CASE STUDY

SAITHE IN THE EU

PRICE STRUCTURE IN THE SUPPLY CHAIN

FOCUS ON FRANCE, DENMARK AND GERMANY

MARCH 2026

WWW.EUMOFA.EU

Maritimes Affairs and Fisheries

Manuscript completed in November 2025.

Luxembourg: Publications Office of the European Union, 2026

PDF ISBN 978-92-68-38045-1 doi: 10.2771/3714148 KL-01-26-017-EN-N

FOR MORE INFORMATION AND COMMENTS:

Directorate-General for Maritime Affairs and Fisheries

B-1049 Brussels

E-mail: contact-us@eumofa.eu

Table of contents

Summary

Global catches of saithe (*Pollachius virens*) reached 341.457 tonnes in 2023[1]. Catches of saithe are geographically concentrated (98%) in Northeast Atlantic. The leading producer country is Norway, which accounts for 68% of global catches with 231.477 tonnes. In 2023, the EU accounted for 6% of global catches. Among other non-EU countries, Iceland, the Faroe Islands and Russia accounted for respectively 12%, 5% and 4% of global catches. In 2024, the main producers within the EU were France (56% of the EU total), Germany (24%) and Denmark (13%). The port of Hanstholm in Denmark is the place in the EU where most catches are landed. It must be noted that a significant share of catches by the EU fleet is also landed outside the EU, mainly in Norway and Scotland. Denmark and the Netherlands are important countries for saithe fileting. A share of the EU supply also comes from fish (from EU or other European origin) double frozen and fileted in Lithuania and China.

According to the estimated apparent consumptions, the main consumer countries for saithe in the EU are France (46%), Poland (29%), Germany (23%), Spain (12%) and Sweden (9%). Saithe is mostly sold to the final consumer in large retail and mass catering. It is particularly popular in mass catering as an alternative to Alaska pollock, cod and haddock. It can be found to a lesser extent in other HORECA channels as fish & chips shops or restaurants in Germany and Denmark. In the retail sector, saithe is sold as fresh or frozen filet or loins. It is appreciated by consumers as a fish which is easy to cook, with little bones. The supply chain is mainly divided between frozen products predominantly sold in mass catering and fresh products sold in part of the HORECA and retail. Apart from distribution channels, saithe market is not strongly segmented. The loin cut stands out as the most premium saithe product. The Marine Stewardship Council (MSC) certification differentiates some fisheries for saithe, but the recent loss of the MSC label for several EU fisheries (France[2], Germany[3]) is deemed to have little consequence on consumption, limited to part of the HORECA channel which will redirect to certified fisheries, for example in the Barents Sea[4].

This study focuses on two of the main consumption markets for saithe, France and Germany, which count also among the main producing countries, as well as on Denmark, which is the EU country where most catches from EU fleets are landed and transit.

In 2024, France was the first consumption market for saithe in the EU, with an apparent consumption of 47.234 tonnes live weight equivalent (LWE). It was also the first producer country, with catches amounting to 10.731 tonnes. The volume of catches has decreased by 32% between 2015 and 2024 and by 14% between 2023 and 2024. French catches were historically landed mostly in Scotland, due to the proximity of the Scottish ports from the fishing areas. Starting with the Brexit, most of the catches were instead landed in Denmark, as well as Norway and Iceland in minor proportions. French apparent consumption has increased by 11% over the past decade. The main consumption channel is institutional and mass catering, where saithe is a cheaper option than cod, but more qualitative than pollock. The French market is well segmented between fresh filleted saithe and frozen fillets; the latest being imported for the large majority. Imports are 80% of the national apparent consumption in tonnes LWE, most of which is imported filleted from processing countries such as Denmark or the United Kingdom, or from trading countries such as the Netherlands. Part of the saithe used was caught and landed by French vessels in these countries. Only 7.491 tonnes LWE of saithe were exported from France in 2024, mostly fresh whole fish that was likely landed in foreign ports.

In 2024, Germany was the third main market for saithe in the EU, with an apparent consumption of 23.593 tonnes LWE. It was also the second producer, with catches amounting to 4.554 tonnes. The

[1] Latest year for which global data is available
[2] Assessments Euronor and Compagnie des Peches de St Malo saithe fishery - MSC Fisheries
[3] View Germany North Sea saithe trawl - MSC Fisheries
[4] Assessments Barents Sea cod, haddock and saithe - MSC Fisheries

volume of catches, mainly driven by TACs (Total Allowable Catches) and the resource's availability, has decreased by 46% between 2015 and 2024. In 2024, imports accounted for most of the German supply in saithe, mostly from Denmark, Lithuania and Iceland. Exports accounted for fewer volumes and value. Both imports and exports decreased over the past decade, by respectively 24% and 59%. Apparent consumption has progressed by 8% over the past 10 years, at a slightly slower pace than during the past decade (+15%). According to stakeholders, the HORECA sector accounts for more than half of the volumes consumed in Germany, mainly in mass catering and for a smaller share in street-food outlets, either baked or in fish sandwiches. A large share of the volume is also sold in large retail. In retail, saithe is mostly sold as fresh or frozen filet, to a lesser extent as loins. The German market distinguishes itself by a stronger preference of the consumer for saithe over cod, notably as backed fish. Saithe is widely used as an alternative to Alaska pollock in mass catering. It remains rare in restaurants, where cod is generally preferred. While first sale nominal prices increased over the past decade, real prices remained relatively stable.

In 2024, Denmark was the 16th consumption market for saithe in the EU with 559 tonnes LWE, while being the main country of transit. Denmark is the main landing country for saithe in the EU, and the third country in terms of catches, with 2.515 tonnes. Total imports and exports of saithe remained stable in volume in the past five years but experienced strong increases in value. These imports consist in foreign landings in Danish ports, while exports consist of saithe landing, either directly transported by lorry to the main EU markets or processed in Danish factories before being exported to EU markets. The limited apparent consumption on the Danish market has decreased by 89% over the past decade, mainly due to a reduction in production, which almost halved over the last decade. Saithe can be found fresh in fillets in supermarkets or in restaurants, canteens and catering, but the size of the Danish market is marginal compared to the main EU markets. The local market is estimated at 1-2% of the overall Danish supply.

List of acronyms

CN	Combined nomenclature
EU	European Union (EU-27)
FAO	Food and Agriculture Organisation of the United Nations
HORECA	Hotels, restaurants and cafés/catering
IQF	Individually Quick Frozen
LWE	Live weight equivalent
MCRS	Minimum conservation reference size
MS	Member States
n.c	Not communicated
PO	Producer's Organisation
POK	Saithe (Pollachius virens), also called coalfish
STECF	Scientific, Technical and Economic Committee for Fisheries
TAC	Total allowable catches
VAT	Value added tax

1. SCOPE AND CONTENT

1.1 Case study scope

Key elements for the analysis of saithe price structure and distribution of value in the supply chains are:

Product	Origin	Characteristics	Market and price drivers	Focus MS
Saithe	Fishery	The product is found filleted both fresh and frozen. Most of the consumption occurs in institutional catering and large retail to a lesser extent.	Competition with other white fish (cod, Alaska pollock) Affected by TACs and quotas	France Denmark Germany

EUMOFA provides other relevant publications on the topics covered by this study:

- Price structure analysis
    - Saithe fillet in France (2018): Saithe fresh fillet FR (eumofa.eu)

- Monthly highlights
    - Case study - Saithe fresh fillet in France (2019) in Monthly Highlight No. 1/2019 (pp 31-37)

- Country profiles
    - France - https://eumofa.eu/en/france
    - Denmark - https://eumofa.eu/en/denmark
    - Germany - https://eumofa.eu/en/germany

1.2 Content of the document

Following the methodology developed within EUMOFA and available on its website (http://www.eumofa.eu/price-structure), this document includes:

- A description of the product;
- An analysis of production and market trends at the EU level;
- An analysis of the price structure along the supply chain in France, Denmark and Germany.

2. DESCRIPTION OF THE PRODUCT AND MARKETS

2.1 Biological and commercial characteristics

This study focuses on two of the main consumption market for saithe, France and Germany, which counts also among the main producing countries, as well as Denmark, which is the EU country were most catches from EU fleets are landed and transit.

Case study product

Family: Gadidae

Name: Saithe (*Pollachius virens*)

FAO 3-alpha code: POK

Presentation: Fresh whole or in fillets, steaks, loins, flanks portions; frozen whole headed and gutted, cuts (IQF[5]), blocks; dried (for African market); preserved[6].

The main categories are fillets and loins : loins are a part of the fillet; the advantage is that the thickness of the piece is regular and may be cut in several pieces, and that they are boneless.

Two processes coexist for frozen saithe fillets: single and double freezing. Whereas single freezing requires the freezing of the fillet from the earliest stage to the final consumer, double freezing consists in exporting frozen saithe, headless and gutted, to eastern countries the fish is partially defrosted, filleted and conditioned, before being frozen a second time and shipped to final consumers.

Commercial sizes:

The species can reach nearly 130 cm total length, but common size is from 30 to 110 cm.

The Minimum conservation reference size (MCRS) for saithe is 35 cm in all fishing areas, except in Skagerrak and Kattegat, where MCRS is set at 30 cm[7].

In the market, saithe is sold at least according to the following size categories established by EU marketing standards[8]. The saithe market is segmented according to sizes based on the fish's weight as follows:

- Size 4: 0,3-1,5 kg,
- Size 3: 1,5-3 kg,
- Size 2: 3-5 kg,
- Size 1: over 5 kg.

Main commercial categories are:

- Fresh whole: 5 kg and more, 3-5 kg, 1,5-3 kg, 0,3-1,5 kg;
- Fresh fillets or loins: 600 g and more, 400-600 g, 200-400 g.

[5] Individually Quick Frozen.
[6] http://pdm-seafoodmag.com/guide/poissons/details/product/Lieu_noir.html
[7] https://fish-commercial-names.ec.europa.eu/fish-names/species/pollachius-virens_en#ecl-accordion-header-conserv-meas
[8] Council Regulation (EC) No 2406/96 of 26 November 1996 laying down common marketing standards for certain fishery products: https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A31996R2406

Related codes in the product nomenclature (COMEXT/EUROSTAT)

From 2023 onwards, the Combined Nomenclature[9] (CN) distinguishes between presentation and preservation states of saithe:

- Fresh or chilled (whole):
  - CN code 03025300 - Fresh or chilled coalfish "*Pollachius virens*"
- Frozen (whole):
  - CN code 03036500- Frozen coalfish "*Pollachius virens*"
- Fresh or chilled in fillet:
  - CN code 03044430 - Fresh or chilled fillets of coalfish "*Pollachius virens*"
- Frozen fillet:
  - CN code 03047300 - Frozen fillets of coalfish "*Pollachius virens*"
- Frozen, other cuts:
  - CN code 03049540 - Frozen meat, whether or not minced, of coalfish "*Pollachius virens*" (excl. fillets and surimi)
- Prepared/preserved, other cuts:
  - CN code 16041993 - Coalfish "*Pollachius virens*", prepared or preserved, whole or in pieces (excl. finely minced and fillets, raw, merely coated with batter or breadcrumbs, whether or not pre-fried in oil, frozen)

Biological parameters

Saithe is a gregarious pelagic fish found in inshore and offshore waters to above 200 m depth. It belongs to the same family as cod and haddock but is distinguished from other species of the genus *Gadus* by its dark colour. Although it can be found from the Arctic Ocean to the Mediterranean Sea, it is commonly a northern fish. It usually enters coastal waters in spring and returns to deeper water in winter[10]. Its growth is rapid and can reach a total length of nearly 130 cm, but its common size is from 30 to 110 cm. The maximum age is 25 years. The smaller fish in inshore waters feeds on small crustaceans and small fish, while the larger saithe mostly preys on fish species (such as pout, sprat and blue whiting)[11].

Table 1: Biological parameters of saithe

Parameter	**Saithe *(Pollachius virens)***
Temperature	4°C - 11°C
Habitat	Juveniles tend to be close to shore before migrating to deeper waters (50-200m).
Diet in the wild	Adults feed on fish. Smaller fish and juveniles feed on crustaceans.
Distribution in the wild	Eastern Atlantic Western Atlantic Northern Atlantic

Source: Fishbase

[9] CN is a tool for designating goods and merchandise which was established to meet simultaneously the requirements both of the Common Customs Tariff and of the external trade statistics of the EU. The basic regulation is Council Regulation (EEC) n°2658/87; an updated version of the Annex I is published every year (latest version: Council Regulation (EU) 2024/1652).

[10] https://www.fishbase.se/summary/Pollachius-virens

[11] https://www.fao.org/fishery/en/species/3016/en

2.2 World production

In 2023, global saithe catches amounted to 341.457 tonnes, representing a 18% increase compared to 2014. Saithe is caught in the Northeast Atlantic (98% of the captured volume in 2023) and in the Northwest Atlantic to a lesser extent (2%). Norway accounted for most of the saithe world catches in 2023, representing 68% of the global catches, followed by Iceland (12%), Faroe Islands (5%), Russia (4%) and the United Kingdom (3%). EU Member States accounted for 6% of the total catches.

Table 2: World catches of saithe (in tonnes LWE) 2014-2023

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	Evol 2014/23
Norway	153.836	151.508	154.136	178.655	202.670	194.980	191.464	192.182	212.030	231.477	+50%
Iceland	46.051	48.360	49.787	49.389	66.486	64.819	50.838	59.901	62.187	42.270	-8%
EU-27	**28.877**	**31.983**	**28.126**	**32.602**	**36.365**	**30.177**	**26.096**	**22.100**	**20.301**	**20.947**	-27%
Faroe Islands	26.513	28.282	31.681	33.411	26.139	23.340	24.735	18.991	17.051	15.729	-41%
Russia	12.405	13.182	15.203	14.553	14.171	13.992	14.082	13.836	13.617	12.917	+4%
United Kingdom	12.705	13.037	12.354	12.088	16.054	15.246	12.224	10.094	9.616	10.404	-18%
Others	8.177	7.548	6.885	7.037	7.266	6.624	7.187	6.972	6.712	7.713	-6%
Total	**288.564**	**293.900**	**298.172**	**327.734**	**369.150**	**349.178**	**326.625**	**324.076**	**341.514**	**341.457**	**+18%**

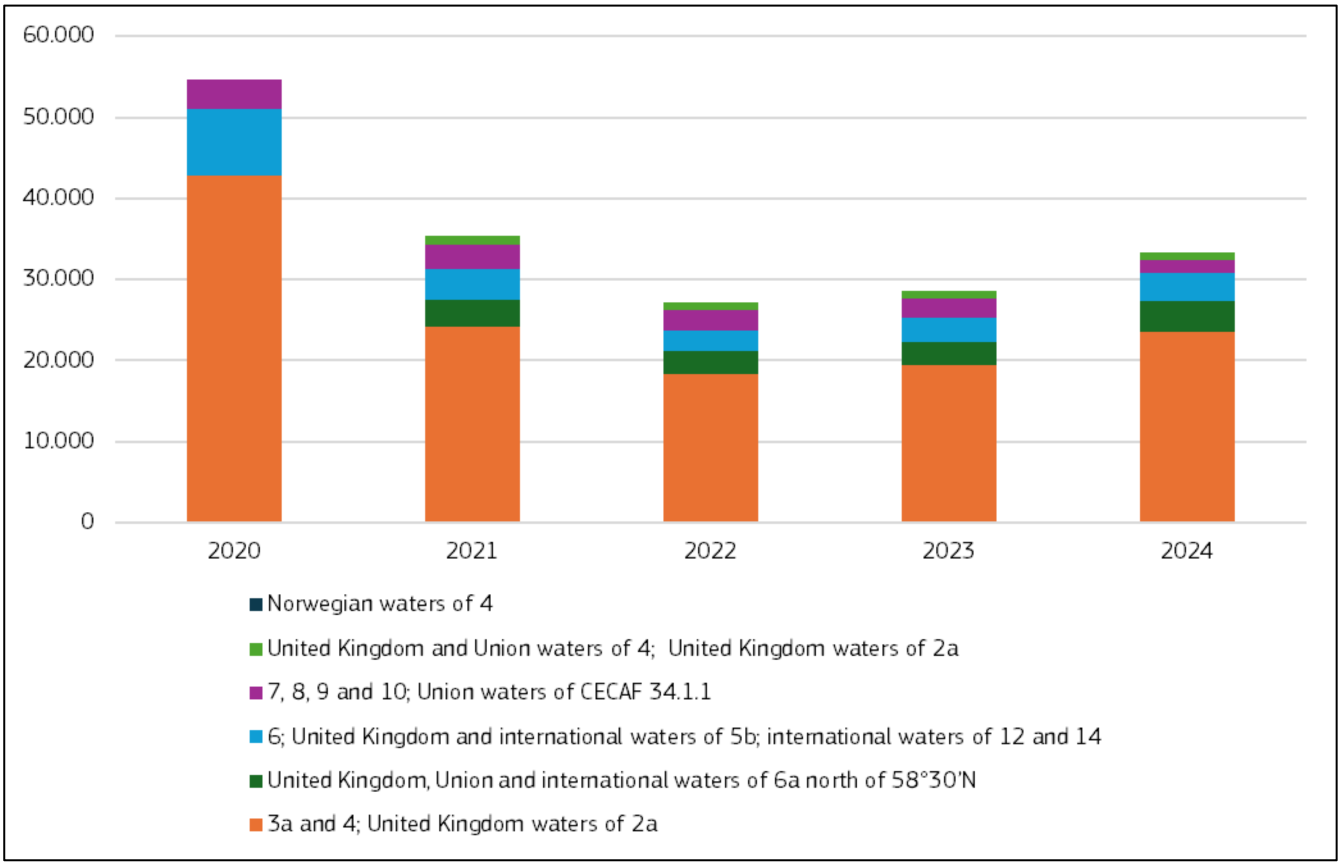
Source: FAO

2.3 EU production

2.3.1 Evolution of saithe production

For the EU fleet, saithe is managed through TACs and quotas, and concern six main stocks. The primary fishing area is the North Sea, the UK waters of the Norwegian Sea and the Kattegat and Skagerrak, accounting for 71% of the 2024 EU saithe quotas. Over the 2020-2024 period, the combined EU quotas for saithe declined by 39%.

Figure 1: EU saithe quotas by main stocks (2020-2024, in tonnes)*



Source: own elaboration based on EU TACs, quotas regulation (DG Mare) and Eurostat data on catches

In 2024, the EU TACs for saithe amounted to 33.862 tonnes, marking a 10% increase since 2015. Danish quotas decreased by 29%, German quotas fell by 11%, while French quotas increased by 32%, reaching 20.958 tonnes in 2024.

In 2024, EU saithe catches totaled 19.140 tonnes. France and Germany were the leading producers, contributing respectively to 56% and 24% of the EU production. Other important Member States were Denmark and Sweden, contributing to 13% and 6% of the EU production, respectively.

Between 2015 and 2024, EU saithe catches decreased by 40%, driven by reduced catches in almost all major producing countries. Over the decade, catches decreased the most in Germany (-46%) and Denmark (-44%), while French catches experienced a 32% decrease.

Table 3: EU-27 saithe catches (in tonnes LWE) 2015-2024

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Evol. 2015/24
France	15.788	14.042	15.117	17.250	14.242	11.353	11.237	11.557	12.551	10.731	-32%
Germany	8.416	7.266	8.815	9.621	8.466	8.421	5.074	4.781	4.576	4.554	-46%
Denmark	4.512	4.094	5.706	7.024	5.337	3.868	2.963	2.297	2.266	2.515	-44%
Sweden	1.156	1.200	1.187	1.318	1.415	1.194	1.001	1.094	1.085	1.191	+3%
Netherlands	83	125	195	368	182	190	151	98	172	145	+75%
Others	1.979	1.563	1.502	542	422	185	78	153	31	4	-100%
EU-27	**31.934**	**28.290**	**32.522**	**36.123**	**30.064**	**25.212**	**20.503**	**19.979**	**20.681**	**19.140**	**-40%**

Source: Eurostat

2.3.2 Import - Export

Extra-EU imports

In 2024, saithe imports from third countries accounted for 92.142 tonnes (net weight) and an overall value of EUR 288 million. Imports consist mainly of frozen saithe (66% of imports value in 2024) and fresh saithe (33%).

In 2024, the main exporters to the EU were Norway (41% of the EU imports value), Iceland (29%) and Faroe Islands (14%). The same year, the main importing Member States were the Netherlands (28% of the import value), Sweden (21%) and Denmark (19%). According to interviewees, almost all Danish imports from third countries consist of landings of third countries in Danish ports. These imports/landings can be fresh saithe or frozen onboard.

Frozen saithe is imported filleted for 50% of frozen volumes, and whole for 47% of volumes, mainly from Norway (51% of frozen volumes), Iceland (21%), Faroe Islands (14%) and China (11%).

Prepared/preserved saithe originates from the United Kingdom for 85% of the volumes, and Norway for the remaining 15%.

Between 2020 and 2024, imported volumes increased by 21%, while prices increased by 36%, reaching 3,13 EUR/kg in 2024.

Table 4: Extra-EU imports of saithe (2024, nominal value)

	Nominal value (1.000 EUR)	Volume (tonnes product weight)	Nominal price (EUR/kg)	Evol. value 2023/24
Fresh or chilled	95.640	34.146	2,80	+1%
Frozen	191.986	57.862	3,32	-8%
Prepared/preserved	826	134	6,18	+96%
Total	**288.453**	**92.142**	**3,13**	**-5%**

Source: EUMOFA elaboration of EUROSTAT-COMEXT data

Extra-EU exports

In 2024, saithe exports from the EU to third countries amounted to 8.634 tonnes for an overall value of EUR 20,9 million. Saithe is exported frozen, fresh and prepared/preserved accounting for 84%, 10% and 6% of the export value, respectively.

China was the main market for EU saithe exports, representing 62% of the export value in 2024, followed by Norway (15%) and Nigeria (11%). The Netherlands, as an important international crossroad for goods, were the leading exporter with 59% of the export value.

Filleted saithe, either fresh or frozen, are mainly exported by Spain (25 % of exported filleted volumes), Lithuania (21%) and Sweden (13%).

According to stakeholders interviewed, significant volumes of saithe are sent to China to be processed, before they are imported back to Europe. This explains China's importance as the 4th importer of saithe in the EU, in value. Similarly, the importance of the Netherlands as a main exporter is due to its role as a logistical and processing hub (with large fileting facilities in Urk, a coastal town in the centre-north of the Netherlands). Exports to Norway are likely to consist in landings by EU fleets (especially the Danish fleet) that are then transported by lorry to EU auctions.

Between 2020 and 2024, export volume has increased by 27%, while prices have increased by 23%. As a result, the overall export value increased by 57% over the same period.

Table 5: Extra-EU exports of saithe (2024, nominal value)

	Nominal value (1.000 EUR)	Volume (tonnes product weight)	Nominal price (EUR/kg)	Evol. value 2023/24
Fresh or chilled	2.045	754	2,71	-2%
Frozen	17.533	7.630	2,30	-14%
Prepared/preserved	1.344	250	5,38	-19%
Total	**20.922**	**8.634**	**2,42**	**-13%**

Source: EUMOFA elaboration of EUROSTAT-COMEXT data

Intra-EU exports

Intra-EU exchanges concern mainly frozen saithe, which accounted for 47.674 tonnes and 56% of the EU exchanges in value terms and fresh saithe, accounting for 41.680 tonnes and 42% of the EU trade in value in 2024. Trade within the EU increased by 24% in volume between 2020 and 2024, while prices rose by 35%. As a result, the overall value of EU trade increased by 67% over the period.

Table 6: Intra-EU exports of saithe (2024, nominal value)

	Nominal value (1.000 EUR)	Volume (tonnes product weight)	Nominal price (EUR/kg)	Evol. value 2023/24
Frozen	191.415	47.647	4,02	+1%
Fresh or chilled	144.143	41.680	3,46	-12%
Prepared/preserved	5.274	861	6,12	+23%
Total	**340.832**	**90.189**	**3,78**	**-6%**

Source: EUMOFA elaboration of EUROSTAT-COMEXT data

In 2024, Denmark was the main exporter to the other EU Member States, accounting for 33% of intra-EU export value. The Netherlands and Sweden followed, contributing together to 41% of the intra-EU exports value. While Denmark exported mostly fresh saithe (80% of its intra-EU export value), the Netherlands and Sweden exported mainly frozen saithe (respectively 75% and 69% of their intra-EU export value in 2024). Denmark is the main landing place for saithe in EU, and therefore the main exporter of saithe to other EU markets. According to stakeholders, Sweden also is mostly a country of transit, notably for the Norwegian production. Similarly to extra-EU exports, the importance of the Netherlands is due to its role as a logistical and processing hub for extra-EU trade.

The main destinations for intra-EU trade were France, accounting for 30% of the intra-EU exports value, followed by Germany (17%), Poland (13%) and Denmark (9%). While some countries imported mainly fresh saithe, such as France (61% of imports from EU) and Denmark (59%), others imported primarily frozen saithe, such as Poland (74% of imports) and Germany (51%).

Table 7: Nominal value of intra-EU exports of saithe to the main Member States (MS) of destination (1.000 EUR, 2024)

Destination	Fresh or chilled	Frozen	Prepared/ Preserved	Total	% val. 2024
France	61.753	38.916	45	100.715	30%
Germany	27.772	30.137	1.402	59.311	17%
Poland	11.509	32.694	8	44.211	13%
Denmark	18.928	13.288	113	32.329	9%
Spain	1.316	18.484	232	20.032	6%
Lithuania	258	14.148	0	14.406	4%
Netherlands	7.401	6.330	197	13.927	4%
Belgium	4.630	5.195	260	10.085	3%
Italy	3.304	4.408	1.319	9.031	3%
Sweden	3.705	4.128	1	7.835	2%
Others	3.568	23.688	1.694	28.950	9%
Total	**144.143**	**191.415**	**5.274**	**340.832**	**100%**

Source: EUMOFA elaboration of EUROSTAT-COMEXT data

2.3.3 Apparent consumption by Member State

In 2024[12], the total supply of saithe in the EU (production + extra-EU imports) was estimated at 111.137 tonnes LWE, 17% originating from EU catches and 83% coming from extra-EU imports. The apparent consumption at the EU level (production + extra-EU imports - extra-EU exports) was estimated at 102.503 tonnes LWE, while 8% of the total supply was exported outside the EU.

In 2024, the main Member States in terms of apparent consumption were France (47.234 tonnes LWE, 46% of the EU total), Poland (29.817 tonnes LWE, 29%) and Germany (23.593 tonnes LWE, 23%). Denmark was the 2nd main importer and the 1st main exporter for saithe products (EU + extra-EU), with respectively 46.109 tonnes LWE and 48.065 tonnes LWE. The main producers were France, Germany and Denmark, accounting for respectively 56%, 24% and 13% of EU catches.

[12] For saithe, no farmed production takes place, and it is assumed that all production is for human consumption. Thus, the apparent consumption could be calculated.

Table 8: Apparent consumption of saithe in the EU (2024, in tonnes of live weight equivalent) (in bold, the three MS with focus in this report)

	Production	**Imports**	**Supply** (Production + Imports)	**Exports**	**Apparent consumption** (Supply - Exports)
France	**10.731**	**43.995**	**54.726**	**7.491**	**47.234**
Poland	0	39.044	39.044	9.228	29.817
Germany	**4.554**	**29.769**	**34.323**	**10.730**	**23.593**
Spain	0	14.386	14.386	1.896	12.490
Sweden	1.191	41.373	42.565	32.895	9.669
Netherlands	0	49.951	49.951	44.821	5.129
Italy	0	4.004	4.004	24	3.980
Belgium	4	3.754	3.758	1.225	2.533
Finland	0	1.664	1.664	5	1.659
Lithuania	0	17.359	17.359	15.855	1.505
Czechia	0	1.725	1.725	393	1.331
Greece	0	1.370	1.370	66	1.303
Romania	0	762	762	2	760
Ireland	0	720	720	33	688
Croatia	0	675	675	56	619
Denmark	**2.515**	**46.109**	**48.624**	**48.065**	**559**
Slovakia	0	383	383	23	360
Austria	0	364	364	48	316
Hungary	0	252	252	34	218
Luxembourg	0	235	235	36	200
Latvia	0	192	192	67	125
Estonia	0	90	90	0	90
Cyprus	0	67	67	0	67
Malta	0	56	56	0	56
Slovenia	0	12	12	6	6
Bulgaria	0	5	5	0	5
Portugal*	0	917	917	1.246	nc
EU-27	**18.995**	**92.142**	**111.137**	**8.634**	**102.503**

Source: EUMOFA estimates based on EUROSTAT and EUROSTAT-COMEXT data

* The calculation of the apparent consumption provides a negative value for Portugal, which may be due to stock variation or confidentiality issues

3. THE FRENCH MARKET

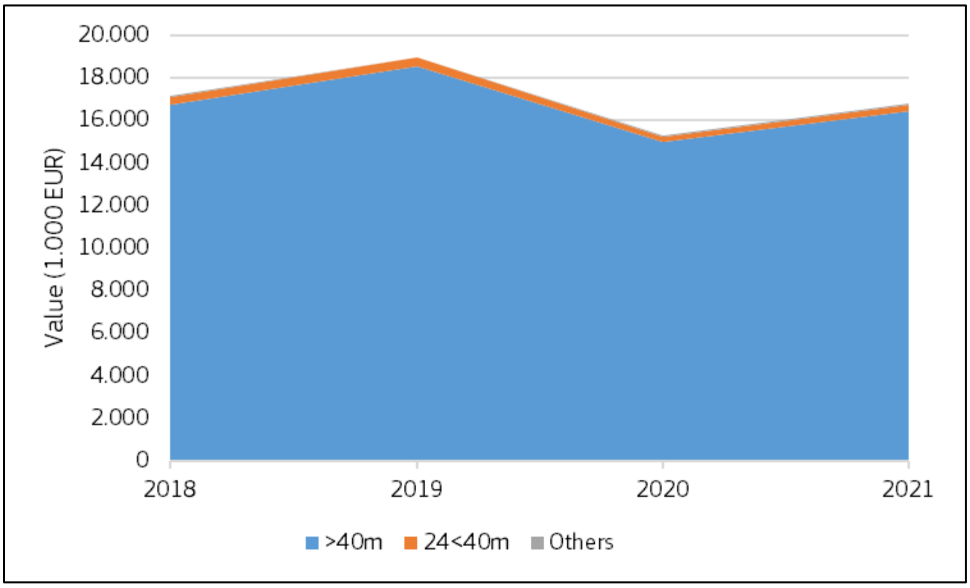
3.1 Structure of the supply chain

3.1.1 Production

Characteristics of the fleet

In 2021, saithe was landed in France almost exclusively by vessels of more than 40 meters (98% of the value landed), and mostly under 50 m long. Except for one freezer trawler, all fishing vessels carry and land fresh fish. Two companies make almost all catches: Euronor and Scapêche[13].

Figure 2: Evolution of French landings of saithe by vessel length (nominal value in 1.000 EUR)



Source: STECF (2021 last available data for France)

French landings of saithe were caught almost exclusively by demersal trawlers and/or demersal seiners (98% of the volume landed in 2021). According to STECF workbook with fleet segment level data details provided by STECF[14], vessels using hook accounted for 1% of the volume landed in 2021.

Management measures

French quotas for saithe increased by 32% between 2015 and 2024 even though the European TAC decreased by 6% over the same period. French quotas for saithe reached 20.958 tonnes in 2024, and 17.459 tonnes in 2025, however, catches in 2024 reached 10.731 tonnes.

French sub-quotas are distributed across the North Sea, mainly in the territorial east waters of the UK and around Denmark. Fewer quotas also consent saithe fishing in Eastern Atlantic international waters, and in Norwegian waters.

Most volumes are caught around west Scotland and north of the Shetland Islands. Smaller volumes are caught with freezer trawlers in the north of Norway.

Catches

[13] Le marin, 01/10/2018. Lieu noir : la France en pêche beaucoup mais pas assez pour son marché
[14] AER - STECF - Scientific, Technical and Economic Committee for Fisheries

According to the table below, French catches of saithe reached 10.731 tonnes in 2024, decreasing by 32% between 2015 and 2024, experiencing a 14% decrease between 2023 and 2024.

Table 9: Evolution of French captures of saithe (tonnes LWE, 2015-2024)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Evol 2015/24	Evol. 2023/24
Saithe	15.788	14.042	15.117	17.250	14.242	11.353	11.237	11.557	12.551	10.731	-32%	-14%

Source: Eurostat

First sale volumes

As reported by FranceAgriMer to EUMOFA, first sales of saithe in France reached 3.758 tonnes in 2024. These volumes are mostly landed near the fishing areas, in Scottish ports, and carried to France using trucks. The remaining 70% of the volume of saithe caught by French vessels, was sold in ports of the North Sea, mainly in Denmark as well as in Norway and Iceland to industries, according to stakeholders.

Over the last decade, first sale of saithe in France decreased by 40% in volume. This decline varied across regions, with volumes decreasing by 67% in the Bay of Biscay and Iberian Coast, and by 29% in the North Sea. The Celtic Sea is the only seaboard with increasing first sales over the period (from 16 tonnes in 2015 to 256 tonnes in 2024), however, they remain low, representing 7% of the first sales in volume.

This decrease of first sale volumes was initiated in 2019 and is directly due by Brexit: indeed, as most of the volumes caught by French vessels were landed in Scotland, Brexit required a new procedure to import landings into Europe. In the immediate aftermath of Brexit, customs were not yet able to deliver the required certification, which led most French fishing vessels to stop landing fish in Scotland. Instead, they addressed it to Denmark which is the closest European country.

Since then in Denmark, for transportation logistics, French fishing companies increasingly organized transportation via third-party companies, to which saithe volumes are sold, to then be transported to France for the national market.

Table 10: First sales of saithe in France by seaboard (tonnes product weight, 2015 -2024)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Evol. 2015/24
North Sea	3.793	3.569	4.544	6.253	5.330	4.441	3.058	1.711	2.721	2.692	-29%
Bay of Biscay and Iberian Coast	2.477	1.835	2.560	2.816	1.459	1.176	1.786	1.557	957	811	-67%
Celtic Seas	16	18	23	47	188	453	217	269	321	256	+1.520%
Total	**6.286**	**5.421**	**7.126**	**9.116**	**6.977**	**6.070**	**5.060**	**3.537**	**3.999**	**3.758**	**-40%**

Source: EUMOFA

In 2024, almost all the first sales took place in four ports. Boulogne-sur-Mer is by far the main port, accounting for 72% of total first sales, followed by Lorient (19%), Saint-Malo (7%) and Saint-Jean-de-Luz (3%). Over the past decade, first sales evolved unequally across these main ports, with decreasing volumes in Boulogne-sur-Mer (-29%) and Lorient (-71%) and development of first sales in Saint-Malo (from 0 in 2015 to 248 tonnes in 2024) and Saint-Jean-de-Luz (from 0 in 2015 to 110 tonnes in 2024).

Table 11: First sales of saithe in France by ports (tonnes product weight, 2015-2024)

Seaboard	Port	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Evol. 2015*/24
North Sea	Boulogne -sur-Mer	3.793	3.569	4.544	6.253	5.330	4.441	3.058	1.711	2.721	2.692	-29%
Bay of Biscay	Lorient	2.448	1.761	2.492	2.739	1.422	1.096	1.738	1.468	880	698	-71%
Celtic Seas	St Malo	0	0	0	29	172	444	206	258	309	248	+755%
Bay of Biscay and Iberian Coast	St Jean-de-Luz	0	2	2	1	0	47	37	83	71	110	+6.260%
All	Others	44	90	88	94	53	42	21	16	18	10	-76%
Total		**6.286**	**5.421**	**7.126**	**9.116**	**6.977**	**6.070**	**5.060**	**3.537**	**3.999**	**3.758**	**-40%**

Source: EUMOFA (*evolution from 2015 or from the first available data)

3.1.2 Imports

Total imports of saithe to France amounted to 22.484 tonnes in 2024, for a value of over EUR 101 million, according to EUMOFA data. Between 2020 and 2024, French imports of saithe increased by 12% in volume, despite a slight decrease in 2023 (-4% compared to 2022). Imports consisted almost exclusively of three categories of products: fresh fillets (43% of the total value), frozen fillets (30%) and fresh whole saithe (25%) in 2024. The main suppliers of fresh saithe were Denmark (43% of fresh imports value), the United Kingdom (26%) and the Netherlands (17%). As most of the French catches are landed and sold in first sales in Denmark and the Netherlands, part of the fish imported from these countries originates from the French fishing vessels.

Whereas saithe imports increase for high-added value and transformed products, such as fresh fillets (+54% between 2020 and 2024), they are stable for fresh whole fish. The “fresh fillet” category includes different types of products, such as loins and portions. While the French production is mostly manual and specialised in filleting, cuts imported from third countries such as Denmark and Scotland are most frequently backs and portions, machine-cut. Investments in filleting machines for saithe were possible thanks to the availability of the raw product and the associated economy of scale.

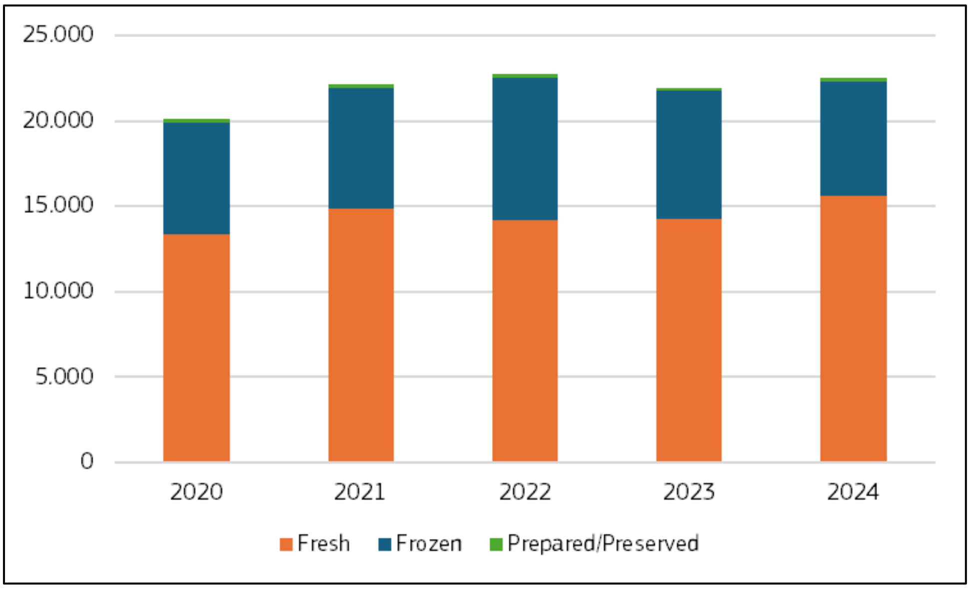
Imports of frozen saithe fillet are slightly increasing, mainly from the Netherlands (38% of the frozen imported value), Lithuania (25%), China (12%) and Poland (10%). Over the period 2020-2024, imports of frozen saithe from the Netherlands have doubled, and imports from Lithuania have almost tripled.

Table 12: French imports of saithe in 2024 and their evolution, by preservation and presentation type (nominal value)

Preservation	Presentation	Volume (tonnes product weight)	Nominal value (1.000 EUR)	Nominal price (EUR/kg)[15]	% val. 2024	Evol. 2020/24 (tonnes product weight)
Fresh or chilled	Fillets	6.478	43.240	6,67	43%	+54%
	Whole	9.122	25.520	2,80	25%	0%
Frozen	Fillets	6.373	30.337	4,76	30%	+12%
	Other cuts	270	706	2,62	1%	-46%
	Whole	42	207	4,92	0,2%	-89%
Prepared/preserved	Other cuts	200	1.387	6,95	1%	-7%
Total	**All**	**22.484**	**101.398**	**4,51**	**100%**	**+12%**

Source: EUROSTAT-COMEXT

Figure 3: Evolution of French imports of saithe by preservation type (in tonnes net weight)



Source: EUROSTAT-COMEXT

[15] Import prices for each member state are a combination of intra-EU and extra-EU prices.

Table 13: Evolution of French imports of saithe by supplier (tonnes product weight, 2020-2024)

	2020	2021	2022	2023	2024	Evol. 2020/24
Denmark	7.701	8.184	8.495	6.194	6.103	-21%
United Kingdom	5.500	4.602	3.428	3.880	4.920	-11%
Netherlands	2.554	4.957	5.396	4.380	4.497	76%
Sweden	571	784	874	2.707	2.807	392%
Lithuania	677	903	1.089	1.050	1.522	125%
China	2.000	1.388	1.539	868	915	-54%
Poland	633	412	399	794	846	34%
Others	493	918	1.492	2.018	874	77%
Total	**20.130**	**22.147**	**22.712**	**21.892**	**22.484**	**12%**

Source : EUROSTAT-COMEXT

Stakeholders interviewed noted that the Netherlands' fish fillet production is scarce and pointed out Iceland as one of the major saithe exporter. EUMOFA's data regarding Dutch's saithe fillets exports most likely traces Icelandic fillets that enter the Dutch commercial hub before being distributed across Europe.

EUMOFA's data regarding volumes imported from Sweden since 2023 also stand out and struck stakeholders interviewed as abnormally high. The reason is that Sweden is the main entry point for fresh fish from Norway in the EU.

According to stakeholders interviewed, the increase in saithe imports is due to several factors. First, as explained in the previous section, Brexit led to a redistribution of saithe volumes in first-sale from France to Denmark and other countries around the North Sea, thus enhancing dependency on imports. Secondly, climate change disrupts species' distribution, causing species like saithe to settle more north[16], according to research (Duvy et al., 2008) and the PO (Producers' Organisation) interviewed: the subsequent landings and transformation processes are thus increasingly important in Northern countries: Norway, the Netherlands, etc. The Netherlands are particularly increasing their fish processing capacity thanks to their cheap labour force, and to their long-lasting experience in global transfers of goods. For the future, as the French North Sea fisheries have decided to suspend their MSC certification as of June 30, 2025[17] for saithe, following independent auditors' evaluation of the fisheries, the demand for certified products might partially shift toward imported fish, notably from the Barents Sea.

3.1.3 Exports

French exports of saithe accounted for 5.402 tonnes in 2024, for a total value of EUR 13,8 million, composed almost exclusively of fresh saithe (74% of exports' value) and frozen saithe (25%).

A large part of the volume of exported fresh saithe is made of the French landings in countries around the North Sea.

[16] Climate change and deepening of the North Sea fish assemblage: a biotic indicator of warming seas - Dulvy - 2008 - Journal of Applied Ecology - Wiley Online Library

[17] Les pêcheries de lieu noir de la Mer du Nord suspendent leur certification | Marine Stewardship Council

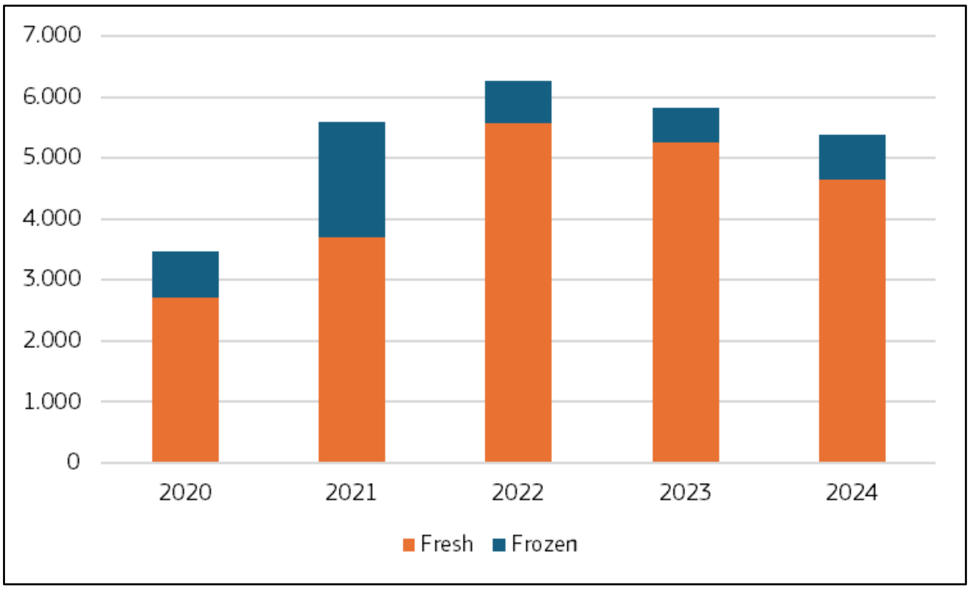
Table 14: French exports of saithe in 2024 (nominal value)

Preservation	Presentation	Volume (tonnes product weight)	Nominal value (EUR 1.000)	Nominal price (EUR/kg)[18]	% val 2024	Evol. 2020/24 (tonnes product weight)
Fresh	Whole	4.401	8.441	1,92	61%	94%
	Fillets	250	1.810	7,24	13%	-44%
Frozen	Fillets	622	3.291	5,29	24%	-14%
	Other cuts	109	158	1,45	1%	220%
	Whole	6	45	7,23	0,3%	74%
Prepared/ preserved	Other cuts	14	51	3,68	0,4%	374%
Total	**All**	**5.402**	**13.796**	**2,55**	**100%**	**55%**

Source: EUROSTAT-COMEXT

French exports of saithe increased by 55% in volume since 2020. From 3.475 tonnes in 2020, volumes reached a peak in 2022 (6.270 tonnes) and amounted to 5.402 tonnes in 2024.

Figure 4: Evolution of French exports of saithe by preservation state (tonnes product weight)



Source: EUROSTAT-COMEXT

Denmark was by far the first destination of French exports in 2024, amounting to 4.065 tonnes, equivalent to 75% of the exports in tonnes product weight. The very large proportion of fresh whole saithe in these exports (98% of volume) explains the minor part of Denmark in the export value, accounting for only 53% of the export value. Exports to Italy experienced the highest growth since 2020, increasing by 533% to reach 219 tonnes product weight in 2024 (4% of export volumes). As exports to Italy are frozen fish fillets for 80% of volumes, their value reaches up to 11% of the total exports value. Exports to Denmark, Germany and Belgium also experienced significant growths over the same period: +118%, +79% and +37% in tonnes respectively. In contrast, French exports to Poland have decreased between 2020 and 2024, by 77%, reaching 161 tonnes.

[18] Export prices for each member state is a combination of intra-EU and extra-EU prices.

Table 15: Evolution of French exports of saithe by destination (tonnes product weight, 2020-2024)

	2020	2021	2022	2023	2024	Evol. 2020/24
Denmark	1.868	3.018	5.108	4.749	4.065	118%
Germany	247	334	299	231	442	79%
Belgium	175	174	189	203	240	37%
Italy	35	78	96	139	219	533%
Poland	696	1.438	204	187	161	-77%
Netherlands	78	292	197	174	123	58%
Others	377	256	178	142	153	-59%
Total	**3.475**	**5.590**	**6.270**	**5.825**	**5.402**	**55%**

Source: EUROSTAT-COMEXT

3.1.4 Apparent consumption

The French market for saithe was estimated at 47.234 tonnes LWE in 2024. French apparent consumption of saithe remained relatively stable between 2023 and 2024 (+1%); overall, it increased by 11% between 2015 and 2024. Between 2015 and 2024, French catches decreased by 32%, while imports and exports increased by 24% and decreased by 15%, respectively.

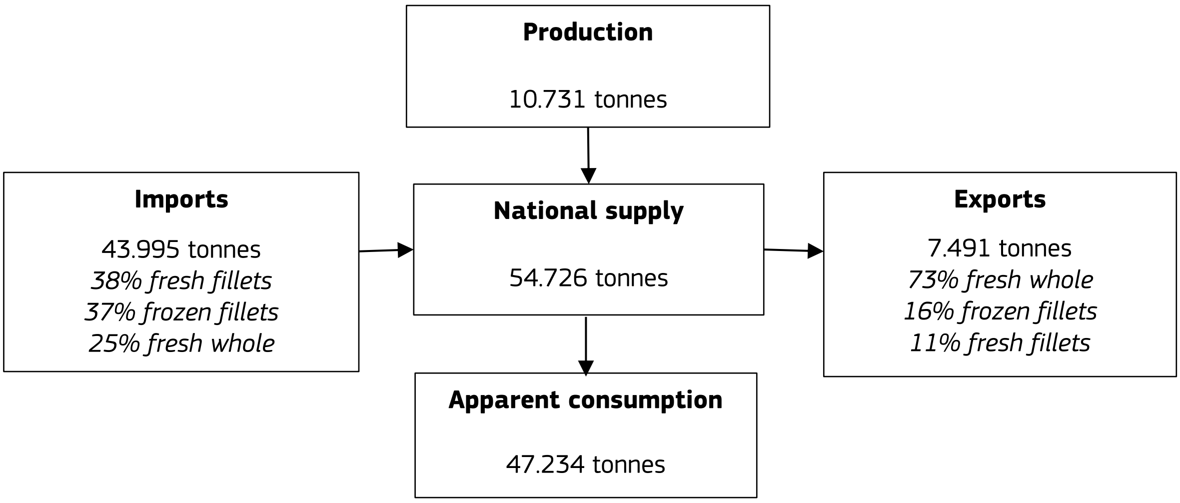
In 2024, French supply of saithe reached 54.726 tonnes LWE, of which 80% originated from imports and 20% from national catches. Exports represented 14% of the supply; therefore, 86% was estimated as apparent consumption.

Table 16: Apparent consumption for saithe in 2024 (tonnes LWE)

	Volume	Evol. 23/24	Evol. 2015/24
Production	10.731	-14%	-32%
Import	43.995	+4%	+24%
Supply	54.726	0%	+7%
Export	7.491	-6%	-15%
Apparent consumption	47.234	+1%	+11%

Source: EUMOFA estimates based on Eurostat, EUROSTAT-COMEXT data

Figure 5: Supply figure for saithe in France (tonnes LWE, 2024)



Note: volumes and percentages provided in the figure are in LWE

Source: EUMOFA estimates, based on EUROSTAT-COMEXT

3.2 Characteristics of the French market and consumption

3.2.1 Structure of the supply chain in France

According to stakeholders interviewed, the structure of the supply chain for fresh saithe fished by the French fleet includes in most cases 4 intermediaries:

- The transporter, who transports the fish from a landing port, mostly in Scotland or Denmark, to France using trucks.
- The specialised fish wholesaler, or "*mareyeur*", who buys the fish directly from the auction and prepares it into fillets, loins or portions. This can be done manually or using automatic filleting machines.
- The wholesaler, who buys the fish from the *mareyeur* and sells it.
- The retailers and catering firms.

In some cases, the supply chain is shorter, involving only the fishing company which also carries out transportation, and sometimes even "*mareyeu*r" processing phase. It can also be longer, with several wholesalers involved.

According to wholesalers interviewed, saithe is sold through different low-cost sale channels, mostly large retailers and institutional catering.

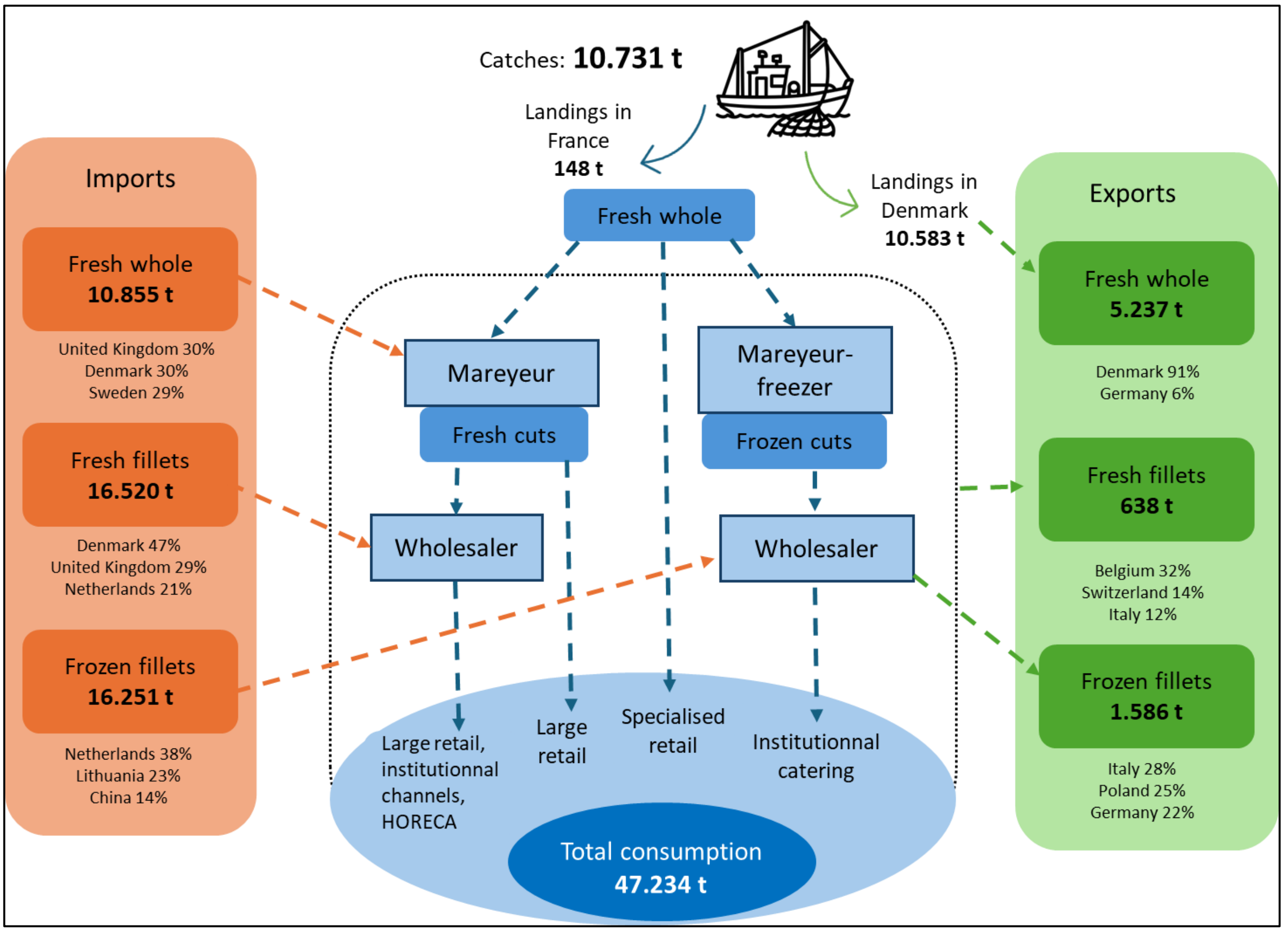
Frozen saithe fillets are mostly imported. Two processes coexist for saithe fillets: single and double freezing, the latest representing at least 50% of frozen saithe fillets imported in France. Whereas single freezing requires the freezing of the fish, whole or cut, from the earliest stage to the final consumer, double freezing consists in exporting frozen saithe, headless and gutted, to eastern countries (mainly Lithuania, China and Poland, in the French case study) where labour costs are lower than in western Europe, and efficiency higher (manual filleting in China yields 3 to 4% more than machine filleting in northern Europe). Saithe are then partially defrosted, filleted and conditioned, before being frozen a second time and shipped to final consumers.

These two processes have distinct supply chains, as the countries involved differ, as well as the quality of the final product and its price. According to stakeholders interviewed, single frozen fillets are bought from Iceland, Faroe Islands, Norway, whereas double-frozen fillets originate from China, Lithuania and Poland.

In the case of imported frozen fillets, the structure of the supply chain in France includes in most cases:

- A wholesaler who buys frozen fillets and offers a wide variety fresh and frozen products
- A catering firm, which cooks and serves it.

Figure 6: Structure of the supply chain for saithe in France (tonnes LWE, 2024)



Note: volumes and percentages provided in the figure are in LWE

Source: EUMOFA

3.2.2 Characteristics of the market

According to a FranceAgriMer study published in 2024[19], saithe is the 3rd fish species purchased as fresh by consumers for household consumption in France with 9.427 tonnes in 2023, accounting for 9% of the total volume of fresh fish purchased in France. 25% of households buy fresh saithe at least once a year. It is a popular fish for its price, lower than the national average (12,8 EUR/kg vs 16,9 EUR/kg in 2023). Since 2018, the volume of fresh saithe purchased by French consumers declined by 8%, at the same rate than the total volume of fresh fish, though its average price rose by 35%. Wholesalers and *mareyeurs* interviewed added that most of this volume is filleted saithe.

According to the stakeholders interviewed, saithe makes up 80% of the fish volumes consumed in institutional catering.

Based on this information regarding the volume of filleted fresh saithe consumed in French households, on the filleting yield of 50% given by processors, and on the estimate of the national apparent

[19] https://www.franceagrimer.fr/sites/default/files/rdd/documents/STA_MER_CONSO_2023_2.pdf

consumption, it can be established that domestic consumption of fresh saithe represents 30 to 50% of total saithe consumption.

According to wholesalers, frozen fillets consumed in France are, for a large majority, imported: thus, frozen fillet consumption in France can be estimated at around 20.000 t LWE (which amounts to approximately 40 to 45% of total saithe consumption). The large majority of this volume is destined to collective and institutional catering. According to wholesalers interviewed, 90% of frozen saithe fillets are consumed by collective catering, because of their low price and conveniency.

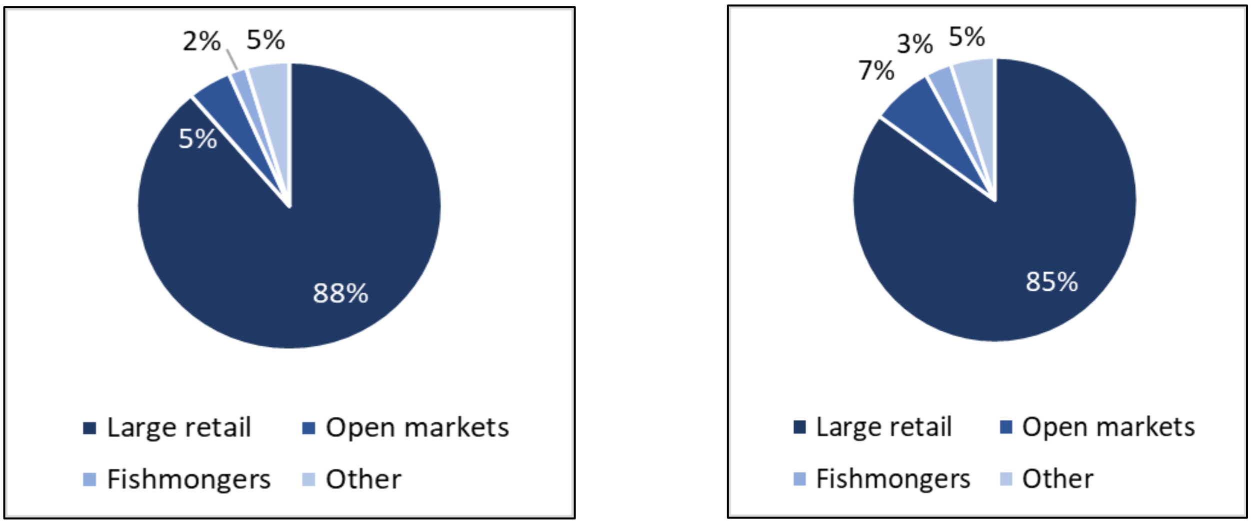
The remaining 5% to 30% of the volumes of saithe is sold fresh, still in the HORECA sector, and particularly in fine dining restaurants, where it is slowly gaining in reputation.

According to the stakeholders interviewed, catering for institutions and companies account for 50% of fresh saithe consumption, while commercial catering accounts for 30% of volumes, and large retail channels account for the remaining 20%. These channels ask for an increasing share of filleted saithe, and even saithe portions in the case of institutional catering, respect to whole saithe, for simplification reasons.

These estimates overlook saithe co-products: after filleting, the remaining meat enters in transformed fish products such as surimi, stuffing, and other fish products, while skin, eyes, bones and the rest of the fish is exported, often in Asian countries, as explained by a fish trader.

Because of its low price, saithe is not common in the fishmongers or open market channels, which generally address clients with a higher purchasing power. Large retail channels account for 88% of the fresh saithe volume sold to households (the share is 78% for fresh fish from all species) and 84% of the value. Outdoor markets and fishmongers are minor retail channels, with respectively 4,6% and 1,9% of volumes.

Figure 7: Breakdown of French household consumption of fresh saithe by main marketing channels in volume (product weight) (left) and nominal value (right) in 2023



Source: FranceAgriMer

3.2.3 Consumption

According to *mareyeurs* and wholesalers, in the HORECA sector as in large distribution, saithe is mostly sold ready-to-cook : often fresh and filleted, and increasingly frozen as loins or portions, boneless and skinless.

The fish is prized in collective catering because it is cheaper than cod and haddock, while more qualitative than pollock, as explained by POs and wholesalers interviewed. Saithe in HORECA is mostly sold in institutional catering and fast-foods, as its affordability and quality are suitable for large, low-cost structures.

In retail, saithe is mostly sold fresh via large retail stores. It is typically sold packed in portions varying between 100 and 500g, with a 5-day-long consumption interval. Less frequently, it can be found frozen under the designation "colin-lieu" and coated in batter. It is sometimes sold whole in outdoor markets or by specialised fishmongers.

According to FranceAgriMer[20], the typical saithe domestic consumer is older than the average consumer (65 years old and older) and with a slightly lower purchasing power than the average seafood consumer. This is mainly due to the position of saithe as a nutritiously interesting while affordable product.

White fish, especially cod, saithe and pollock, are substitutable goods : as cod prices have been increasing (+31% for the average cod price between 2018 and 2023 according to FranceAgriMer), white fish consumers tend to substitute these for saithe, for which consumption has increased recently : fresh saithe consumed volumes rose by 8,3% between 2022 and 2023.

3.3 Price transmission in the supply chain

3.3.1 First sale prices

First sale prices of saithe rose over the last 5 years, then fell, reaching in 2024 the nominal prices observed in 2020. This stability in nominal price is due to the equal decline of nominal values and of volumes, of 38% over the past five years. As of 2025, first sale prices observed by operators in 2025 until the time of this publication are often higher and near 2,50 EUR/kg, suggesting that the average 2025 price will be higher than in 2024. In real terms, the first sale price for saithe decreased by 8% between 2020 and 2024.

Table 17: Saithe first sale value, volume (LWE) and prices (nominal value) (2020-2024)

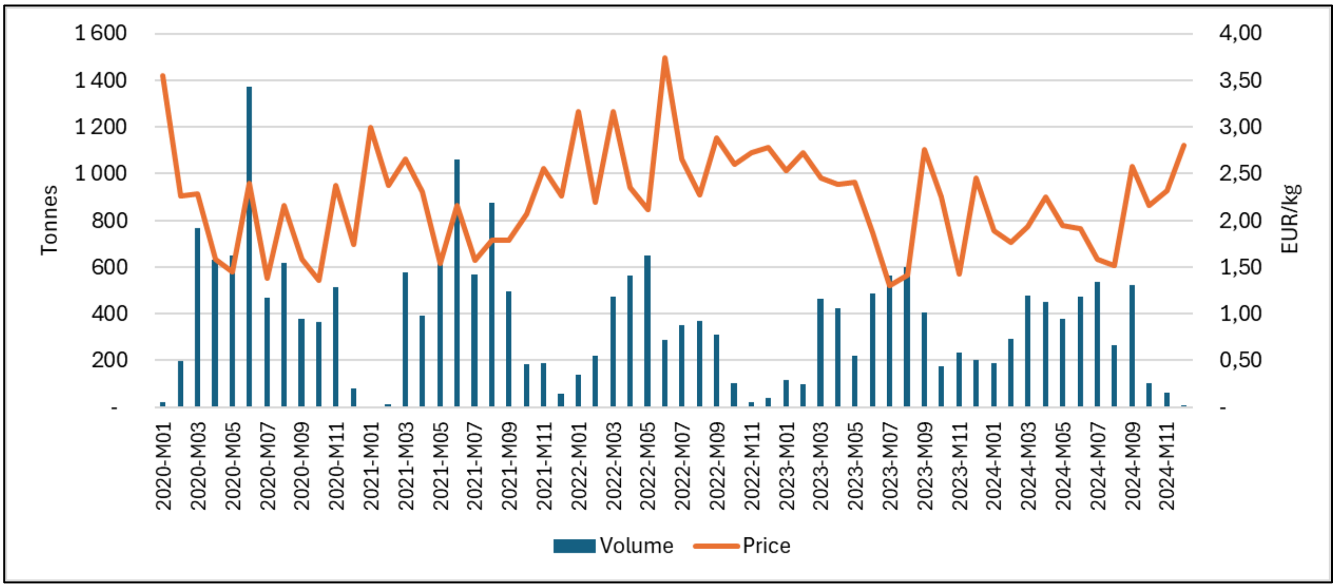
	2020	2021	2022	2023	2024	Evol 2020/2024
Nominal value (1.000 EUR)	11.971	10.108	9.327	8.108	7.442	-38%
Volume (tonnes LWE)	6.070	5.060	3.537	3.999	3.758	-38%
Nominal price (EUR/kg)	1,97	2,00	2,64	2,03	1,98	0%

Source: EUMOFA, based on FranceAgriMer

As illustrated in the figure below, first sales of saithe are seasonal, with the highest volumes landed from February to May. This trend corresponds to the significant activity of netters during this period. There is also a significant inverted correlation between first sale volumes and prices, with prices typically reaching the lowest levels when volumes peak and in the months afterward, as refrigerated and frozen stocks are important. However, stakeholders are promoting a lesser activity in the summer period, when the demand in fresh saithe drops.

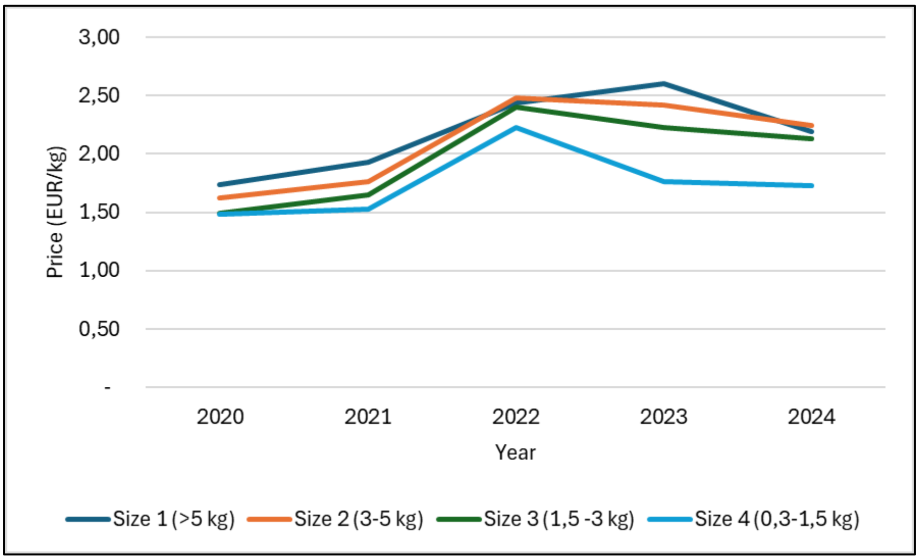
[20] https://www.franceagrimer.fr/sites/default/files/rdd/documents/STA_MER_CONSO_2023_2.pdf

Figure 8: Saithe monthly first-sale[21] volumes (LWE) and prices (nominal value) in France (2020-2024)



Source: EUMOFA, based on FranceAgriMer

Figure 9: First-sale nominal prices evolution according to saithe size (2020-2024)



Source: EUMOFA

As explained by saithe market operators, confirmed by Figure 10, prices of saithe do not vary significantly depending on the fish size.

The most common fish size is the 0,3 to 1,5 kg category, which made up more than 67% of the first-sale volume in 2024.

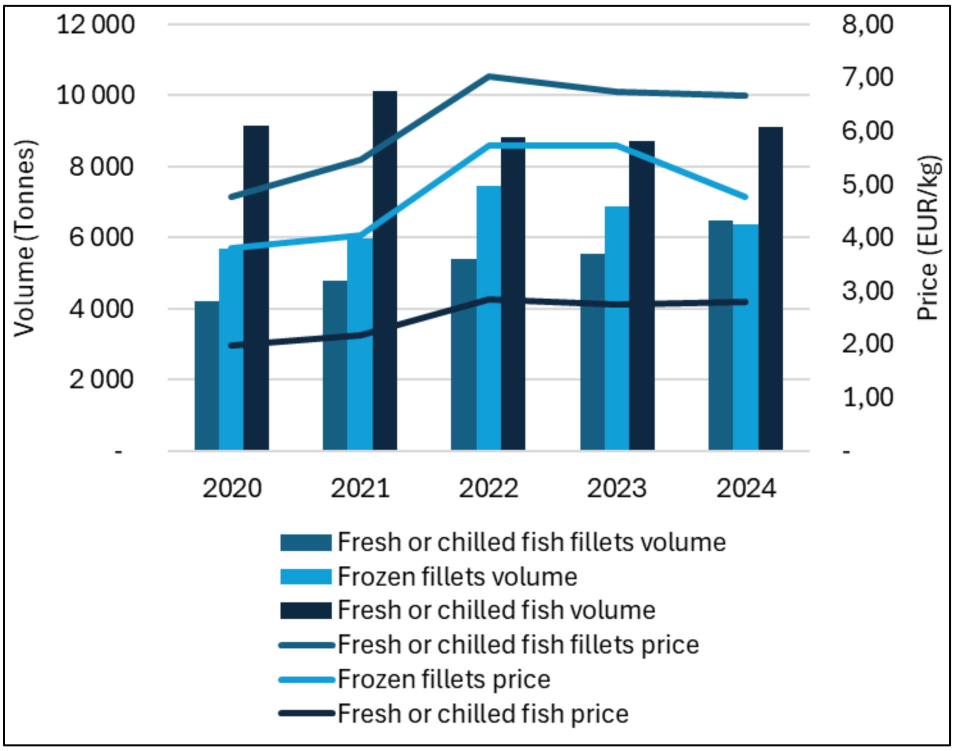
First-sale prices also depend on the freshness of the fish and the fishing apparel: a small quantity of saithe is fished with hooks and carried to France by plane : this top-quality saithe is destined to specialized fishmongers and upscale restaurants and can be sold at around double the average price of saithe import prices, according to importers' explanations and EUMOFA data.

[21] First-sales may differ from landings since the former do not cover fish that is landed by vessels owned by processing companies or direct sales to processors.

3.3.2 Import prices

Import price for saithe reached on average 4,51 EUR/kg in 2024; it is 2,80 EUR/kg for fresh saithe, 4,76 EUR/kg for frozen saithe fillets, and 6,67 EUR/kg for fresh saithe fillets. Whereas the import price of fresh whole saithe is comparable to fresh whole fish sold in first sales in France, (1,98 EUR/kg in 2024), the average price for all imports is twice higher due to the elevated proportion of fresh and frozen fillets and their higher prices, ranging from 3,80 EUR/kg to 7,30 EUR/kg.

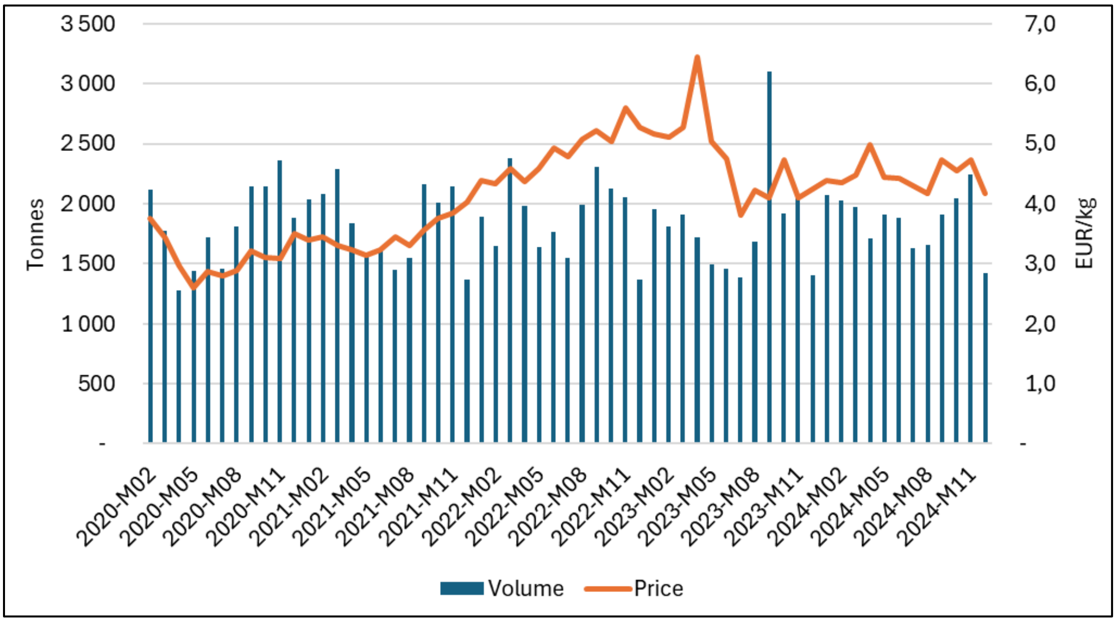
Figure 10 : Saithe import prices (nominal value) and volumes (product weight) per main products (EUR/kg, 2020-2024)



Source: EUMOFA, from EUROSTAT-COMEXT

The evolution of volumes and prices of imports followed a slightly increasing trend over the past four years, particularly for filleted products. Prices followed an upward trend until September 2023, when a record volume of saithe was imported, causing the average price to plunder to 4,00 EUR/kg. The absence of seasonality in imports indicates a relatively good synchronisation between domestic landings and consumption.

Figure 11: Saithe monthly import volumes (product weight) and prices (nominal value) in France (2020-2024)



Source : EUROSTAT-COMEXT

3.3.3 Wholesale prices

The table below presents the prices recorded in Rungis wholesale market for saithe products in 2024. According to stakeholders interviewed, they are relevant, except for frozen fillet which price is undervalued. In 2025, these prices increased.

While ex-*mareyeur* prices range between 6,00 and 7,00 EUR/kg, ex-wholesaler prices are higher.

Fresh loin in portions is more expensive than fresh fillets, because of the additional work required in the filleting process. According to a panel of online prices, wholesale prices for saithe loins range from 12,50 to 20,00 EUR/kg, while fresh fillets' prices range from 9,90 to 15,50 EUR/kg in 2025.

Table 18 : Average prices for fresh whole and fillet of saithe in Rungis wholesale market in 2024, by origin and weight (nominal value)

Origin (product)	Weight	Price (EUR/kg)
France (fresh whole)	2-3 kg	5,03
Import (fresh whole)	2-3 kg	4,71
France (fresh fillet)	<1 kg	7,66
Import (frozen fillet)	<1 kg	4,20

Source: FranceAgriMer/RNM

Table 19 : Panel of wholesale online prices (September and October 2025)

Presentation	Weight (kg)	Price (EUR/kg)
Fresh loin in portions	0,200	12,50
Fresh fillet	0,500-1,200	10,00
Fresh fillet	0,312	8,95
Fresh loin in 180g portions	1,800	17,90
Fresh loin in 70g portions	1,400	17,90
Fresh loin	0,300	13,95
Fresh loin	0,110-0,130	16,50
Fresh fillet in 312,5 g portions	5,000	9,95
Fresh fillet	3,000	10,25
Fresh loin in 150g portions	1,600	20,08
Fresh fillets 140 to 160 g	3,000	16,50
Fresh fillets size 100 g and above	Varying	10,50
Fresh fillets size 300 g and above	Varying	9,90
Fresh fillet (400-600g)	Varying	9,90

Source: Online survey

3.3.4 Retail prices

The average price of fresh saithe for household consumption is 12,30 EUR/kg in France in 2024 (Europanel data collected on EUMOFA)
According to the panel realised by collecting shelf prices in 15 online and on-site retails (

Table 20), the average prices for saithe in autumn 2025 are higher: for fresh fillets, prices range from 10,00 to 19,00 EUR/kg, and average 15,50 EUR/kg. For fresh loins in portions, prices range from 15,00 to 22,00 EUR/kg, and average 18,30 EUR/kg.

Frozen products were not found in a large enough diversity to be included in the panel. In addition, the lack of information about the filleting process (single or double freezing) induces a risk of mixing different products in our analysis.

Cooked saithe served in restaurants and collective catering ranges from 20,00 to 40,00 EUR/kg.

Table 20 : Price survey for saithe sold in France in large retail and fishmonger stores, outdoor markets and restaurants (September and October 2025)

Location	Sale channel	Presentation	Weight (kg)	Price (EUR/kg)
Online	**Large retail**	Fresh fillet	0,200	19,00
Urban context	**Large retail**	Fresh fillet	0,260	11,70
Online	**Large retail**	Fresh fillet	0,300	18,30
Online	**Large retail**	Fresh fillet	0,500	10,00
Online	**Large retail**	Fresh fillet MSC	0,500	13,00
Urban context	**Large retail**	Fresh loin	0,200	20,00
Urban context	**Large retail**	Fresh fillet	0,250	18,00
Urban context	**Fishmonger in large retail**	Fresh loin	Varying	18,90
Seaside town	**Fishmonger in large retail**	Fresh loin	Varying	15,00
Urban context	**Specialized fishmonger**	Fresh loin	Varying	19,00
Urban context	**Outdoor market**	Fresh whole	Varying	28,00
Medium-sized town	**Large retail**	Fresh loin	0,250	22,00
Online	**Large retail**	Fresh loin	0,300	17,50
Medium-sized town	**Institutional catering**	Cooked and served	Unknown	20,00
Seaside town	**Restaurant**	Cooked and served	Unknown	40,00

Source: On-field survey and online survey

3.3.5 Price transmission in retail

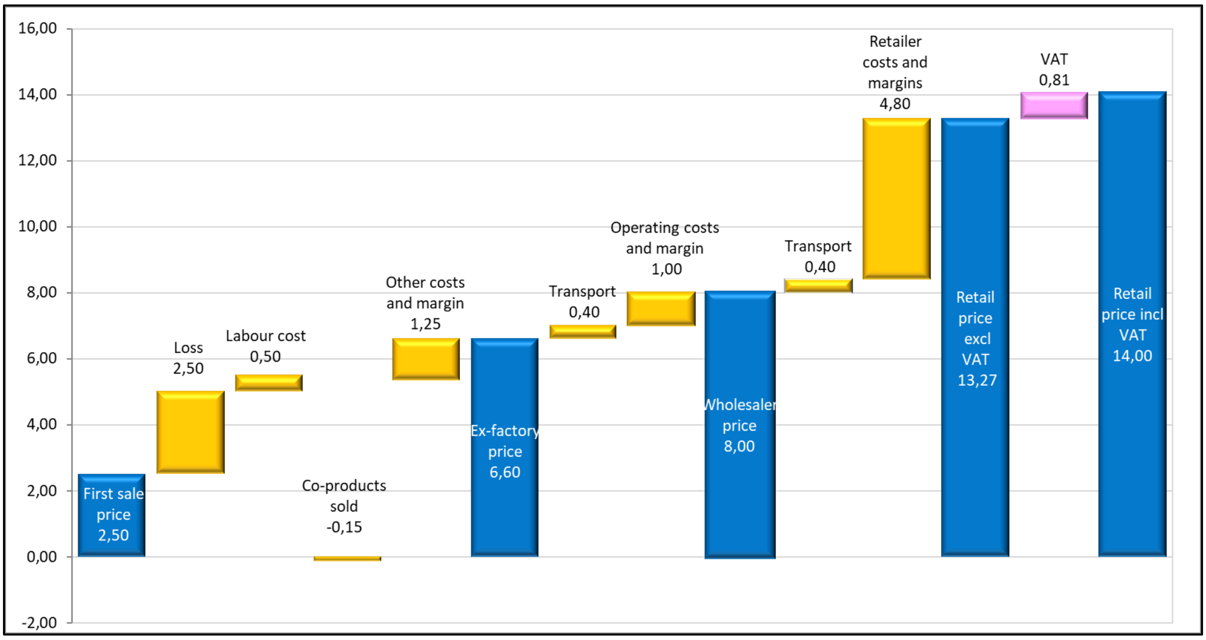
The following price structure corresponds to one of the main supply chains for saithe in France. The fish (300-1.500 g) is gutted on the fishing vessel and landed in a port around the North Sea, mainly in Scotland and Denmark. It is brought to Boulogne-sur-Mer by truck and sold to a *mareyeur* in almost independently from the auction place. Once it is filleted and packed, a wholesaler buys it and transports it to a retailer, which sells it to the final consumer for domestic consumption. The transport from the landing place to the *mareyeur* plant is covered by the fishing organisation, or a third-party buyer. In this last case, fish is bought before transportation. The fish is sold by the wholesaler to the retailer. The transport from the wholesale platform to the retail place is covered by the wholesaler. The place of retail considered is in France and is not close to the landing place.

Table 21: Costs and margin for a 1 kg fresh fillet of saithe, filleted in France and sold in large retail (2025, prices in EUR/kg)

Stage	Price (EUR/kg)	% of the final price	Source
First sale price	**2,50**	**20%**	**Based on interviews**
Loss (50%)	2,50	18%	Based on interviews and bibliography
Labour costs	0,50	4%	Based on interviews
Co-products (1)	-0,15	-1%	Based on interviews and FranceAgriMer
Other costs and margin	1,25	9%	Calculated
Ex-factory price	**6,60**	**47%**	**Based on interviews**
Transport (2)	0,40	3%	Based on interviews
Operating costs and margin	1,00	7%	Calculated
Wholesale price	**8,00**	**57%**	**Based on a panel**
Transport	0,40	3%	Based on interviews
Retailer costs and margin	3,45	35%	Calculated
Retail price excl. VAT	**13,27**	**95%**	**Based on a panel**
VAT (5,5%)	0,81	6%	VAT at 5,5%
Retail price incl. VAT (3)	**14,00**	**100%**	**Based on a panel and on FranceAgriMer OFPM report**

Sources: EUMOFA elaboration

Figure 12: Price transmission for a 1 kg fresh fillet of saithe, filleted in France and sold in large retail (2025, prices in EUR/kg) 13



Sources: EUMOFA elaboration

Notes :

(1) According to stakeholders, EUMOFA and FranceAgriMer's 2025 Observatory of Prices and Margins[22], co-products of saithe are sold at prices ranging from a few cents (skin, eyes) to 4,00 EUR/kg (small pieces of meat). Yield being of 50% for fillets, a 1 kg fillet generates 1 kg of co-products, which average price is 0,15 EUR.

(2) According to stakeholders, transportation costs for fresh fillets vary between 0,30 and 1,00 EUR/kg, depending on the distance. We chose 0,40 EUR/kg for transportation in France, and 0,70 EUR/kg for imported cuts.

(3) For retail prices, the estimate was made based on the FranceAgriMer data, gathered from a Kantar panel in 2024 (FranceAgriMer OFPM report)[23]. This value of 11,74 EUR/kg was raised to 12,50 EUR/ kg because of the higher prices for saithe in 2025, as observed by stakeholders and in our panel. An average was made of this price and the average one calculated based on our 2025 panel in large retail.

3.3.6 Price transmission in institutional catering

The following price structure focuses on the same supply chain type as the previous one, but with a different origin of the fish, and a different consumption channel. Fresh saithe loins in portions are imported by the wholesaler from a foreign filleting firm, usually in Iceland, Denmark or the Netherlands. The wholesaler sells it to a catering firm.

The first sale price is the average price in the past few months, as described by stakeholders. Prices are higher than those of the previous price structure, mainly due to the geographical location of the landing place. The wholesale price of this structure is an average, indistinctive of the final seller. The final price paid by the consumer is based on a survey of a popular restaurant in Boulogne and institutional catering meal prices.

Table 22 : Costs and margin for 1 kg of imported fresh saithe loin in portions, cooked and sold in institutionnal catering (2025)

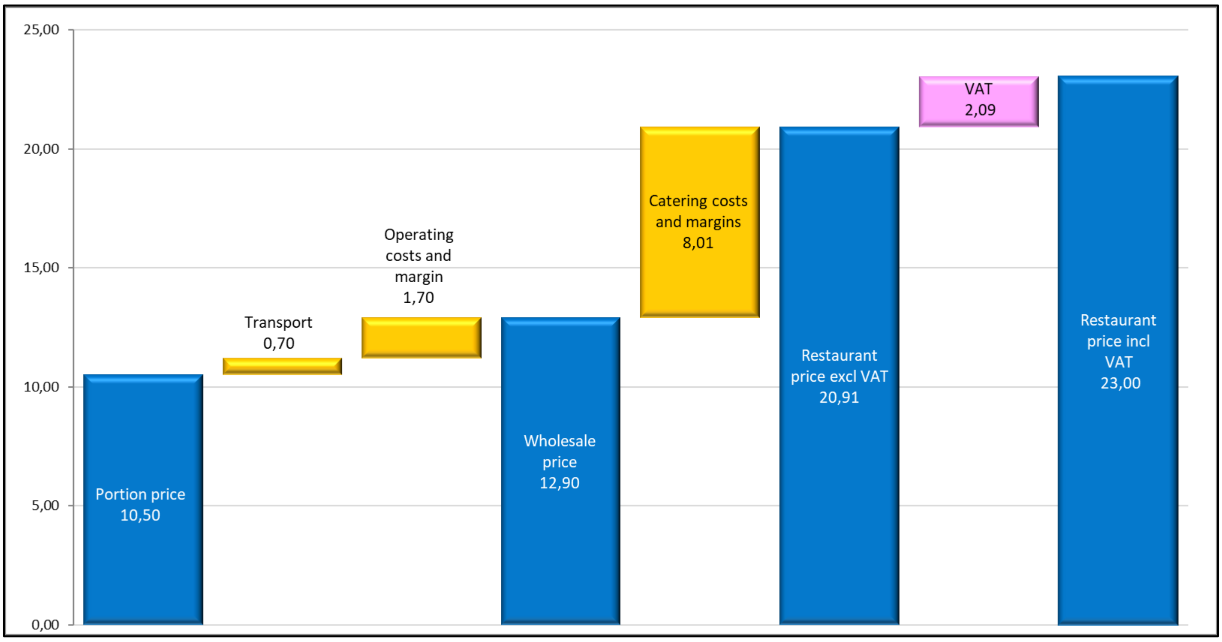
Stage	Price (EUR/kg)	% of the final price	Source
Portion price (1)	**10,50**	**46%**	**Based on interviews**
Transport (2)	0,70	3%	Based on interviews
Operating costs and margin	1,70	7%	Calculated
Wholesale price	**12,90**	**56%**	**Based on a survey**
Catering costs and margin	8,01	35%	Calculated
Restaurant price excl. VAT	**20,91**	**91%**	**Based on a survey**
VAT	2,09	9%	VAT at 10%
Restaurant price incl. VAT (3)	**23,00**	**100%**	**Based on a survey**

Sources: EUMOFA elaboration

[22] https://observatoire-prixmarges.franceagrimer.fr/sites/default/files/pictures/microsoft_word_-_15.1_2025_section_10_produits_peche_aquaculture_v4.docx_.pdf

[23] https://observatoire-prixmarges.franceagrimer.fr/sites/default/files/pictures/microsoft_word_-_15.1_2025_section_10_produits_peche_aquaculture_v4.docx_.pdf

Figure 13 : Price transmission for 1 kg of imported fresh saithe loin in portions, cooked and sold in institutionnal catering (2025)



Sources: EUMOFA elaboration

Notes :

(1) According to stakeholders, ex-factory price for fresh loin ranges from 10 to 12 EUR/kg, depending on the loin size. The most common prices average 10 to 11 EUR/kg, so we chose 10,50 EUR/kg as loin price. Loin and fillet prices being homogeneous throughout Europe, this ex-factory price is valid whichever country is chosen for importation.

(2) According to stakeholders, transportation costs for fresh fillets vary between 0,30 and 1,00 EUR/kg, depending on the distance. We chose 0,40 EUR/kg for transportation in France, and 0,70 EUR/kg for imported cuts.

(3) As collective catering meals and restaurant menu each cost 13 EUR, hypotheses were made that the main dish accounted for 8 to 9 EUR, in which saithe accounted for 3 to 4 EUR. We assumed that portion size was the one most present in supermarkets and wholesaler catalogues, 150g/portion. An average price of 3,50 EUR/portion and a 150g portion amounted to an average price of 23,33 EUR/kg.

4. THE DANISH MARKET

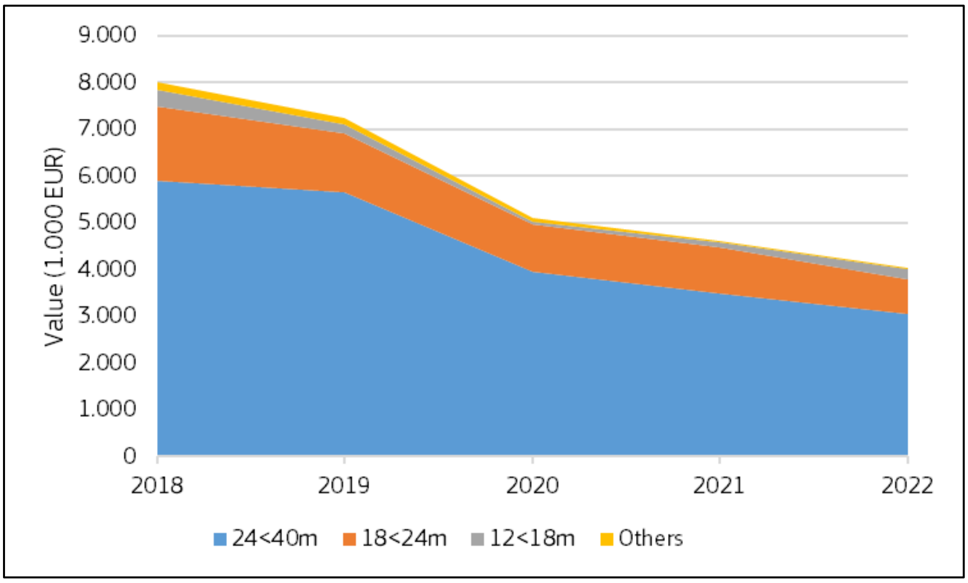
4.1 Structure of the supply chain

4.1.1 Production

Characteristics of the fleet

Saithe catches by the Danish fleet are essentially made by large vessels between 24 and 40 meters (accounting for 76% of Danish landings of saithe in value in 2022) and to a lesser extent by vessels between 18 and 24 meters (18%) and vessels between 12 and 18 meters (6%). According to the interviews, the saithe Danish fleet counts 15 vessels. Since 2018, landings of saithe have decreased by 50% in value in Denmark, with a 48% decrease of landings of vessels between 24 and 40 meters, and a 53% decrease of vessels between 18 and 24 meters.

Figure 14: Evolution of Danish landings of saithe by vessel length (nominal value in 1.000 EUR)



Source: STECF

The fishing technique used by the Danish fleet for saithe is almost exclusively demersal trawlers and/or demersal seiners (96% of the volumes landed in 2022). Pelagic trawlers accounted for 3% of the landed volumes and drift and/or fixed netters accounted for the remaining 1%.

Management measures

The Danish fleet caught 2.515 tonnes of saithe in 2024. Saithe catches have been increasing between 2015 and 2018, reaching 7.024 tonnes, before gradually decreasing. Overall, saithe catches decreased by 44% since 2015. The decrease in catches is proportional to the reduction of Danish saithe quotas (-41% between 2015 and 2023 according to DG MARE TACs, quotas regulation and Eurostat data), in the United Kingdom waters and the United Kingdom and international waters.

Table 23: Evolution of Danish catches of saithe (tonnes LWE)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Evol. 2015/24
Saithe	4.512	4.094	5.706	7.024	5.337	3.868	2.963	2.297	2.266	2.515	-44%

Source: Eurostat data

Landings

Denmark is the main landing place for saithe in Europe, with 11.611 tonnes (net weight) in 2024 landed according to Eurostat, representing 95% of EU saithe landings. Overall, they decreased by 31% since 2015 in relation to the quota reduction for all EU fleets. Saithe landings in Denmark consisted of mainly foreign landings in Danish ports: 34% of the landed saithe volume originated from French fisheries, 25% from German fisheries, and 19% from Norwegian fishing fleet. In 2024, saithe from the Danish fleet represented only 15% of saithe landings in Denmark. Hanstholm is the main landing port for saithe in Denmark, accounting for approximately 95% of the landed volumes according to the interviews. Few landings also occur in Thyborøn and Hirtshals (less than 5%). It is worth highlighting that the landing data from Eurostat might be underestimated as according to the Hanstholm Fiskauktion, saithe landings in Hanstholm reached 14.400 tonnes in 2024 (which is higher than the total landings from Eurostat).

Most of German and Swedish landings go through first sales in Danish auctions. A small share (approximately 10% according to the interviews) of French landings in Danish ports is directly transported by lorry to Boulogne-sur-Mer where the first sale occurs. The largest share of French landings is sold through first sales in Danish auctions.

Danish landings reached 1.753 tonnes in 2024, although catches from the Danish fleet reached 2.515 the same year. A share of Danish catches is landed in Norway and then transited by lorry to Danish auctions.

Table 24: Shares of saithe landings in Denmark by fleet (% of tonnes)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Evol. 2015/24
Total landings in Denmark	16 794	15 175	15 160	17 599	14 629	9 774	9 824	10 723	11 484	11.611	-31%
Landings in Hanstholm	nd	nd	nd	17.100	17.100	14.200	14.100	13.900	16.100	14.400	-15,8%*
France	18%	26%	0%	19%	20%	17%	26%	39%	40%	34%	+16 points
Germany	22%	22%	0%	21%	23%	27%	20%	18%	24%	25%	+3 points
Norway	21%	13%	11%	13%	10%	12%	9%	6%	11%	19%	-2 points
Denmark	**22%**	**22%**	**30%**	**33%**	**30%**	**29%**	**21%**	**15%**	**13%**	**15%**	**-7 points**
Others	18%	16%	4%	15%	17%	15%	25%	22%	11%	7%	-11 point

Source: Eurostat data, Hanstholm Fiskauktion

*evolution between 2018 and 2024

First sales

First sales of saithe decreased by 24% in value in Denmark between 2015 and 2024, driven by a decrease in volume (-29%), decreasing from EUR 29,3 million in 2015 to EUR 22,2 million in 2024. Between 2020 and 2024, first sales increased by 20% in volume and 40% in value, resulting in a 17% increase in price, reaching 1,84 EUR/kg in 2024.

Table 25: Saithe first-sale in Denmark between 2020 and 2024 (nominal value)

	2020	2021	2022	2023	2024	Evol. 2020/24
Volume (tonnes)	10.078	9.790	10.725	11.406	12.060	+20%
Nominal value (1.000 EUR)	15.893	17.439	26.166	23.005	22.227	+40%
Price (EUR/kg)	1,58	1,78	2,44	2,02	1,84	+17%

Source: EUMOFA, based on data sent by Ministeriet for Fødevarer

4.1.2 Imports

Danish ports are a hub for the saithe market in EU with most of saithe landings taking place in Denmark. These landings are generally processed in Denmark before being exported to the main EU markets. Some landings can be directly transported by lorry to other MS where they will be processed.

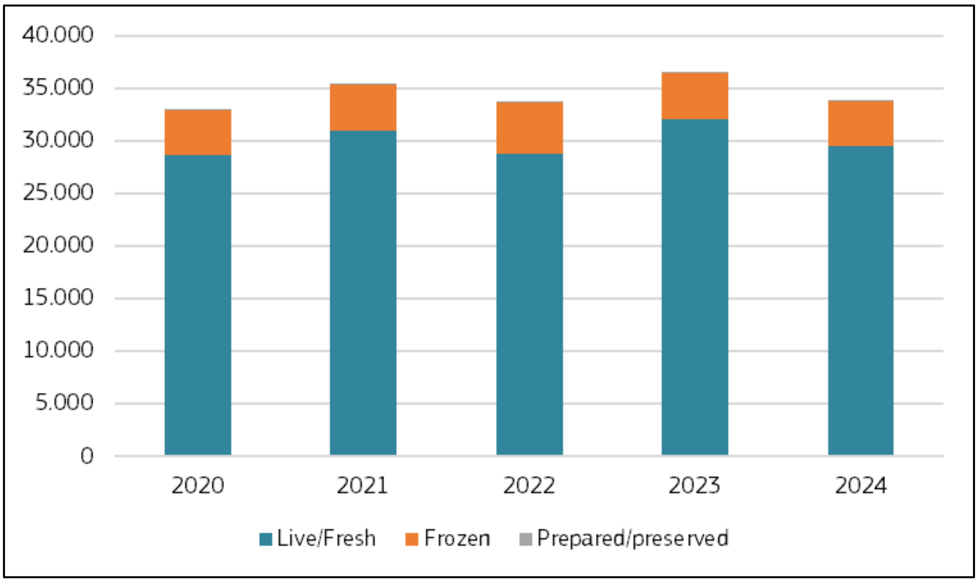
Total imports of saithe by Denmark reached 33.748 tonnes in 2024, amounting to EUR 42 million. Between 2020 and 2024, Danish imports of saithe increased by 2% in volume and 42% in value. Over the same period, import price of saithe increased by 39%. These imports consist almost entirely of landings of foreign fleets in Danish ports. Saithe imports are mainly composed of fresh whole saithe which represented 72% of the imports value and frozen fillets, representing 19% of the import value. The main suppliers of fresh whole saithe were Norway (accounting for 52% of the fresh whole imports, EUR 60 million), Poland (14%, EUR 31 million), France (12%, EUR 7,5 million) and Germany (9%, EUR 5,6 million). Frozen fillets originated mostly from Faroe Islands (66% of the frozen fillet imports), Iceland (14%) and Norway (8%), they consist of saithe captured and frozen onboard by these fleets. The volume landed, fresh and frozen, is then processed in Denmark before being exported to the main EU markets.

Table 26: Danish imports of saithe in 2024, by preservation and presentation type (nominal value)

Preservation	Presentation	Volume (tonnes product weight)	Nominal value (1.000 EUR)	Nominal price (EUR/kg)	% val. 2024
Fresh or chilled	Whole	28 569	60 358	2,11	+72%
	Fillet	959	6 567	6,85	+8%
Frozen	Fillets	3.594	16.030	4,46	+19%
Others	All	626	1.068	1,71	+1%
Total	**All**	**33.748**	**84.024**	**2,49**	**+100%**

Source: EUROSTAT-COMEXT

Figure 15: Evolution of Danish imports of saithe by preservation state (in tonnes net weight)



Source: EUROSTAT-COMEXT data

Table 27: Evolution of Danish saithe imports by main suppliers (tonnes product weight, 2020-2024)

	2020	2021	2022	2023	2024	Evol. 2020/24
Norway	14.268	14.509	14.553	18.554	16.849	+18%
Faroe Islands	5.046	4.050	4.169	3.224	4.166	-17%
France	1.873	2.958	4.813	4.670	4.096	+119%
Germany	2.724	2.134	2.149	2.787	2.963	+9%
Poland	1.793	2.406	1.747	2.194	2.246	+25%
Sweden	1.509	2.298	1.705	2.698	1.638	+9%
Iceland	4.973	4.861	1.799	955	1.005	-80%
Others	919	2.267	2.743	1.377	786	-14%
Total	**33.105**	**35.483**	**33.677**	**36.460**	**33.748**	**2%**

Source: EUROSTAT-COMEXT

4.1.3 Exports

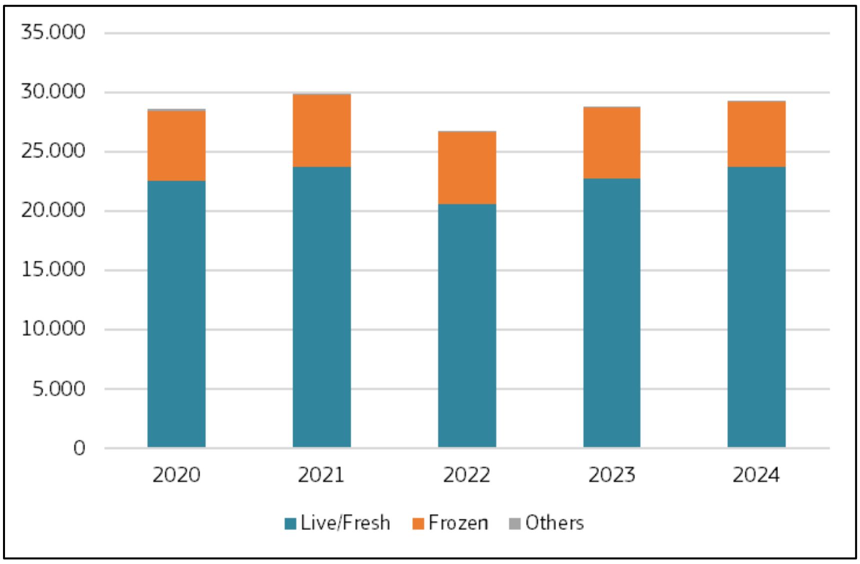
Almost all volumes landed in Denmark are exported to other EU countries. Experts estimate that only 1 to 2% of the volumes transiting through Denmark are intended to the local market. Total saithe exports from Denmark reached 29.234 tonnes in 2024, amounting to EUR 112 million. Between 2020 and 2024, exports remained relatively stable in volume (+2%) while they increased by 46% in value. These exports refer to saithe landed and sold though auctions in Danish ports. Saithe volumes are then processed and exported. Exports included fresh whole, fresh fillet and frozen fillet, accounting for 49%, 31% and 19% of the exports value in 2024. Fresh whole saithe was mainly exported to France (41% of the fresh whole exports in value), Germany (24%), Poland (15%), and Netherlands (12%), while fresh fillets were mainly exported to France (57% of the exports value of fresh fillets) and Germany (24%), and frozen fillets of saithe were exported to Poland (38% of the export value of frozen fillets), and Germany (21%).

As explained in the part 4.1.1, exports to France include a small share of saithe landed and directly transported by lorry to Boulogne-sur-Mer, and a large share of landings sold through auctions and then exported to France. A significant share of the exports goes to Poland, although it is not an important market for saithe in EU. Fresh whole saithe exported to Poland is then processed in local factories as well as Danish factories abroad, before being exported to France and Germany. Regarding the frozen exports to Poland, they consist of raw material frozen onboard on vessels from third countries (eg. Norway, Iceland) landed in Denmark and processed in Poland.

Exports of whole fresh saithe from Denmark increased by 4% in volume between 2020 and 2024 and by 55% in value, resulting in a 50% increase of the price, reaching 2,96 EUR/kg in 2024. Fresh fillets exports increased by 12% in volume and 60% in value over the same period resulting in a 43% increase in price, reaching 6,80 EUR/kg in 2024.

Danish exports of frozen fillets of saithe rose by 8% in volume and 43% in value since 2020. Between 2020 and 2024, the nominal price increased by 32%, reaching 4,41 EUR/kg in 2024.

Figure 16: Evolution of Danish saithe exports by preservation type (in tonnes product weight, EUR/kg)



Source: EUROSTAT-COMEXT data

Exports to France, the first destination of Danish saithe exports in 2024, increased by 14% since 2020. Poland and Germany, two main destinations of saithe exports from Denmark experienced significant decreases: -17% and -14% respectively since 2020. In contrast, exports to the Netherlands and Norway increased by 62% and 13% over the same period.

Table 28: Evolution of Danish saithe exports by destination (tonnes product weight, 2020-2024)

	2020	2021	2022	2023	2024	Evol. 2020/24
France	8.089	9.764	9.875	9.660	9.239	14%
Poland	8.455	6.711	5.027	6.674	7.046	-17%
Germany	7.160	8.652	6.112	5.956	6.152	-14%
Netherlands	1.578	1.631	1.607	2.235	2.563	62%
Sweden	1.091	1.140	1.184	842	960	-12%
Norway	494	455	610	557	557	13%
Others	1.733	1.531	2.345	2.811	2.717	57%
Total	**28.600**	**29.884**	**26.759**	**28.735**	**29.234**	**2%**

Source: EUROSTAT-COMEXT

4.1.4 Apparent consumption

The Danish market for saithe was estimated at 559 tonnes LWE in 2024 corresponding to 0,095 kg/per habitant. Danish apparent consumption of saithe decreased by 87% between 2023 and 2024 and by 89% between 2015 and 2024. In 2023, the Danish consumption of saithe was estimated at 4.329 tonnes LWE according to EUMOFA calculation. However, according to interviews, this calculation overestimated the local market. Interviewees estimate that the local consumption is 1% to 2% of the landings. Over the same period (2015-2024), Danish catches fell by 44% while imports and exports increased by 31% and 39%.

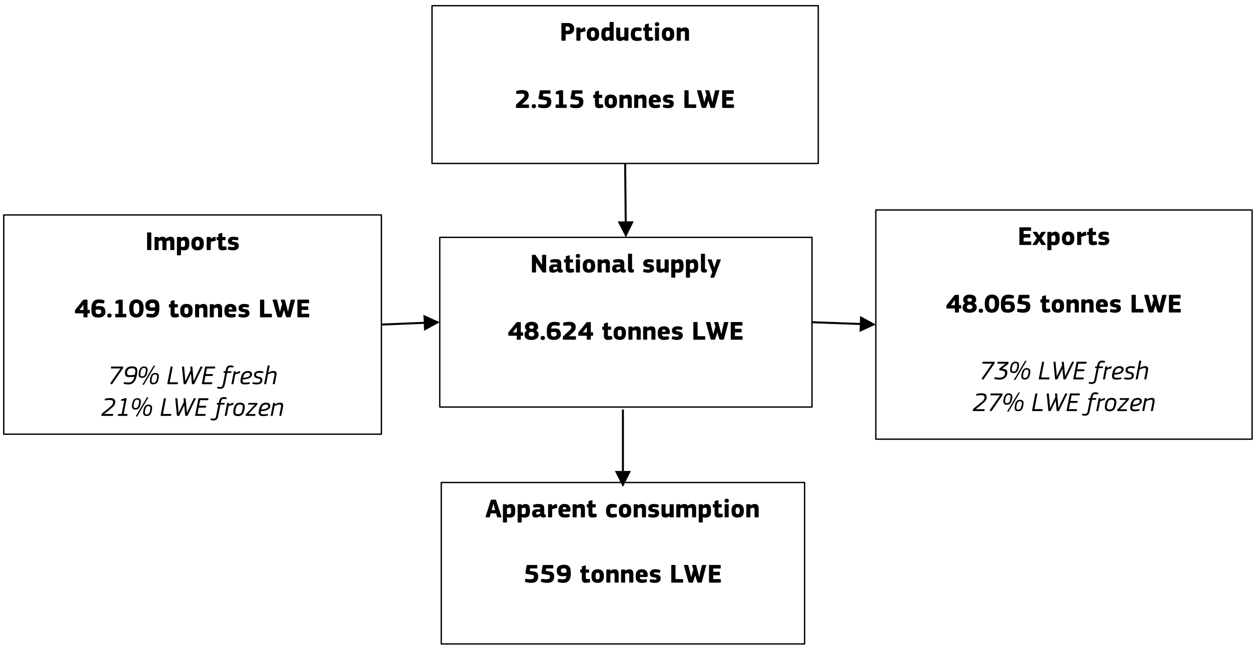
Danish supply of saithe amounted to 48.624 tonnes LWE in 2024, of which 95% originated from imports. Exports represented 99% of the national supply, therefore Danish apparent consumption accounted for 1% of the national supply.

Table 29: Danish apparent consumption of saithe in 2024 (tonnes of LWE)

	Volume (t LWE)	Evol. 2023/24	Evol. 2015/24
Production	2.515	11%	-44%
Import	46.109	-5%	31%
Supply	48.624	-4%	22%
Export	48.065	3%	39%
Apparent Consumption	**559**	**-87%**	**-89%**

Source: EUMOFA estimates

Figure 17: Supply balance for saithe in Denmark (2024, tonnes of live weight equivalent)



Source: EUMOFA estimates based on EUROSTAT and EUROSTAT-COMEXT data

4.2 Characteristics of the Danish market and consumption

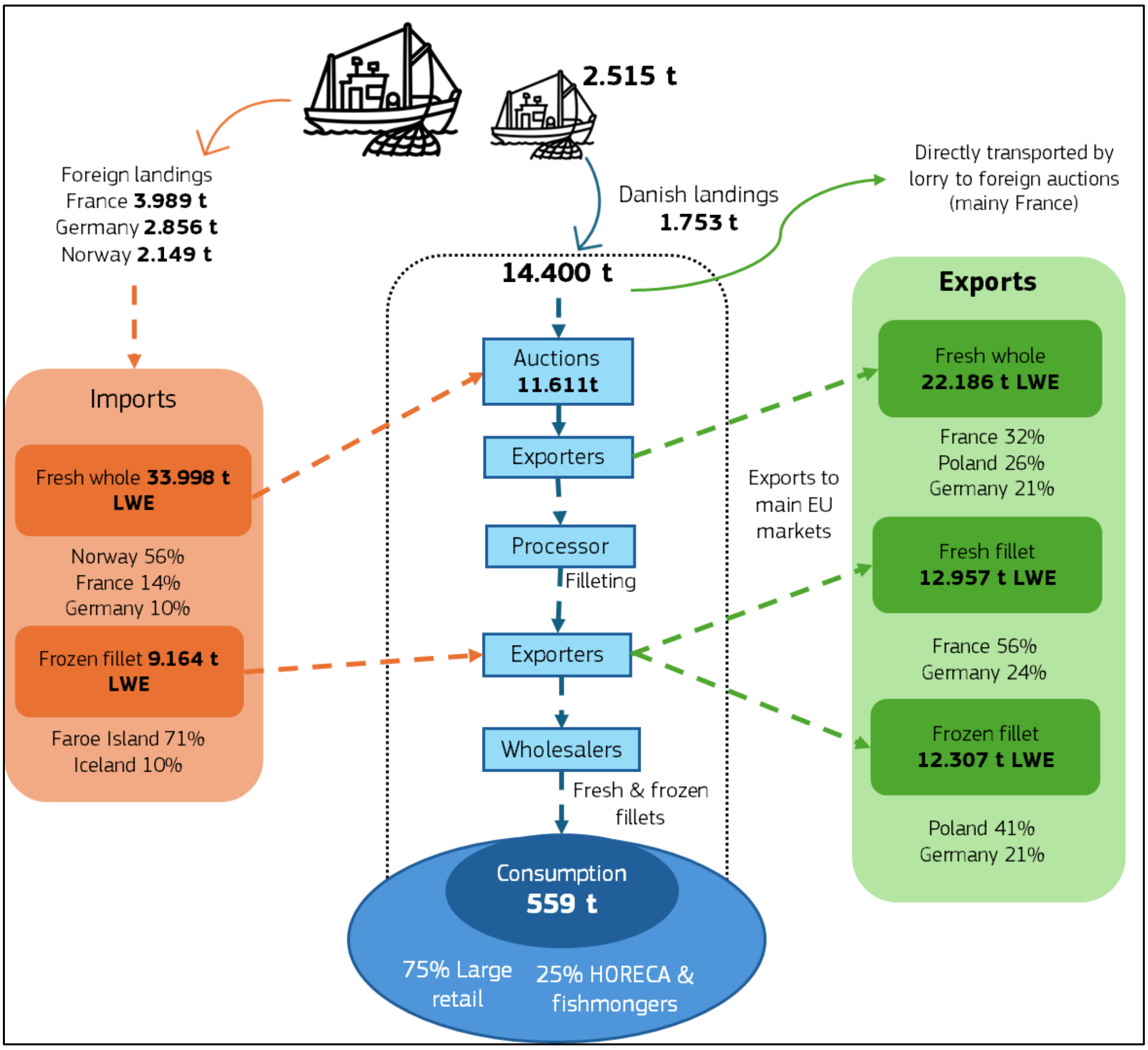
4.2.1 Structure of the supply chain in Denmark

According to stakeholders, the structure of the supply chain for saithe in Denmark includes in most cases 5 stakeholders:

- Danish, EU and third country fishing fleets landing in Danish ports;
- Auctions, where the volume is first sold;
- Processors filleting the fish;
- Exporters to EU main markets for saithe (France and Germany).

However, being a hub for saithe market in the EU, some volumes of saithe products transit through Denmark without going through the entire supply chain described above but transiting directly from the landings to the destination MS where they will enter first sales (e.g. a share of French landings in Denmark). Another share of landed volumes in Denmark is sold through auctions and directly transported to France and Germany where it is processed and sold to the market. Some volumes also go directly to Poland for processing before being exported to the main EU market.

Figure 18: Supply chain for saithe in Denmark (tonnes LWE, 2024)



Source: EUMOFA elaboration based on interviews

4.2.2 Consumption

According to the stakeholders interviewed, between 90 and 95% of the saithe volumes landed in Denmark are either directly transported by lorry to other EU MS, or they are processed into fillets and loins in Danish factories and then transported by lorry to large retailers in other MS.

The Danish market for saithe is very small, although saithe consumption is viewed as a more affordable alternative (usually 20-30% cheaper than cod) and sustainable alternative to cod in Denmark. Saithe is not very popular, however it can be purchased in supermarkets and at fishmongers across Denmark, though supply is decreasing according to interviewees. Additionally, saithe can be consumed in restaurants where it is usually served as part of traditional Danish meals, although it is not a particularly famous product in restaurants. Finally, due to its reasonable price, saithe can be served in canteens and catering. There is a competition, in Denmark and other MS, with Alaska pollock which is cheaper and often served in school canteens and working places. According to interviewees, Alaska pollock is 1 euro cheaper than saithe for similar products.

Volumes of saithe of size 4 (300 g to 1.500 g) have been increasing in the last years, they accounted for 60-65% of the catches (sizes 3, 2, and 1 account for the 35-40% left) and are therefore the most consumed in the Danish and EU markets.

Based on qualitative feedback from stakeholders, the Danish market is about 1-2% of the landed volumes of saithe, while the rest goes to the main EU markets (mostly French and German markets).

The estimated breakdown in volume by sales channel in Denmark is as follows (based on stakeholders' interviews):

- 75% in supermarkets;
- 25% in fishmongers and HORECA.

4.3 Price transmission in the supply chain

4.3.1 First-sale prices

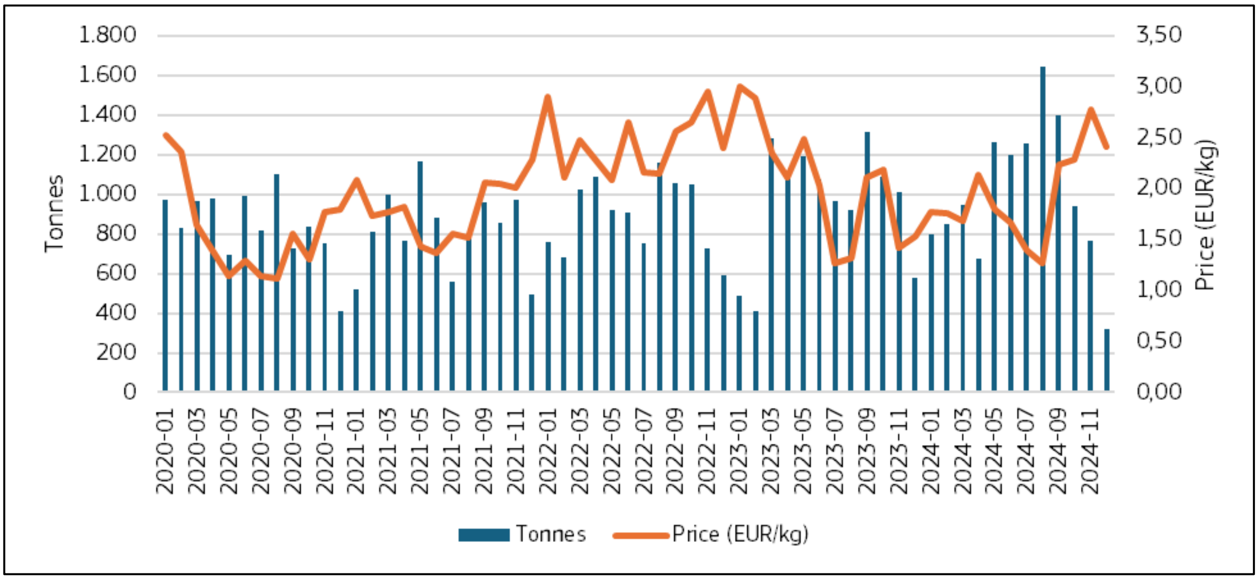
While first sales volumes of saithe in Denmark increased by 20% between 2020 and 2024,their value increased by 40% over the same period and amounted to EUR 22 million in 2024. The first sale price increased at a lower rate (+17% between 2020 and 2024 in nominal terms, +6% in real terms and reached its highest value in 2022 (2,44 EUR/kg), in relation to the peak of the first sale value the same year (EUR 26 million).

Table 30: Evolution of first-sale volume (tonnes product weight), value and price (nominal) of saithe in Denmark between 2020 and 2024

	2020	2021	2022	2023	2024	Evol. 2020/24
Volume (tonnes)	10.078	9.790	10.725	11.406	12.060	+20%
Nominal value (1.000 EUR)	15.893	17.439	26.166	23.005	22.227	+40%
Nominal price (EUR/kg)	1,58	1,78	2,44	2,02	1,84	+17%

Source: EUMOFA

Figure 19: Saithe monthly first-sale volumes and first-sale nominal prices in Denmark between 2020 and 2024 (in tonnes net weight and EUR/kg)



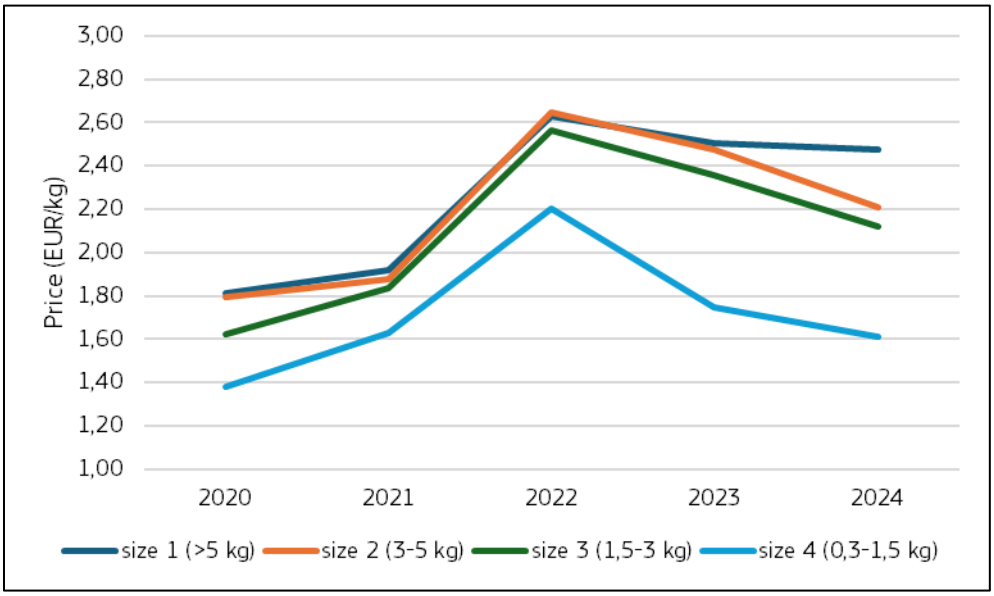
Source: EUMOFA data

Based on the monthly first-sale data, there is clear evidence of price elasticity, as prices decrease when offer is on the rise. Fisheries targeting saithe have a continuous activity throughout the year, with more intense fisheries in spring and summer.

The most common fish sizes are the 0,3 to 1,5 kg category, which made up 61% of the first-sale volume in 2024.

Data analysis highlighted slight price variation based on the size of the fish, with the bigger sizes being more expensive. First sale prices of all sizes experienced significant increases of +17% to +36% between 2020 and 2024.

Figure 20: Average yearly first-sale nominal prices of saithe in Denmark depending on the size (EUR/kg)



Source: EUMOFA

4.3.2 Import/export prices

Between 2020 and 2024, trade volumes remained relatively stable despite the Danish quotas declining by 41% between 2020 and 2023. Imports consist mainly of foreign landings in Denmark, mostly fresh whole saithe. Over the same period, almost all trade prices increased significantly, except for frozen whole saithe whose price decreased by 31% for the import (-37% in real terms) and by 15% for the export (-23% in real terms). In 2024, fresh fillets of saithe presented the highest prices, almost reaching 7,00 EUR/kg.

Table 31: Import/export price (nominal value) for fresh and frozen saithe from Denmark by preservation and presentation

Price (EUR/kg		2020	2021	2022	2023	2024	Evol. 2020/24
Fresh whole	Import	1,34	1,65	2,40	2,10	**2,11**	57%
	Export	1,97	2,30	3,10	2,91	**2,96**	50%
Fresh fillets	Import	4,23	5,08	7,53	5,80	**6,85**	62%
	Export	4,77	5,52	7,16	6,99	**6,80**	43%
Frozen whole	Import	2,53	3,13	4,22	2,55	**1,75**	-31%
	Export	2,47	2,46	3,14	2,80	**2,10**	-15%
Frozen fillets	Import	3,65	3,73	5,41	5,06	**4,46**	22%
	Export	3,34	3,45	5,12	4,97	**4,41**	32%

Source: EUMOFA data

4.3.3 Price transmission

One price transmission analysis has been conducted:

Size 4 saithe – fresh fillets exported to France

Danish market for saithe being very small, almost all volumes of saithe landed and sold through Danish auctions are intended to the EU market. Volumes are sold through first sales to processors. Most of the saithe volume (around ¾ according to the interviewees) is filleted. Processing also includes the skin and bone removal. It is estimated that the loss of raw material is around 52%. Products are then exported to the main EU markets, namely France and Germany.

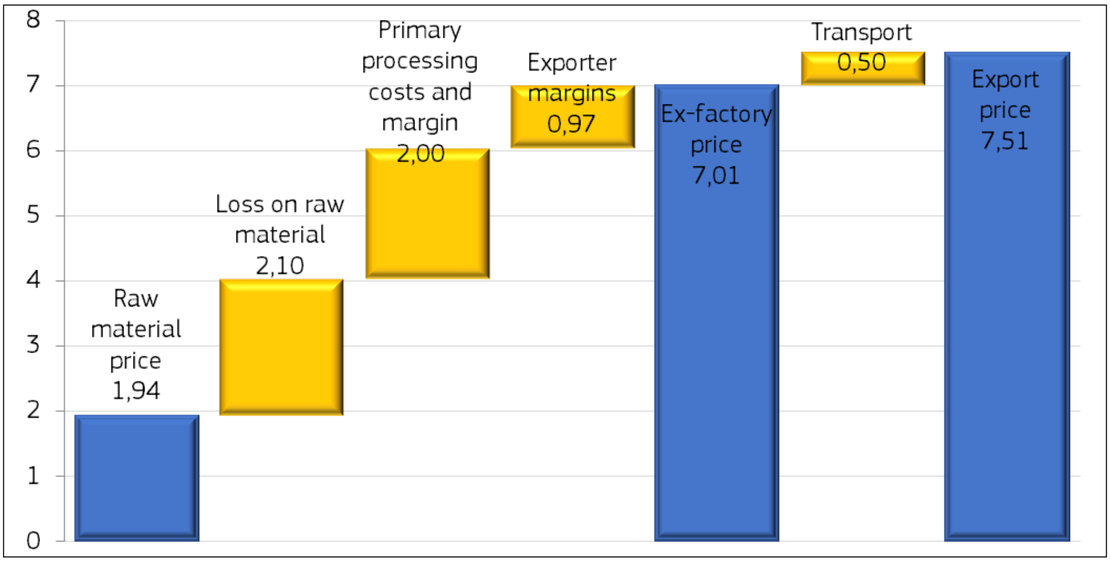
It is worth noticing that calculation of costs and margins differ among the factories. Costs and prices depend also on the final product, the price transmission scheme provided below is an estimation for fresh fillets of size 4 exported from Denmark to France.

Table 32: Costs and margins for fresh fillets of saithe (size 4) exported to France *(*EUR/kg, 2025)

	Price (EUR/kg)	% of the final price	Sources
Auction price	**1,94***	**26%**	EUMOFA
Loss on raw material	2,10	28%	Interview
Primary processing costs and margin			
Cost of labour	2,00	27%	Interview
Depreciation cost			
Exporter margins	0,97	13%	Calculation
Ex-factory price	**7,01**	**93%**	Calculation
Transport	0,50	7%	Interview
Export price to France	**7,51**	**100%**	EUMOFA

Source: elaboration based on interviews and EUMOFA data
*average first-sale price from January to August 2025

Figure 21: Costs and margins for fresh fillets of saithe (size 4), exported to France (EUR/kg, 2025)



Source: elaboration based on interviews and EUMOFA data

5. THE GERMAN MARKET

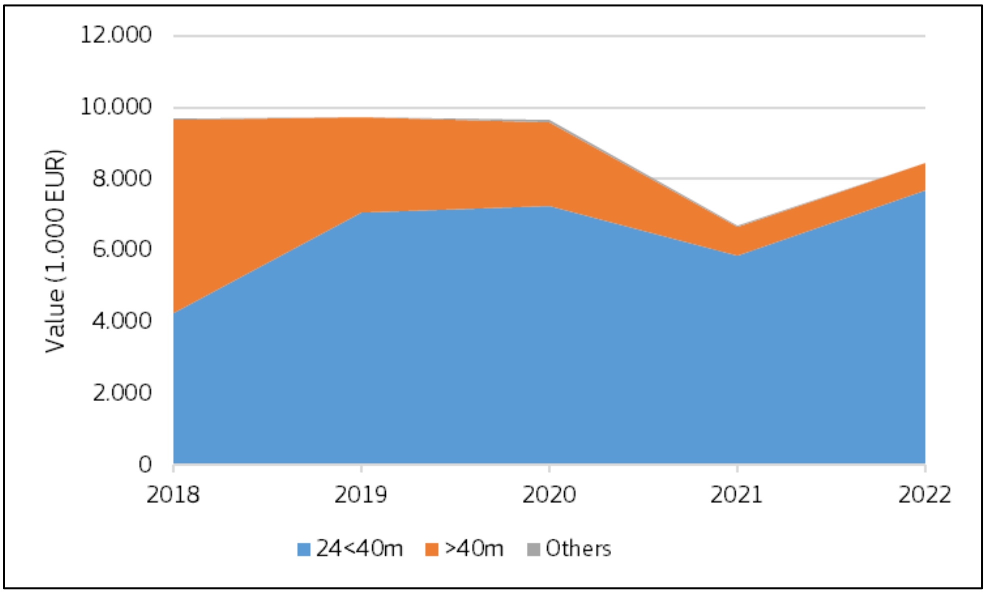
5.1 Structure of the supply chain

5.1.1 Production

Characteristics of the fleet

In 2022, saithe catches by the German fleet were almost exclusively made by large vessels from 24 to 40 meters (accounting for 91% of German landings in value with EUR 7.699.000) and to a lesser extent by vessels of more than 40 meters (9% of the landings in value with EUR 766.000). Since 2018, saithe landings have decreased by 13% in value in Germany, landings of vessels between 24 and 40 meters increased by 91% while landings of vessels above 40 meters decreased by 86% in value. This difference is explained by the renewal of the fleet. Ships over 40 meters have been recently decommissioned, replaced by smaller ships of 25 to 30 meters. However, the storage capacity of the ships has remained around 16 tonnes. Over the past decade, the number of ships positioned on saithe fishing has halved, from 7 to 3-4 ships. Over 99% of the German landings of saithe are caught using demersal trawlers.

Figure 22: Evolution of German landings of saithe by vessel length (nominal value in 1.000 EUR)



Source: STECF

Management measures

The total quota allocated for saithe to the German fleet reached 7.717 tonnes in 2024. The German quota has increased by 35% between 2023 and 2024; it has decreased by 11% over the last decade. Stakeholders expect further progress in the quota in 2025, following the increase in the EU quota for North Sea (+7,1%)[24]. In 2024, German catches of saithe (see below) only reached 59% of the quota.

Catches

German catches of saithe reached 4.554 tonnes in 2024, decreasing by 46% over the last decade and remaining relatively stable between 2023 and 2024. According to stakeholders, the main cause of this decrease is the decline in the number of fishing vessels, rather than the evolution in the quota.

[24] https://www.fischmagazin.de/willkommen-seriennummer-111804.htm

Table 33: Evolution of German catches of saithe (tonnes LWE, 2015-2024)

	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Evol. 2023/24	Evol. 2015/24
Saithe	8.416	7.266	8.815	9.621	8.466	8.421	5.074	4.781	4.576	4.554	0%	-46%

Source: EUROSTAT

First sales

Most of the German catches of saithe are landed abroad. In 2024, 4% of catches of saithe by the German fleet were registered as first sales in Germany, mostly in Cuxhaven (83% of first sales, 67 tonnes) and Bremerhaven (16% with 13 tonnes). Denmark is the main country of landing for German catches, accounting 63% of the volume in 2024. According to stakeholders, German catches are mostly landed in Hanstholm, which is located only a few hours from the fishing grounds, while it takes 2 days for ships to reach their closer home port of Cuxhaven.

Between 2021 and 2024, first sales volumes registered in Germany have varied from a maximum volume of 174 tonnes in 2022 to a minimum volume of 81 tonnes in 2024, accounting for 2 to 11% of German catches. According to stakeholders, landings in Germany are uneconomical due to the distance between German ports and fishing grounds. They only occur when ships need to join their home ports for maintenance or repair, which explains the instability in landings in Germany. It has to be noted that EUMOFA data on first sale is not available for the year 2020.

Table 34: First sales of saithe in Germany (tonnes product weight, 2020-2024)

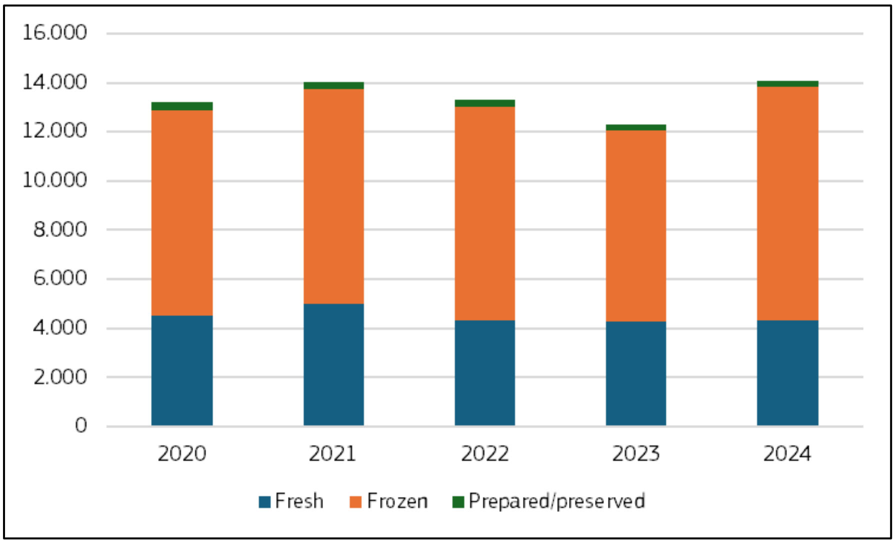
	2020	2021	2022	2023	2024
Cuxhaven	nc	272	375	63	67
Bremerhaven	nc	163	174	104	13
Other German ports	nc	3	0	0	0
Total landings in German ports	**nc**	**439**	**548**	**167**	**81**
Share of total German catches	na	9%	11%	4%	2%

Source: Federal Office for Agriculture and Food; the share of total German catches calculated based on EUROSTAT data

5.1.2 Imports

Total imports of saithe to Germany reached 14.066 tonnes in 2024, for a value of EUR 63 million. From 2020 to 2024, German saithe imports have increased by 6% in volume, though they reached their lowest volume in 2023 at 12.313 tonnes. Over the same period, imports increased by 52% in value, resulting in a 42% increase in the price, that reached 4,49 EUR/kg in 2024. Frozen fillets of saithe dominated imports, accounting for 66% of the total value in 2024, followed by fresh fillet imports (16% of the value) and fresh whole saithe (13%). Import prices of frozen fillets increased by 38% between 2020 and 2024, reaching 4,74 EUR/kg in 2024, while import prices of fresh whole saithe and fresh fillets rose 76% and 38%, reaching respectively 2,89 EUR/kg and 7,24 EUR/kg.

Figure 23: Evolution of German saithe imports by preservation type (in tonnes product weight, EUR/kg)



Source: EUROSTAT-COMEXT data

Table 35: German imports of saithe in 2024, by preservation and presentation type (nominal value)

Preservation	Presentation	Volume (tonnes product weight)	Nominal value (1.000 EUR)	Nominal price (EUR/kg)	% val. 2024
Fresh or chilled	Whole	2.908	8.408	2,89	+13%
	Fillets	1.435	10.395	7,24	+16%
Frozen	Fillets	8.725	41.387	4,74	+66%
Others	All	997	2.948	2,96	+5%
Total	**All**	**14.066**	**63.138**	**4,49**	**+100%**

Source: EUROSTAT-COMEXT

The main suppliers of frozen fillets of saithe were Iceland and Lithuania, accounting respectively for 28% and 25% of the frozen fillet import value in 2024, followed by the Netherlands (15%), Faroe Islands (12%) and Denmark (11%). According to stakeholders, the large share of imports from Lithuania can be explained by its role as a hub for double freezing and processing. Denmark and the Netherlands were the main suppliers of fresh fillets of saithe to Germany in 2024, accounting respectively for 56% and 28% of the total import value. According to stakeholders, the large share of imports from the Netherlands can be explained by its role as a trade hub and its large fileting facilities (based in Urk). The main supplier of fresh whole saithe were Denmark, accounting for 43% of the fresh whole import value, the Netherlands (28%) and Sweden (23%). According to stakeholders, imports of fresh whole saithe from Denmark consists mainly in German catches landed in Denmark and transferred by trucks in Germany.

Table 36: Evolution of German imports of saithe by supplier (tonnes product weight, 2020-2024)

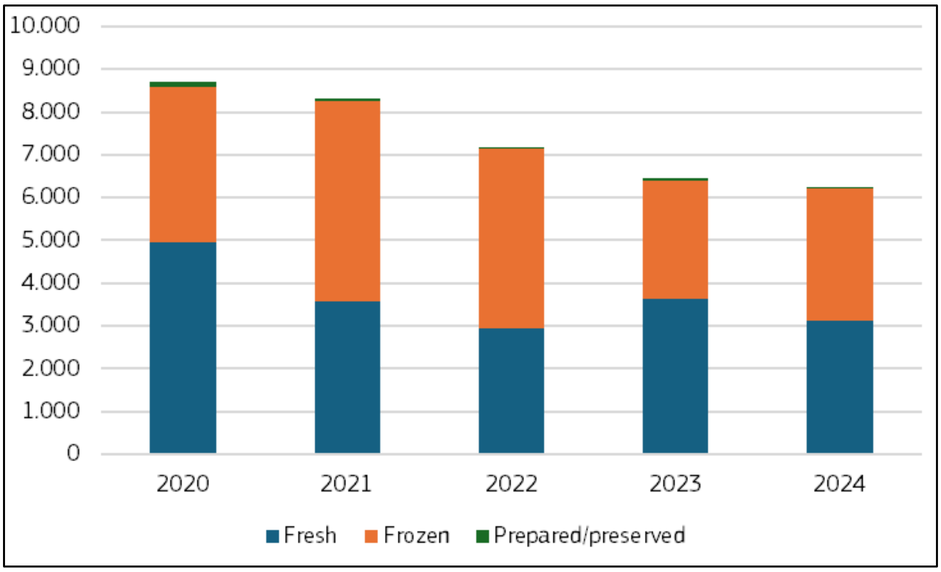
	2020	2021	2022	2023	2024	Evol 2020/24
Denmark	4.487	5.161	3.391	3.092	3.370	-25%
Lithuania	1.683	1.193	2.419	2.452	2.552	+52%
Iceland	1.903	2.563	2.792	1.894	2.454	+29%
Netherlands	1.776	2.141	2.129	2.117	1.981	+12%
Faroe Islands	775	357	317	209	1.381	+78%
Sweden	478	1.079	1.022	1.380	1.140	+138%
Other	2.106	1.552	1.216	1.170	1.188	-44%
Total	**13.208**	**14.046**	**13.285**	**12.313**	**14.066**	**+6%**

Source: EUROSTAT-COMEXT

5.1.3 Exports

Total exports of saithe from Germany reached 6.252 tonnes in 2024, for a value of EUR 20 million. The volume of exports decreased by 28% in volume between 2020 and 2024 while its value remained relatively stable (+2%). Over the same period the average export price for saithe increased by 42%, from 2,30 EUR/kg in 2020 to 3,27 EUR/kg in 2024. Frozen fillets of saithe dominated exports in 2024, representing 64% of the total export value (EUR 13 million). Between 2020 and 2024, the volumes of exported frozen fillet decreased by 22%. Over the same time their prices increased by 31%, reaching 5,08 EUR/kg. Exports of fresh whole saithe, which consist essentially in German landings of saithe registered as exports, accounted for 26% of the export value. The registered exports of fresh whole saithe decreased by 38% between 2020 and 2024. Their price rose by 56%, reaching 1,78 EUR/kg.

Figure 24: Evolution of German saithe exports by preservation type (tonnes product weight, EUR/kg)



Source: EUROSTAT-COMEXT data

Table 37: German exports of saithe in 2024, by preservation and presentation type (nominal value)

Preservation	Presentation	Volume (tonnes product weight)	Nominal value (1.000 EUR)	Nominal price (EUR/kg)	% val. 2024
Fresh or chilled	Whole	3.038	5.407	1,78	26%
Frozen	Fillet	2.583	13.117	5,08	64%
Others	Other cuts, fresh fillets	631	1.913	3,03	9%
Total	**All**	**6.252**	**20.438**	**3,27**	**100%**

Source: EUROSTAT-COMEXT

In 2024, France and Poland are the main market for the German exports of frozen fillets, accounting for 26% and 24% respectively of their total export value. Other important markets for frozen fillets are Spain (16% of the total frozen fillet export value) and the Netherlands (13%). Denmark account 97% of the registered value for exports of fresh whole saithe. According to Eurostat, 80 to 98% of these exports consist in German landings of fish in Denmark. German exports of saithe to Denmark decreased by 22% in volume between 2020 and 2024. It is essentially due to a decrease in German catches, leading to landings of saithe in Denmark. Among other destinations, exports decreased strongly to Poland (-32%) and France (-20%) between 2020 and 2024. German exports to Spain have strongly increased by 130% over the same period. According to stakeholders, a significant share of exports to the Netherlands likely consists of fluxes transiting through the country, with France as the final destination.

Table 38: Evolution of German exports of saithe by destination (tonnes product weight, 2020-2024)

	2020	2021	2022	2023	2024	Evol. 2020/24
Denmark	3.842	2.833	2.516	3.413	3.001	-22%
Poland	1.214	1.476	1.354	763	824	-32%
France	992	1.243	940	625	789	-20%
Spain	222	871	772	581	510	+130%
Netherlands	328	263	239	247	394	+20%
Others	2.110	1.644	1.364	813	734	-65%
Total	**8.708**	**8.330**	**7.184**	**6.442**	**6.252**	**-28%**

Source: EUROSTAT-COMEXT

5.1.4 Apparent consumption

The German market for saithe was estimated at 23.593 tonnes LWE in 2024. Apparent consumption increased by 15% between 2023 and 2024 and by 8% between 2015 and 2024. Over this 10-year period, German catches decreased by 46%; imports and exports declined by 24% and 59%, respectively.

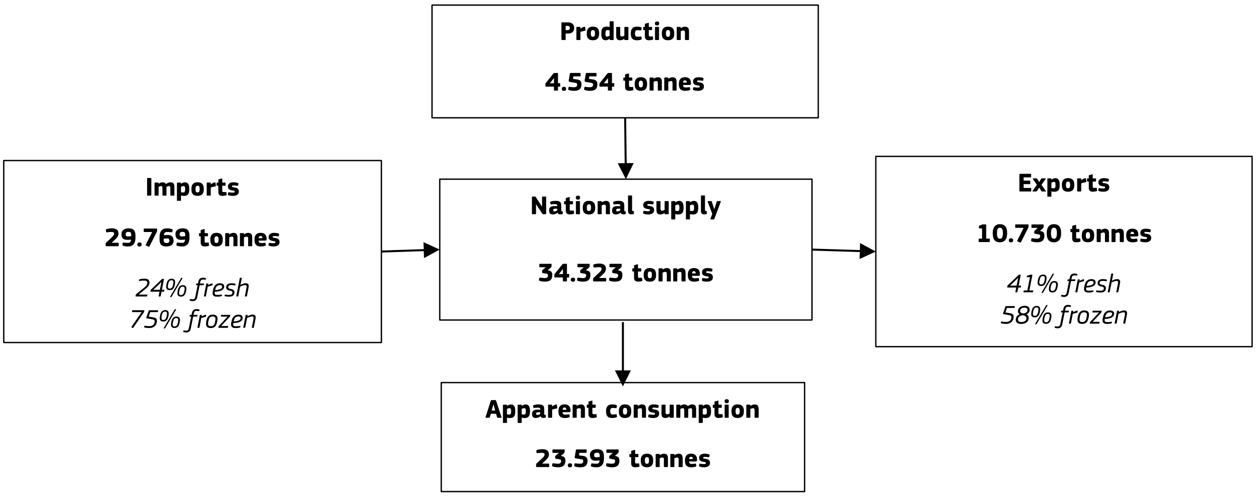
National supply of saithe reached 34.323 tonnes LWE in 2024. Imports represented 87% of the supply and national catches accounted for 13%. Exports of saithe accounted for 31% of the German supply of saithe, therefore, apparent consumption represented 69% of the national supply in 2024.

Table 39: Apparent consumption of saithe in Germany in 2024 (tonnes LWE)

	2024	Evol. 2023/24	Evol. 2015/24
Production	4.554	0%	-46%
Imports	29.769	+11%	-24%
Supply	34.323	+10%	-28%
Exports	10.730	-1%	-59%
Apparent consumption	**23.593**	**+15%**	**+8%**

Source: EUROSTAT, EUROSTAT-COMEXT

Figure 25: Supply balance for saithe in Germany (2024, tonnes LWE)



Note: volumes and percentages provided in the figure are in LWE

Source: EUMOFA estimates based on EUROSTAT and EUROSTAT-COMEXT data

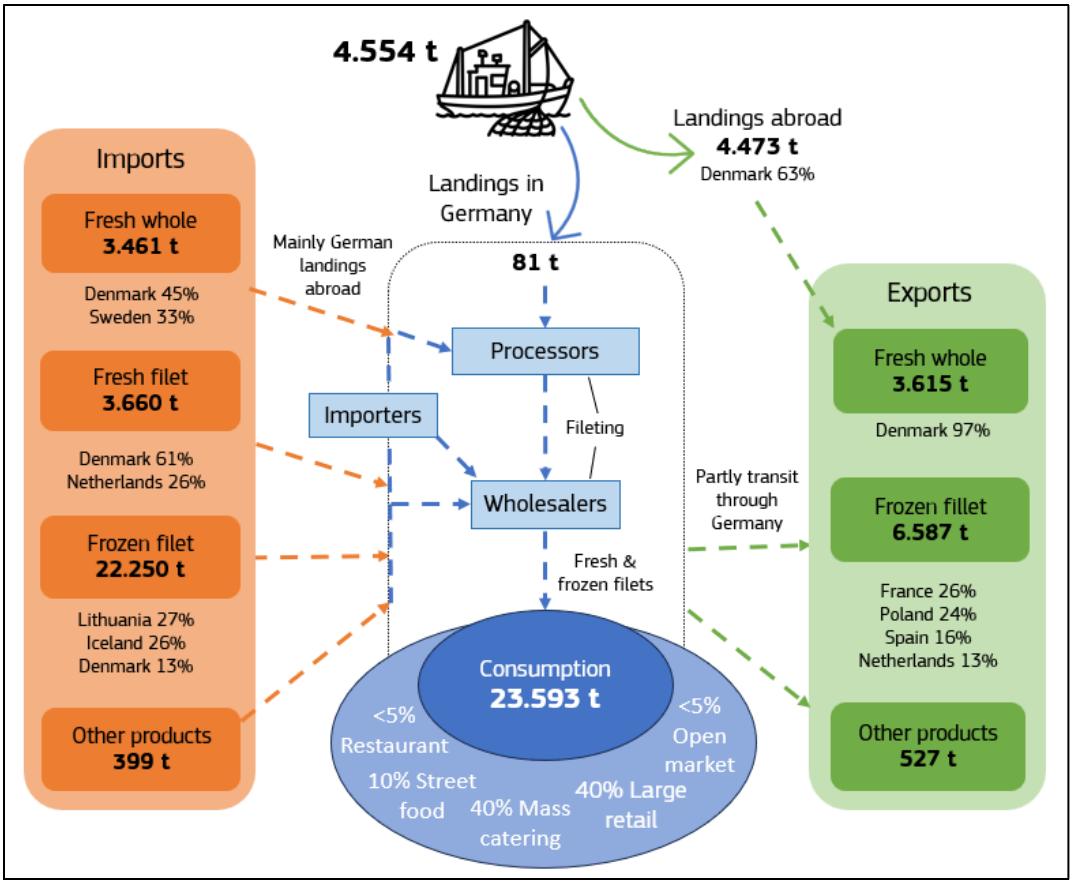
5.2 Characteristics of the German market and consumption

5.2.1 Structure of the supply chain in Germany

The supply chain of saithe in Germany is characterized by little landings in the country. Imports of saithe mainly consist of filets, either frozen or fresh. Imports of whole fish include German landings abroad in Denmark. These volumes are all processed as filets before being sold to the HORECA sector or the final retailer. The wholesale stage is relatively concentrated, with a few actors supplying either HORECA or the retail sector. Specialized importers play an important role in supplying German wholesalers with saithe filets. According to stakeholders, Germany is also a transit country for frozen fillet imported from the Nordic or Baltic countries and exported to France.

According to stakeholders, the HORECA sector represents more than half of saithe consumption in Germany. Saithe is mostly sold in mass catering, which is estimated to amount 40% of the total consumption. Around 5-10% of the volumes are consumed backed in street-food restaurants (fish and chip shops, "*Imbisse*"). A smaller share is sold in classic restaurants. The retail sector is estimated to account for a little less than half of household consumption. Most of this market segment consists of supermarkets and discounters. A small share of the saithe is sold to the final consumer on fish markets. According to stakeholders, direct sales of saithe are inexistant. Online sales are also very marginal; while few offers can be found, saithe is deemed by stakeholders not premium enough for this sale channel.

Figure 26: Structure of the supply chain for saithe in Germany (tonnes LWE, 2024)



Note: volumes and percentages provided in the figure are in LWE

Source: EUMOFA

5.2.2 Characteristics of the market

In 2024, saithe (*Pollachius virens*, in German "Seelachs", "Köhler" or "Köhlfisch") was the 11th most consumed fish species in Germany, with a market share of 1,5%[25]. It must not be mixed up with Alaska pollock (*Gadus chalcogrammus*, in German "Alaska Seelachs"), whose market share reaches 14,9% (2nd most consumed species), or with pollack (*Pollachius pollachius*, in German "Steinköhler").

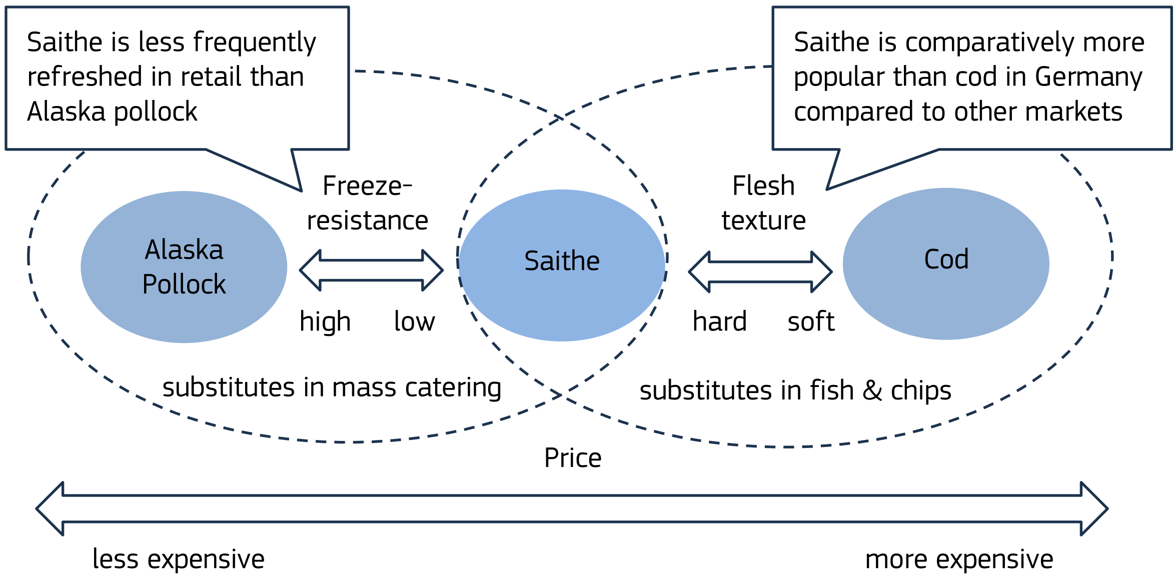
In retail, saithe comes mainly as fresh or frozen filet. According to stakeholders, refreshed saithe filets are rare in retail due to the low resistance to freezing fish, which makes the texture of refreshed saithe less attractive than the texture of refreshed Alaska pollack. Saithe can also be processed to be sold as fish fingers, while Alaska pollack is also preferred most of the time. Saithe loins are sold in retail as premium products due to the absence of fish bones. Mass catering sells prepared fillets from a supply of frozen fillets. Saithe is also appreciated by the German consumer in fish sandwiches, which are mostly sold on fairgrounds by mobile fish shops, from a supply of fresh fillets. Saithe is used as raw material for as backed products sold in fish and chips dishes. According to stakeholders, saithe is rarely sold in restaurants, where other whitefish like cod and redfish are preferred. When it does, saithe filets are mostly presented baked as *Schnitzel*.

According to stakeholders, the German consumer preference for saithe is firstly driven by price.. Saithe is considered in HORECA and - to a lesser extent - in retail as an entry-level product. In mass catering, it is a substitute for Alaska pollack. In fish & chips, it is a more affordable substitute for cod. In restaurants,

[25] https://www.fischinfo.de/images/broschueren/pdf/FIZ_DF_2024.pdf

stakeholders report that preferences are mainly based on color of the fish. Among similar fish species, redfish is considered as the most valuable, followed by cod, which has clearer white flesh than saithe. According to stakeholders, Germany also differentiates itself from other countries for its lower preference for fishes with soft flesh, and thus a stronger preference for saithe over other whitefish, notably in retail. On the German market, saithe is also often preferred to cod in fish & chips and other channels selling backed fish (on the contrary to the UK market, where cod is mostly used).

Figure 27: Market characteristics of saithe filets compared to substitute products



Source: EUMOFA elaboration based on interviews

The average consumer of saithe in retail is estimated by stakeholders to be between 35 and 80 years old. As saithe is cheaper than other fish species, its consumer's purchasing power is likely to be lower than for other fish species. Geographically, fish consumption in Germany is strongly correlated with the proximity with the sea. However, stakeholders also report that a large part of saithe consumption in retail occur in west and south Germany. Among whitefishes sold in retail, saithe is more commonly sold in the west of the country, whereas cod would be preferred in the south. Consumption of saithe in fish & chips, *Imbisse* and fish shops mostly occur in coastal Länder. Saithe is sold in mass catering throughout the whole country. Some companies choose saithe to be the fish served in canteens on Fridays, a tradition in the predominantly catholic regions of South Germany.

The seasonality of saithe consumption in Germany is characterized in retail by a decrease in the four summer months: May, June, July and August. This situation is common to other fish species in Germany. Indeed, these months are known as the barbecue season, which favors meat over fish. Seasonality of consumption in HORECA is more stable over the year, except for a strong decline in December, when most mass catering, street-food shops and other restaurants are closed.

According to German stakeholders, recent rising prices for cod and other whitefishes could benefit saithe more than other affordable substitutes in Germany as it is a specie the German consumer is already well familiar with.

5.3 Price transmission in the supply chain

5.3.1 First sale prices

According to Eurostat, the first sale price for saithe caught by the German fleet, landed both abroad and in Germany, reached 1,91 EUR/kg in 2024. Over the past decade, the average first sale price increased by 16% in nominal terms, from 1,65 EUR/kg to 1,91 EUR/kg. In real terms, prices increased by 5% between 2020 and 2024.

Table 40: Evolution of first sale volume, value and price for saithe landed by the German fleet in Denmark (2020-2024, nominal value)

	2020	2021	2022	2023	2024	Evol. 2020/24
Volume (tonnes product weight)	2.660	1.940	1.958	2.749	2.856	+7%
Nominal value (1.000 EUR)	4.381	3.622	4.976	5.804	5.479	+25%
Nominal price (EUR/kg)	1,65	1,87	2,55	2,11	1,91	+16%

Source: Eurostat

According to stakeholders, approximately half of the German catches are sold in auction; the other half are sold under contracts and are directly transferred by trucks in Germany. The auction is used for crew payment to be directly based on a market price.

Saithe is gutted on the boat before landing. Therefore, first sale price already includes a yield of 1,19 for the gutted fish, head-on; against 1,00 for live fish (12% loss). Stakeholders also report a 15% share of auction fees included in the first sale price in Denmark (over a potential price of 2,00 EUR/kg for gutted fish, the fishers get paid 1,70 EUR/kg).

5.3.2 Import prices

The main imported saithe product is frozen filet, with 62% of the total volume in 2024. Imports of fresh whole and gutted, head-on saithe, which consist mainly in German landings, accounted the same year for 21% of the total, and imports of fresh fillet for 10%. Other products, which include frozen whole fish, frozen other cuts and prepared saithe only account for 7% of the total.

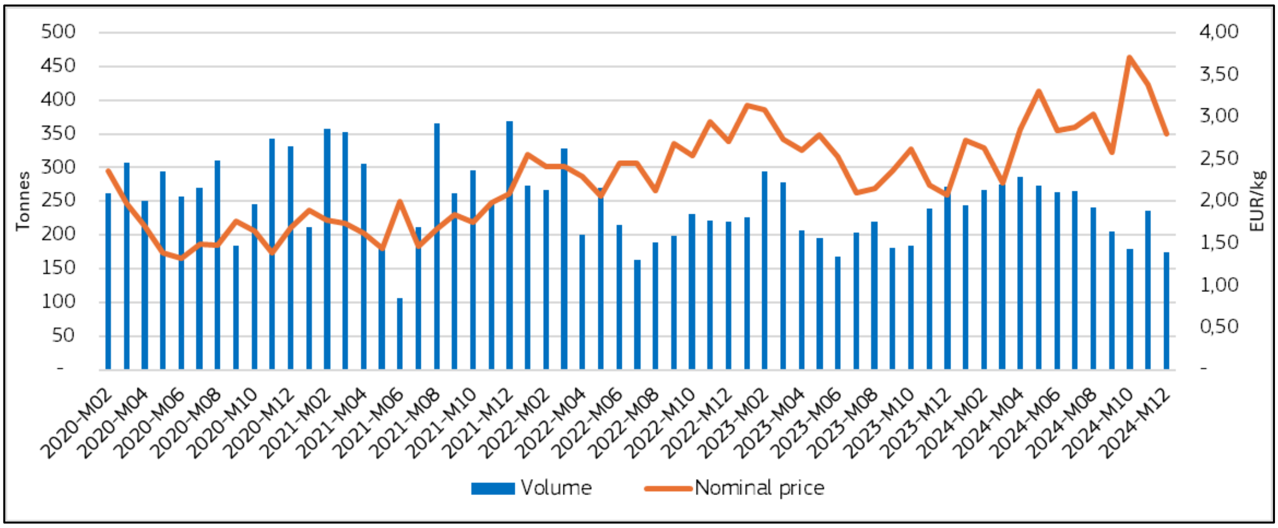
Table 41: Evolution of import prices (nominal value) for saithe products in Germany (EUR/kg, 2020-2024)

Preservation	Presentation	2020	2021	2022	2023	2024	Evol. 2020/24
Live/fresh	**Whole/gutted**	1,65	1,77	2,46	2,54	2,89	+76%
	Fillet	5,25	5,57	7,15	7,08	7,24	+38%
Frozen	**Fillet**	3,50	3,62	5,66	5,80	4,74	+36%
Average all products		3,16	3,29	5,03	5,20	4,49	+42%

Source: EUROSTAT-COMEXT

The monthly evolution of volumes and prices of imported fresh whole saithe over the past four years show both a downward trend in volumes and an upward trend in prices. Stakeholders also report a seasonality in the demand in fresh fillet in retail, with a strong decrease in summer. This seasonality can be observed in the figure below to a certain extent with both lower imported volumes and prices from May to August, especially in 2021 and 2022.

Figure 28: Monthly import volumes (product weight) and prices (nominal value) for fresh whole saithe in Germany (2020-2024)

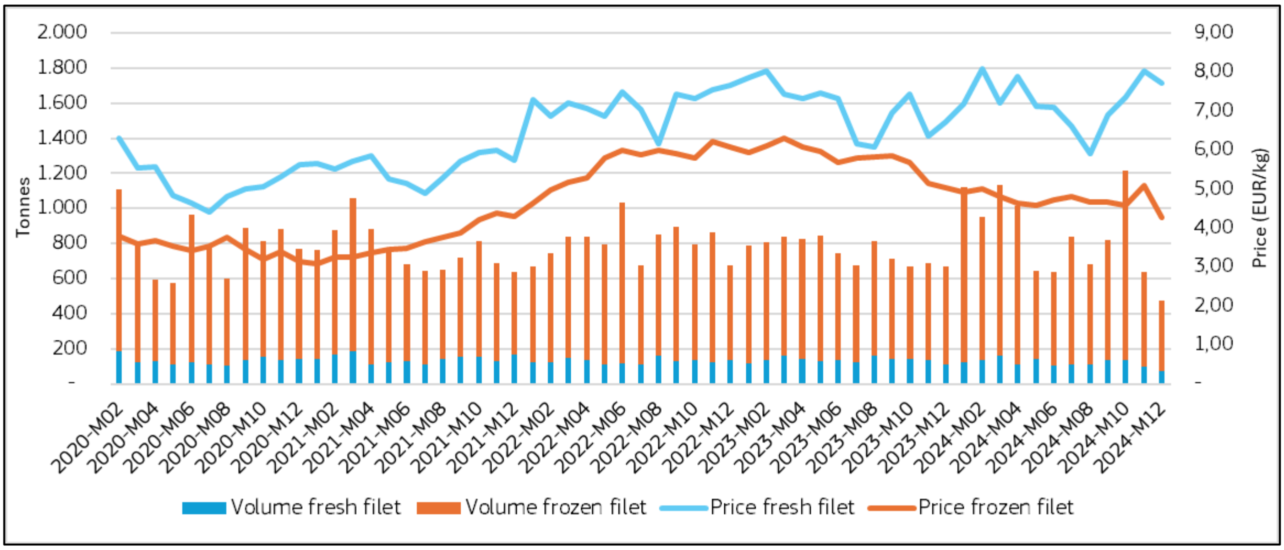


Source: EUMOFA elaboration based on Eurostat data

The monthly evolution of volumes and prices of imported fresh and frozen fillet over the past four years show the significant differences between the two import fluxes. Prices of imported fresh filet vary strongly throughout the year; the lowest prices are observed in summer. The imported volumes are relatively stable on the long run. Prices of imported frozen filets are more stable throughout the year, while imported volumes appear to be less stable, independently from the season. Over the past four years, prices increased in 2021 and 2022, peaked in 2023 and have decreased since.

The evolution of prices for saithe filets is linked to the price of other fish species substitutable with saithe in HORECA, notably cod (in fish & chips) and Alaska pollock (in mass catering). In 2025, tight quotas and supply for cod, a species widely used in fish & chips, notably in the UK, have led to an increasing demand for saithe filets, with a rise in price which was felt by German stakeholders.

Figure 29: Monthly import volumes (product weight) and prices (nominal value) for fresh and frozen filet of saithe in Germany (2020-2024)



Source: EUMOFA elaboration based on Eurostat data

5.3.3 Ex-factory and wholesale prices

According to stakeholders, the price paid by large wholesaler for fresh filet of saithe, either fileted in Germany or abroad, range from 5,65 EUR/kg to 8,50 EUR/kg. The monthly evolution of import prices over the past four years displays a similar range, with monthly average prices between 5,91 EUR/kg in August 2024 and 8,02 EUR/kg in November 2024. The average price of imported fresh filet in 2024, which reach 7,24 EUR/kg, is deemed realistic by wholesalers as a reference price.

The wholesale price, at which fresh filet of saithe is sold by the wholesaler to the retailer, is estimated by stakeholders to range between 11,00 EUR/kg and 14,00 EUR/kg.

5.3.4 Retail prices

During the fieldwork of this study, conducted in August, no saithe products could be found among 3 supermarkets and 1 discounter visited. According to stakeholders, the common price for fresh/refreshed filet of saithe in retail range from 15,00 EUR/kg to 20,00 EUR/kg. Temporary discounts can bring the price down to 12,90 EUR/kg. The price for the premium cut of loin generally reaches 20,00 EUR/kg.

The fieldwork allowed the identification of two prices for saithe sold in HORECA in Bremerhaven. Baked filet of saithe of approximately 250 g was sold 36,00 EUR/kg by a fishmonger having its own fish and chips shop, and 44,80 EUR/kg in a seafood restaurant located in a touristic area.

5.3.5 Price transmission

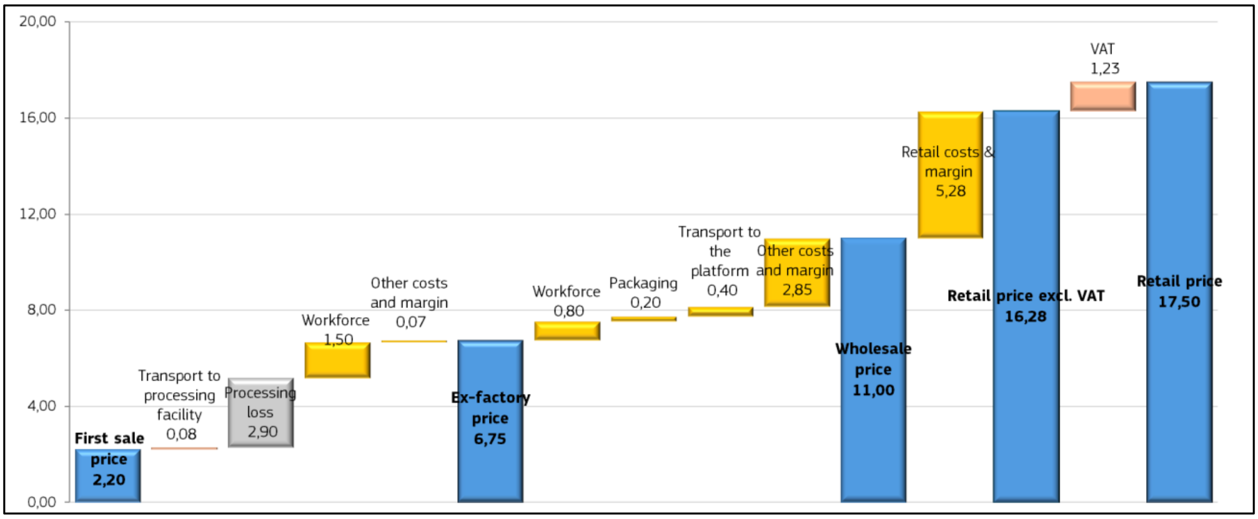
A price structure analysis is presented for the year 2025 (9 first months) for saithe caught by the German fleet, landed in Denmark, transported as fresh, whole and gutted in Germany, fileted in Germany, packaged and transported to the point of sale by large wholesalers and sold in Germany as fresh fillets under packaging in large retail.

Table 42: Costs and margins for fresh fillet of saithe from German catches landed in Denmark, sold in a German supermarket (EUR/kg, 2025)

Level	Price	% of the final price	Source
First sale price (1)	**2,20**	**13%**	**Average price in 2025 (9 months) for landings in Denmark**
Transport to processing facility	0,08	0%	Interviews
Processing loss	2,90	17%	Interviews/calculated
Labour costs	1,50	9%	Interviews
Other costs	0,07	0%	Calculated
Ex-factory price (2)	**6,75**	**39%**	**Interviews/calculated**
Workforce	0,80	5%	Interviews
Packaging	0,20	1%	Interviews
Transport to the platform	0,40	2%	Interviews
Other costs and margin	2,85	16%	Calculated
Wholesale price (3)	**11,00**	**63%**	**Interviews/calculated**
Retail costs & margin	5,28	30%	Calculated
Retail price excl. VAT	**16,28**	**93%**	**Calculated**
VAT	1,23	7%	7% VAT
Retail price (4)	**17,50**	**100%**	**Interviews**

Source: EUMOFA elaboration

Figure 30: Price transmission for fresh fillet of saithe from German catches landed in Denmark, sold in a German supermarket (EUR/kg, 2025)



Source: EUMOFA elaboration

Notes:

(1) The first sale price is the average price from January to September 2025 for landings in Denmark. It is deemed consistent by German stakeholders landing in Denmark. In this price structure, the fish is gutted on the fishing boat, as it is commonly done for saithe.

(2) The ex-factory price is for filets of saithe processed in Germany from imports of gutted fish from Denmark. Stakeholders report a processing loss from gutted fish to fish filet slightly lower than the EUMOFA reference figure (56% instead of 57%). Labor and transport costs have been estimated from interviews carried out in August 2025; the other costs have been calculated based on the difference between the ex-factory price and processing costs. The final ex-factory price is lower than the price of import for saithe fillet, which reached 7,24 EUR/kg in 2024 (latest year for which this data is available).

(3) The wholesale price chosen ranks relatively low on the price range reported by stakeholders. This choice is consistent with information from interviews carried out in August 2025 on ex-factory price, labor, packaging and transport costs. The total costs and margin at the wholesale stage, which reach 4,25 EUR/kg, are relatively high on the range provided by stakeholders. An alternative price structure with a sourcing of imported fresh filets from Denmark would provide a total value for costs and margin of 3,76 EUR/kg, including 2,36 EUR/kg of other costs and margin (excluding workforce, transport and packaging costs). According to this price structure analysis, the gross margin in wholesale ranges between 30% and 40%. It is higher when processing is done in Germany than when it is done in Denmark.

(4) The retail price is in the middle for the price range from 15,00 EUR/kg to 20,00 EUR/kg provided by stakeholders for fresh filets of saithe in large retail (interviews August 2025). It excludes temporary discounts on products, which can lower the price to 12,90 EUR/kg. In Germany, the Value-Added Tax for food in retail reaches 7%. According to this price structure analysis, the gross margin in large retail (excluding VAT) reaches 30%.

Data provided by stakeholders, especially at wholesale level, was insufficient to build a price structure analysis for saithe sold in mass catering, which is main sale channel for saithe in Germany. The price of imported frozen fillet of 4,74 EUR/kg in 2024 can serve as a reference price for the raw material used in this other supply chain.

6. CONCLUSIONS

This study provides price transmission analyses for fresh filets of saithe sold in large retail in France, and Germany, a price transmission for fresh filet of saithe exported from Denmark and a price transmission analysis for fresh saithe loin sold in institutional catering in France.

Table 43: Price structure analysis for fresh filet of saithe sold in large retail (EUR/kg, 2025)

Country	France	Germany	Denmark (size 4)
First sale price	2,50	2,20	1,94
Ex-factory price	6,60	6,75	6,04
Export/import price (filet)			7,51
Wholesale price	8,00	11,00	
Retail price	14,00	17,50	

Source: EUMOFA

Price transmission analyses for fresh filet of saithe show little difference among the three Member States studied. The supply chain for saithe in the EU is indeed relatively unified. The fish used in French and German supply chains is mainly landed and sold in first-sales in Denmark, implying little differences in terms of first sale price. The first sale price is slightly lower for Denmark as it focuses on size 4 saithe only.

Ex-factory prices are similar in France, Germany and Denmark. Apart from losses, other costs and margin in processing account for 11% of the retail price in France and 9% in Germany. Export price for fresh filet from Denmark is higher than ex-factory prices in France and in Germany (between +0,61 and +0,76 EUR/kg). If the supply chains chosen for price transmission analyses in France and in Germany illustrate the case of imported whole fish processed domestically, a significant share of both national markets are directly supplied with imported fish filets.

The wholesale price is higher in Germany than in France (+3,00 EUR/kg). Costs and margin estimated for the wholesale stage reach 10% of the retail price in France and 24% in Germany. The wholesale sector in the saithe supply chain is relatively concentrated compared to other fish species, in particular on the German market. In both countries, large wholesalers are either national or European actors, specialized either on the fresh or the frozen market.

Costs and margin in retail vary from 30% to 38% of the retail price. This estimated share is higher in France than in Germany. This difference could be due to varying degrees in the concentration of actors in the wholesale and the retail sector.

Table 44: Price structure analysis for saithe loin sold in institutional catering (EUR/kg, 2025)

Country	France
First sale price	
Ex-factory price	10,50
Wholesale price	12,90
Retail price	23,00

Source: EUMOFA

The price structure analysis built for saithe portion sold in institutional catering in France first illustrates the significantly higher price (+4,10 EUR/kg) of fresh loin compared to fresh filet at ex-factory stage. The estimate for costs and price in institutional catering gives a share of costs and margin of 38% at the wholesale stage, like the price transmission analysis for saithe sold in large retail. The share of costs and margin at institutional catering stage reaches 35%, which is lower than the share at large retail stage (38%).

The end of the MSC certification for saithe fishing fleets in France, Denmark and Germany in June 2025 has risen the fear of a substitution of domestically caught saithe by imports of saithe, notably from extra-EU origins such as Norway and Iceland, whose fleets remained certified. The real impact of this loss is deemed less significant than expected by stakeholders. The impact is particularly low for fresh and frozen filets in retail, as well as for the demand by small fishmongers, fish & chips shops and restaurants. A stronger impact is expected for the demand by mass catering, in particular for canteens in schools and universities. However, stakeholders also admit that the loss of MSC certification is still too recent to appreciate its impact on the market.

In all three countries studied, saithe is characterized by its competition and potential substitution with other whitefish species. The low segment of the saithe market (mass catering) in terms of price is substitutable Alaska pollock, while the high segment (large retail, fish & chips) is substitutable with cod. On the short and medium term, saithe demand will benefit from the decreasing supply in cod, due to more restrictive quotas, with interesting perspectives for exports to the UK, driven by the demand for fish & chips. The price dynamic for saithe is expected to follow the upward trend of the cod market.

According to stakeholders, saithe will not be completely spared by a structural decline in fish consumption over the medium and long term, due to the ageing of consumer population. However, in retail, the average consumer will increasingly be looking for practicality and “easy to cook” options. In this context, saithe is a relatively convenient fish species, with little fish bones. Therefore, the decrease in consumption may be less important for saithe than for other fish species. In terms of products, the frozen share of the saithe market is expected to grow, as well as the demand for premium presentations such as loin. Stakeholders reported new premium products on the market consisting in saithe loin in modified atmosphere packaging.

7. Stakeholders interviewed

- France
  - One fishing company
  - One producer organisation
  - Fish auction
  - Two wholesalers, one of which also transforms
  - One *mareyeur* organization
  - One fish co-product trader

- Denmark
  - Fish auction
  - Danish Seafood Association
  - Processor/exporter

- Germany
  - One producer organisation
  - Two wholesalers
  - Fisch-Informationszentrum Hamburg (FIZ)

KL-01-26-017-EN-N

EUMOFA

European Market Observatory for
Fisheries and Aquaculture Products

www.eumofa.eu

Publications Office
of the European Union

ISBN 978-92-68-38045-1

doi: 10.2771/3714148