



ATLANTIC SALMON (*SALMO SALAR*)



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BIOLOGY AND HABITAT

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

Native to the Atlantic Ocean, the Atlantic salmon has been introduced throughout the world for aquaculture purposes.

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

The wild Atlantic salmon lives in the Northern Atlantic Ocean, in rivers flowing into the North Atlantic, and, due to human introduction, in the North Pacific Ocean.

RESOURCE, EXPLOITATION AND MANAGEMENT

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

Minimum conservation size is established at 60 cm in all fishing areas, and 50 cm only in Bothnian Bay (Finland).

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

The main fishing gears used are drifnets, gillnets and similar nets, hooks and lines, and pots and traps. The species is also massively produced by aquaculture.

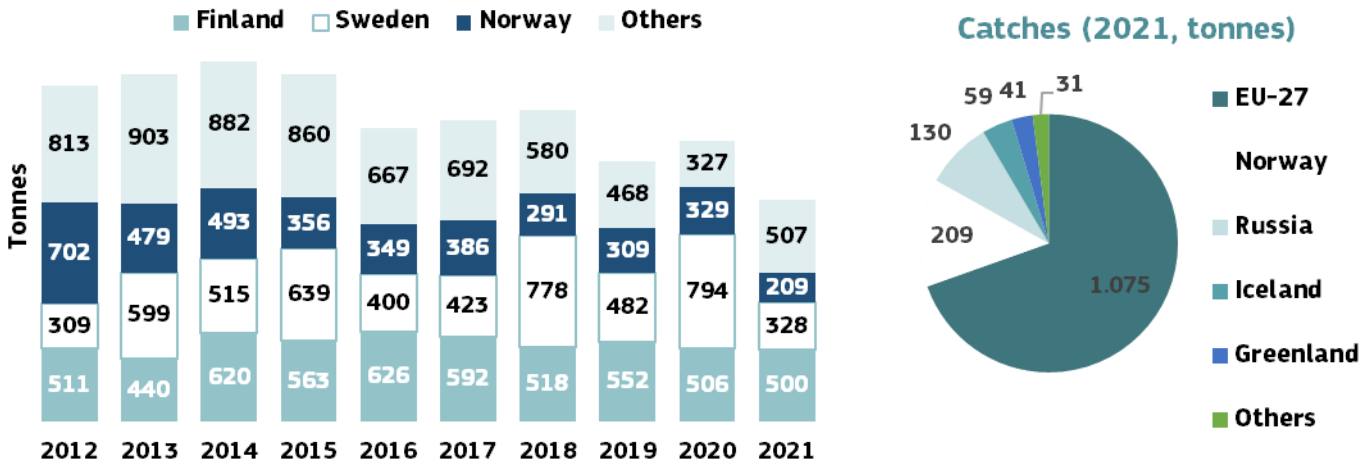
Atlantic salmon



CATCHES

- Catches of wild Atlantic salmon have decreased significantly in the last decades. In 2021, global catches of Atlantic salmon reached 1.545 tonnes (i.e. 0,002% of the total global catches).
- Between 2012 and 2021, Atlantic salmon catches have dropped by 34%.

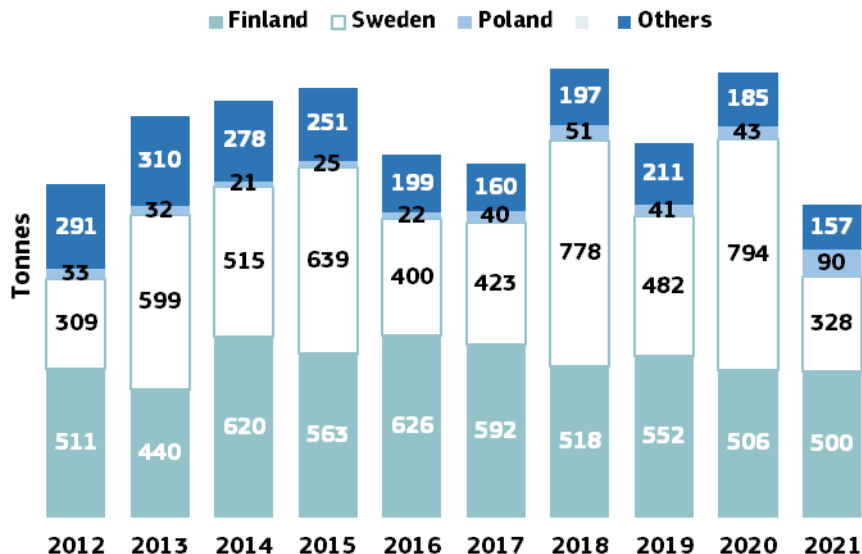
Evolution of world catches



Source: FAO

Evolution of EU catches

- In 2021, the EU provided **70%** of the global Atlantic salmon catches (vs. 49% in 2012). Finland and Sweden were the main EU producers. In 2021, they contributed to 77% of the EU production of Atlantic salmon.



Source: FAO

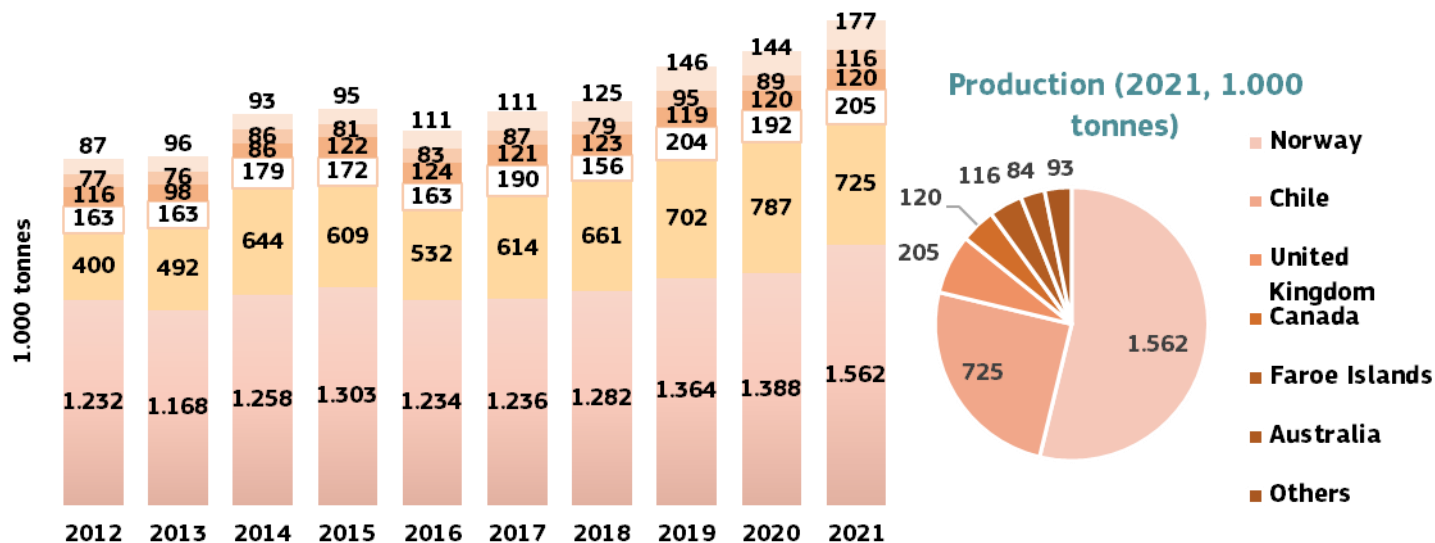


AQUACULTURE PRODUCTION

Evolution of world production

The global production of Atlantic salmon has been increasing since the early 1900s. During the last decade, it has increased by 40% and has reached over 2,9 million tonnes in 2021. Norway and Chile were the leaders of salmon production, accounting for 79% of the global production. Both have significantly increased their production (by respectively 27% and 81% between 2012 and 2021).

■ Norway ■ Chile ■ United Kingdom ■ Canada ■ Faroe Islands ■ Others



Source: FAO

Evolution of EU production

After Brexit, the EU production of Atlantic salmon become very limited (15,000 tonnes in 2021) (UK was the largest producer within the EU). EU production occurs mainly in Ireland (89% of the EU production in 2021) and to lesser extent in Denmark (11%).

Atlantic salmon



PROCESSING

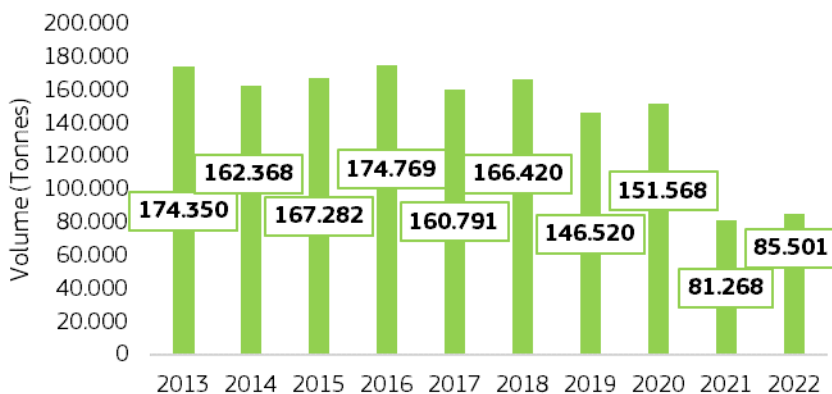
- A significant processing activity of Atlantic salmon exists (mainly smoking).
- 2 [PRODCOM](#) codes refer to Atlantic salmon:
 - 10202425: “Smoked Pacific, Atlantic and Danube salmon (including fillets, excluding heads, tails and maws)”.
 - 10202510: “Prepared or preserved salmon, whole or in pieces (excluding minced products and prepared meals and dishes)”.

• Smoked salmon:

The annual EU production of smoked salmon has been around 147.000 tonnes on average over the period between 2013 and 2022. In 2022, the EU production reached 85.501 tonnes (EU-27).

Lithuania, France, and Denmark were the main producers of smoked salmon in the EU in 2022, covering 35%, 26% and 18% of the EU production, respectively.

EU production of smoked salmon

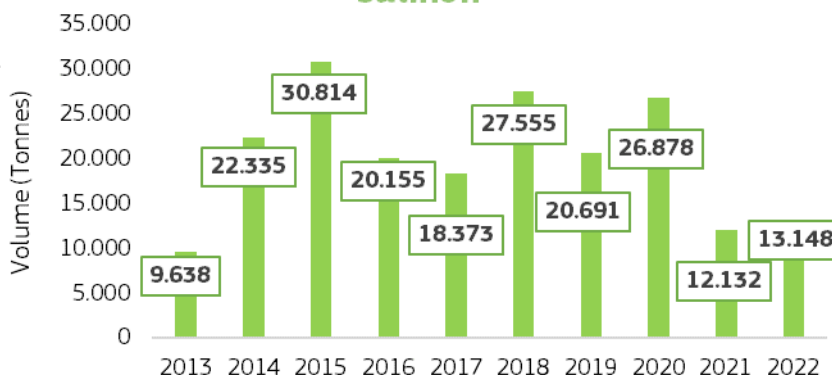


• Prepared or preserved salmon:

Between 2013 and 2022, the EU production (EU-27) of prepared or preserved salmon has fluctuated, with an overall increasing trend over this period (by +36%).

France, Lithuania and Sweden were the main producers. In 2022, they provided 75% of the EU production.

EU production of prepared or preserved salmon



Atlantic salmon



TRADE

- Combined nomenclature ([Read more](#))

EU trade of salmon (2022, EU-27)

CN code	Product	EU imports	EU exports
03 01 99 11	Live Pacific salmon (whole) , Atlantic salmon and Danube salmon	8	15
03 02 13 00	Fresh or chilled (whole) , Pacific salmon	80	43
03 02 14 00	Fresh or chilled (whole) , Atlantic salmon and Danube salmon	862.267	8.594
03 03 11 00	Frozen whole sockeye salmon	13.152	33
03 03 12 00	Frozen whole Pacific salmon (excl. sockeye salmon)	8.207	320
03 03 13 00	Frozen (whole) , Atlantic salmon and Danube salmon	8.846	5.433
03 04 41 00	Fish fillets and other fish meat, fresh or chilled , Pacific salmon, Atlantic salmon and Danube salmon	63.019	21.248
03 04 81 00	Fish fillets and other fish meat, frozen , Pacific salmon, Atlantic salmon and Danube salmon	71.640	29.956
03 05 39 10	Salted or in brine salmon (Pacific salmon, Atlantic salmon, and Danube salmon)	34	125
03 05 41 00	Smoked salmon (including fillets, other than edible fish offal)	3.826	20.143
03 05 69 50	Salted Salmon but not dried or smoked and fish in brine, other than edible fish offal	0	27
16 04 11 00	Prepared or preserved salmon , whole or in pieces	3.374	6.908
16 04 20 10	Prepared or preserved salmon, other	183	1.544
Total		1.034.634	94.390

In EUROSTAT-COMEXT, Atlantic salmon (*Salmo salar*) is combined with Pacific salmon, Danube salmon and other species.

Source: EUROSTAT-COMEXT

Atlantic salmon

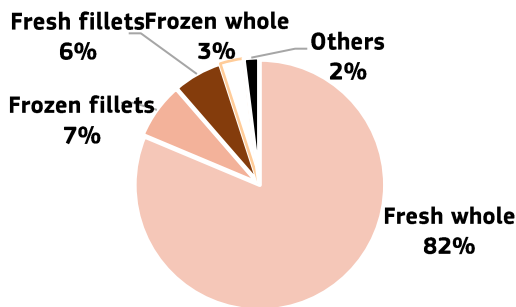


TRADE

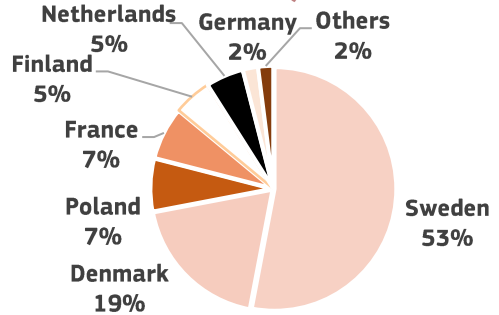
EU imports of Salmon products (tonnes - 2022)

EU imports from third countries reached over 1 million tonnes in 2022, from which 862.354 tonnes of fresh whole salmon, i.e. 82% of the EU imports. Norway was by far the main supplier of the EU market. In 2022, Norway contributed to 81% of the EU imports from third countries. Sweden and Denmark were the main importers, accounting for 72% of EU imports. Both act as hubs and re-export almost all products to the main EU markets for salmon (Poland, Germany and France).

Imports by product type (2022, % in volume)



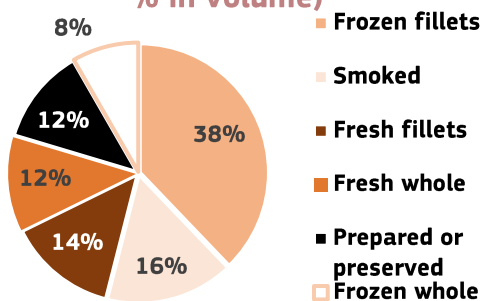
EU importers (2022, % in volume)



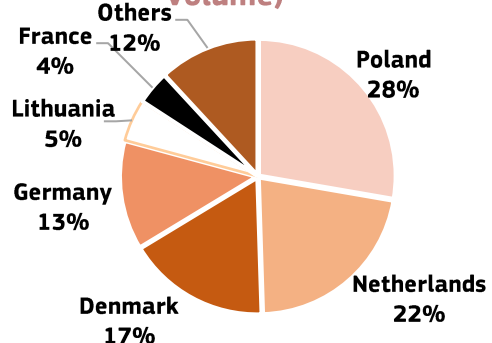
EU exports of Salmon products (tonnes - 2022)

Extra-EU exports reached over 94.390 tonnes in 2022. 32% of exports concerned frozen fillets salmon, while lesser volumes were exported in fresh fillets (23%) or smoked (21%). Main destinations were the United States, the United Kingdom and Switzerland (37%, 10% and 9% of EU exports in volume terms, respectively). Main exporters were the Netherlands (28% of EU exports to third countries), Poland (22%), and Denmark (17%).

Exports by product type (2022, % in volume)



EU exporters (2022, % in volume)

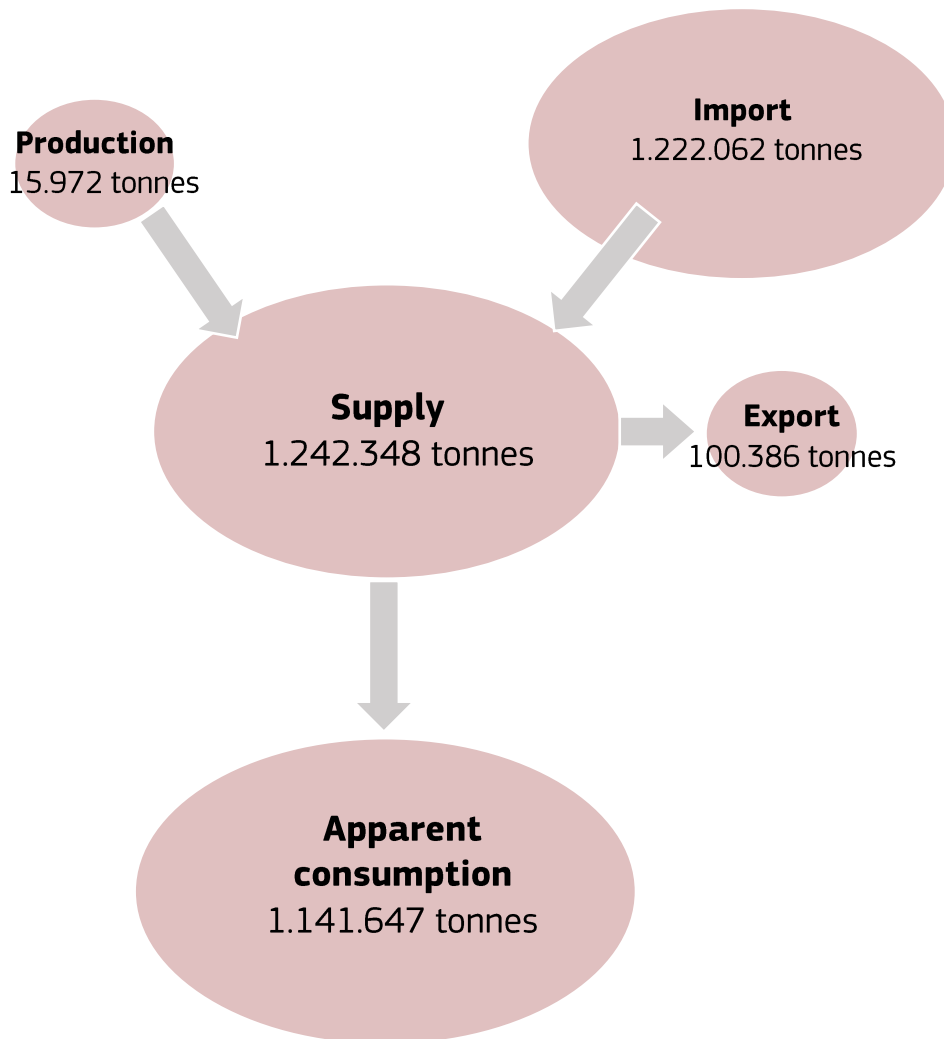




Supply balance

EU supply balance (2021¹) – Tonnes of live weight equivalent² – Salmon:

Production data concern the Atlantic salmon while trade data include other species of salmon.



Source: FAO/ EUROSTAT-COMEXT

¹ Supply balance is provided for the year 2021 (trade data for 2021 were taken into account). Detailed trade data provided in the slides 5 and 6 concern the year 2022.

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

Atlantic salmon



PRICES ALONG THE SUPPLY CHAIN (EUR/kg)

Ex-farm (fresh farmed)

Ex-farm prices are provided for Ireland, the main and only major EU producer.

	2014	2015	2016	2017	2018	2019	2020	2021	Source
Ireland	6,16	6,85	6,41	7,28	9,56	9,44	9,24	8,03	EUMOFA

Wholesale

Wholesale prices are provided for Rungis (Paris, France).

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*	Source
Salmon fresh whole gutted (2-3 kg) from Scotland	5,81	5,79	8,66	8,61	8,10	7,18	7,26	7,16	9,98	11,83	Rungis (RNM)
Salmon fresh whole gutted (2-3 kg) from Norway	5,02	5,27	8,05	7,87	7,37	6,99	6,94	6,87	9,47	10,37	Rungis (RNM)
Salmon fresh whole gutted (2-3 kg) Label Rouge from Scotland	6,70	7,01	9,49	10,89	9,82	9,70	9,24	9,24	12,66	13,07	Rungis (RNM)
Salmon fresh fillets (3-4 kg) from Norway	10,57	10,63	11,69	12,57	12,47	11,77	10,80	10,80	16,98	17,02	Rungis (RNM)
Smoked salmon organic	28,05	29,00	29,00	29,00	31,94	37,00	38,00	38,00	38,89	37,93	Rungis (RNM)

(*) from January to November 2023

Retail/consumption

Retail prices refer to France and Spain.

	2014	2015	2016	2017	2018	2019	2020	2021	2022*	Source
France (whole salmon, aquaculture, <4kg)	9,29	9,26	11,09	12,35	11,60	11,51	11,47	n.a.	n.a.	EUMOFA
France (Salmon, fillets, aquaculture, 1 kg)	14,74	14,54	17,54	19,24	18,79	18,52	19,30	n.a.	n.a.	EUMOFA
France (Salmon, "pavé", aquaculture, 1 kg)	16,90	16,71	19,40	21,12	20,88	20,86	21,68	n.a.	n.a.	EUMOFA
Spain (whole)	11,48	11,10	12,85	13,77	14,16	n.a.	n.a.	n.a.	n.a.	EUMOFA
Spain (fresh)	8,85	8,63	10,38	10,76	10,49	10,18	9,97	9,77	12,19	
Spain (frozen)	11,88	13,36	13,43	14,73	14,83	15,48	16,17	16,76	18,29	MAPA
Spain (smoked)	21,66	21,36	23,11	24,63	24,89	25,41	25,69	27,06	30,61	

(*) last year available

Atlantic salmon



PRICES ALONG THE SUPPLY CHAIN (EUR/kg)

Import (fresh whole)

Import prices are provided for Sweden, Denmark and Poland, the largest EU importers from third countries.

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*	Source
Sweden	4,92	4,81	6,39	6,50	6,31	6,07	5,29	5,74	7,70	8,54	EUMOFA
Denmark	4,92	4,80	6,39	6,57	6,32	6,04	5,22	5,78	7,89	8,85	EUMOFA
Poland	4,93	4,76	6,11	6,23	5,95	6,09	5,69	5,36	6,79	7,88	EUMOFA

(*) From January to August 2023

Export (frozen fillets)

Export prices refer to the Poland, Netherlands, and Denmark, the largest EU exporters to third countries.

	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023*	Source
Poland	5,57	5,78	6,51	8,17	7,41	7,95	6,99	6,68	9,02	10,21	EUMOFA
Netherlands	8,01	9,99	10,49	10,06	10,29	9,40	8,03	10,40	13,91	16,02	EUMOFA
Denmark	9,12	9,53	10,67	13,36	10,81	10,61	9,23	9,56	12,80	13,62	EUMOFA

(*) From January to August 2023

Atlantic salmon



MARKETING

- National lists of commercial designations ([Read more](#))
- Information system on commercial designations and scientific names in all EU languages ([Read more](#))
- Applicable marketing standards ([Read more](#))
- In the EU, there is one name protected under Protected Geographical Indication: **PGI “Clare Island Salmon”** in Ireland.

CONSUMPTION

- Second most consumed species in the EU after tuna (source: [The EU Fish Market – 2023 edition](#), EUMOFA)
- Apparent consumption per capita in 2021: **2,60 kg** live weight equivalent (source: [The EU Fish Market – 2023 edition](#), EUMOFA)
- Nutritional value (Atlantic salmon, nutrition values per serving 100g) ([Read more](#))

Nutrition values	Farmed	Wild
Energy (kcal)	208	142
Total fat (g)	13,42	6,34
Saturates (g)	3,05	0,981
Carbohydrate (g)	0	0
Protein (g)	20,42	19,84
Salt (mg)	147,5	110