



Bivalves

Bivalve demand strong in summer months

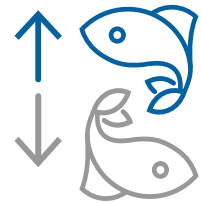
In the summer months, demand for bivalves is strong in Europe and consumers looking for a sustainable seafood source often find them to be ideal candidates. This year was no exception. Prices generally increased, despite the fact that it was also the main production period for bivalves in the northern hemisphere.

As winter approaches, demand is likely to decline, which is a normal feature for this time of the year. Apart from oysters, bivalves are not a favourite food for traditional Christmas or year-end festivities in the Western world. Trade in bivalves is stable at 2023 levels, indicating that the marketplace is mature, with established patterns.

Mussels

World trade of mussels remained the same in the first half of the year when compared with the same period of 2023, with exports reaching 171 000 tonnes. Chile continues to be the biggest mussel exporter; during the review period, 55 000 tonnes were shipped to mainly Spain and France. The Kingdom of the Netherlands was a distant second, despite increasing exports by 50 percent to 21 000 tonnes. In 2023, Dutch mussel production had suffered from low rain levels impacting the seabed where the mussels are grown. On the importer side, France and Italy are the main importing countries, followed by the United States of America. However, all three countries reported declining imports in the first quarter of the year. Spain, the fourth major importing country, reported higher mussel imports, mainly going to the canning industry.

In 2024, French mussel production has seen some positive trends. At the same time, the market has been growing steadily, driven by increasing consumer demand for sustainable seafood options. Mussels are popular due to their



high protein and omega-3 content; they are used in a variety of ways, from direct consumption to processed foods and even animal feed. The French mussel market has also benefited from a shift towards healthier eating habits and a greater awareness of the nutritional benefits of the species. Overall, the outlook for the French mussel industry is optimistic, with expectations of continued growth in the coming years.

Oysters

France, the biggest oyster-producing country in Europe, faced several challenges in 2024. A norovirus outbreak in December 2023 had led to a temporary ban on the sale of oysters from the Bay of Arcachon and other regions; this contamination scare affected consumer confidence and led to a decrease in demand and sales. Additionally, climate change has been impacting oyster farming, with rising sea temperatures making oysters more vulnerable to diseases. In response, some regions have had to adjust their production practices, such as halting summer maturation in oyster beds due to high salt concentrations caused by fast-evaporating water. Despite these challenges, France continues to produce high-quality oysters from regions like Marennes-Oleron.

The first half of the year saw a volume of 41 000 tonnes of oysters traded globally, about the same as in the same period of 2023. The same trend was seen in the case of France, which remains the main producer and trader of oysters worldwide; 7 300 tonnes were exported from the country in the first half of 2024, similar to the volume in January–June 2023. In contrast, the Republic of Korea, which exported 7 300 tonnes in the first half of 2023, experienced a 12 percent decline in exports in the first half of 2024. The United States was the main importer of oysters, registering stable imports of 7 500 tonnes during the first half of 2024. Meanwhile, the improving economic situation in Italy resulted in a 12 percent increase in oyster imports during the first half of the year, at 4 500 tonnes.

Scallops

Mostly in the hands of Asian producers, world scallop trade in the first half of 2024 amounted to 83 000 tonnes, 18 percent less than in the same period of 2023. The decline is attributed to lower supplies from the main exporter, Japan. Chinese exports were 18 000 tonnes, the same as in the first half of 2023.

Oyster exports

Republic of Korea	-12% ↓
Italy	+12% ↑

In January–June 2024, total scallop exports from Japan amounted to 33 000 tonnes, down from 58 000 tonnes in the first half of last year. The main destinations were Viet Nam, Thailand and the Republic of Korea. However, Japanese scallop production and exports have been performing quite well recently. Total production is around 500 000 tonnes per year. Hokkaido and Aomori Prefecture are the main production areas, known for their high-quality scallops. The “hanging method” of scallop farming, where shellfish fries are suspended in seawater, is commonly used in these regions. This product has a good name in the world market, where it is selling at high prices, especially in North America. Some scallops go to Viet Nam for re-processing.

In the first half of 2024, global imports exhibited the same declining trend as exports. Some 76 700 tonnes entered international trade, down 20 000 tonnes from the same period of 2023. However, the United States, the main importing country, reported an eight percent increase in imports. The Republic of Korea and Spain were the number two and number three main scallop importing countries.

Scallop exports

World	-18% ↓
Japan	-43% ↓

Clams

The annual world production of clams is about three million tonnes. With an output of 50 000 tonnes, Italy ranks first in Europe and second in the world, after China. This is despite the significant drop in Italian output due to the invasion of the blue crab which devours young oysters, mussels, cockles and other bivalve molluscs. In fact, starting from Spring 2023 and till today, both on the Veneto and Emilia sides, the production of clams has been practically zero. According to the Scardovari Fishermen’s Consortium, the sector will not be able to reach the usual output levels of 5 000 to 5 500 tonnes.

The extreme temperature in the Adriatic Sea this year has impacted the blue crab, reportedly resulting in significant mortality of the species. At the same time, the industry is working on strategies to mitigate the impact of these challenges and ensure the continued supply of clams.

Global clam trade was fairly stable in the first six months of 2024, at 137 000 tonnes. China is the world’s main producer and exporter of clams, accounting for about half of all exports. Some 65 000 tonnes of clams were exported by China in the period under review, 8 000 tonnes more than in January–June 2023. The Republic of Korea and Japan were the two major markets for Chinese clams, with imports recovering from the low levels reported last year. Meanwhile, despite difficulties, the clam market in Italy remains vibrant, driven by consumer demand for sustainable seafood.

Outlook

Bivalve growing is subject to climate changes, and further reductions in supply are likely to materialize this year, especially in Italy. The anticipated drop in production, coupled with high demand, are expected to push prices up in all major markets. After the strong demand this past summer, the market is expected to slow down in autumn (which is a normal seasonal feature) and revitalize towards the end of the year.

Clam exports

World +17% ↑

World imports and exports of scallops January–June, 2022–2024 (1 000 tonnes)

	2022	2023	2024
Imports			
United States of America	16.04	11.14	12.61
Viet Nam	2.04	2.14	9.95
Republic of Korea	7.26	6.82	7.13
Other countries	91.45	84.48	46.24
Total imports	116.79	104.57	75.93
Exports			
Japan	64.20	57.97	33.66
China	20.69	18.33	18.29
France	5.43	6.70	4.96
Other countries	27.24	22.41	25.27
Total exports	117.56	105.40	82.19

Source: Author's own elaboration based on GTT, 2024, Global Trade Tracker. [Cited 1 October 2024]. www.globaltradetracker.com

World imports and exports of oysters January–June, 2022–2024 (1 000 tonnes)

	2022	2023	2024
Imports			
United States of America	8.21	7.29	7.49
Italy	4.15	4.06	4.55
Japan	3.45	4.26	3.51
Other countries	19.57	20.76	19.68
Total imports	35.38	36.36	35.22
Exports			
France	7.25	7.27	7.29
Republic of Korea	6.06	7.32	6.52
China	4.08	4.87	5.00
Other countries	22.91	23.27	22.33
Total exports	40.30	42.74	41.14

Source: Author's own elaboration based on GTT, 2024, Global Trade Tracker. [Cited 1 October 2024]. www.globaltradetracker.com

World imports and exports of mussels January–June, 2022–2024 (1 000 tonnes)

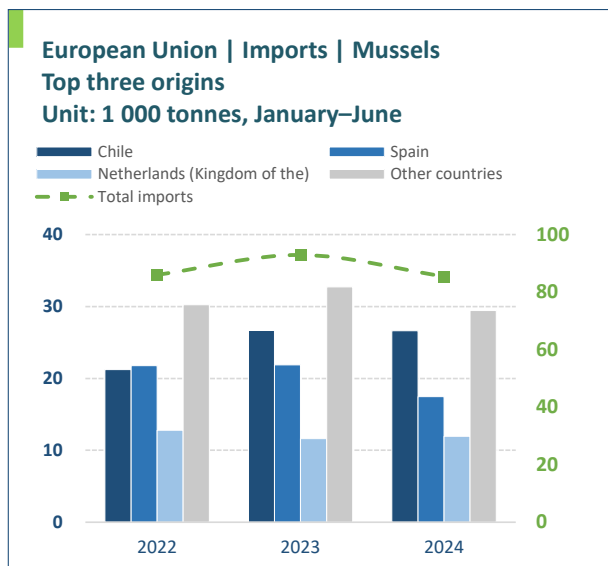
	2022	2023	2024
Imports			
France	28.36	27.47	22.13
Italy	18.52	22.36	19.51
United States of America	19.42	19.72	18.38
Other countries	68.49	82.28	74.18
Total imports	134.79	151.83	134.20
Exports			
Chile	45.80	54.69	55.86
Netherlands (Kingdom of the)	14.66	14.43	21.36
Spain	24.51	25.17	19.76
Other countries	71.10	79.38	74.62
Total exports	156.06	173.66	171.60

Source: Author's own elaboration based on GTT, 2024. Global Trade Tracker. [Cited 1 October 2024]. www.globaltradetracker.com

World imports and exports of clams January–June, 2022–2024 (1 000 tonnes)

	2022	2023	2024
Imports			
Republic of Korea	24.31	24.26	25.20
Japan	21.19	20.01	22.69
Spain	23.82	19.01	19.80
Other countries	70.24	70.51	69.45
Total imports	139.56	133.78	137.13
Exports			
China	60.06	57.21	65.56
Viet Nam	20.30	22.83	25.74
Canada	6.71	8.14	7.00
Other countries	48.15	46.41	48.11
Total exports	135.23	134.59	146.40

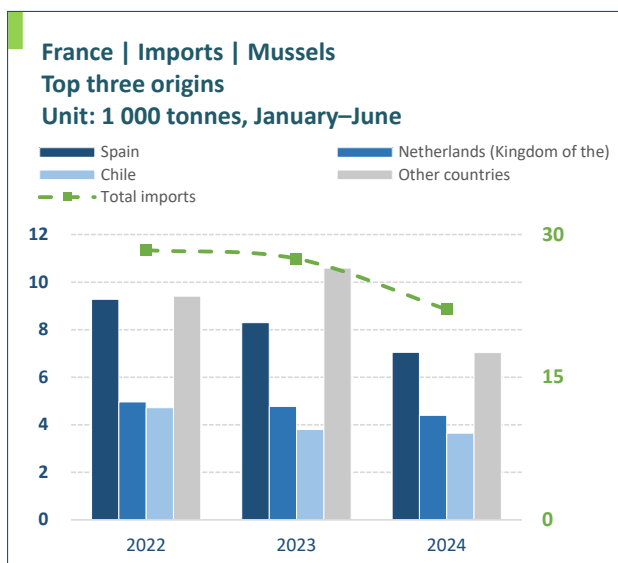
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Source: Author's own elaboration based on the European Price Report 2024. GLOBEFISH. [Cited 1 October 2024]. www.globefish.org