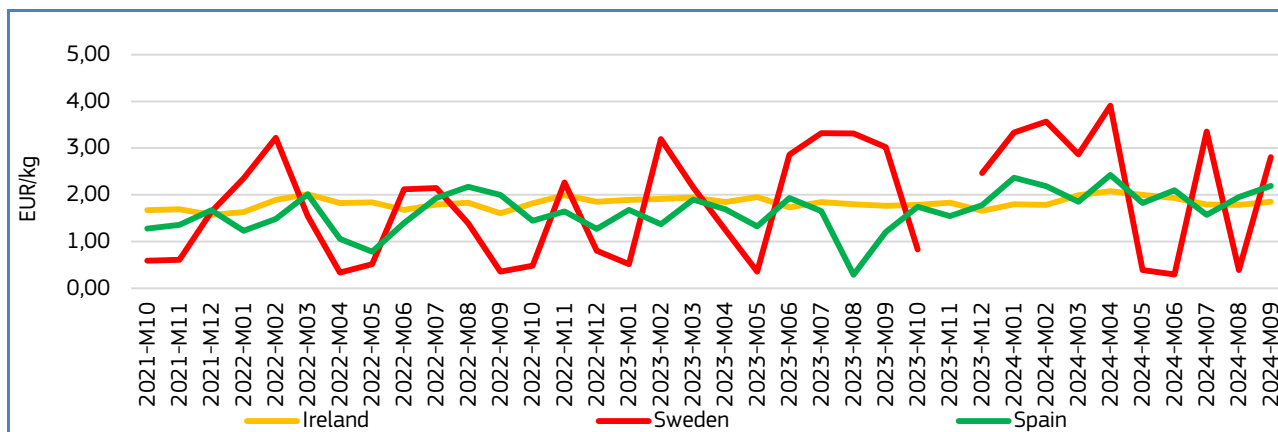
1.4. Comparison of first sales prices of selected species in selected countries⁶

Figure 18. **FIRST SALES PRICES OF TURBOT IN BELGIUM, DENMARK AND THE NETHERLANDS**



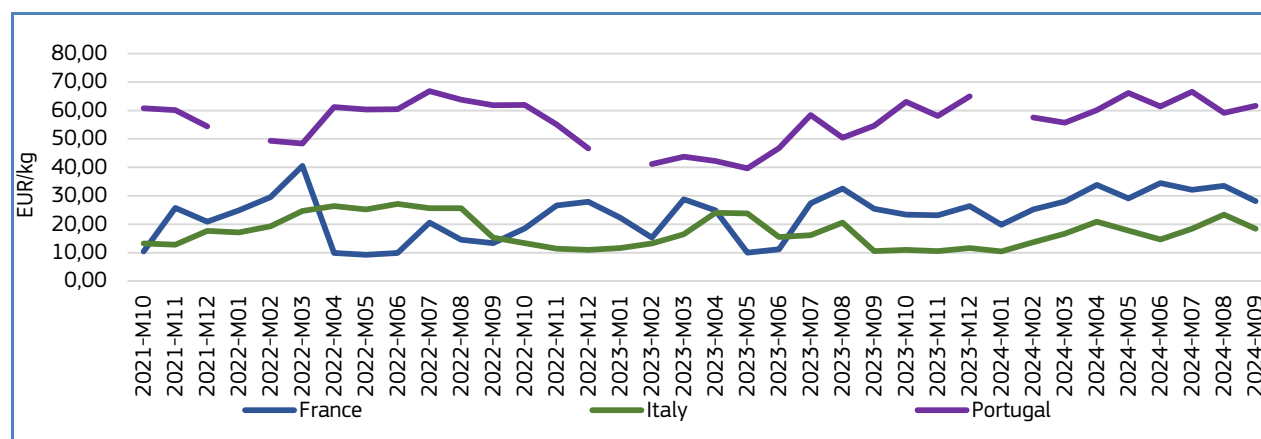
EU first sales of **turbot** occur in several countries including **Belgium, Denmark** and **the Netherlands**. In September 2024, average first-sales prices of turbot were 14,07 EUR/kg in Belgium (down by 9% from the previous month and up by 3% from the previous year), 13,32 EUR/kg in Denmark (down by 11% from August 2024 and by 5% from September 2023), and 12,77 EUR/kg in the Netherlands (down by 9% from the previous month and by 1% from the previous year). In September 2024, supply relative to the previous year increased in Belgium (+17%) and Denmark (+84%), while it decreased in the Netherlands (-23%). In the countries analysed, volume seemed to peak in May and September in Belgium; in May-June in Denmark; and between September and December in the Netherlands. Between months 10/2021 and 09/2024, prices followed availability of supply and seemed to peak in February-March in Belgium and Denmark. Falls in prices seemed to occur between May and July in the Netherlands, where overall prices followed a decreasing trend.

Figure 19. **FIRST SALES PRICES OF WHITING IN IRELAND, SWEDEN AND SPAIN**



EU first sales of **whiting** occur in **Ireland, Sweden** and **Spain** as well as several other Member States. In September 2024, the average first-sales prices of whiting were: 1,85 EUR/kg in Denmark (up by 3% from previous month and by 5% from September 2023), 2,80 EUR/kg in Sweden (up by 618% from August 2024 and down by 7% from September 2023), and 2,19 EUR/kg in Spain (up by 12% from the previous month and by 82% from the previous year). In September 2024, supply increased in Sweden (+15%), and Spain (+2939%) while it decreased in Ireland (-37%), relative to the previous year. Peaks in supply seemed to occur in similar periods in the three markets analysed: August-September in Ireland, August-October in Sweden, and October-November in Spain. Between months 10/2021 and 09/2024, prices fluctuated and increased in the three markets analysed. In Sweden, strong fluctuations in prices were recorded following supply, and peaks in prices seemed to occur in February and July/August.

⁶ First sales data updated on 21. 11. 2024.

Figure 20. **FIRST SALES PRICES OF WARMWATER SHRIMPS IN FRANCE, ITALY AND PORTUGAL**

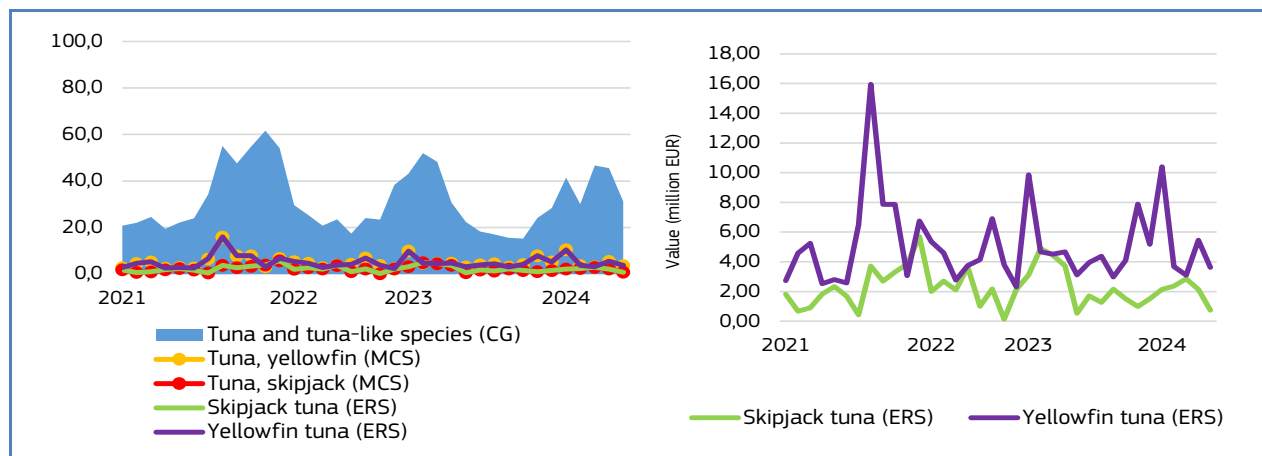
EU first sales of **warmwater shrimps**⁷ are recorded in six Member States including **France, Italy** and **Portugal**. In September 2024, the average first-sales prices of warmwater shrimp were 28,11 EUR/kg in France (down by 16% from the previous month and up by 11% from the previous year), 18,44 EUR/kg in Italy (down by 21% from the previous month and up by 76% from September 2023), and 61,62 EUR/kg in Spain (up by 4% from August 2024 and by 13% from the previous year). In September 2024, supply decreased in Italy (-73%), while it increased in France (+35%) and Spain (+49%), relative to the previous year. In the countries analysed, volume seemed to peak in April and May in France, whereas a fall in supply was registered in December in Italy; and in March and September/October in Portugal. Between months 10/2021 to 09/2024, prices fluctuated strongly and increased in France and Italy, while Portugal registered the highest prices. In Italy peaks in prices were recorded in May-June following supply, while in France peaks in prices were registered in March, July and December. The highest price of 66,77 EUR/kg was recorded in July 2022 in Portugal.

⁷ In France, four species are classified under the warm water shrimp MCS, with *Penaeus* shrimps *nei* being the dominant species by volume. In Italy, eight species are listed under in the same MCSs, where the camarote prawn leads in terms of volume. In Portugal, the MCS covers three species, with the scarlet shrimp representing the largest one by volume.



1.5. Commodity group of the month: Tuna and tuna-like species⁸

Figure 21. **FIRST-SALES COMPARISON AT CG, MCS, AND ERS LEVELS FOR REPORTING COUNTRIES⁹, SEPTEMBER 2021 – SEPTEMBER 2024**



In September 2024, first sales of the “**Tuna and tuna-like species**” commodity group (CG¹⁰) were 5th highest in both value and volume out of the 10 CGs in the countries monitored by EUMOFA.¹¹ In the reporting countries covered by the EUMOFA database, first sales of this group of species in September 2024 totalled EUR 31,2 million and 7.174 tonnes, representing a 10% increase in value and 5% increase in volume compared to September 2023. In the past 36 months, the highest first-sales value of tuna and tuna-like species was registered in July 2022 at about EUR 61,6 million.

The tuna and tuna-like species commodity group includes seven main commercial species (MCS): albacore, bigeye, bluefin, skipjack, yellowfin, miscellaneous tuna species¹², and swordfish. Pelagic shark species, normally regarded as tuna-like species, are not included in the commodity group.

At the Electronic Recording and Reporting System (ERS) level yellowfin tuna (12%) and skipjack tuna (2%) together accounted for 14% of the total first-sales value for “Tuna and tuna-like species” recorded in September 2024.

⁸ First sales data updated on 21. 11. 2024.

⁹ Norway, the Faroe Islands and the UK excluded from the analyses.

¹⁰ Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>

¹¹ More data on commodity groups can be found in Table 1.2 of the Annex.

¹² EUMOFA aggregation for species - Metadata 2, Annex 3: <http://eumofa.eu/supply-balance-and-other-methodologies>



1.6. Focus on yellowfin tuna



Source: FishBase

Yellowfin tuna (*Thunnus albacares*) belongs to the family of Scombridae. It is a marine fish that prefers depths up to 250 m. The species is pelagic in open water, but rarely seen near reefs. They school primarily by size, either in monospecific or multi-species groups. Larger fish frequently school with porpoises and are also associated with floating debris and other objects. They feed on fish, crustaceans and squids. The species is sensitive to low concentrations of oxygen¹³. Yellowfin tuna can be found worldwide in tropical and subtropical seas, but not in the Mediterranean Sea. It is a highly migratory species.¹⁴ The yellowfin tuna fishery is regulated by various Regional Fishery Management Organizations (RFMOs). Among these, the European Union fleet

primarily operates in regions managed by the Inter-American Tropical Tuna Commission (IATTC), the International Commission for the Conservation of Atlantic Tunas (ICCAT), the Indian Ocean Tuna Commission (IOTC), and the Western and Central Pacific Fisheries Commission (WCPFC). The fishery is managed through annual quotas, spatio-temporal measures, minimum reference size, fishing gear regulation, and strict compliance and enforcement, among others.

Purse seine fishing for yellowfin tuna in the IATTC Convention area and the WCPFC Convention area fall under specific restrictions within the EU, whereby they cannot be used for fishing in certain areas at certain times of the year in the IATTC Convention area, while in the WCPFC Convention area no more than 403 fishing days can be allocated to purse seine vessels to fish yellowfin tuna.¹⁵

Selected countries

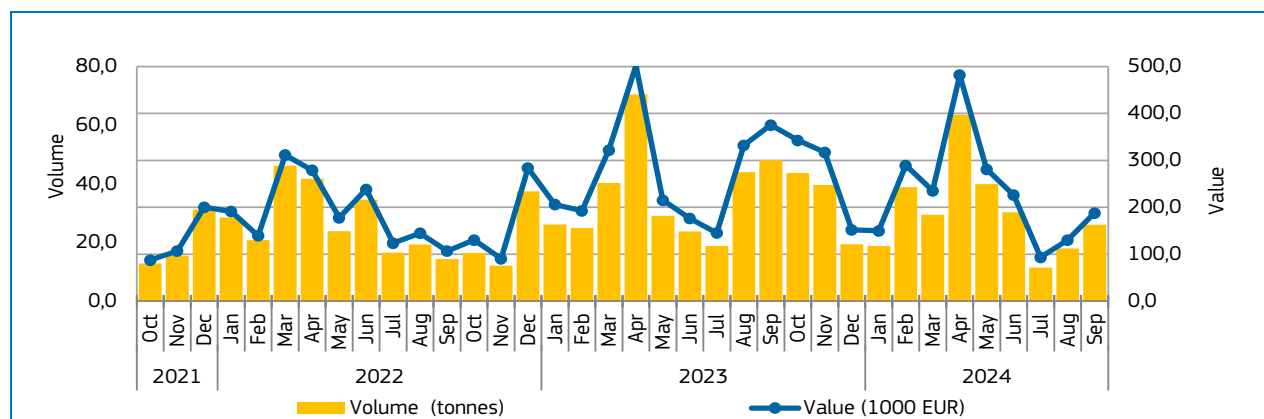
Table 23. **COMPARISON OF YELLOWFIN TUNA FIRST-SALES PRICES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "TUNA AND TUNA-LIKE SPECIES" IN SELECTED COUNTRIES**

Yellowfin tuna		Changes in yellowfin tuna first sales Jan-Sep 2024 (%)		Contribution of yellowfin tuna to total "Tuna and tuna- like species" first sales in September 2024 (%)	Principal places of sale in September 2024 in terms of first-sales value
		Compared to Jan-Sep 2023	Compared to Jan-Sep 2022		
France	Value	-16%	+21%	3%	Le Port (Reunion), Sainte-Marie (Martinique), Sainte-Rose (Guadeloupe).
	Volume	-15%	+12%	2%	
Portugal	Value	+357%	+2121%	38%	Ribeira Grande, Funchal, Madeira, Santa Maria Island Apt.
	Volume	+383%	+3792%	39%	
Spain	Value	+1%	-23%	13%	Bermeo, Arrecife de Lanzarote, Santa Cruz de Tenerife.
	Volume	+3%	-12%	21%	

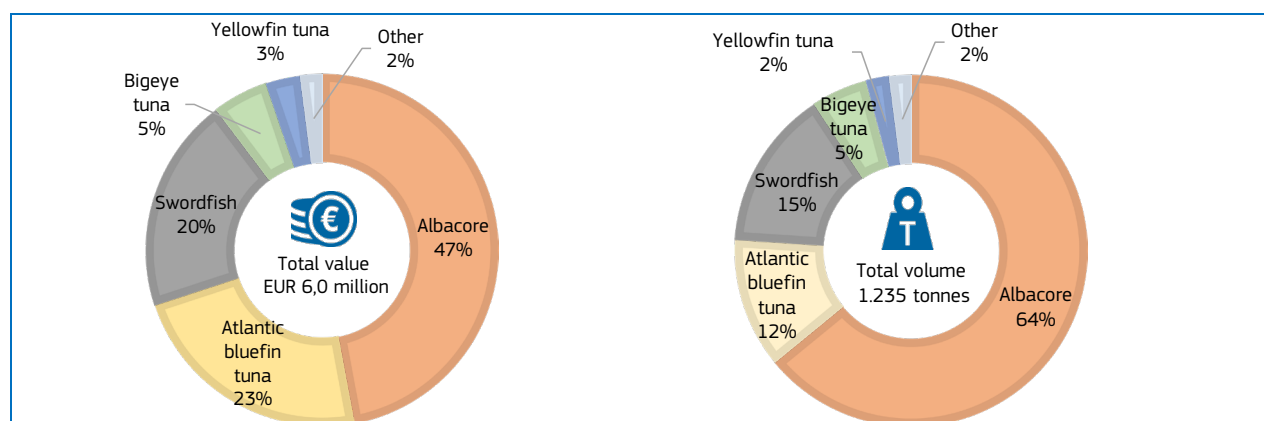
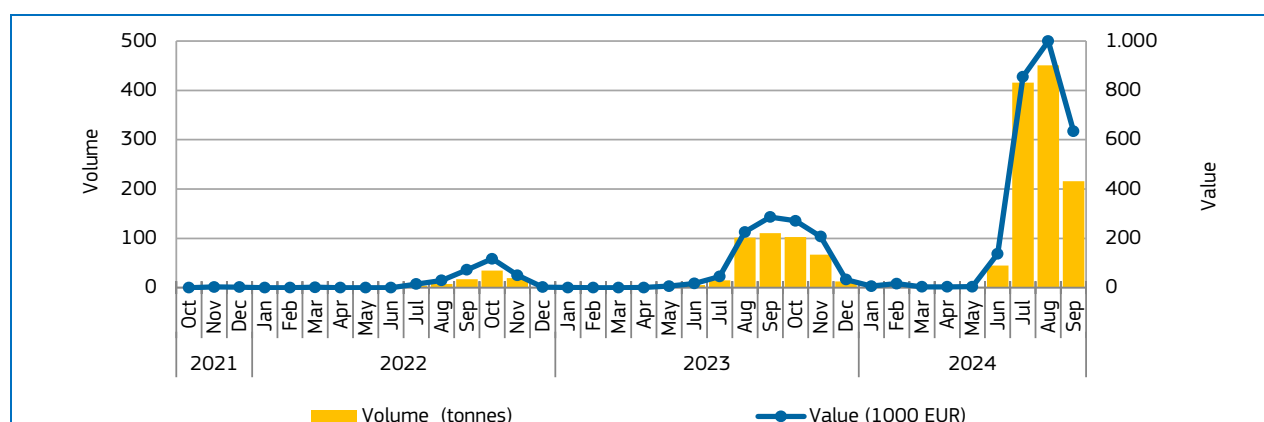
¹³ <https://www.fishbase.se/summary/thunnus-albacares>

¹⁴ <https://www.fishbase.se/summary/thunnus-albacares>

¹⁵ COUNCIL REGULATION (EU) 2024/257: https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=OJ%3AL_202400257

Figure 22. **YELLOWFIN TUNA: FIRST SALES IN FRANCE, OCTOBER 2021 – SEPTEMBER 2024**

Over the past 36 months in **France**, the highest first-sales of yellowfin tuna were in April 2023 when approximately 70 tonnes were sold for EUR 0,5 million.

Figure 23. **FIRST SALES: COMPOSITION OF “TUNA AND TUNA-LIKE SPECIES” (ERS LEVEL) IN FRANCE IN VALUE AND VOLUME, SEPTEMBER 2024**Figure 24. **YELLOWFIN TUNA: FIRST SALES IN PORTUGAL, OCTOBER 2021 – SEPTEMBER 2024**

Over the past 36 months in **Portugal**, the highest first-sales value of yellowfin tuna was in August 2024 when approximately 451 tonnes were sold for EUR 1,0 million.

Figure 25. **FIRST SALES: COMPOSITION OF “TUNA AND TUNA-LIKE SPECIES” (ERS LEVEL) IN PORTUGAL IN VALUE AND VOLUME, SEPTEMBER 2024**

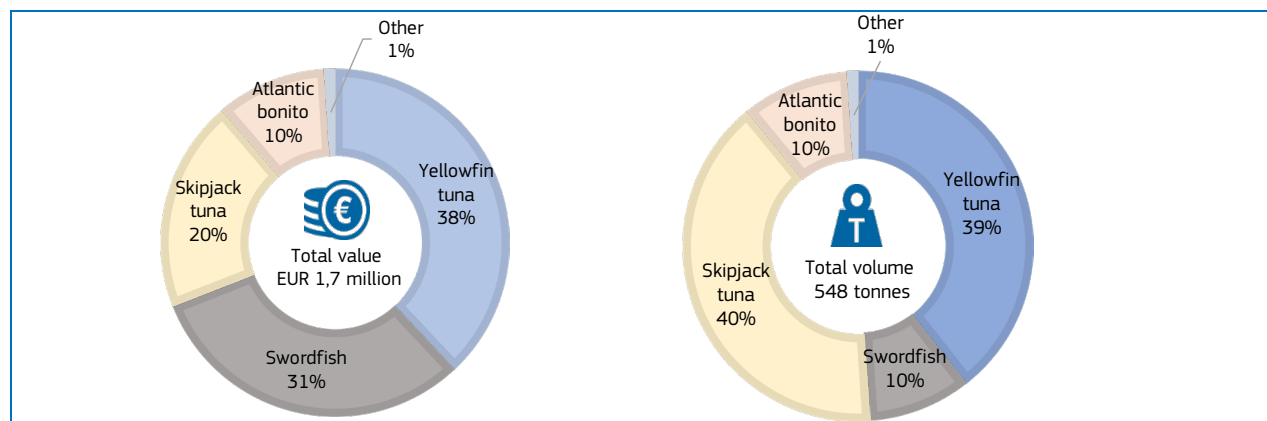
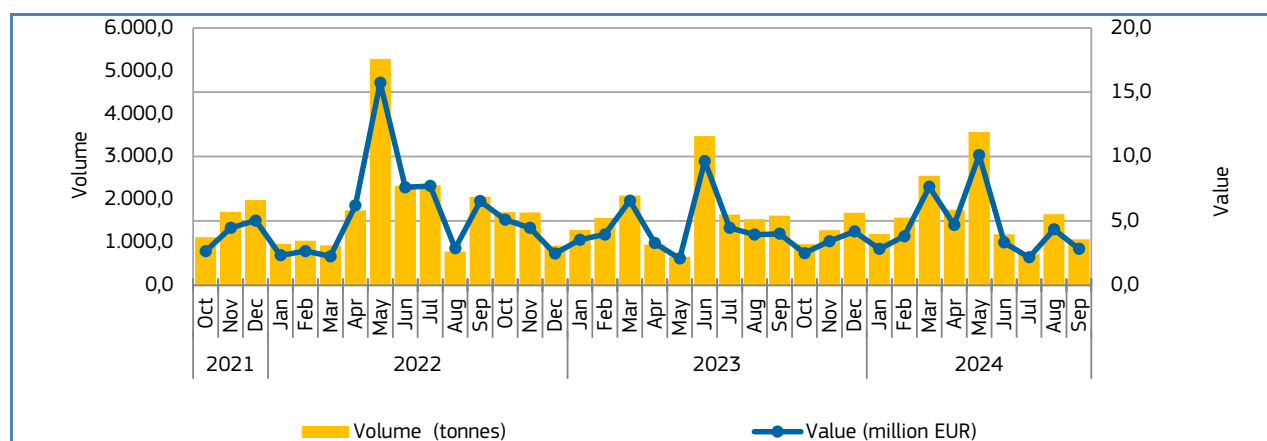
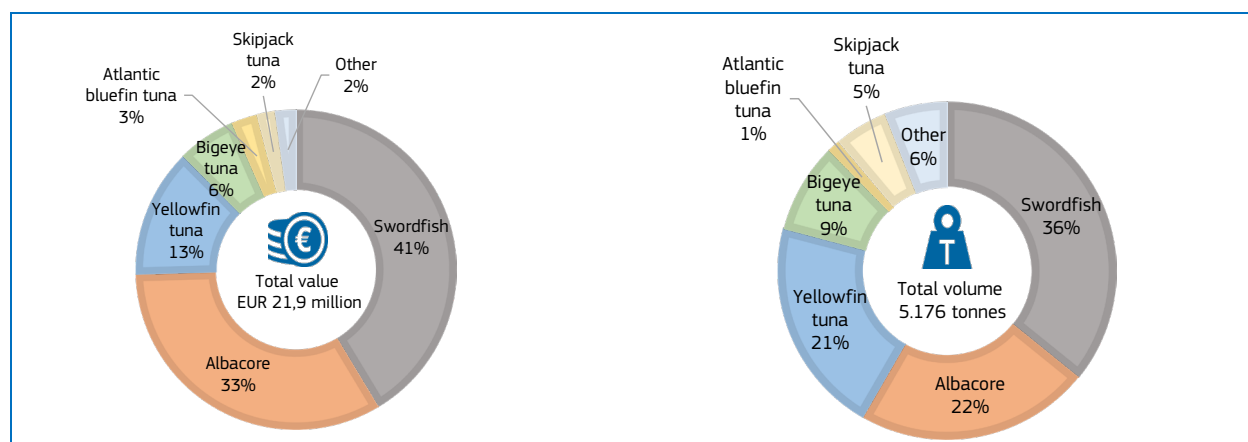


Figure 26. **YELLOWFIN TUNA: FIRST SALES IN SPAIN, OCTOBER 2021 – SEPTEMBER 2024**



In **Spain**, over the 36-month observation period from October 2021 to September 2024, the highest first-sales value of yellowfin tuna was registered in May 2022 when 5.279 tonnes were sold for EUR 15,7 million.

Figure 27. **FIRST SALES: COMPOSITION OF “TUNA AND TUNA-LIKE SPECIES” (ERS LEVEL) IN SPAIN IN VALUE AND VOLUME, SEPTEMBER 2024**



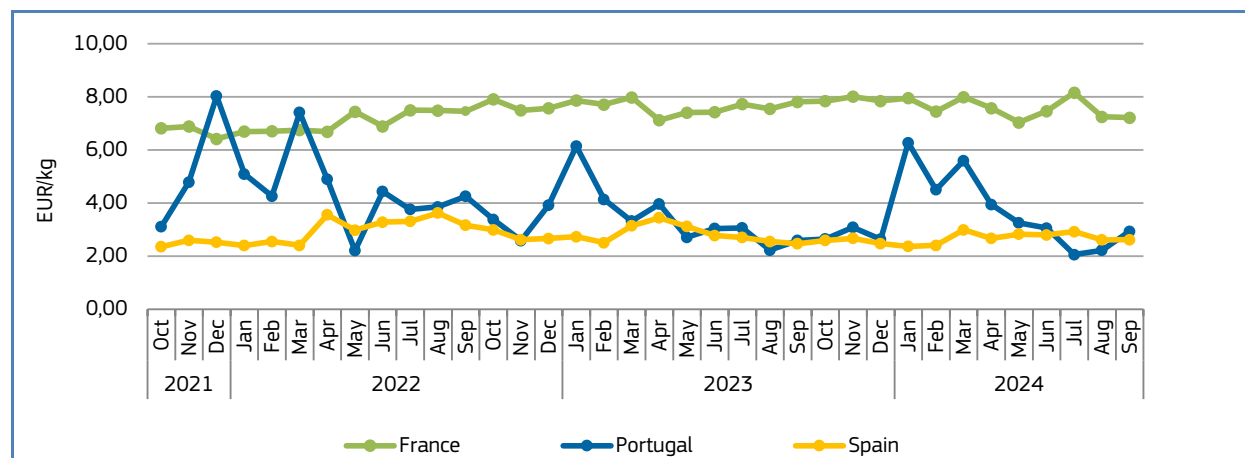
Overview | 1. First sales in Europe | 2. Extra-EU imports | 3. Consumption

4. Fisheries and Aquaculture in Türkiye | 5. Pacific salmon in the EU | 6. Global highlights | 7. Macroeconomic context



Price trend

Figure 28. **YELLOWFIN TUNA: FIRST-SALES PRICES IN SELECTED COUNTRIES, OCTOBER 2021 – SEPTEMBER 2024**



Over the 36-month observation period (October 2021 to September 2024), the weighted average first-sales price of yellowfin tuna in **France** was 7,40 EUR/kg, 199% higher than in **France** (2,47 EUR/kg) and 162% higher compared to **Spain** (2,82 EUR/kg).

In **France** in September 2024, the average first-sales price of yellowfin tuna (7,22 EUR/kg) decreased by 8% compared to September 2023 and by 3% compared to the same month in 2022. Over the past 36 months, the average price ranged from 6,42 EUR/kg in December 2021 to 8,16 EUR/kg in July 2024.

In **Portugal** in September 2024, the average first-sales price of yellowfin tuna (2,93 EUR/kg) increased by 13% compared to September 2023, while it decreased by 31% compared to September 2022. Over the past 36 months, the average price ranged from 2,06 EUR/kg for 416 tonnes in July 2024 to 8,03 EUR/kg for about 256 kg in December 2021.

In **Spain** in September 2024, the average first-sales price of yellowfin tuna (2,62 EUR/kg) increased by 6% compared to September 2023 and decreased by 17% compared to 2022. During the period observed, the average price ranged from 2,35 EUR/kg for 1.118 tonnes in October 2021 to 3,63 EUR/kg for 789 tonnes in August 2022.

EUMOFA also covered **yellowfin tuna** in the following *Monthly Highlights*:

First sales: MH 10 2021 (Portugal, Spain).



1.7. Focus on skipjack tuna



Skipjack tuna (*Katsuwonus pelamis*) is a species of the family Scombridae. It is a marine species found in offshore waters at a depth range of 0-260 m. It shows a strong tendency to school in surface waters with birds, drifting objects, sharks and whales, and may show characteristic behaviour such as jumping, feeding and foaming. It feeds on fish, crustaceans, cephalopods and molluscs. Cannibalism is also common¹⁶.

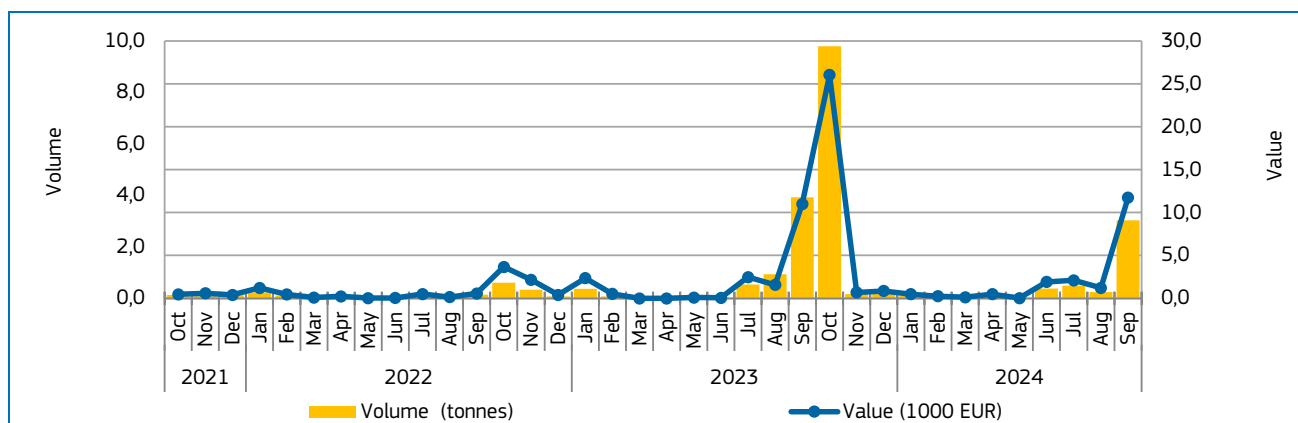
Skipjack tuna is a cosmopolitan species that lives in tropical and warm-temperate waters. It is not found in the Black Sea. Skipjack tuna is a highly migratory species¹⁷. As with yellowfin tuna, another important tuna species within the EU, the same rules apply to skipjack tuna regarding purse seine fishery (see above). It also falls under the same specific restrictions in the RFMO areas where the EU fishing fleet is active¹⁸.

Selected countries

Table 24. **COMPARISON OF SKIPJACK TUNA FIRST-SALES, MAIN PLACES OF SALE, AND CONTRIBUTION TO OVERALL SALES OF "TUNA AND TUNA-LIKE SPECIES" IN SELECTED COUNTRIES**

Skipjack tuna		Changes in skipjack tuna first sales Jan-Sep 2024 (%)		Contribution of skipjack tuna to total "Tuna and tuna-like species" first sales in September 2024 (%)	Principal places of sale in September 2024 in terms of first-sales value
		Compared to Jan-Sep 2023	Compared to Jan-Sep 2022		
France	Value	+2%	+457%	0,2%	St Jean-de-Luz, Arcachon, Les Sables-d'Olonne.
	Volume	-24%	+509%	0,2%	
Portugal	Value	-33%	-24%	20%	Ribeira Grande, Funchal (Madeira), Ilha do Pico.
	Volume	-37%	-39%	40%	
Spain	Value	-36%	-38%	2%	Bermeo, Ondárroa, Tazacorte.
	Volume	-34%	-40%	5%	

Figure 29. **SKIPJACK TUNA: FIRST SALES IN FRANCE, OCTOBER 2021 – SEPTEMBER 2024**



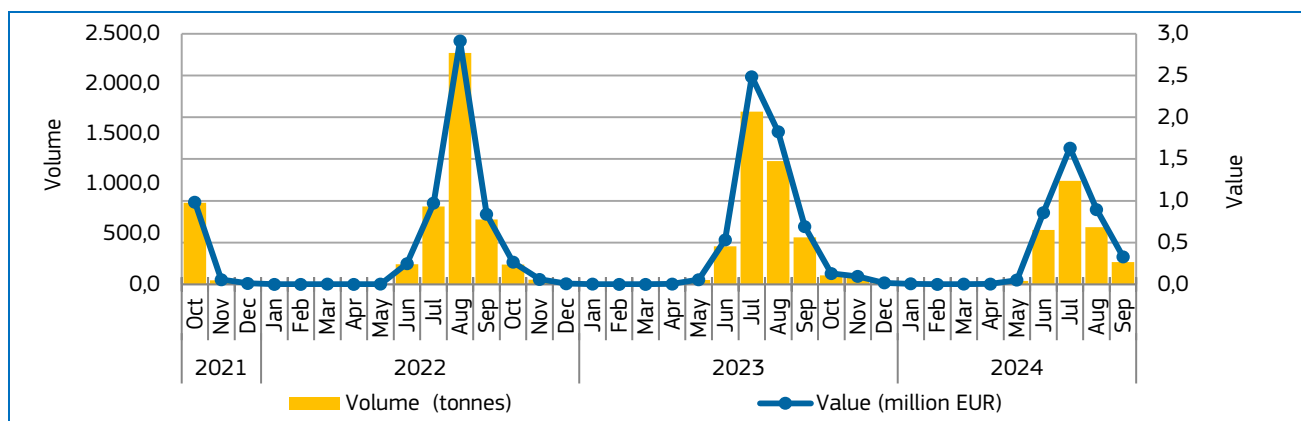
¹⁶ <https://www.fishbase.se/summary/107>

¹⁷ <https://www.fishbase.se/summary/107>

¹⁸ COUNCIL REGULATION (EU) 2024/257: https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=OJ%3AL_202400257

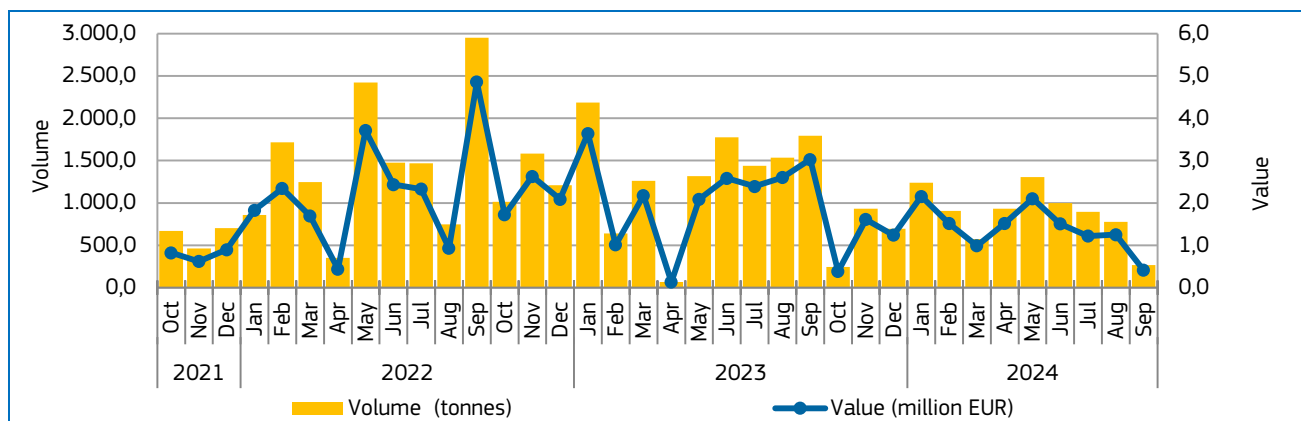
In **France** over the 36-month period observed, the highest first-sales in both value and volume were registered in October 2023 when approximately 26 tonnes were sold for EUR 9,800.

Figure 30. **SKIPJACK TUNA: FIRST SALES IN PORTUGAL, OCTOBER 2021 – SEPTEMBER 2024**



In **Portugal** over the 36-month period observed, the highest first-sales in both value and volume were registered in August 2022 when approximately 2.310 tonnes were sold for EUR 2,9 million.

Figure 31. **SKIPJACK TUNA: FIRST SALES IN SPAIN, OCTOBER 2021 – SEPTEMBER 2024**

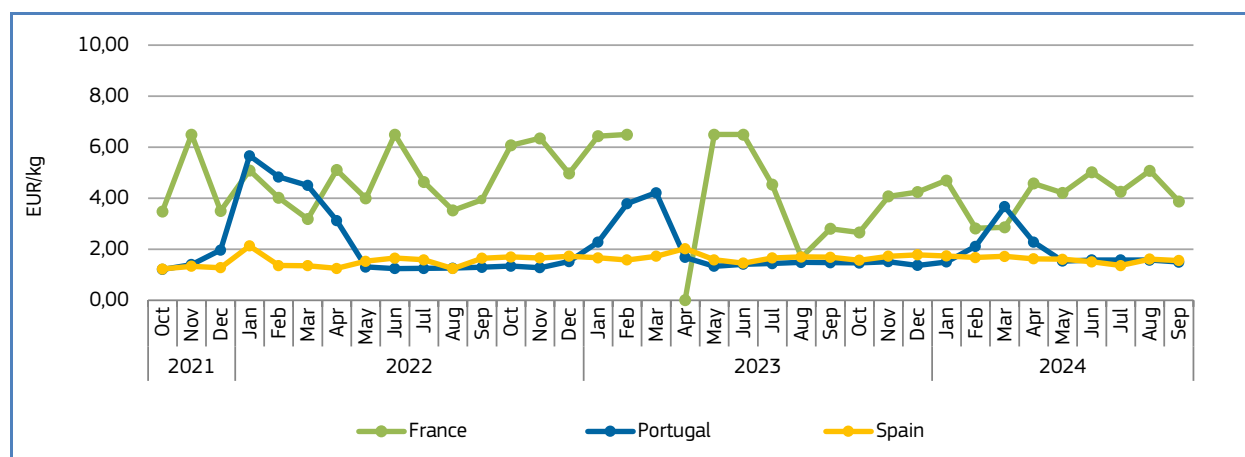


In **Spain**, from October 2021 to September 2024, the highest first-sales value was registered in September 2022 when about 2.951 tonnes were sold for EUR 4,9 million.



Price trend

Figure 32. **SKIPJACK TUNA: FIRST-SALES PRICES IN SELECTED COUNTRIES, OCTOBER 2021 – SEPTEMBER 2024**



Over the 36-month observation period (October 2021 – September 2024), the weighted average first-sales price of skipjack tuna in **France** was 3,31 EUR/kg, 107% more than in **Portugal** (1,39 EUR/kg) and 107% more than in **Spain** (1,60 EUR/kg).

In **France** in September 2024, the average first-sales price of skipjack tuna (3,88 EUR/kg) increased by 38% compared to September 2023 and increased by 1% compared to September 2022. In the 36-month period observed, the lowest average price of 1,68 EUR/kg for 0,9 tonnes was registered in August 2023, while the highest price of 6,50 EUR/kg for about 10 kg was recorded in June 2023.

In **Portugal** in September 2024, the average first-sales price of skipjack tuna (1,50 EUR/kg) increased by 2% compared to September 2023 and by about 16% compared to September 2022. During the period observed, the highest average price of 5,67 EUR/kg was reached in January 2022 when 3 kg were sold, while the price bottomed out in October 2021 (1,21 EUR/kg) when 814 tonnes were sold.

In **Spain** in September 2024, the average first-sales price of skipjack tuna (1,56 EUR/kg) decreased by only 8% compared to September 2023 and by 6% from September 2022. In the 36-month period observed, the lowest average price of 1,22 EUR/kg for 670 tonnes was registered in October 2021, while the highest price of 2,13 EUR/kg for about 858 tonnes was recorded in January 2022.

EUMOFA also covered **skipjack tuna** in the following Monthly Highlights:

First sales: MH 10 2021 (Portugal, Spain).

Case study: MH 1 2024 (Skipjack tuna in the EU),

2. Extra-EU imports

The weekly extra-EU import prices (weighted average values per week, in EUR per kg) for nine different species are examined every month. The three most relevant species in terms of value and volume remain consistent: fresh or chilled Atlantic and Danube salmon from Norway, frozen Alaska pollock fillets from China, and frozen tropical shrimp (*Penaeus* spp.) from Ecuador. The other six species change each month; three are chosen from the commodity group of the month, and three are randomly selected. The commodity group for this month is “Tuna and tuna-like species”¹⁹.

Data analysed in the section “Extra-EU imports” are extracted from EUMOFA, as collected from the European Commission.²⁰

Table 25. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THE THREE MOST RELEVANT FISHERIES AND AQUACULTURE PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 39/2024	Preceding 4-week average	Week 39/2023	Notes
Atlantic and Danube salmon , excluding liver and roes, fresh imported from Norway (<i>Salmo salar</i> , Hucho hucho CN code 03021400)	Price (EUR/kg)	5,96	6,14 (-3%)	7,23 (-18%)	From weeks 40/2021 to 39/2024 prices fluctuated seasonally, ranging between 5,59 EUR/kg (week 40/2021) and 11,28 EUR/kg (week 16/2022) showing a slight increasing trend. Prices follows supply with the highest peaks occurring between weeks 10 and 16, and the highest falls between weeks 34 and 39.
	Volume (tonnes)	12.979	19.887 (-35%)	18.770 (-31%)	Volumes fluctuated seasonally, with highest peaks occurring most often in weeks 35 and 49, and supply ranging between 1.309 tonnes (week 52/2023) and 21.958 tonnes (week 38/2024). The limited supply in week 52 is attributed to reduced harvest activity during the Christmas break and the related decreased processing activity in the EU.
Frozen Alaska pollock fillets imported from China (<i>Theragra chalcogramma</i> , CN code 03047500)	Price (EUR/kg)	2,35	2,43 (-3%)	2,99 (-21%)	In the period analysed, prices fluctuated, following a decreasing trend since week 24/2023 and ranged between 1,84 EUR/kg (week 48/2022) and 4,03 EUR/kg (week 41/2022).
	Volume (tonnes)	1.458	1.167 (+25%)	2.846 (-49%)	From weeks 40/2021 to 39/2024 weekly volumes ranged between 147 tonnes (week 25/2022) to 13.785 tonnes (week 50/2023). Highest peaks in supply seemed to occur in the last part of the year between weeks 46 and 50.
Frozen tropical shrimp imported from Ecuador (genus <i>Penaeus</i> , CN code 03061792)	Price (EUR/kg)	4,83	5,12 (-6%)	5,25 (-8%)	From weeks 40/2021 to 39/2024 prices fluctuated following a decreasing trend ranging between 4,83 EUR/kg (week 07/2024) and 7,19 EUR/kg (week 41/2022). Highest falls in prices occurred between weeks 1 and 8, 26 and 35.
	Volume (tonnes)	3.588	3.611 (-1%)	3.654 (-2%)	In the period analysed volumes showed high fluctuations with highest peaks in supply occurring most often between weeks 15/27, 30/31 and 45/46. Volume ranged between 482 tonnes (week 25/2022) and 5.523 tonnes (week 34/2024).

¹⁹ The featured species of the commodity group of the month are prepared or preserved yellowfin tuna from Seychelles, fresh or chilled swordfish from Morocco and fresh or chilled yellowfin tunas from Maldives. The three randomly selected species this month are fresh or chilled trout from Norway, prepared or preserved shrimps and prawns from Canada and frozen surimi from Viet Nam.

²⁰ Last update: 18. 11. 2024.

Figure 33. **IMPORT PRICE OF ATLANTIC AND DANUBE SALMON FROM NORWAY, 2021 - 2024**

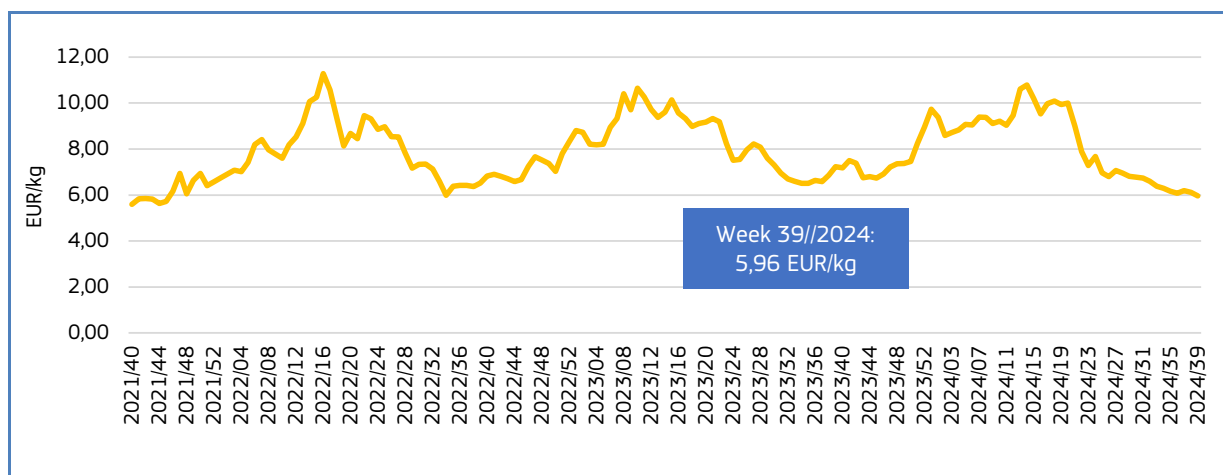


Figure 34. **IMPORT PRICE OF FROZEN ALASKA POLLOCK FILLETS FROM CHINA, 2021 - 2024**

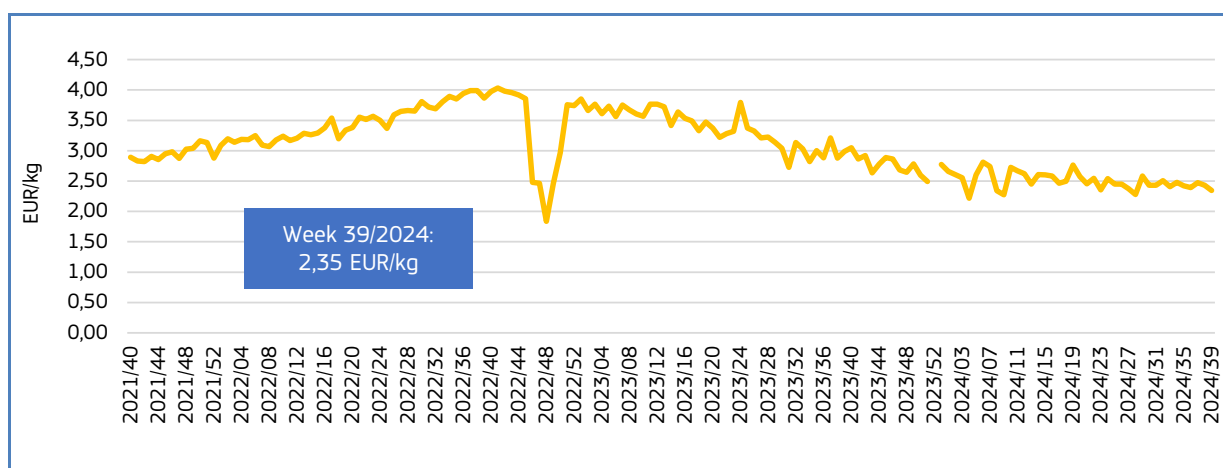
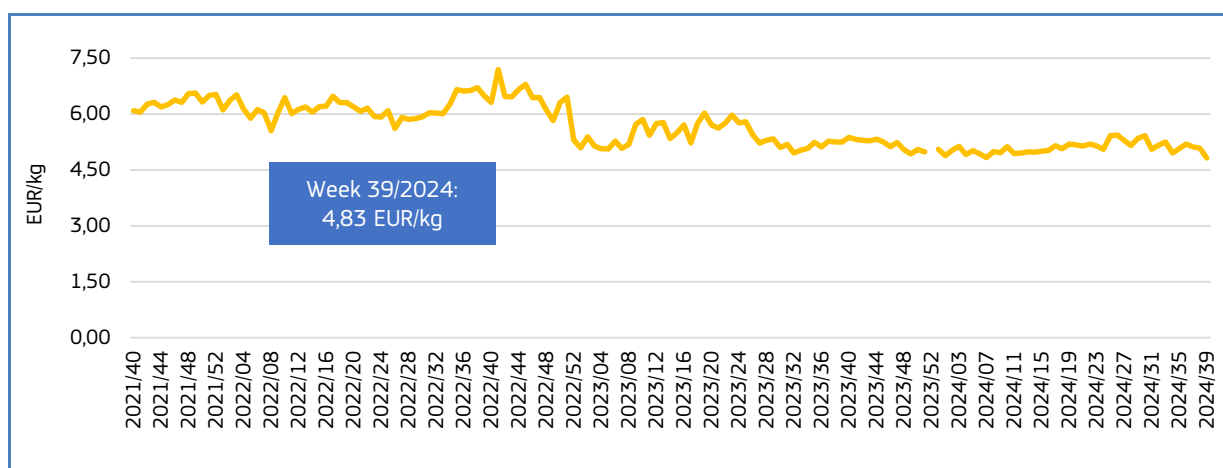


Figure 35. **IMPORT PRICE OF FROZEN TROPICAL SHRIMP FROM ECUADOR, 2021 - 2024**

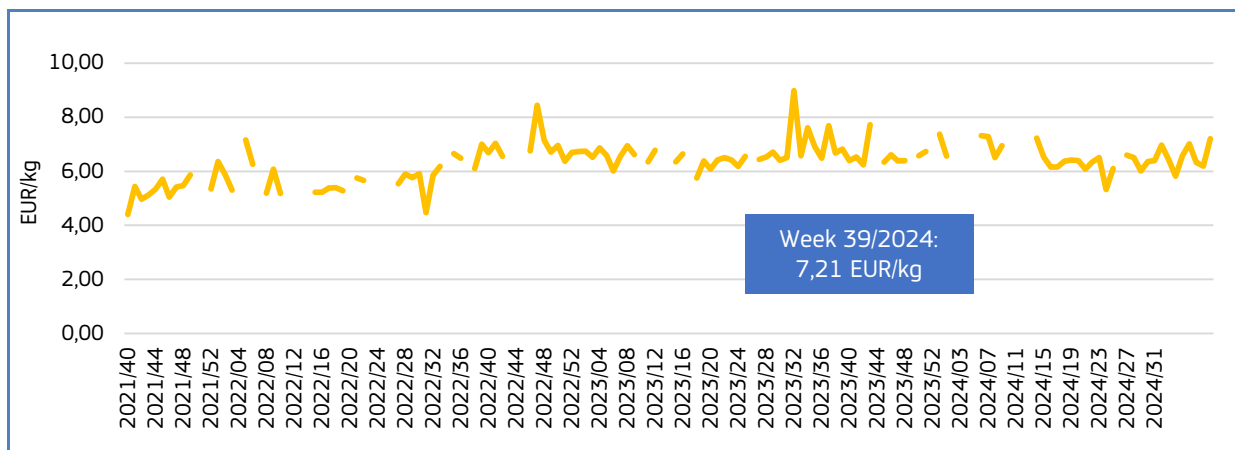


Overview | [1. First sales in Europe](#) | [2. Extra-EU imports](#) | [3. Consumption](#)

| [4. Fisheries and Aquaculture in Türkiye](#) | [5. Pacific salmon in the EU](#) | [6. Global highlights](#) | [7. Macroeconomic context](#)

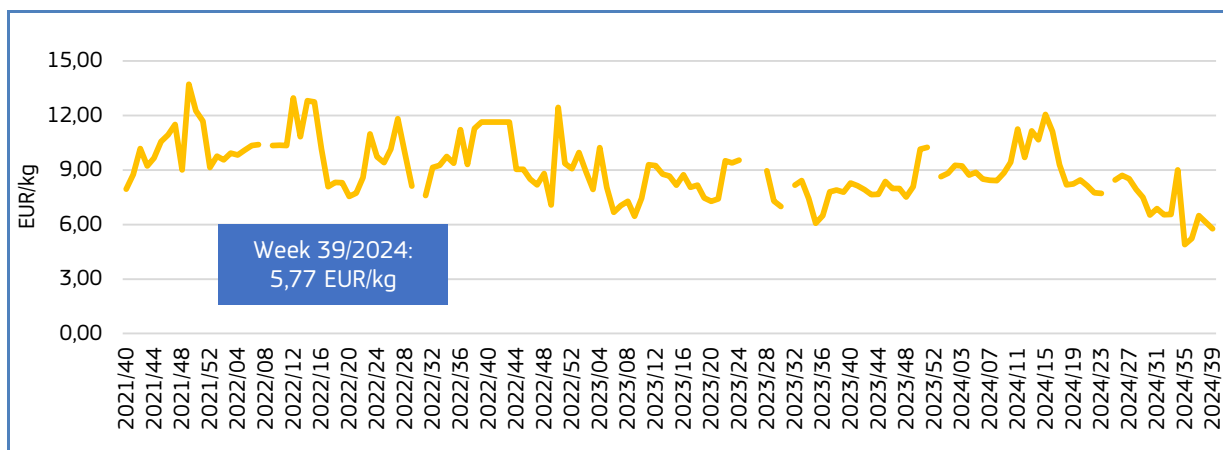
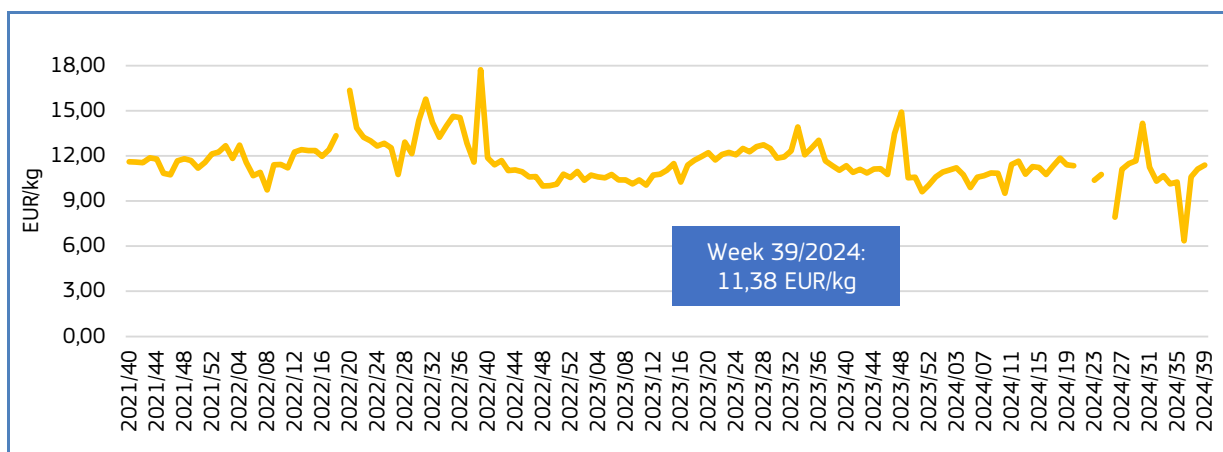
Table 26. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF THIS MONTH'S THREE FEATURED COMMODITY PRODUCTS IMPORTED INTO THE EU**

Extra-EU Imports		Week 39/2024	Preceding 4-week average	Week 39/2023	Notes
Prepared or preserved yellowfin tuna whole or in pieces (excl. minced, fillets known as "loins" and such products in vegetable oil) from Seychelles (" <i>Thunnus albacares</i> ", CN code 16041438)	Price (EUR/kg)	7,21	6,53 (+10%)	6,82 (+6%)	Between weeks 40/2021 to 39/2024 prices fluctuated, ranging between 4,40 EUR/kg (week 40/2021) and 8,98 EUR/kg (week 32/2023). 72% of the weekly prices were between 6,00 EUR/kg and 8,00 EUR/kg.
	Volume (tonnes)	9	148 (-94%)	238 (-96%)	Volumes showed strong fluctuation ranging from 5 tonnes (week 24/2024) to 1.860 tonnes (week 32/2022). 42% of the weekly supply was below 200 tonnes. Highest peaks in supply were registered in 2022.
Fresh or chilled swordfish from Morocco (" <i>Xiphias gladius</i> ", CN code 03024700)	Price (EUR/kg)	5,77	5,69 (+2%)	7,78 (-26%)	Between weeks 40/2021 to 39/2024 prices fluctuated showing a decreasing trend ranging between 4,90 EUR/kg (week 35/2024) and 13,72 EUR/kg (week 49/2021). 48% of weekly prices were between 8,00 EUR/kg and 10,00 EUR/kg, with highest peaks in prices occurring between weeks 04/14 and 49/51.
	Volume (tonnes)	5	17 (-70%)	39 (-86%)	In the period analysed supply fluctuated seasonally with the highest peaks occurring most often between weeks 18 and 20. Volume ranged from 168 kg (week 34/2024) to 169 tonnes (week 20/2022). 45% of the weekly supply was less than 20 tonnes.
Fresh or chilled yellowfin tunas (excl. for industrial processing or preservation) from Maldives (" <i>Thunnus albacares</i> ", CN code 03023290)	Price (EUR/kg)	11,38	9,59 (+19%)	11,05 (+3%)	Between weeks 40/2021 to 39/2024 prices fluctuated reaching the maximum price of 17 EUR/kg (week 39/2022), decreased to the minimum price of 6,346EUR/kg (week 36/2024), then increased again. 66% of the weekly prices were between 10,00 EUR/kg and 12,00 EUR/kg.
	Volume (tonnes)	2	1 (+154%)	7 (-66%)	There were high fluctuations in supply between 24 kg (week 16/2023) and 29 tonnes (week 48/2022). Supply fluctuated with the highest peaks most often between weeks 3/6 and 48/50, with an overall decrease in supply in 2024. 71% of the weekly supply was below 10 tonnes.

Figure 36. **IMPORT PRICE OF PREPARED OR PRESERVED YELLOWFIN TUNA FROM SEYCHELLES, 2021 - 2024**

Overview | 1. First sales in Europe | 2. Extra-EU imports | 3. Consumption

| 4. Fisheries and Aquaculture in Türkiye | 5. Pacific salmon in the EU | 6. Global highlights | 7. Macroeconomic context

Figure 37. **IMPORT PRICE OF FRESH OR CHILLED SWORDFISH FROM MOROCCO, 2021 - 2024**Figure 38. **IMPORT PRICE OF FRESH OR CHILLED YELLOWFIN TUNAS FROM MALDIVES, 2021 - 2024**

Between weeks 01/2024 and 39/2024, the price of prepared or preserved **yellowfin tuna** from **Seychelles** showed some fluctuations and an increasing trend. The price ranged between 5,33 EUR/kg and 7,36 EUR/kg, and volume fluctuated between 5 tonnes and 865 tonnes.

Between weeks 01/2024 and 39/2024, the price of fresh or chilled **swordfish** from **Morocco** decreased ranging between 4,90 EUR/kg and 12,07 EUR/kg. Supply fluctuated between 168 kilos and 127 tonnes.

In 2024, the price of fresh or chilled **yellowfin tunas** from **the Maldives** ranged between 6,36 EUR/kg and 14,17 EUR/kg, and volume fluctuated between 33 kg and 11 tonnes.

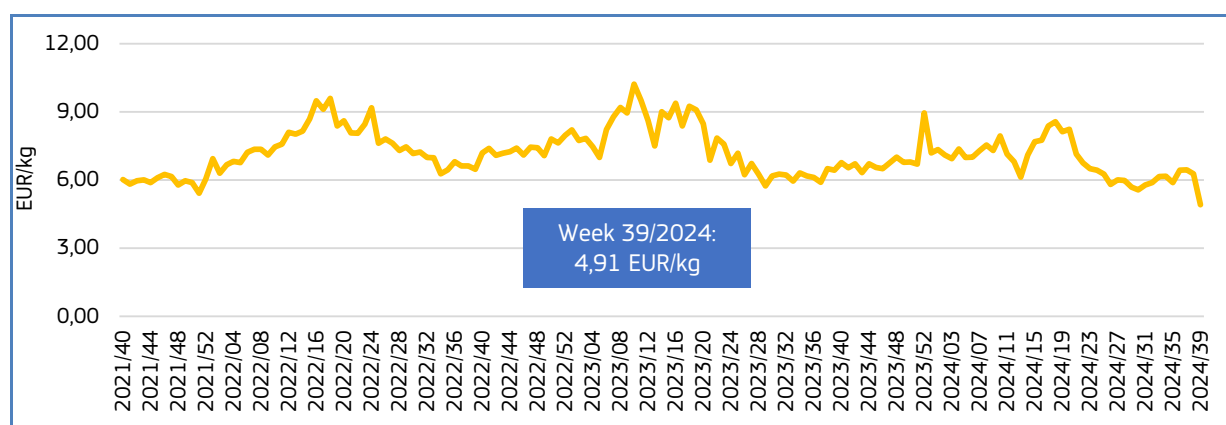
Overview | [1. First sales in Europe](#) | [2. Extra-EU imports](#) | [3. Consumption](#)

| [4. Fisheries and Aquaculture in Türkiye](#) | [5. Pacific salmon in the EU](#) | [6. Global highlights](#) | [7. Macroeconomic context](#)

Table 27. **EVOLUTION OF WEEKLY PRICE AND VOLUME OF EU IMPORTS OF THREE OTHER FISHERIES AND AQUACULTURE PRODUCTS RELEVANT TO THE EU MARKET**

Extra-EU Imports		Week 39/2024	Preceding 4-week average	Week 39/2023	Notes
Fresh or chilled trout , with heads on and gills on, gutted, weighing > 1,2 kg each, or with heads off, gilled and gutted, weighing > 1 kg each from Norway ("Oncorhynchus mykiss", CN code 03021120)	Price (EUR/kg)	4,91	6,26 (-22%)	6,44 (-24%)	Between weeks 40/2021 to 39/2024 prices fluctuated following a decreasing trend. They reached the maximum price of 10,22 EUR/kg (week 10/2023), and decreased to the minimum price of 4,91 EUR/kg (week 39/2024). 31% of the weekly prices were between 7,00 EUR/kg and 8,00 EUR/kg with highest peaks in prices occurring between weeks 10 and 18.
	Volume (tonnes)	70	139 (-50%)	170 (-59%)	Supply fluctuated strongly ranging between 2 tonnes (week 52/2023) and 374 tonnes (week 35/2022). The highest peaks seemed to occur most often between weeks 30 and 35. 36% of the weekly supply was less than 100 tonnes.
Shrimps and prawns , prepared or preserved, in immediate packings of a net content of > 2 kg (excl. merely smoked, and in airtight containers) from Canada (CN code 16052190)	Price (EUR/kg)	7,50	9,83 (-24%)	6,41 (+17%)	In the period analysed prices fluctuated ranging between 4,88 EUR/kg (week 08/2024) and 18,89 EUR/kg (week 50/2022). 61% of the weekly prices were between 8,00 EUR/kg and 10,00 EUR/kg.
	Volume (tonnes)	1	29 (-96%)	3 (-63%)	Volumes ranged between 334 kg (week 50/2022) and 360 tonnes (week 46/2021). No clear seasonality was detected, while highest peaks in supply were recorded in weeks 12/13 and between 43/46. 79% of the weekly supply was below 50 tonnes.
Frozen surimi of fish n.e.s.. from Viet Nam (CN code 03049910) ²¹	Price (EUR/kg)	1,56*	2,52 (-38%)**	1,81 (-14%***)	Between weeks 40/2021 to 39/2024 prices fluctuated ranging between 1,44 EUR/kg (week 26/2024) and 8,16 EUR/kg (week 12/2024). 59% of the weekly prices were between 2,00 EUR/kg and 3,00 EUR/kg.
	Volume (tonnes)	23*	13 (+77%)**	13 (+89%***)	Volumes showed a decreasing trend showing strong fluctuations ranging from 600 kilos (week 30/2024) to 187 tonnes (week 46/2021). 50% of the weekly supply was below 40 tonnes.

*The analysis considers the most recent available data, week 37/2024. **Considers the most recent available data weeks 35/2024 and 36/2024. *** The analysis considers week 37/2023.

Figure 39. **IMPORT PRICE OF FRESH OR CHILLED TROUT FROM NORWAY, 2021 - 2024**

²¹ The data considered for the analysis represent 71% of the time series considered

Figure 40. **IMPORT PRICE OF PREPARED OR PRESERVED SHRIMPS AND PRAWNS FROM CANADA, 2021 - 2024**

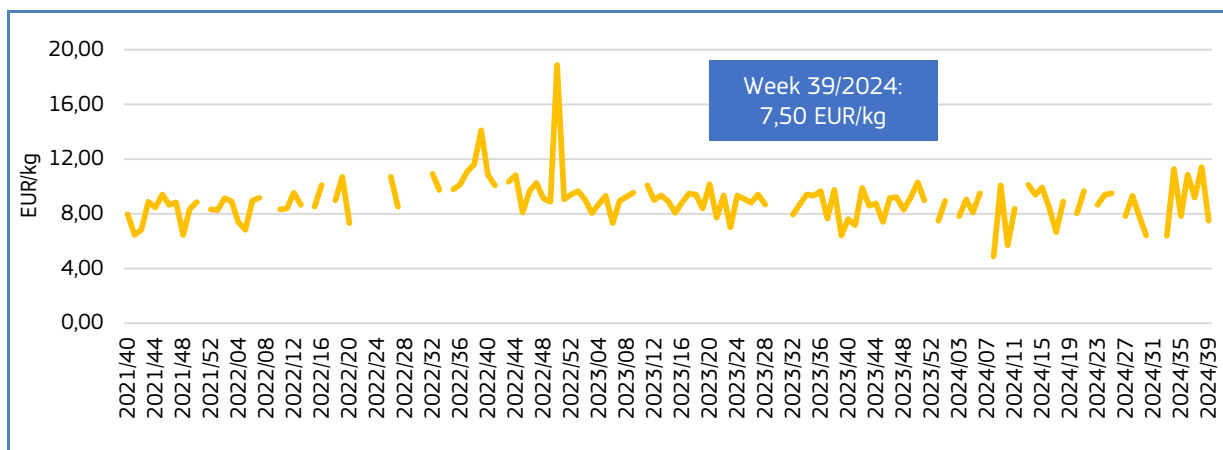
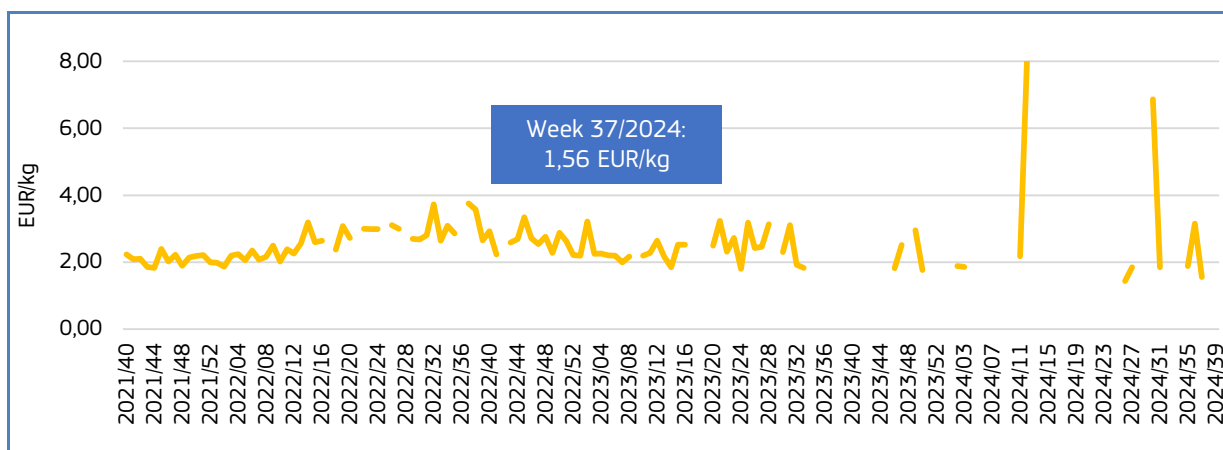


Figure 41. **IMPORT PRICE OF FROZEN SURIMI FROM VIET NAM, 2021 - 2024**



Between weeks 01/2024 and 39/2024, the price of fresh or chilled **trout** from **Norway** showed a decreasing trend. The price ranged between 4,91 EUR/kg and 8,57 EUR/kg, and volume fluctuated ranging between 42 tonnes and 308 tonnes.

Between weeks 01/2024 and 39/2024, the price of prepared or preserved **shrimps** and **prawns** from **Canada** fluctuated and decreased. The price ranged between 4,88 EUR/kg to 11,42 EUR/kg. Supply fluctuated between 702 kilos and 76 tonnes.

In 2024, the price of frozen **surimi** from **Viet Nam** decreased and fluctuated between 1,44 EUR/kg and 8,16 EUR/kg, and volume varied between 600 kilos and 52 tonnes.

3. Consumption

3.1. HOUSEHOLD CONSUMPTION IN THE EU

Data analysed in the section “Consumption” are extracted from EUMOFA, as collected from Europanel²².

In September 2024 compared with September 2023, household consumption in volume and value of fresh fisheries and aquaculture products fell in Germany, Hungary, Portugal and Spain, while an increase was observed in Denmark, Ireland, Poland and Sweden. The highest increase in absolute terms was observed in Ireland, due mainly to haddock (82% in volume and 87% in value) and saithe (70% in volume and 76% in value). The highest decrease was reported in Hungary where the volume of consumption decreased by 25%, and value fell by 21%.

Table 28. **SEPTEMBER OVERVIEW OF THE HOUSEHOLD CONSUMPTION OF FRESH FISHERY AND AQUACULTURE PRODUCTS IN THE REPORTING COUNTRIES (volume in tonnes and value in million EUR)**

Country	Per capita apparent consumption 2022* (live weight equivalent, LWE) kg/capita/year	September 2022		September 2023		August 2024		September 2024		Change from September 2023 to September 2024	
		Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Denmark	20,00-25,00	996	17,97	951	18,16	1.111	21,04	1.160	21,46	22%	18%
France	32,58	17.563	210,45	16.930	207,62	15.675	189,01	17.014	182,05	0%	12%
Germany	12,49	4.579	72,55	4.300	72,52	4.080	73,06	3.932	69,22	9%	5%
Hungary	6,73	220	1,53	275	2,52	244	2,14	206	1,99	25%	21%
Ireland	20,00	813	13,70	723	13,23	787	14,19	988	17,60	37%	33%
Italy	30,01	24.105	286,58	24.260	291,06	16.536	205,25	22.929	298,48	5%	3%
Netherlands	18,88	3.709	59,47	3.179	55,48	2.654	43,97	2.975	55,67	6%	0%
Poland	13,68	3.062	24,08	2.810	28,12	2.695	30,33	2.942	32,89	5%	17%
Portugal	54,54	5.195	38,48	5.341	38,46	5.380	43,31	4.698	37,78	12%	2%
Spain	41,92	40.375	367,05	41.944	405,18	36.975	372,61	39.125	392,32	7%	3%
Sweden	22,46	736	10,96	507	8,23	832	13,16	675	10,23	33%	24%

* EUMOFA estimates. The supply balance is built on the basis of the equation catches + aquaculture production + imports – exports = apparent consumption and is calculated in live weight equivalent. The methodologies for estimating apparent consumption at EU and Member State levels are different, the former based on data and estimates, the latter also requiring the adjustment of abnormal trends due to the higher impact of stock changes. Where EUMOFA estimations of per capita apparent consumption continued to show high annual volatility even with these adjustments, national contact points were contacted to confirm these estimates or to provide their own figures. For the Netherlands and Poland, sources are the Dutch Fish Marketing Board and Institute of Agricultural and Food Economics – National Research Institute, respectively. The estimate for Denmark was provided by the University of Copenhagen.

Over the past three years, the average household consumption of fresh fisheries and aquaculture products in September has been below the annual average in both volume and value in Germany, Hungary, Ireland, Poland and Sweden, while it has been above the average in Denmark, Italy and the Netherlands, where volume increased by 6%, 10% and 18% and value by 3%, 12% and 8%, respectively.

²² Last update: 18. 11. 2024.

The most recent monthly consumption data (up to **September 2024**) are available on the EUMOFA website and can be accessed [here](#).

3.2. Carp

Habitat: It is a freshwater species tolerant of a wide variety of conditions but generally favours large water bodies with slow flowing or standing water and soft bottom sediments²³.

Catch areas: From Europe to Asia: in the Black, Caspian and Aral Sea basins. It has been introduced throughout the world.

Producing countries: Poland, the Czech Republic, Hungary²⁴.

Production method: Mostly farmed, but also caught.

Main consumers in the EU: Poland, Hungary, the Czech Republic, Lithuania.

Presentation: Whole.

Preservation: Live, fresh.

3.2.1. Overview of household consumption in Germany and Poland

Based on EUMOFA estimates, in 2022 per capita apparent consumption of fishery and aquaculture products in Germany and Poland were both below the EU average of 23,51 kg LWE. Consumption in Poland of 13,68 kg LWE was 42% lower than the EU average, while in Germany with 12,49 kg it was 47% lower, and 9% lower than Poland. Compared to Portugal with the highest volume of consumption, consumption in Poland was 75% lower, and in Germany 77% lower. However, compared to Czechia which has the lowest level of the consumption of fishery and aquaculture products in the EU, consumption in Germany was 112% higher and in Poland 132% higher.

In September 2024, the average monthly household consumption of fresh carp was 41 tonnes in Germany and 16 tonnes in Poland, and households paid on average 10,79 EUR and 8,27 EUR per kg respectively. However, it needs to be mentioned that in both countries December is by far the month with highest sales: in Germany an average of 44% of the total yearly consumption was consumed in December in the last three years, while in Poland this ratio was even higher with 91%. In both countries consumption of carp has shown a downward trend; until September 2024 a 5% decline was observed in Germany, and a 35% decline in Poland compared to the same period the previous year.

We have covered **Carp** in previous *Monthly Highlights*:

Consumption: MH 10 2020 (DE, PL); MH 4 2018 (DE, PL); MH 12 2016 (DE, PL); MH 8 2016 (LV,LT,PL); MH 6 2015 (LT,LV,PL).

Extra-EU imports: MH 8 2023, Myanmar; MH 7 2022, Myanmar; MH 7 2021, Myanmar; MH 9 2019, Myanmar; MH 2 2019, Myanmar; MH 7 2018, Myanmar.

Topic of the month: Fresh carp in central Europe MH 4 2016.

²³ <https://www.fishbase.se/summary/cyprinus-carpio.html>

²⁴ EUMOFA MH 10 2020

Figure 42. **PRICES OF CARP PURCHASED BY GERMAN AND POLISH HOUSEHOLDS**

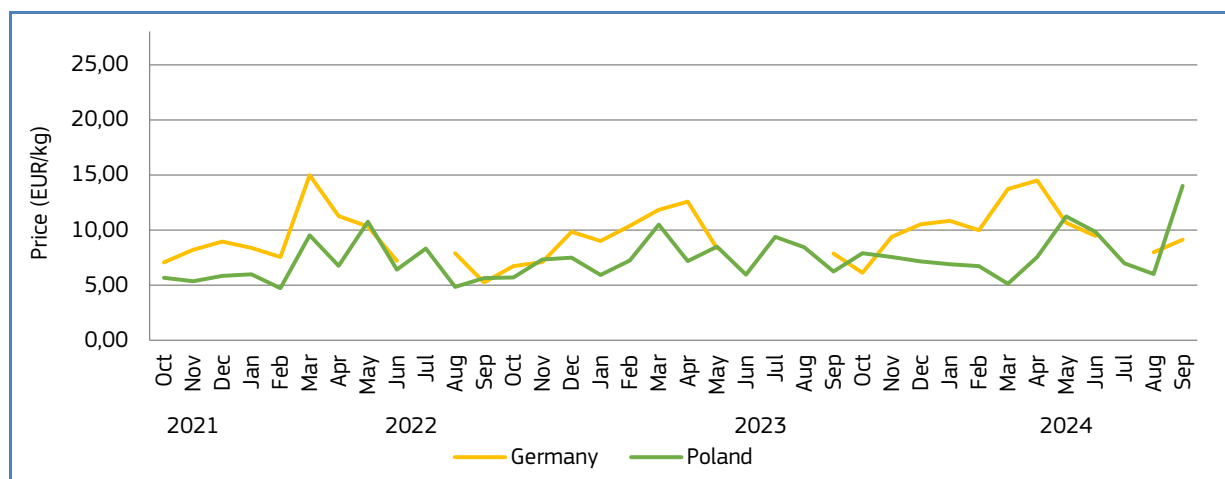
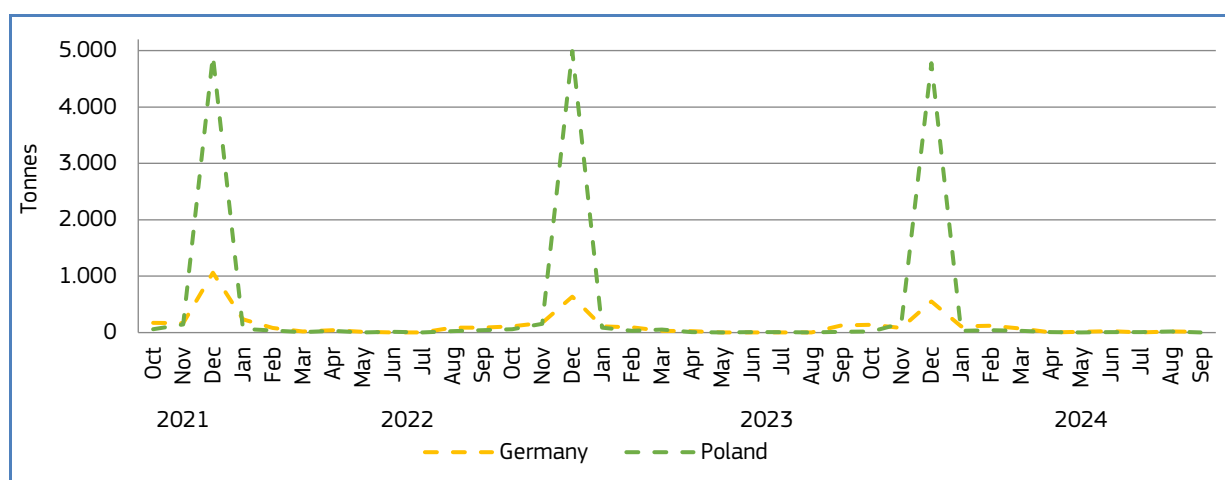


Figure 43. **HOUSEHOLD PURCHASES OF CARP IN GERMANY AND POLAND**



3.2.2. Household consumption trends in Germany

Long-term trend (October 2021 to September 2024): Seasonal fluctuation in volume and a slight upward trend in price.

Yearly average price: 6,66 EUR/kg (2021), 8,05 EUR/kg (2022), 7,17 EUR/kg (2023).

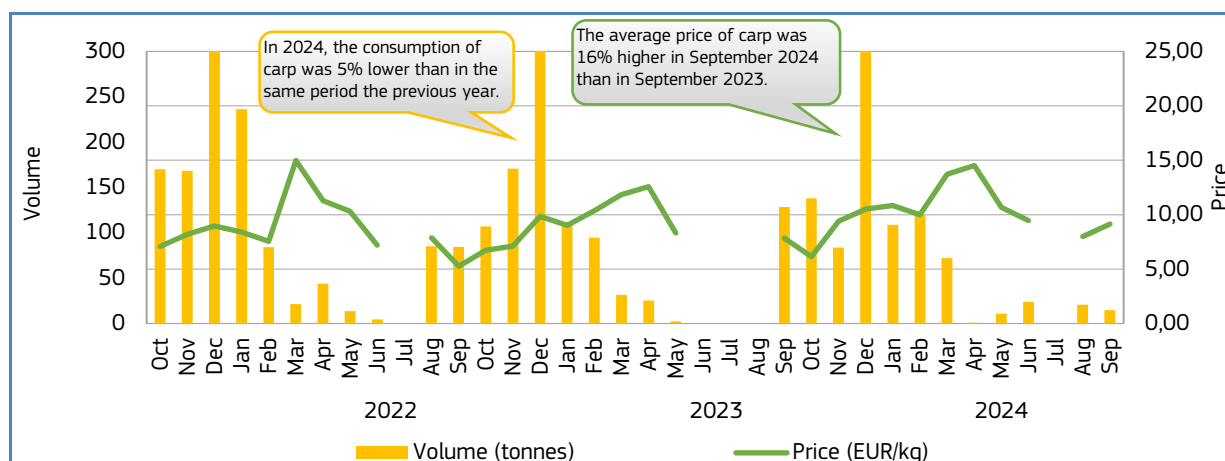
Yearly consumption: 2.426 tonnes (2021), 1.486 tonnes (2022), 1.166 tonnes (2023).

Short-term trend (January-September 2024): Downward trend in volume and a slight upward trend in price.

Price: 9,59 EUR/kg.

Consumption: 373 tonnes.

Figure 44. **RETAIL PRICE AND VOLUME OF CARP PURCHASED BY HOUSEHOLDS IN GERMANY, OCTOBER 2021 – SEPTEMBER 2024**



3.2.3. Household consumption trends in Poland

Long-term trend (October 2021 to September 2024): Downward trend in volume and upward trend in price.

Yearly average price: 5,23 EUR/kg (2021), 6,96 EUR/kg (2022), 7,67 EUR/kg (2023).

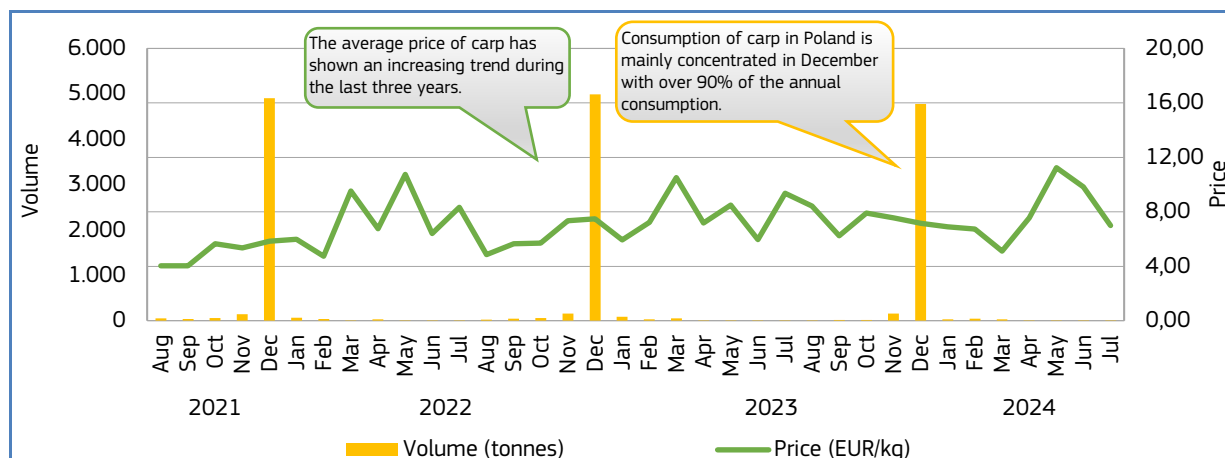
Yearly consumption: 5.491 tonnes (2021), 5.435 tonnes (2022), 5.175 tonnes (2023).

Short-term trend (January–September 2024): Downward trend in volume and upward trend in price.

Price: 8,27 EUR/kg.

Consumption: 142 tonnes.

Figure 45. **RETAIL PRICE AND VOLUME OF CARP PURCHASED BY HOUSEHOLDS IN POLAND, OCTOBER 2021 – SEPTEMBER 2024**



Overview | 1. First sales in Europe | 2. Extra-EU imports | 3. Consumption

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4. Case study: Fisheries and Aquaculture in Türkiye

The Republic of Türkiye is a country bridging southeastern Europe and western Asia. Türkiye borders eight countries and four seas: the Mediterranean Sea, the Aegean Sea, the Black Sea and the Sea of Marmara. Ankara is the capital and is in the central part of the country.

4.1. Fisheries and aquaculture in Türkiye



Map of Türkiye (source: DG ECHO, European Commission)

With its geographic location and natural resources, Türkiye has a suitable environment for both fisheries and aquaculture production. Aquaculture in Türkiye began in inland water in the 1970s, while marine aquaculture started in the middle of the 1980s²⁵. In Türkiye, aquaculture operations are governed through regulations and acts specified by the Ministry of Agriculture and Forestry (MAF) and the Ministry of Environment and Urbanization (MEU). The Ministry of Agriculture and Forestry and the aquaculture sector cooperate closely, and the government has played an important role in supporting the Turkish aquaculture sector and has supported the sector by means of subsidies. However, in 2016, subsidies for seabream and seabass production stopped after the European Commission in 2015 initiated an anti-subsidy investigation regarding imports into the EU of seabass and gilthead sea bream originating in Türkiye. After this, the Turkish authorities withdrew the main subsidy scheme (from 1st January 2016). This led the European Commission to conclude that the anti-subsidy proceeding would be terminated without the implementation of measures²⁶. Yet the sector has seen growth also after the subsidies from the Turkish government ended. Support is still being provided by the Turkish government for the production of various species such as trout, and due to this, the EU imposes anti-subsidy duties on imports of trout products originating in Türkiye²⁷.

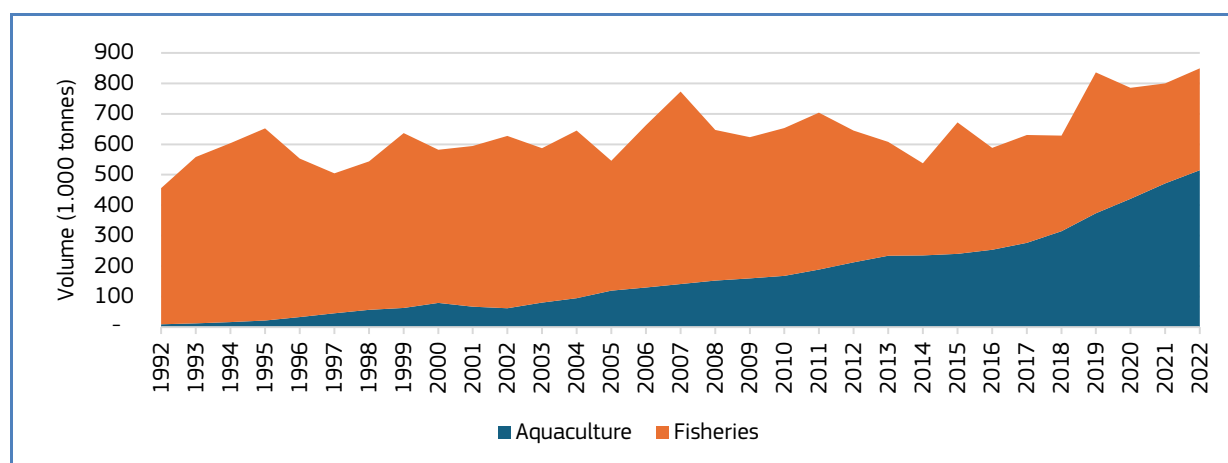
Türkiye has a robust legislative framework for aquaculture, aligned with EU directives and standards²⁸. The current aquaculture regulations, implemented in 2004, aim to ensure the sustainable use of water resources, maintain food security, and promote the environmental sustainability of aquaculture operations. These regulations include detailed provisions for site selection, licensing applications, and evaluation processes. Marine fish farms in Türkiye are subject to strict monitoring to assess their activities and environmental impacts. The regulations address physical, production, social, and ecological carrying capacities. Since 2020, aquaculture farms have been required to develop and adhere to approved environmental management plans.

²⁵ Yıldız, M., Karatas, S. Present-day Turkish Aquaculture and Trends in International Research. Istanbul University Press.

²⁶ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016D1360>

²⁷ <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021R0823>

²⁸ Coban, D. Demircan, D., Tosun, D. Turkish Marine Research Foundation. Marine Aquaculture in Türkiye: advancements and management. https://www.researchgate.net/publication/347993955_MARINE_AQUACULTURE_IN_TURKIYE_ADVANCEMENTS_AND_MANAGEMENT

Figure 46. **TOTAL PRODUCTION OF FISHERIES AND AQUACULTURE IN TÜRKİYE**

Source: FAO.

Aquaculture has seen a steady growth in production in Türkiye, growing from 9.085 tonnes in 1992 to 514.823 tonnes in 2022. In contrast, fisheries has shown a more fluctuating pattern, initially increasing from 447.374 tonnes in 1992 to a peak of 632.450 tonnes in 2007, followed by a general decline. By 2022, fisheries production had dropped to 335.003 tonnes.

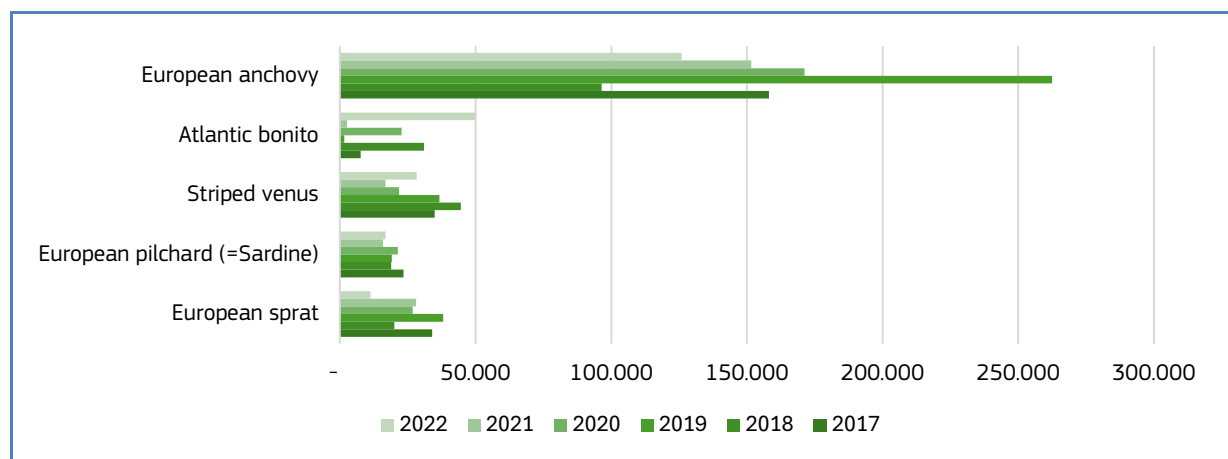
Fisheries production

The five largest captured species in Türkiye are European anchovy (*Engraulis encrasicolus*), Atlantic bonito (*Sarda sarda*), striped venus (*Chamelea gallina*), European pilchard (*Sardina pilchardus*) and European sprat (*Sprattus sprattus*). In 2022, the catch volume for European anchovy reached 125.980 tonnes, a 17% decrease from the volume in 2021. The catch volume of Atlantic bonito saw a noticeable jump from 2.595 tonnes in 2021 to 49.892 tonnes in 2022. The estimated catch volume of Atlantic bonito tends to show significant variations from year to year. The catch volume of striped venus reached 28.305 tonnes in 2022, a 68% increase from 2021. European pilchard catch volumes reached 16.729 tonnes in 2022, up 6% from the year before. Lastly, the volume of European sprat declined by 60% from 2021 to 2022, reaching 11.162 tonnes in 2022.

In 2022, the Turkish marine fleet comprised 14.064 vessels. Most of the Turkish fleet consists of smaller vessels, with approximately 90% measuring less than 12 metres²⁹. In 2022, the sector employed 34.684 persons. Nearly three-quarters of the total annual catch is from the Black Sea. The most commonly caught small pelagic species include European anchovy, European pilchard, European sprat and Mediterranean horse mackerel. These species are primarily used for producing fishmeal and fish oil³⁰.

²⁹ DG Fisheries and Aquaculture, Ministry of Food Agriculture and Livestock, Republic of Türkiye.

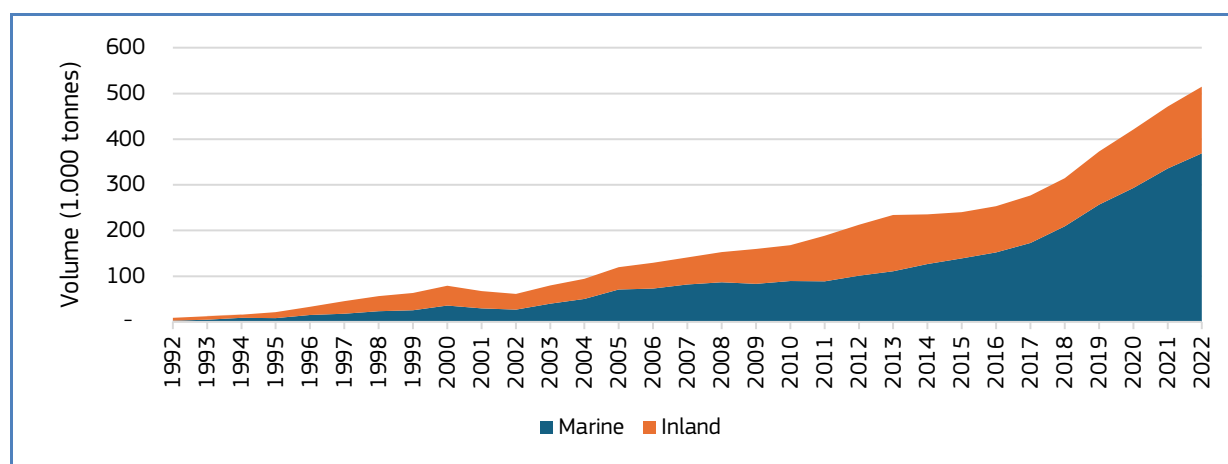
³⁰ FAO

Figure 47. **TOP FIVE CAPTURED SPECIES IN TÜRKİYE BY VOLUME**

Source: FAO.

Aquaculture production

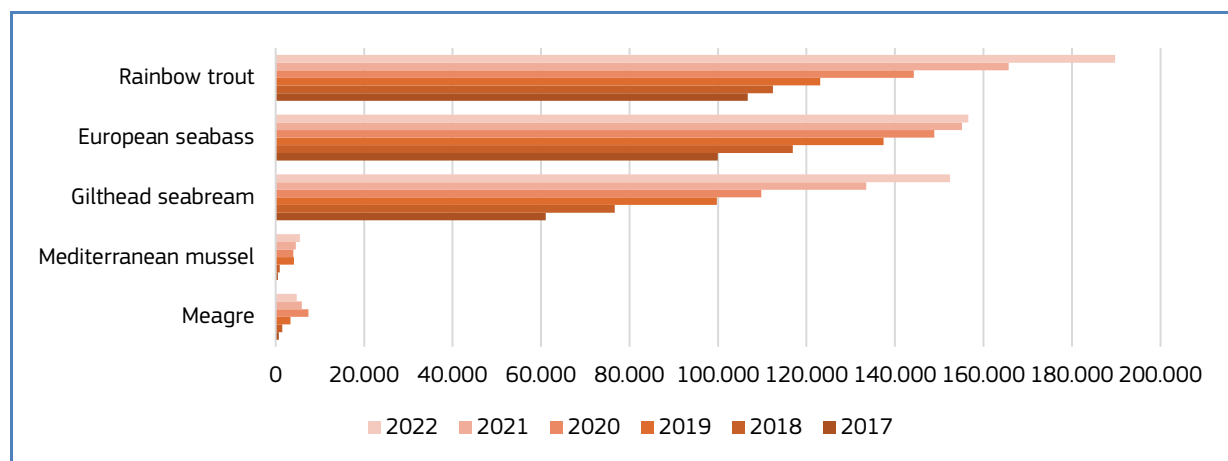
Türkiye has both inland and marine aquaculture, the latter being the largest of the two in terms of both volume and value. There has been significant growth in aquaculture production volumes in both marine and inland environments in Türkiye over the period from 1992 to 2022. Marine production experienced a substantial increase, particularly from the early 2000s, with volumes rising from 2.525 tonnes in 1992 to 368.721 tonnes by 2022. This growth suggests an expanding focus on marine aquaculture which has been driven by advancements in marine farming techniques and new technologies. Inland production also saw steady growth, albeit at a slower rate, increasing from 6.560 tonnes in 1992 to 146.102 tonnes in 2022.

Figure 48. **TOTAL AQUACULTURE PRODUCTION IN INLAND AND MARINE WATERS**

The largest species farmed in Türkiye are rainbow trout (*Oncorhynchus mykiss*), European seabass (*Dicentrarchus labrax*), gilthead seabream (*Sparus aurata*), Mediterranean mussel (*Mytilus galloprovincialis*) and meagre (*Argyrosomus regius*). In 2022, the production volume of rainbow trout reached 189.801 tonnes, an increase of 15% from 2021. European seabass, Gilthead seabream and Mediterranean mussel also increased from 2021 to 2022 with 1%, 14% and 19%, reaching 156.602 tonnes, 152.469 tonnes and 5.469 tonnes. The fifth largest species group, meagre, saw its production volume decline by 19% in 2022, reaching 4.771 tonnes.

Overview | 1. First sales in Europe | 2. Extra-EU imports | 3. Consumption

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Figure 49. **TOP FIVE AQUACULTURE SPECIES IN TÜRKİYE BY VOLUME (in tonnes)**

Source: FAO.

Most of the rainbow trout in Türkiye is farmed in freshwater in inland waters (76%), while the rest is being farmed in marine areas³¹. Marine aquaculture in Türkiye is largely represented by seabass and seabream. While far behind the volumes of the three largest species, the Mediterranean mussel is an emerging and promising species for the Turkish aquaculture sector, also farmed in marine waters. Commercial production first started in 2015 with just 3 tonnes and grew to 5.469 tonnes by 2022. While volumes are still modest, the Turkish government is encouraging farming of the species because it thinks it will create more predictable production than wild-caught mussels, as well as greater consumer safety. Meagre is also being farmed in marine waters (the Mediterranean and the Black Sea).

4.2. International trade

Türkiye has been a member of World Trade Organization since 26th March 1995, and a member of the General Agreement on Tariffs and Trade (GATT) since 17 October 1951. Türkiye is also one of the 42 members of the Union for the Mediterranean (UfM), an inter-governmental partnership established in 2008 as a continuation of the Euro-Mediterranean Partnership initiated at the Barcelona Conference in 1995. The UfM fosters cooperation and dialogue across the Euro-Mediterranean region, bringing together all 27 EU Member States and 15 countries from the southern and eastern Mediterranean. Its strategic objectives include promoting regional stability, advancing human development, and encouraging regional economic integration, with the ultimate goal of transforming the region into a zone of peace, stability and prosperity³².

In addition to its Customs Union and other agreements with the EU, Türkiye has 22 active Free Trade Agreements (FTAs) with partners such as the EFTA countries, Israel, North Macedonia, Bosnia and Herzegovina, Palestine*, Tunisia, Morocco, Egypt, Syria (currently suspended), Albania, Georgia, Montenegro, Serbia, Chile, Mauritius, South Korea, Malaysia, Moldova, the Faroe Islands, Singapore, Kosovo, Venezuela, and the United Kingdom.

Export of fishery and aquaculture products from Türkiye

In 2023, Türkiye exported 819.637 tonnes of fisheries and aquaculture products, valued at EUR 1,94 billion. Compared to 2022, this represented a decline of 16% in export volume but only a slight decrease in export value of 2,5%. Falls in exports to key markets such as Iraq and Syria partly drove the overall decline in volume. In 2023, the EU was the third largest export market for fishery and aquaculture products from Türkiye in terms of volume, accounting for 139.578 tonnes. While volumes exported to Iraq and Syria were higher in 2023, the EU was the largest market in terms of value, reaching EUR 712 million in 2023. Exports to the EU increased by 6% in value from 2022. The fourth and fifth largest markets were Russia and the

³¹ FAO. FishStat.³² European Commission.

United Kingdom, with export volumes of 87.878 tonnes and 18.923 tonnes, respectively, and values of EUR 348 million and EUR 148 million.

For Iraq, fish or marine mammal solubles destined for non-food use made up 98% of the total volume in 2023, while other marine fish and carp made up 1% each. For Syria, fish or marine mammal solubles destined for non-food use also made up the largest share of the export volume with 98% of the total volume, and carp with 1%. Exports to Russia consisted mainly of trout (53%), fish or marine mammal solubles destined for non-food use (30%), other marine fish³³ (6%), seabass (5%), seabream (3%) and salmonids other than salmon and trout³⁴ (2%). Exports to the United Kingdom included mostly other marine fish³⁵ (43%), seabass (35%), and seabream (19%), as well as smaller volumes of other non-food use, trout and salmon.

Table 29. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM TÜRKİYE BY TRADE PARTNER**
(volume in tonnes, value in 1.000 EUR)

Trade partner	2019		2020		2021		2022		2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Iraq	60.547	25.321	80.606	30.973	144.449	51.653	407.349	153.910	224.542	102.073
Syria	187.210	62.080	137.627	44.682	219.494	80.400	195.443	85.530	184.507	78.626
EU	133.427	490.348	117.907	491.960	119.943	541.196	128.181	669.967	139.578	712.245
Russia	19.309	79.365	29.526	114.592	42.348	183.662	58.276	316.698	87.878	348.364
United Kingdom	10.098	58.915	10.863	65.899	18.665	122.818	19.479	154.558	18.923	148.244
United Arab Emirates	4.895	16.713	5.854	19.749	5.714	20.756	6.220	26.129	16.045	29.582
Uruguay	0	0	0	0	0	0	4.629	1.208	15.786	4.244
Turkmenistan	18.157	7.431	15.602	6.618	11.333	5.562	11.751	7.444	11.386	6.077
Tunisia	5.741	8.886	13.051	16.045	20.443	23.428	19.275	31.388	11.085	18.873
Others	93.339	311.729	100.580	307.739	110.476	350.689	125.237	544.064	109.907	493.271
Total	532.722	1.060.787	511.616	1.098.257	692.865	1.380.163	975.839	1.990.895	819.637	1.941.599

Source: Trade Data Monitor.

Import of fishery and aquaculture products to Türkiye

In 2023, Türkiye imported 522.282 tonnes of fishery and aquaculture products, valued at EUR 939,7 million. Compared to 2022, this represented an increase of 1% in import volume and an increase of 0,3% in value. In 2023, the largest and second-largest suppliers were Morocco and the EU, with import volumes of 101.327 tonnes and 66.637 tonnes, respectively. The import values from Morocco and the EU reached EUR 123.6 million and EUR 151.6 million. Imports from Morocco largely consisted of fishmeal (67%), miscellaneous small pelagics (26%), and mackerel (7%). The largest suppliers from the EU to Turkey in 2023 were Spain, France, the Netherlands and Germany. Fish or marine mammal solubles for non-food use, skipjack tuna, fishmeal, yellowfin tuna and bigeye tuna were the largest species groups imported to Turkey from the EU in 2023. Norway was the third largest supplier of fishery and aquaculture products to Turkey with imports totalling 66.427 tonnes valued at EUR 175,2 million. Imports from Norway largely consisted of fish oil (75%), mackerel (10%), salmon (8%), and saithe (2%). Imports from Brazil also showed a significant increase from 2019 to 2023, rising from 266 tonnes to 45.752 tonnes. The volume consisted of other non-food use, mainly fish or marine mammal solubles, but also some volume of seaweeds and other algae (not fit for human consumption).

³³ MCS Other marine fish consist of 98% "Other fish (excl. 0303 11 - 0303 84), excluding edible fish offal of subheading 0303 91 - 0303 99, frozen"

³⁴ Other salmonidae (excl. 0303 11 - 0303 14), excluding edible fish offal of subheading 0303 91 - 0303 99, frozen

³⁵ Other marine fish exported to the United Kingdom in 2023 consisted largely of Other fish (excl. 0304 61 - 0304 88), fillets, frozen and Other fish (excl. 0304 31 - 0304 48), fillets, fresh or chilled

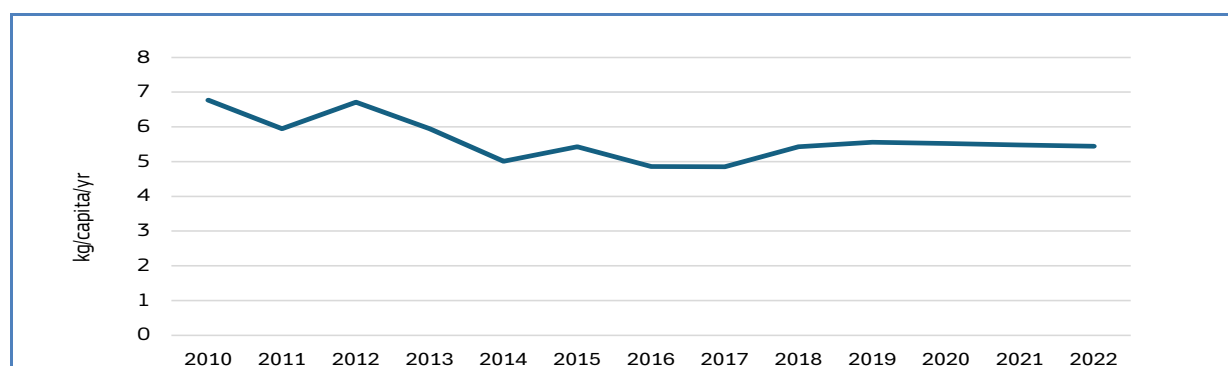
Table 30. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO TÜRKİYE BY TRADE PARTNER (volume in tonnes, value in 1.000 EUR)**

Trade partner	2019		2020		2021		2022		2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Morocco	125.480	116.537	109.209	98.747	112.450	109.211	133.362	172.562	101.327	123.550
EU	44.545	76.382	48.267	84.991	58.411	102.986	60.489	127.316	66.637	151.553
Norway	55.819	96.498	52.627	74.354	62.223	103.038	66.758	153.450	66.427	175.226
Brazil	266	391	16.967	9.901	28.461	17.148	32.265	33.266	45.752	42.647
Oman	7.571	8.942	11.773	14.007	25.636	31.379	24.505	37.263	31.283	57.278
Russia	14.324	9.882	8.198	5.795	4.929	3.540	16.205	16.609	29.743	23.662
India	3.807	8.460	2.764	5.195	3.056	4.538	4.080	9.493	28.351	51.938
Chile	13.719	15.658	20.431	19.400	12.749	14.012	16.767	30.120	21.720	47.238
Guinea	32	106	1	2	5.098	5.959	10.585	17.334	20.137	35.934
China	25.895	28.851	14.113	18.498	11.910	21.333	16.600	36.063	18.345	25.599
Others	114.784	174.838	132.698	160.276	108.129	151.813	133.595	303.249	92.560	205.081
Total	406.242	536.545	417.048	491.166	433.052	564.957	515.211	936.725	522.282	939.706

Source: Trade Data Monitor.

4.3. Consumption

Despite being surrounded by seas, fish consumption in Türkiye remains low compared to the global average and the rest of Europe. According to FAO, Turkish consumption of fishery and aquaculture products in 2022 was 5,4 kg per capita. Consumption of fishery and aquaculture products during the period declined from 6,8 kg in 2010 to approximately 4,9 kg in 2015. Between 2015 and 2020, consumption stabilized and increased slightly. From 2020 to 2022, consumption plateaued around 5,5 kg per capita. Traditionally, Turkish consumers have favoured non-fish meat products, and fish consumption varies significantly across regions. In the Mediterranean region, trout and sea bass are particularly popular, while in eastern Türkiye, anchovy is the preferred choice, followed by trout. The Marmara and Aegean regions lead in both volume and variety of fish consumed³⁶. While inland areas show low levels of fish consumption, it is more common in coastal regions. Factors such as local dietary habits, product availability, pricing, and consumer purchasing power all play a role in shaping fish consumption patterns.

Figure 50. **CONSUMPTION OF FISH AND SEAFOOD IN TURKEY (2010-2022) (kg/capita/year)**

Source: FAO.

³⁶ Eurofish.

4.4. Trade flows with the EU

The EU has trade agreements in place with Türkiye, and the trade relations are based on an Association Agreement from 1963 and a Customs Union agreement from 1995. Since 1999, Türkiye has been a candidate country to join the EU. The accession negotiations started in 2005 but have shown little progress in recent years. In 2023, Türkiye was the EU's 5th largest trade partner for overall goods. For Türkiye, the EU is its largest trade partner in terms of both export and import goods³⁷. For fishery and aquaculture products, the EU was the third largest export market for Türkiye in 2023.

EU export of fishery and aquaculture products to Türkiye

From 2019 to 2023, the export volume and value of fishery and aquaculture products from the EU to Türkiye saw an increase in both volume and value. Total export volume rose from 18.905 tonnes in 2019 to 26.977 tonnes in 2023, while the corresponding export value increased from EUR 29 million to EUR 53 million.

In 2023, skipjack tuna was the largest main commercial species group with a volume of 13.832 tonnes to a value of EUR 21,5 million. This was an 81% increase from 2021 in terms of volume. The largest supplier of this species was Spain, which exported 99.9% of the volume. Other non-food use was the second largest group with a volume of 3.384 tonnes and a value of EUR 5,2 million; this was a decrease of 31% from 2022. 82% of other non-food use consisted of seaweeds and other algae (unfit for human consumption), and 17% consisted of fish or marine mammal solubles. The main exporter of this species in the EU was Ireland with 82% of the volume. France and Italy accounted for 12% and 4% of this volume.

Yellowfin tuna and bigeye tuna were the third and fourth largest main commercial species groups with a volume of 2.431 tonnes and 1.942 tonnes, respectively. The export volume of both species increased noticeably from 2022 when the volumes were at 136 tonnes and 475 tonnes. For yellowfin tuna and bigeye tuna, Spain exported the entire volume coming from the EU in 2023. Lastly, anchovy was the fifth largest species exported from the EU to Türkiye in 2023 with a volume of 1.481 tonnes. Spain was again the largest exporter from the EU with 82% of the volume. Greece was the second largest supplier of anchovy to the Turkish market and accounted for 17% of the volume.

Table 31. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM THE EU TO TÜRKIYE BY MAIN COMMERCIAL SPECIES (volume in tonnes, value in 1.000 EUR)**

MCS	2019		2020		2021		2022		2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Skipjack tuna	9.112	10.643	6.966	9.024	7.206	8.471	7.654	10.509	13.832	21.464
Other non-food use	2.212	3.387	2.360	2.821	1.988	5.495	4.928	7.221	3.384	5.224
Yellowfin tuna	249	312	1.140	1.328	2.107	2.992	136	184	2.431	4.356
Bigeye tuna	679	829	532	522	1.011	1.152	475	645	1.942	3.162
Anchovy	1.193	1.198	788	862	1.158	1.398	1.096	1.292	1.481	2.029
Other	5.460	12.878	7.428	14.415	11.392	19.870	11.146	26.193	3.908	16.800
Total	18.905	29.248	19.216	28.971	24.861	39.378	25.435	46.044	26.977	53.036

Source: EUMOFA elaboration of Eurostat-Comext data.

EU imports from Türkiye

In 2023, the overall EU import volume from Türkiye reached 121.642 tonnes, 8% up from the volume in 2022. The total value reached EUR 731 million in 2023, up from EUR 677,7 million in 2022 (8%). In 2023, gilthead seabream comprised the largest volume among EU imports from Türkiye with 40.668 tonnes, an increase from 2022 when it was at 37.639

³⁷ European Commission. Türkiye. https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/turkiye_en

tonnes. Italy was the largest importer of gilthead seabream in 2023 with 11.989 tonnes, followed by Greece, the Netherlands and Spain with 7.921 tonnes, 6.321 tonnes, and 5.322 tonnes, respectively. Other marine fish³⁸ was the second largest species group with a volume of 25.788 tonnes, a minor increase from 2022 (2%). The Netherlands, Italy and Greece were the three largest importers in 2023 with a volume of 9.095, 7.654 tonnes, and 6.701 tonnes, respectively.

European seabass was the third largest main commercial species group imported by the EU from Türkiye in 2023. The volume reached 22.304 tonnes to a value of 121.287 tonnes. This was an increase of 10% in volume and 4% in value from 2022. Italy was again the largest importer with 6.798 tonnes. Other large importers of European seabass in 2023 were the Netherlands, Greece and Spain with 4.244 tonnes, 4.486 tonnes, and 3.724 tonnes, respectively.

Trout was the fourth largest species group imported by the EU at a volume of 15.359 tonnes in 2023 to a value of EUR 106 million. Imports of trout have seen a steady increase over the past few years, and compared to 2022, import volume and value were up by 12% and 38%. Germany, Austria and Romania were the three largest EU importers of trout with 4.048 tonnes, 4.278 tonnes, and 1.593 tonnes, respectively. Lastly, other freshwater fish³⁹ was the fifth largest group imported by the EU with a volume of 2.723 tonnes to a value of EUR 4,8 million. The import volume in 2023 was down from 2022 by 5%, but the import value increased by 2%. Italy and France were the two largest markets for other freshwater fish in 2023 with 913 and 748 tonnes.

Table 32. **TOTAL IMPORT OF FISHERY AND AQUACULTURE PRODUCTS TO THE EU FROM TÜRKİYE BY MAIN COMMERCIAL SPECIES (volume in tonnes, value in 1.000 EUR)**

MCS	2019		2020		2021		2022		2023	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Gilthead seabream	36.317	140.703	37.774	148.066	43.020	166.014	37.639	170.841	40.668	187.144
Other marine fish	19.461	146.357	20.253	155.765	23.096	180.539	25.298	229.683	25.788	229.982
European seabass	26.600	99.052	23.588	97.625	20.775	97.439	20.281	117.044	22.304	121.287
Trout	13.263	65.462	12.274	60.221	12.527	60.187	13.660	77.033	15.359	106.158
Other freshwater fish	2.592	4.566	1.910	2.997	2.672	3.667	2.869	4.776	2.723	4.881
Others	20.790	58.227	13.873	45.960	10.792	50.910	13.309	78.356	14.799	81.745
Total	119.022	514.366	109.672	510.635	112.882	558.755	113.057	677.733	121.642	731.196

Source: EUMOFA elaboration of Eurostat-Corcom data.

³⁸ The MCS "Other marine fish" mainly consists of Fresh or chilled fillets of fish, n.e.s. (55%), Fresh or chilled fish meat, whether or not minced (excl. all fillets, freshwater fish, flaps of herring, tilapias, catfish, carp, eels, Nile perch, snakeheads, salmonidae, swordfish, toothfish, rays, skates, dogfish and other sharks, and fish of the fam, (28%), Fresh or chilled fish, n.e.s. (12%).

³⁹ The MCS "Other freshwater fish" consist mainly Frozen freshwater fish, n.e.s. (95%).

5. Case study: Pacific salmon in the EU

Pacific salmon includes six main species of salmon caught in the North Pacific (sockeye, pink, chinook (or king), coho, chum and masu salmon). In 2022, the global production of Pacific salmon (all species combined) reached 699.625 tonnes live weight equivalent (LWE), the USA and Russia together accounting for 85% of global catches. Significant volumes of farmed Pacific salmon are also produced in Chile (coho) and to a lesser extent in Japan (coho) and New Zealand (chinook). In 2023, global catches of Pacific salmon reached one of the highest in history – just below 1,1 million tonnes – driven by record high catches of pink salmon, whereas preliminary data points towards a significant drop in global catches at around 500.000 tonnes. There is no production in the EU, which therefore relies on imports. In 2023, the EU imported 17.026 tonnes (net weight) of Pacific salmon from third countries for a value of EUR 103 million. Most of the EU imports of Pacific salmon are used either for the frozen fillet market or for the smoking industry to diversify its product range from smoked Atlantic salmon and smoked trout (e.g. in France and Poland).

5.1. Biology exploitation and management

Pacific salmon begin their life in freshwater streams, lakes and rivers, and migrate to the sea as small fish called smolts. After they transition from fresh to salt water and grow into adults in the high seas of the North Pacific Ocean, a biological clock signals to the salmon when it is time to return to their place of birth to spawn a new generation. Salmon are a primary source of protein for the several indigenous peoples of the Pacific Rim, as well as being part of their culture. Native groups celebrate the first return of salmon and individuals catch and store salmon for their families to eat all winter. Salmon plays a major role in many economies. The North Pacific provides the primary source of wild salmon that are harvested commercially and eaten in homes and restaurants all over the world. The Alaska salmon fishery, responsible for around 90% of wild caught salmon in North America, is certified by the Marine Stewardship Council⁴⁰.

Seven species (or six species plus one sub-species) are grouped under the name “Pacific salmon”⁴¹:

- **Chinook** salmon (*Oncorhynchus tshawytscha*) is the biggest and most valuable species. Individuals are blue green on the back and top of the head with silvery sides and white bellies. The biggest specimens can reach up to 150 cm and weigh 60 kg but are usually around 90 cm and weigh 15 kg. Chinook salmon mature sexually between the ages of 2 and 7 but are typically 3 or 4 years old when they return to spawn, after which they die. Chinook salmon spend their early life growing and feeding in freshwater streams, estuaries, and associated wetlands, while they spend the remainder of their life foraging in the ocean before returning to the streams and tributaries where they were born to spawn⁴².
- Commonly called silver salmon, **coho** (*Oncorhynchus kisutch*) have dark metallic blue or greenish backs with silver sides and a light belly. They are lighter than Chinook, 3,5–5,5 kg on average and 60–75 cm long. Coho salmon are found throughout the North Pacific Ocean and in most coastal streams and rivers from Alaska to central California. In North America, they are most abundant in coastal areas from southeast Alaska to central Oregon⁴³.
- **Pink** salmon (*Oncorhynchus gorbuscha*) are the smallest of the Pacific salmon found in North America, weighing between 1,5 and 2,2 kg, with an average length of 50 to 60 cm. They can be distinguished from other Pacific salmon by the large dark oval spots on their back and entire tail fin as well as their general colouring and form. Unlike coho, Chinook, or sockeye salmon, pink salmon do not live in fresh water for an extended period. Young pink salmon typically migrate directly to estuarine and marine waters soon after they are born. Once they reach the ocean, they feed voraciously and grow rapidly. They are among the fastest

⁴⁰ <https://www.worldwildlife.org/species/pacific-salmon>

⁴¹ <https://www.thecanadianencyclopedia.ca/fr/article/saumon-du-pacifique>

⁴² <https://www.fisheries.noaa.gov/species/chinook-salmon>

⁴³ <https://www.fisheries.noaa.gov/species/coho-salmon>

growing of the Pacific salmon species. After about 1,5 years of feeding and growing in the ocean, maturing pink salmon return to fresh water to spawn, usually from August to October⁴⁴.

- **Sockeye** (*Oncorhynchus nerka*) is also one of the smaller species of Pacific salmon, with similar sizes to pink salmon, and weighing 1,8 to 6,8 kg⁴⁵.
- **Chum** salmon (*Oncorhynchus keta*) do not reside in fresh water for an extended period (unlike coho, Chinook, and sockeye salmon). They can grow up to more than 100 cm but their average size is around 60 cm. They usually weigh between 4,4 to 10 kg. Young chum salmon typically migrate directly to estuarine and marine waters soon after they are born⁴⁶.
- **Masu** salmon (*Oncorhynchus masou*) has the most limited distribution and is the least abundant of the anadromous Pacific salmon. Masu is one of the smallest Pacific salmon. Adult masu measure up to 50 cm and weigh on average 2 to 2.5 kg. Masu, like coho, reside 1 – 3 winters in freshwater, and spend one year in salt water with short ocean migrations, spending most of their time in either the Sea of Japan or the Sea of Okhotsk. There is debate about whether it is one species or two (anadromous vs resident form)⁴⁷.
- **Amago** salmon (*Oncorhynchus rhodurus* or more recently *Oncorhynchus masou macrostomus*) also inspires debate about taxonomic classification. This species can be found in lakes in Japan and in the Philippine Sea. Adults usually range from 40 to 50 cm in length and 1,5 to 2,5 kg in weight⁴⁸.

Despite these 7 different species, Pacific salmon can all be grown in farms or fished in northwestern and northeastern Pacific. Chinook, coho, pink and sockeye are fished in Alaska and in the northwest coast of America (USA, Canada)^{2 3 4 5 6}, while masu and amago salmon can only be found near Kamchatka peninsula and the Japanese coasts^{49 50}. They are mainly fished with nets and seines, traps, cages or lines, with some species being fished with trawls (coho, chinook) or even dredges (chinook)^{51 52 53 54 55}.

The management of Pacific salmon fisheries involves a combination of national, regional, and international tools aimed at ensuring sustainable practices.

- **Quotas and Catch Limits:** Governments and organizations like NOAA Fisheries (USA) and Fisheries and Oceans Canada establish species-specific quotas to prevent overfishing. In response to overfishing in North America, the United States and Canada agreed in 1985 to cooperate in the management, research and enhancement of Pacific salmon stocks of mutual concern by ratifying the Pacific Salmon Treaty, which also regulates the fisheries occurring in the ocean and inland waters of west Canada and USA⁵⁶. Quotas also exist in Russia: fishing for salmon can only be conducted under the TAC established annually and based on quotas allocated to different types of fisheries⁵⁷.
- **Seasonal and Area Closures:** Fishing seasons are set to protect salmon during critical life stages, such as spawning, and specific areas are closed to protect habitats⁵⁸.

⁴⁴ <https://www.fisheries.noaa.gov/species/pink-salmon>

⁴⁵ <https://www.fisheries.noaa.gov/species/sockeye-salmon>

⁴⁶ <https://www.fisheries.noaa.gov/species/chum-salmon>

⁴⁷ <https://wildsalmoncenter.org/salmon-species/masu/>

⁴⁸ <https://fishbase.mnhn.fr/summary/Oncorhynchus-rhodurus.html>

⁴⁹ <https://wildsalmoncenter.org/salmon-species/masu/>

⁵⁰ <https://animalia.bio/biwa-trout>

⁵¹ https://fish-commercial-names.ec.europa.eu/fish-names/species/oncorhynchus-tshawytscha_fr

⁵² https://fish-commercial-names.ec.europa.eu/fish-names/species/oncorhynchus-kisutch_fr

⁵³ https://fish-commercial-names.ec.europa.eu/fish-names/species/oncorhynchus-keta_fr

⁵⁴ https://fish-commercial-names.ec.europa.eu/fish-names/species/oncorhynchus-gorbuscha_fr

⁵⁵ https://fish-commercial-names.ec.europa.eu/fish-names/species/oncorhynchus-nerka_fr

⁵⁶ <https://www.fisheries.noaa.gov/west-coast/sustainable-fisheries/pacific-salmon-treaty-and-pacific-salmon-commission>

⁵⁷ https://nasco.int/wp-content/uploads/2020/02/FisheriesFAR_Russia.pdf

⁵⁸ <https://www.fisheries.noaa.gov/west-coast/sustainable-fisheries/salmon-life-cycle-and-seasonal-fishery-planning>

- **Gear Restrictions:** Regulations on fishing gear types (e.g., gillnets, seines, or troll gear) minimize bycatch and environmental impacts, which makes it easier to target wanted species and minimize bycatch of ESA-listed salmon and endangered species⁵⁹.
- **Stock Assessments:** The management of fisheries is planned in line with salmon abundance, and includes regular monitoring and scientific data to ensure salmon stocks are managed sustainably. Specificities about the different life cycles of salmon species, the different ages when they return, and times of year and migration patterns can help fishery managers target specific stocks and forecast the abundance of fish available in each fishery⁵⁸.
- **International Coordination:** Organizations like the North Pacific Anadromous Fish Commission (NPAFC) oversee conservation efforts in international waters and combat illegal fishing. International treaties can also improve and share management of salmon fishery like the Pacific Salmon Treaty, regulating the fisheries occurring in the ocean and inland waters of west Canada and USA⁵⁶.

These measures are supplemented by habitat restoration projects and community involvement to ensure long-term sustainability.

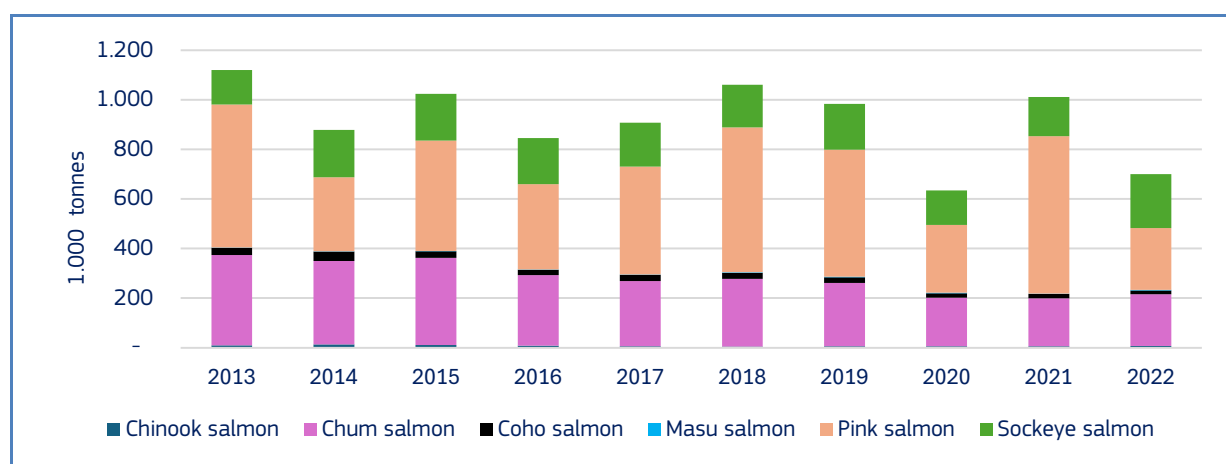
5. 2. Production

Global catches

The global production of Pacific salmon (all species combined) reached 699.625 tonnes LWE in 2022. It was mostly caught in the Northwest and Northeast Pacific (96% of volumes). The United States and Russia together accounted for 85% of global catches with 46% and 39% respectively. Two minor producers are Japan (13%) and Canada (1%).

Three Pacific salmon species are mostly caught worldwide: in the 2013-2022 period, pink salmon accounted for 48% of catches, followed by chum (30%) and sockeye (19%) salmon. Three other species represented less than 4% over the decade (chinook, coho, masu). Between 2013 and 2022, global catches tended to fall, especially pink salmon (-58%) and chum salmon (-43%), while sockeye salmon catches increased by 56%, which however was not enough to offset decreases of the two other main species in terms of volumes.

Figure 51. **GLOBAL CATCHES OF PACIFIC SALMON BY SPECIES (volume in thousand tonnes LWE)**



Source: FAO.

⁵⁹ <https://www.federalregister.gov/documents/2021/02/23/2021-03204/magnuson-stevens-act-provisions-fisheries-off-west-coast-states-pacific-coast-groundfish-fishery>

Table 33. **WORLD CATCHES OF PACIFIC SALMON SPECIES (volume in tonnes LWE)**

Species	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Chinook salmon	9.943	12.736	10.628	8.000	5.808	4.929	6.276	5.720	6.047	7.070
Chum salmon	363.365	337.600	351.984	284.445	262.527	272.191	255.525	195.885	193.369	208.115
Coho salmon	29.691	37.384	26.869	21.898	25.982	25.178	22.541	18.514	17.457	16.059
Masu salmon	1.378	1.074	704	1.303	688	1.431	1.658	1.301	1.799	1.859
Pink salmon	576.532	298.363	444.876	343.918	435.357	584.435	513.341	273.294	634.970	249.326
Sockeye salmon	138.962	191.177	189.088	185.495	176.695	172.325	184.761	139.732	157.142	217.197
Total	1.119.871	878.334	1.024.149	845.059	907.057	1.060.489	984.102	634.446	1.010.784	699.625

Source: FAO.

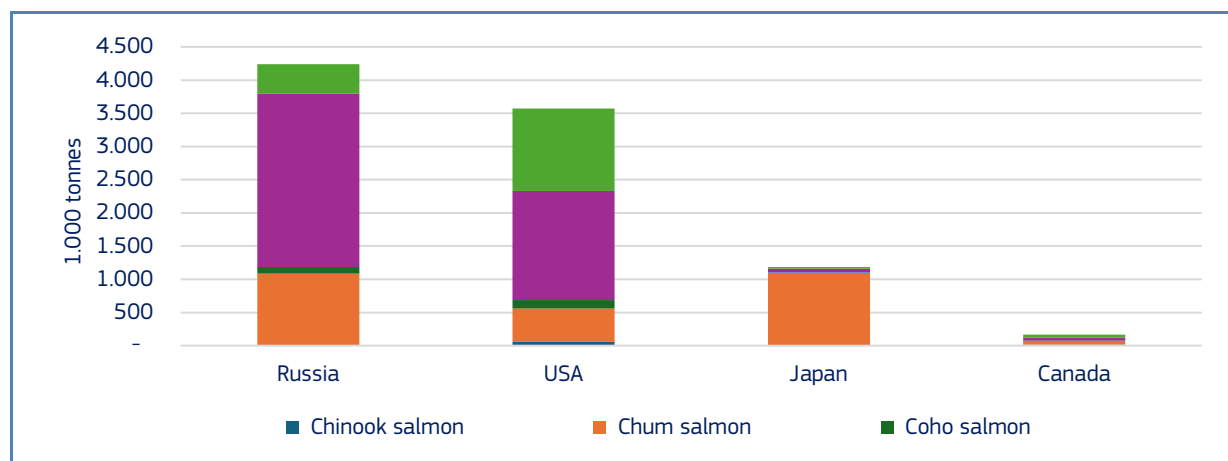
Over the last decade (2013-2022), the global production of Pacific salmon fluctuated between 634.446 tonnes LWE (2020) and 1.119.871 tonnes LWE (2013), around an average of 916.392 tonnes, with a trend of significantly declining volumes (38%). Over the decade, all producers experienced important decreases in Pacific salmon catches: -33% for the USA, -35% for Russia, -47% for Japan, to -76% for Canada.

Table 34. **WORLD CATCHES OF PACIFIC SALMON (volume in tonnes LWE)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
USA	485.431	326.828	483.925	254.755	457.535	261.632	380.440	226.966	371.980	324.283
Russia	422.015	348.255	371.782	446.199	355.235	680.254	503.289	299.830	540.304	272.422
Japan	182.176	161.837	148.328	120.009	81.394	106.270	95.610	99.244	94.285	95.743
Canada	30.249	41.414	20.114	24.096	12.893	12.333	4.763	8.406	4.215	7.177
Total	1.119.871	878.334	1.024.149	845.059	907.057	1.060.489	984.102	634.446	1.010.784	699.625

Source: FAO.

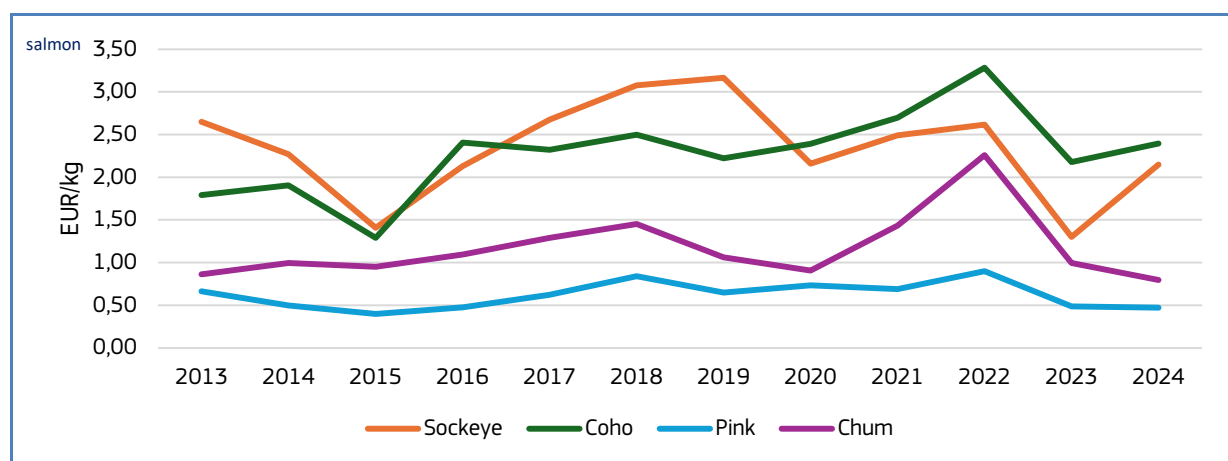
Among the producers, shares per species sometimes vary. Whilst the USA, Russia and Canada caught various species in shares similar to the world average, Japan was far more specialized in chum salmon, where catches accounted for 92% of domestic volumes and 40% of global volumes for chum salmon, though these are decreasing (-33% between 2013 and 2022 of Japanese chum salmon catches). However, chum salmon catches were split between Japan, Russia (40% for each) and the USA (18%). In terms of catches of other species over the decade, pink salmon was mostly fished by Russia (60% of global catches), and sockeye mostly fished by the USA (71%). As for the other minor species, chinook and coho salmon were mainly caught by the USA (respectively 74% and 54% of global volumes), while masu salmon was almost exclusively caught by Japan (99%).

Figure 52. **GLOBAL CATCHES OF PACIFIC SALMON BY COUNTRIES (volume in thousand tonnes LWE)**

Source: FAO.

In 2023, global catches of Pacific salmon reached one of the highest in history – just below 1,1 million tonnes⁶⁰ – driven by record high catches of pink salmon. Preliminary data points towards global catches at the other end of the scale – at around 500.000 tonnes⁶¹.

Of the four Pacific salmon species with the highest catch volume, sockeye and coho reach the highest price at first-hand sales and in the market. A significant share of sockeye catches is processed into canned salmon, but most of the catches are processed into frozen products. Coho is mainly processed into frozen products. From a peak in 2022, prices paid to fishers (first sales prices) in 2023 dropped significantly due to high global catches of Pacific salmon. Prices recovered in 2024 in the wake of record low catch volume in 2024. Pink salmon prices trend in the other end of the scale. Pink salmon is a highly appreciated raw material for canneries in Alaska and fillet processors in China due to its low price.

Figure 53. **FIRST SALE PRICE TREND FOR SELECTED PACIFIC SALMON SPECIES IN THE USA (Alaska) IN EUR/KG**

Source: Alaska Department of Fish and Game, European Central Bank (2024; preliminary data).

In the EU, sockeye and chum are the main species purchased by smoked salmon processors. Both species represents a far cheaper raw material alternative than farmed Atlantic salmon.

⁶⁰ NPAFC scientific research papers 2024⁶¹ Kontali EDGE

Aquaculture production

Aquaculture of Pacific salmon takes a back seat compared to wild catches, though farmed with growing volumes. Between 2013 and 2022, farmed Pacific salmon increased by 63%, mainly driven by Chile, the first producer of farmed Pacific salmon with the fastest growth (+66%). Over this period, Chile has always accounted for 80% to 87% of global Pacific salmon farming, followed by Japan (7% in 2022), New Zealand (5% in 2022), and more occasional minor producers.

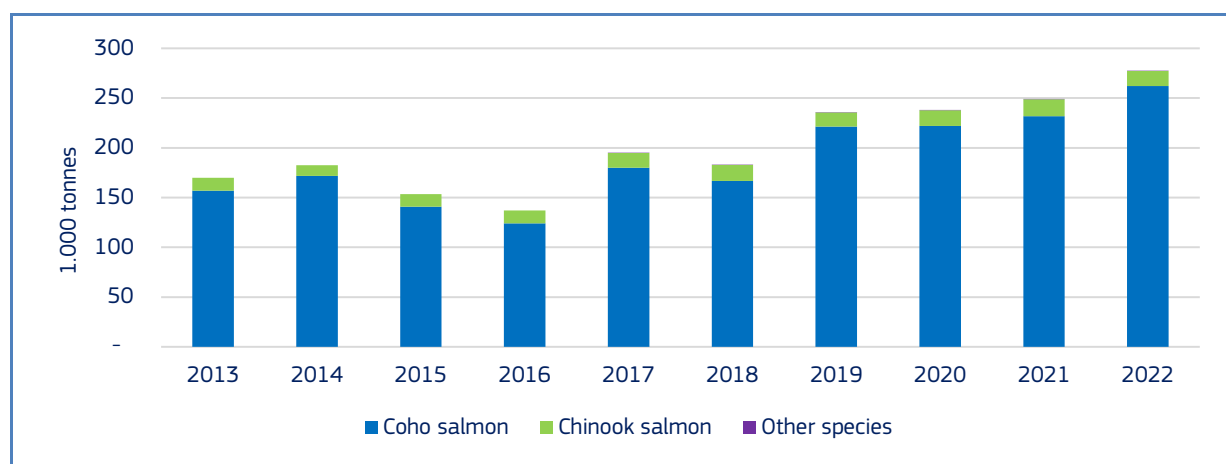
Table 35. **WORLD AQUACULTURE PRODUCTION OF PACIFIC SALMON (volume in tonnes LWE)**

Country	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
Chile	145.561	158.947	127.016	110.980	164.198	148.521	205.386	204.740	213.222	241.906
Japan	12.215	12.802	13.937	13.208	15.648	18.053	15.938	17.333	18.482	20.200
New Zealand	11.988	10.840	12.474	12.943	14.890	16.291	14.209	15.511	16.962	15.118
South Korea	0	0	0	0	199	150	191	201	178	67
Russia	0	0	0	0	0	66	9	116	34	67
Switzerland	0	0	0	0	0	0	2	2	2	2
EU-27	0	2	4	0	36	0	41	31	1	0
Total	169.764	182.591	153.431	137.131	194.971	183.081	235.776	237.934	248.881	277.360

Source: FAO.

Farming mainly involves 2 species: chinook salmon and coho salmon. Over the period 2013-2022, its growth was mainly driven by coho farming (+67%), which provides by far the biggest volumes worldwide, from 91% to 94%, depending on the year. Apart from coho salmon and chinook salmon – which grew by 17% within 10 years, other species have not yet thrived, despite emerging volumes for short periods.

Figure 54. **GLOBAL AQUACULTURE PRODUCTION OF PACIFIC SALMON BY SPECIES (volume in thousand tonnes net weight)**



Source: FAO.

5. 3. Import – Export

In the Combined Nomenclature used for registering EU import-export data, Pacific salmon is specifically reported as fresh and frozen whole, including a specific code for sockeye salmon⁶². However, for other preservation/presentation (fresh and frozen filets, smoked salmon, preparations, etc.), Pacific salmon is mixed with Atlantic salmon. Considering the dominance of Atlantic salmon in EU trade flows, the analysis below only takes into account the CN codes including Pacific salmon species exclusively, so it might underestimate trade flows of Pacific salmon.

In 2023, **extra-EU-27 imports** amounted to 17.026 tonnes (net weight) of Pacific salmon at a value of EUR 103 million, mostly frozen whole (99% of the total value of imports). The major providers of Pacific salmon to the EU market were the USA, accounting for 84% of the extra-EU import volume and 85% of extra-EU value, far ahead of other countries: Russia (6% in import value), Chile (5%), and Canada (3%). France (23% of the total extra-EU import value), Poland (16%), the Netherlands (14%), Lithuania (12%) and Germany (10%) were the main entry points of these imports to the EU.

One significant point of caution is the important number of fillets under mixed denomination (mixed with Atlantic salmon). To estimate the value of imported Pacific salmon reported under mixed denomination (both Atlantic and Pacific species), categories have been split according to reporting country. Among the 4 main producer countries, data showed that Russia and the USA were overwhelmingly specialized in Pacific salmon production (>90% in volume), while Canada and Chile were more specialized in Atlantic salmon production (>75%). So a first approximation is to consider volumes under mixed denominations from Russia and the USA as Pacific salmon volumes. In this respect, additional supposed volumes amount to 2.357 tonnes and EUR 26 million. With 60% of imported value, the USA accounts for most of imported value, followed by Russia (40%). 99% of imported value is made of frozen fillets, and less than 1% accounts for smoked salmon and fresh fillets.

In the same year, **extra-EU exports** recorded much lower volumes, amounting to 988 tonnes at a value of EUR 5 million. Again, volumes might be underestimated due to volumes under denomination of mixed species of salmon. Exported products were only whole/gutted fish, and almost only exported as frozen (93% in terms of values, vs 7% for live/fresh fishes). The main destinations in value terms were the United States (44% of the total value), and various minor destinations, mainly in Europe, each accounting for less than 7% (Switzerland, Thailand and Vietnam 6% respectively, Gibraltar and Andorra 5% respectively).

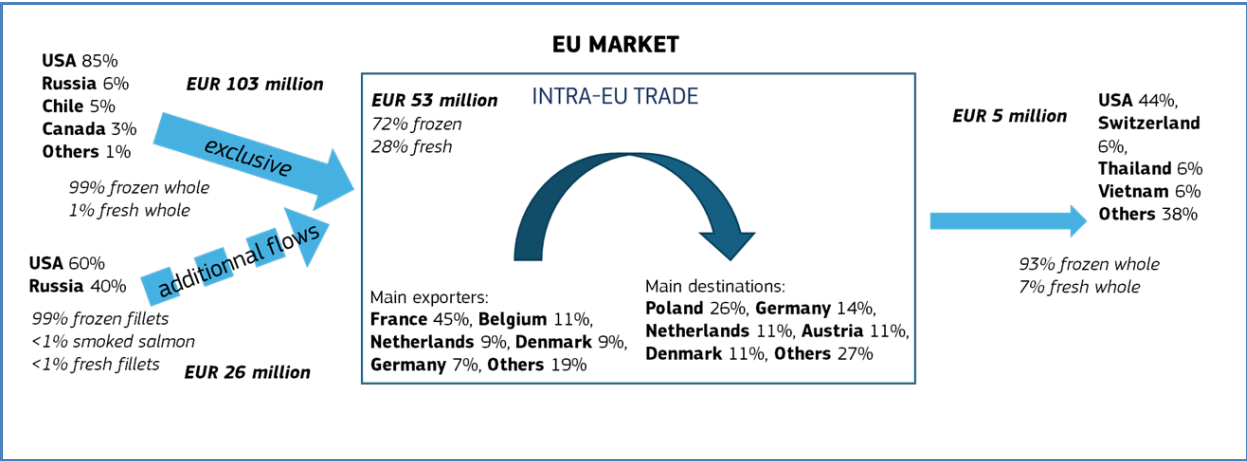
In 2023, **intra-EU exports** amounted to 6.973 tonnes, at a value of EUR 53 million. The intra-EU trade was dominated by frozen products, which accounted for 72% of the export value, whereas fresh products accounted for 28% of the total export value. The main exporting countries within the EU were France (45% of the intra-EU export value), followed by Belgium (11%), the Netherlands (9%), Denmark (9%) and Germany (7%), while Poland (26% of intra-EU export value), Germany (14%), the Netherlands, Austria and Denmark (11% for each) represented the main destination of intra-EU exports. However, these flows only take into account whole fish and not frozen fillets and smoked fish that might account for a significant share of intra-EU exports.

⁶² 03031100 - Frozen sockeye salmon [red salmon] "Oncorhynchus nerka"

03031200 - Frozen Pacific salmon (excl. sockeye salmon "red salmon")

03021300 - Fresh or chilled Pacific salmon "Oncorhynchus nerka, Oncorhynchus gorbuscha, Oncorhynchus keta, Oncorhynchus tshawytscha, Oncorhynchus kisutch, Oncorhynchus masou and Oncorhynchus rhodurus"

Figure 55. THE PACIFIC SALMON TRADE MARKET IN 2023, IN VALUE



Source: EUMOFA elaboration of Eurostat-COMEXT data.

6. Global highlights

EU / Fishery: On 18 November 2024, the European Commission released the **2024 Annual Economic Report on the European Union fishing fleet**, showing a substantial improvement in the fleet's economic performance, with gross profits increasing from both 2022 and 2023 to a projected €1,673 million in 2024. The improvement with respect to sustainability of EU fish stocks, driven by EU measures to reduce fishing effort over recent years, has proven economically beneficial: fleets targeting stocks exploited sustainably over several years tend to improve both profitability and salaries. It also shows that moving to less fuel-intensive fishing techniques brings not only environmental benefits, but also decreases costs and strengthens socio-economic resilience. The report also highlights several challenges, including structural problems such as aging and inactive vessels, a lack of new young entrants to the industry, and the lagging behind of socio-economic performance of small-scale coastal fishing fleets (SSCF)⁶³.



AGRIFISH COUNCIL: The EU Agriculture and Fisheries Council has finalized a political agreement on fishing opportunities for 2025, establishing catch limits and fishing effort restrictions to balance sustainability with socioeconomic considerations. Based on the Commission's proposals, fisheries ministers from EU Member States reached unanimous agreements for the Mediterranean, Black Sea, Atlantic, and North Sea⁶⁴. Additionally, the Commission successfully concluded agreements with Norway⁶⁵ and the UK⁶⁶, as well as trilateral negotiations⁶⁷. Additionally, the Commission represented the EU in the final rounds of negotiations for regional fisheries management organizations, including the annual ICCAT⁶⁸ and NEAFC⁶⁹ meetings.

EU / Norway / Fishing quotas: On 11 November 2024, the European Commission and Norway reached agreement on a number of outstanding issues in the area of fisheries, including a quota of Svalbard cod to the EU of 2,8% of the total allowable catch (TAC) for the next and the following years. This will allow EU vessels to fish the quota – corresponding to 9.217 tonnes in 2025 – in both Svalbard and international waters. The issue arose after the UK left the EU and Norway's subsequent decision to set a quota of Svalbard cod for the EU below the Union's historical fishing rights, thus affecting the livelihood of fisheries communities in several Member States⁷⁰.

Mediterranean / Fishery: During the 47th annual meeting of the General Fisheries Commission for the Mediterranean (GFCM), which took place on 4-8 November in Rome, the EU and neighbourhood countries agreed on important measures in favour of sustainability of the Mediterranean and the Black Sea. The EU and neighbourhood countries agreed on measures to continue strengthening sustainability strategies at sea basin level, including through subregional cooperation. They also agreed to consolidating the overall management framework for the Adriatic and Black Seas on the principles of the Common Fisheries Policy (CFP), an important delivery of the GFCM subregional approach that is supported by the EU as main financial donor⁷¹.

Fishery / Atlantic Tuna: At the annual meeting in Cyprus of the International Commission for the Conservation of Atlantic Tunas (ICCAT), the EU paved the way to an agreement on the sustainable management of tropical tunas. The agreement includes an increase in the Total Allowable Catch (TAC) for bigeye tuna, mainly to the benefit of developing coastal states. Fishing opportunities for the European fleet are also slightly improved. The agreement also establishes a route towards the mandatory use of biodegradable and

⁶³ https://oceans-and-fisheries.ec.europa.eu/news/eu-fishing-fleet-sees-improved-profitability-structural-challenges-remain-2024-11-18_en

⁶⁴ https://oceans-and-fisheries.ec.europa.eu/news/fisheries-ministers-agree-fishing-opportunities-2025-atlantic-and-north-sea-and-mediterranean-and-2024-12-11_en

⁶⁵ https://oceans-and-fisheries.ec.europa.eu/news/eu-and-norway-reach-agreement-fishing-opportunities-2025-2024-12-06_en

⁶⁶ https://oceans-and-fisheries.ec.europa.eu/news/eu-and-uk-agree-fishing-opportunities-2025-worth-eu14-billion-eu-fishers-2024-12-09_en

⁶⁷ https://oceans-and-fisheries.ec.europa.eu/news/eu-norway-and-uk-agree-fishing-opportunities-north-sea-2025-2024-12-05_en

⁶⁸ https://oceans-and-fisheries.ec.europa.eu/news/landmark-agreement-sustainable-management-atlantic-tropical-tunas-2024-11-19_en?pk_source=ec_newsroom&pk_medium=email&pk_campaign=MARE+Newsletter

⁶⁹ https://oceans-and-fisheries.ec.europa.eu/news/north-east-atlantic-fisheries-face-significant-challenges-conservation-and-control-unprecedented-2024-11-21_en?pk_source=ec_newsroom&pk_medium=email&pk_campaign=MARE+Newsletter

⁷⁰ https://oceans-and-fisheries.ec.europa.eu/news/commission-and-norway-agree-eu-quota-svalbard-cod-2025-and-beyond-2024-11-11_en

⁷¹ https://oceans-and-fisheries.ec.europa.eu/news/eu-and-neighbourhood-countries-agree-1st-shared-eu-albania-fisheries-restricted-area-and-other-2024-11-11_en?pk_source=ec_newsroom&pk_medium=email&pk_campaign=MARE+Newsletter

non-entangling Fish Aggregation Devices (FADs). FAD fishery closure was reduced to 45 days, and scientific work to inform future decisions on the appropriate length of the FAD closure was strengthened⁷².

EU / Fishery: The European Transport Workers' Federation (ETF) convened a landmark conference on 19 November 2024, focusing on the issue of fair pay and working conditions for non-EU fishers employed on EU vessels. The event brought together policymakers, industry stakeholders and experts including representatives from the EU Commission, European Parliament, and the International Labour Organisation (ILO) to address challenges within the framework of Sustainable Fisheries Partnership Agreement (SFPAs)⁷³.

7. Macroeconomic Context

7.1. Marine fuel

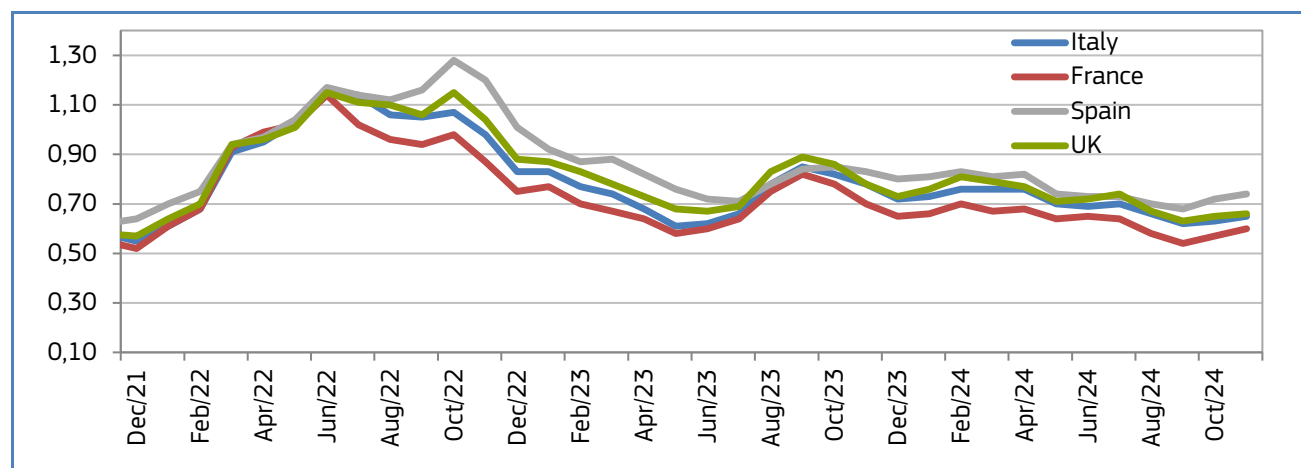
Average prices for Marine fuel in **November 2024** ranged between 0,60 and 0,74 EUR/litre in ports in **France, Italy, Spain** and the **UK**. Prices increased by an average of 3,1% compared with the previous month and decreased by an average of 14,2% compared with the same month in 2023.

Table 36. **AVERAGE PRICE OF MARINE DIESEL IN FRANCE, ITALY, SPAIN, AND THE UK (EUR/litre)**

Member State	Nov 2024	Change from Oct 2024	Change from Nov 2023
France (ports of Lorient and Boulogne)	0,60	5%	-14%
Italy (ports of Ancona and Livorno)	0,65	3%	-17%
Spain (ports of A Coruña and Vigo)	0,74	3%	-11%
The UK (ports of Grimsby and Aberdeen)	0,66	2%	-15%

Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

Figure 56. **AVERAGE PRICE OF MARINE DIESEL IN ITALY, FRANCE, SPAIN, AND THE UK (EUR/litre)**



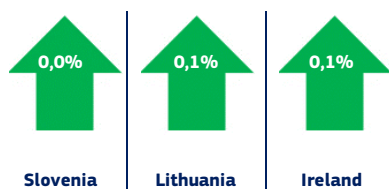
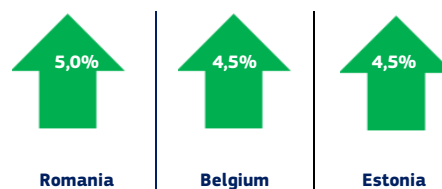
Source: Chamber of Commerce of Forlì-Cesena, Italy; DPMA, France; MABUX.

7.2. Consumer prices

The EU annual inflation rate was 2,3% in October 2024, up from 2,1% in September 2024. A year earlier, the rate was 3,6%.

⁷² https://oceans-and-fisheries.ec.europa.eu/news/landmark-agreement-sustainable-management-atlantic-tropical-tunas-2024-11-19_en

⁷³ <https://thefishingdaily.com/latest-news/etf-conference-urges-fair-pay-for-non-eu-fishers-on-eu-vessels/>

**Inflation: lowest rates in October 2024,
compared with September 2024.****Inflation: highest rates in October 2024,
compared with September 2024.**Table 37. **HARMONISED INDEX OF CONSUMER PRICES IN THE EU (2015 = 100)**

	Oct 2022	Oct 2023	Sep 2024	Oct 2024	Change from Sep 2024	Change from Oct 2023
Food and non-alcoholic beverages	130,80	140,73	143,38	144,41	↑ 0,7%	↑ 2,6%
Fish and seafood	130,18	138,92	141,39	141,45	↑ 0,04%	↑ 1,8%

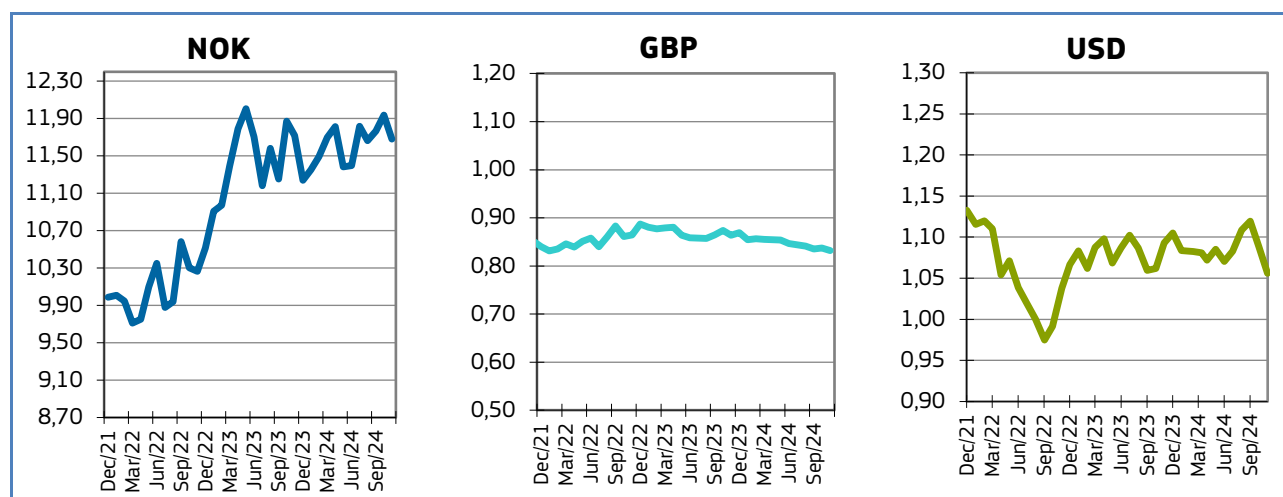
Source: Eurostat.

7.3. Exchange ratesTable 38. **EURO EXCHANGE RATES FOR SELECTED CURRENCIES**

Currency	Nov 2022	Nov 2023	Oct 2024	Nov 2024
NOK	10,2648	11,7200	11,9385	11,6805
GBP	0,8649	0,8637	0,8375	0,8321
USD	1,0376	1,0931	1,0882	1,0562

Source: European Central Bank.

In November 2024, the euro depreciated against the US dollar (2,9%), the Norwegian krone (2,2%) and the British pound sterling (0,7%) as well relative to the previous month. For the past six months, the euro has fluctuated around 11,7099 against the Norwegian krone. Compared with November 2023, the euro has depreciated 3,7% against the British pound sterling, 0,3% against the Norwegian krone and 3,4% against the US dollar.

Figure 57. **TREND OF EURO EXCHANGE RATES**

Source: European Central Bank.

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First sales: Fishbase, EUR-lex, CCAMLR.

Consumption: Fishbase.

Case studies: Istanbul University Press, EUR-Lex, ResearchGate, DG Fisheries and Aquaculture of Türkiye, FAO, European Commission, Eurofish, WWF, Canadian Encyclopedia, NOAA Fisheries, Wild Salmon Center, FishBase, Animalia, Fisheries Management Focus Area Report of the Russian Federation, US Federal Register, NPAFC scientific research papers 2024, Kontali EDGE.

Global highlights: European Commission, The fishing daily, Statistics Iceland.

Macroeconomic context: EUROSTAT, Chamber of Commerce of Forlì-Cesena, Italy: DPMA, France: ARVI, Spain: MABUX, European Central Bank.

The underlying first-sales data are in an annex available on the EUMOFA website. Analyses are made at aggregated (main commercial species) level and according to the EU Electronic recording and reporting system (ERS).

In the context of this Monthly Highlight, analyses are led in current prices and expressed in nominal values.

The **European Market Observatory for Fisheries and Aquaculture Products (EUMOFA)** was developed by the European Commission, representing one of the tools of the new Market Policy in the framework of the reform of the Common Fisheries Policy. [Regulation (EU) No 1379/2013 art. 42].

As a **Market intelligence tool**, EUMOFA provides regular weekly prices, monthly Market trends, and annual structural data along the supply chain.

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