



## 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



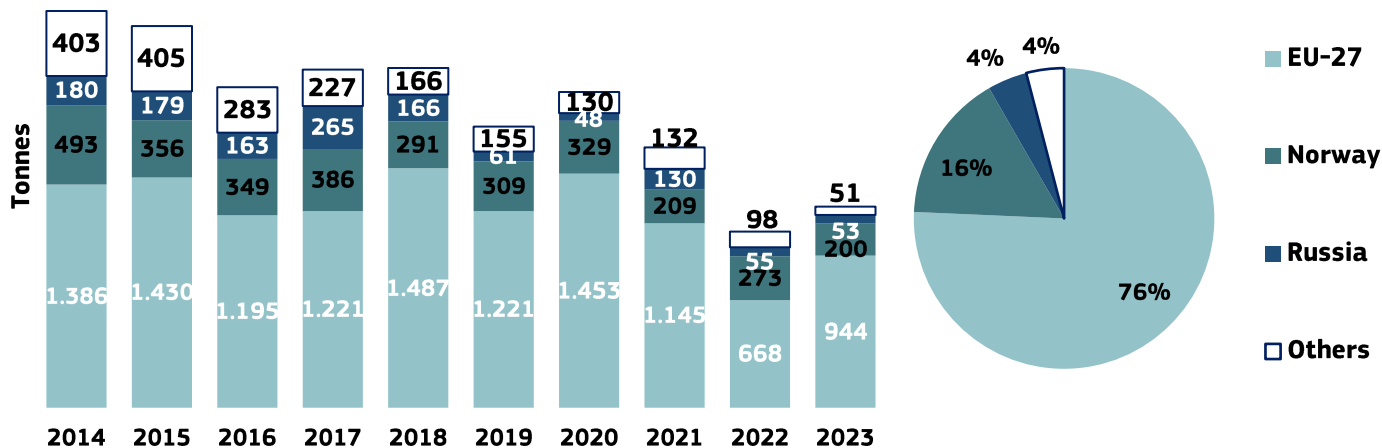
## CATCHES

### Evolution of world catches

- Catches of wild Atlantic salmon have decreased significantly in the last decades. In 2023, global catches of Atlantic salmon reached 1. 248 tonnes (i.e. 0,001% of the total global catches).
- Between 2014 and 2023, Atlantic salmon catches have dropped by 49%.

■ EU-27 ■ Norway ■ Russia □ Others

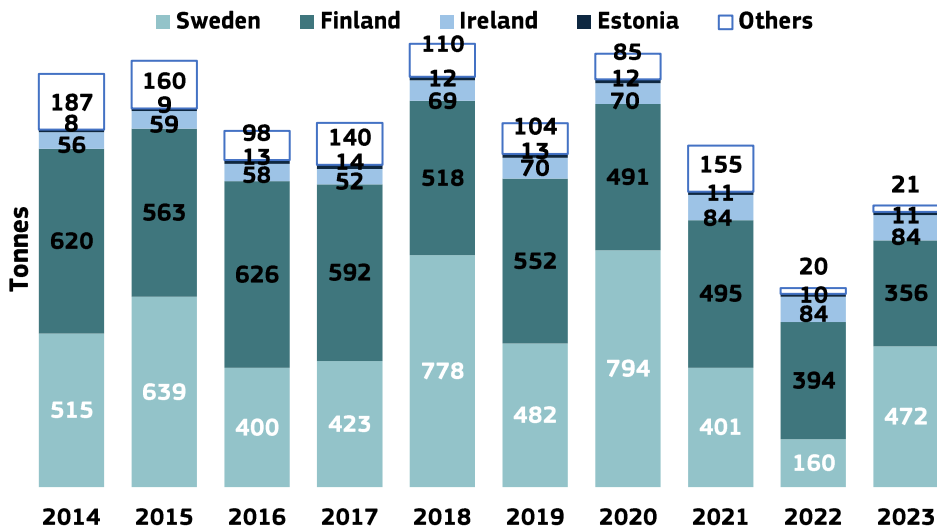
Catches (2023, % volume)



Source: FAO

### Evolution of EU catches

- In 2023, the EU provided **76%** of the global Atlantic salmon catches (vs. 49% in 2012). Sweden was the main EU producer, contributing to 50% of the EU production of Atlantic salmon in 2023, followed by Finland (38% of the EU catches) and Ireland (9%). EU catches decreased by 32% between 2014 and 2023 in relation to the decrease of the main producers, except for Ireland (+50% over the last decade).



Source: FAO

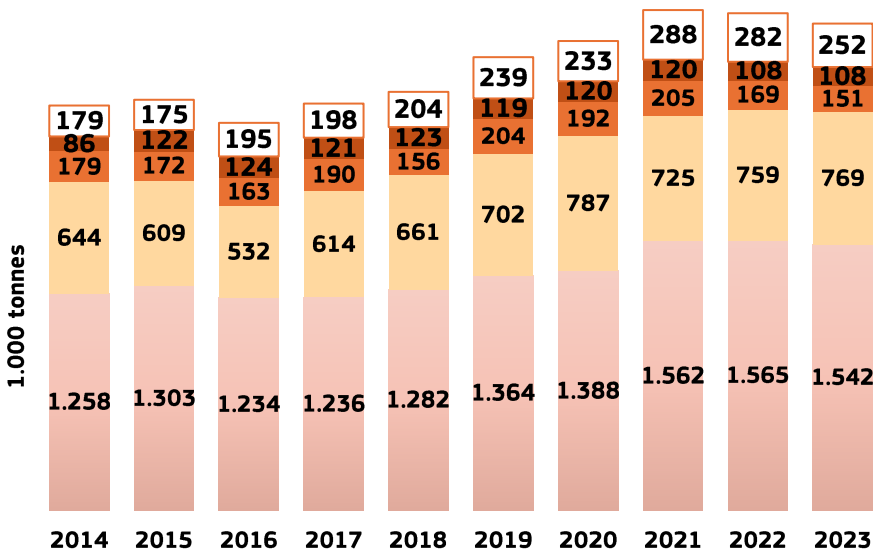


# AQUACULTURE PRODUCTION

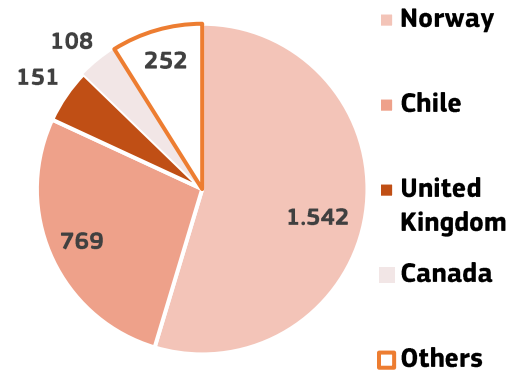
## Evolution of world production

The global production of Atlantic salmon has been increasing since the early 1900s. During the last decade, it has increased by 20% and reached over 2,8 million tonnes in 2023. Norway and Chile were the leaders of salmon production, accounting for 82% of the global production. Both have significantly increased their production (by respectively 23% and 19% between 2014 and 2023).

■ Norway ■ Chile ■ United Kingdom ■ Canada ■ Others



Production (2023, 1,000 tonnes)



Source: FAO

## Evolution of EU production

After Brexit, the EU production of Atlantic salmon became very limited (9,289 tonnes in 2023) (UK was the largest producer within the EU). Currently, EU salmon production occurs exclusively in Ireland (88% of the EU production) and in Denmark (12%) in 2023. Irish production is characterised by being 100% organic.

## Atlantic salmon



## PROCESSING

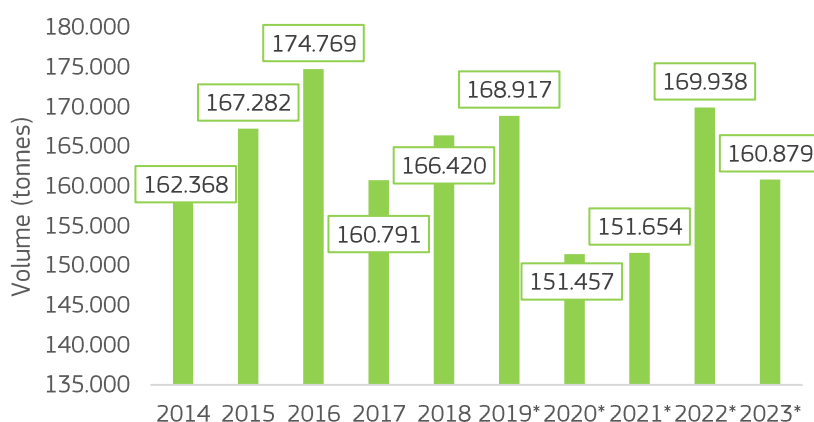
- A significant processing activity of Atlantic salmon exists (mainly smoking).
- 2 [PRODCOM](#) codes refer to Atlantic salmon:
  - 10202425: “Smoked Pacific, Atlantic and Danube salmon (including fillets, excluding heads, tails and maws)”.
  - 10202510: “Prepared or preserved salmon, whole or in pieces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

### Smoked salmon:

The annual EU production of smoked salmon has been around 166.000 tonnes on average over the period between 2014 and 2020. The EU production dropped in 2021 to 151.457 tonnes before reaching 160.879 tonnes in 2023.

Poland, France, and Lithuania were the main producers of smoked salmon in the EU in 2023, covering 48%, 13% and 12% of the EU production, respectively.

### EU production of smoked salmon

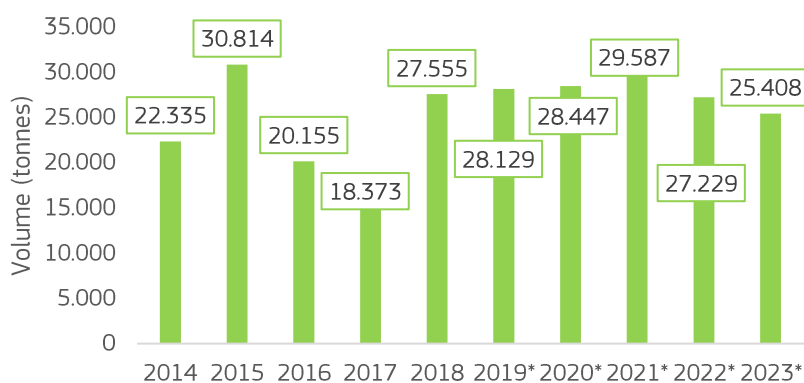


### Prepared or preserved salmon:

Between 2014 and 2023, the EU production (EU-27) of prepared or preserved salmon has fluctuated, with an overall increasing trend over this period (by +14%).

Poland, Sweden, France, and Lithuania were the main producers. In 2023, they provided 84% of the EU production (Sweden only provided 52% of the production).

### EU production of prepared or preserved salmon



Source: EUROSTAT/PRODCOM

\*) data for 2023, 2022, 2021 and 2020 was incomplete for Poland, France, Sweden, Spain, Italy Germany. Values from the previous available year were used to estimate the EU production.

## Atlantic salmon



## TRADE

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

### EU trade of salmon (2024, EU-27)

CN code	Product	EU imports	EU exports
03 01 99 11	<b>Live Pacific salmon (whole)</b> , Atlantic salmon and Danube salmon	22	25
03 02 13 00	<b>Fresh or chilled (whole)</b> , Pacific salmon	217	67
03 02 14 00	<b>Fresh or chilled (whole)</b> , Atlantic salmon and Danube salmon	724.720	5.975
03 03 11 00	<b>Frozen whole</b> sockeye salmon	8.411	38
03 03 12 00	<b>Frozen whole</b> Pacific salmon (excl. sockeye salmon)	7.442	277
03 03 13 00	<b>Frozen (whole)</b> , Atlantic salmon and Danube salmon	15.374	3.051
03 04 41 00	<b>Fish fillets and other fish meat, fresh or chilled</b> , Pacific salmon, Atlantic salmon and Danube salmon	70.058	9.478
03 04 81 00	<b>Fish fillets and other fish meat, frozen</b> , Pacific salmon, Atlantic salmon and Danube salmon	77.197	19.368
03 05 39 10	<b>Salted or in brine salmon</b> (Pacific salmon, Atlantic salmon, and Danube salmon)	45	130
03 05 41 00	<b>Smoked salmon</b> (including fillets, other than edible fish offal)	3.155	11.400
03 05 69 50	<b>Salted Salmon</b> but not dried or smoked and fish in brine, other than edible fish offal	2	16
16 04 11 00	<b>Prepared or preserved salmon</b> , whole or in pieces	2.960	5.827
16 04 20 10	<b>Prepared or preserved salmon, other</b>	88	1.552
<b>Total</b>		<b>909.691</b>	<b>57.204</b>

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

Source: EUROSTAT-COMEXT

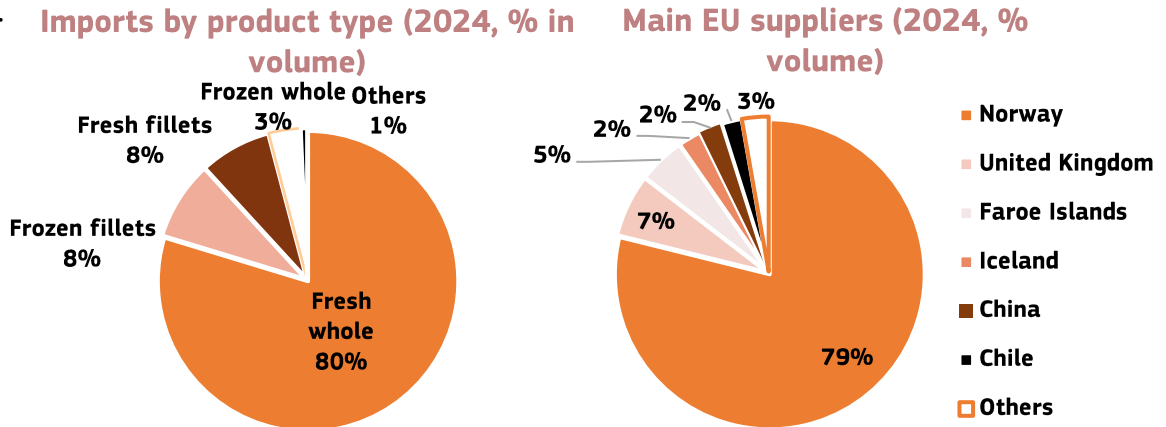
# Atlantic salmon



## TRADE

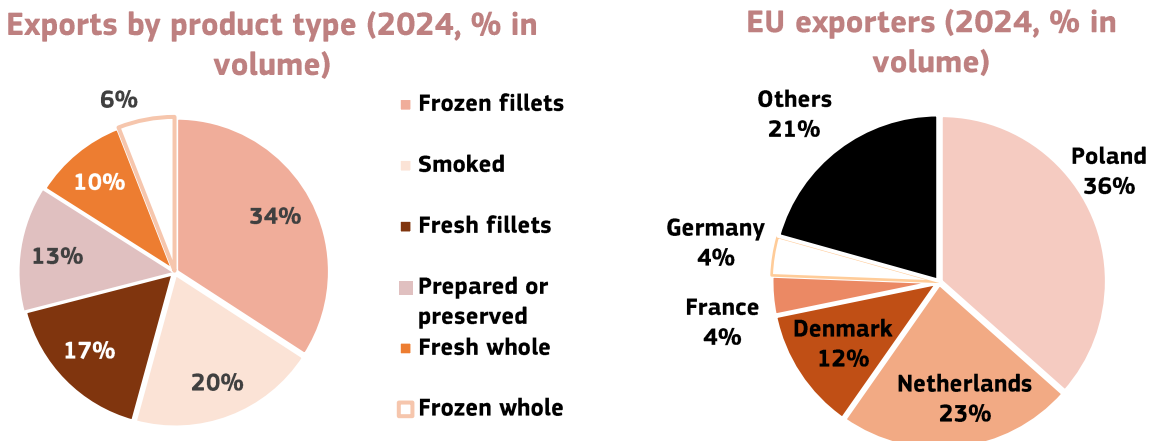
### EU imports of Salmon products (tonnes - 2024)

EU imports from third countries reached over 909.000 tonnes in 2024, from which 724.959 tonnes of fresh whole salmon, i.e. 80% of the EU imports. Norway was by far the main supplier of the EU market. In 2024, Norway contributed to 79% of the EU imports from third countries. Sweden and Denmark were the main importers, accounting for 76% of EU imports. Both act as hubs and re-export almost all products to the main EU markets for salmon (Poland, Germany and France).



### EU exports of Salmon products (tonnes - 2024)

Extra-EU exports reached over 57.000 tonnes in 2024. 34% of exports concerned frozen fillets salmon, while lesser volumes were exported smoked (20%) or in fresh fillets (17%). Main destinations were the United States, the United Kingdom and Switzerland (24%, 13%, and 12% of EU exports in volume terms, respectively). Main exporters were Poland (37% of EU exports to third countries), the Netherlands (23%), and Denmark (12%).



Source: EUROSTAT-COMEXT

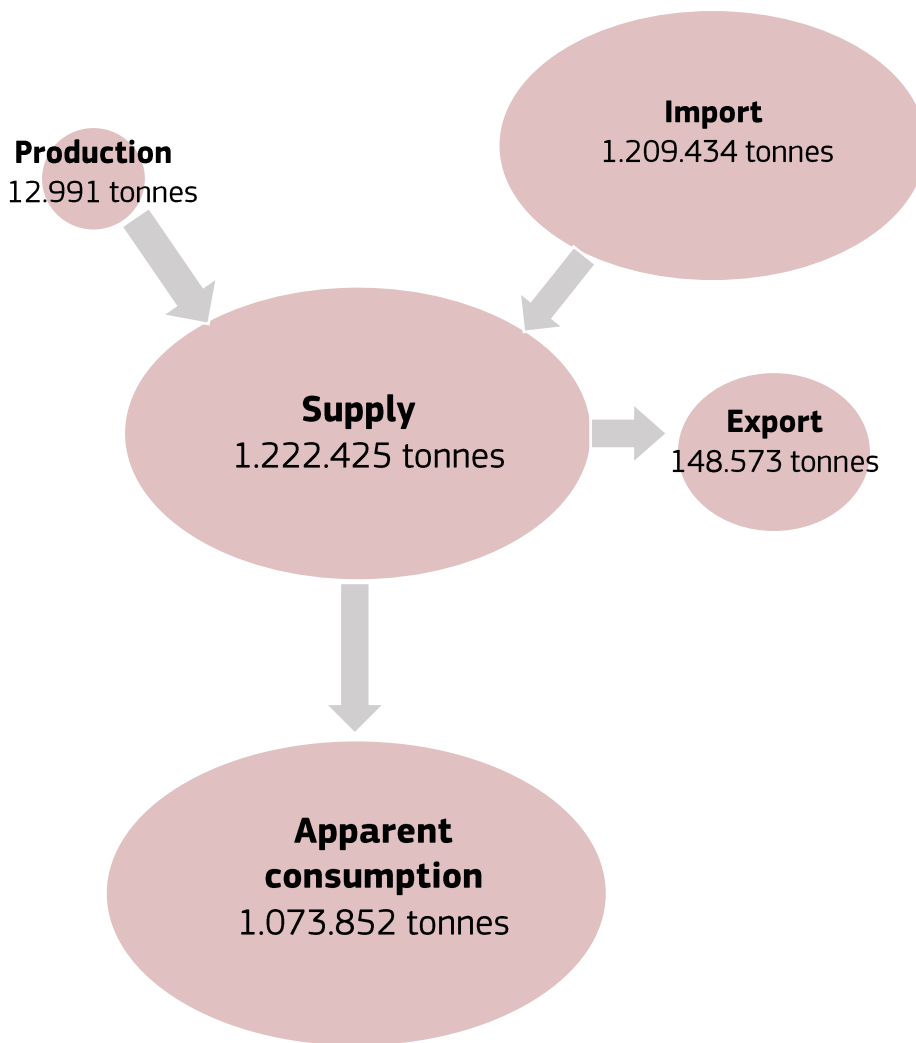
# Atlantic salmon



## Supply balance

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

Data concern Atlantic salmon and other species of salmon.



Source: FAO/ EUROSTAT-COMEXT

<sup>1</sup> Supply balance is provided for the year 2023 (trade data for 2023 were taken into account). Detailed trade data provided in the slides 5 and 6 concern the year 2024.

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

## 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 of Atlantic salmon.

	2016	2017	2018	2019	2020	2021	2022	2023*	Source
Ireland	6,41	7,28	9,56	9,44	9,24	8,03	8,49	10,20	EUMOFA

(\* Latest available year)

### Wholesale

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Source
Salmon fresh whole gutted (2-3 kg) from Scotland	8,66	8,61	8,1	7,18	7,26	7,16	9,98	11,78	10,95	7,96	Rungis (RNM)
Salmon fresh whole gutted (2-3 kg) from Norway	8,05	7,87	7,37	6,99	6,94	6,87	9,47	10,36	9,75	7,36	Rungis (RNM)
Salmon fresh whole gutted (2-3 kg) Label Rouge from Scotland	9,49	10,89	9,82	9,7	9,24	9,24	12,66	13,02	12,63	9,17	Rungis (RNM)
Salmon fresh fillets (3-4 kg) from Norway	11,69	12,57	12,47	11,77	10,8	10,8	16,98	17,02	15,56	11,87	Rungis (RNM)
Smoked salmon organic	29,00	29,00	31,94	37,00	38,00	38,00	38,89	37,93	38,95	37,00	Rungis (RNM)

(\* from January to October 2025)

### Retail/consumption

Retail prices refer to France and Spain.

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Source
France (fresh fillet 300-600g)	n.a.	n.a.	n.a.	n.a.	n.a.	20,14	24,82	26,01	26,48	25,98	EUMOFA
France (fresh)	n.a.	n.a.	18,3	18,7	18,1	17,4	19,9	21,1	20,2	n.a	FranceAgriMer
France (smoked)	n.a.	n.a.	35,2	34,3	34,5	34,2	36,1	38,5	38,9	n.a	FranceAgriMer
Spain (fresh fillets 300-600g)	n.a.	n.a.	n.a.	n.a.	n.a.	20,11	22,69	25,55	25,29	25,05	EUMOFA
Spain (fresh)	10,38	10,76	10,49	10,18	9,97	9,77	12,19	13,60	14,18	n.a	
Spain (frozen)	13,43	14,73	14,83	15,48	16,17	16,76	18,29	21,25	19,77	n.a	MAPA
Spain (smoked)	23,11	24,63	24,89	25,41	25,69	27,06	30,61	35,16	35,92	n.a	

(\* from January to July 2025)

## Atlantic salmon



## PRICES ALONG THE SUPPLY CHAIN (EUR/kg)

Data concern Atlantic salmon and other species of salmon

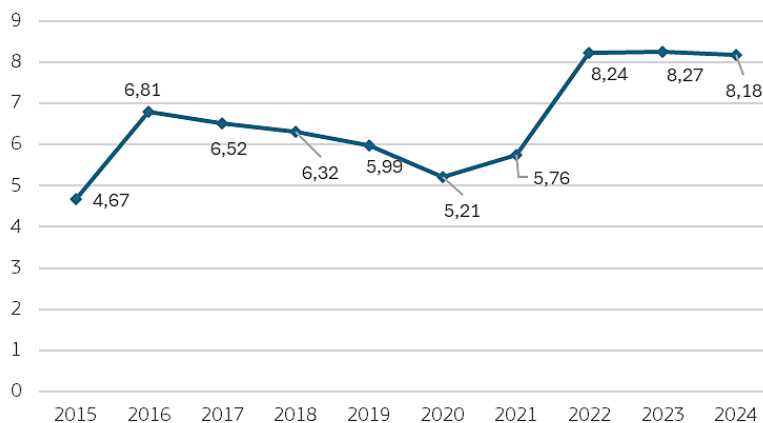
### Extra-EU import (fresh whole)

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Source
<b>Sweden</b>	6,39	6,5	6,31	6,07	5,81	5,78	7,69	8,45	9,17	7,33	EUMOFA
<b>Denmark</b>	6,39	6,57	6,32	6,04	5,28	5,85	8,05	9,14	7,97	6,73	EUMOFA
<b>Poland</b>	6,11	6,23	5,95	6,09	6,38	5,72	7,26	8,09	8,17	7,16	EUMOFA

(\*) From January to September 2025

### Export prices for fresh gutted salmon from Norway (EUR/kg)



Source: Fish Pool export prices, based on the Nasdaq Salmon price index

### Extra-EU export (frozen fillets)

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

	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025*	Source
<b>Poland</b>	6,51	8,17	7,41	7,95	7,27	7,98	9,88	11,38	12,07	11,01	EUMOFA
<b>Netherlands</b>	10,49	10,06	10,29	9,4	11,98	11,16	13,05	14,60	14,23	13,68	EUMOFA
<b>Denmark</b>	10,67	13,36	10,81	10,61	9,61	9,79	14,10	14,07	13,36	11,77	EUMOFA

(\*) From January to September 2025

## 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 (all species of salmon included) (source: [The EU Fish Market – 2025 edition](#), EUMOFA)
- Apparent consumption per capita of salmon (all species) in 2023: **2,40 kg** live weight equivalent (source: [Supply balance - 2023](#), 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