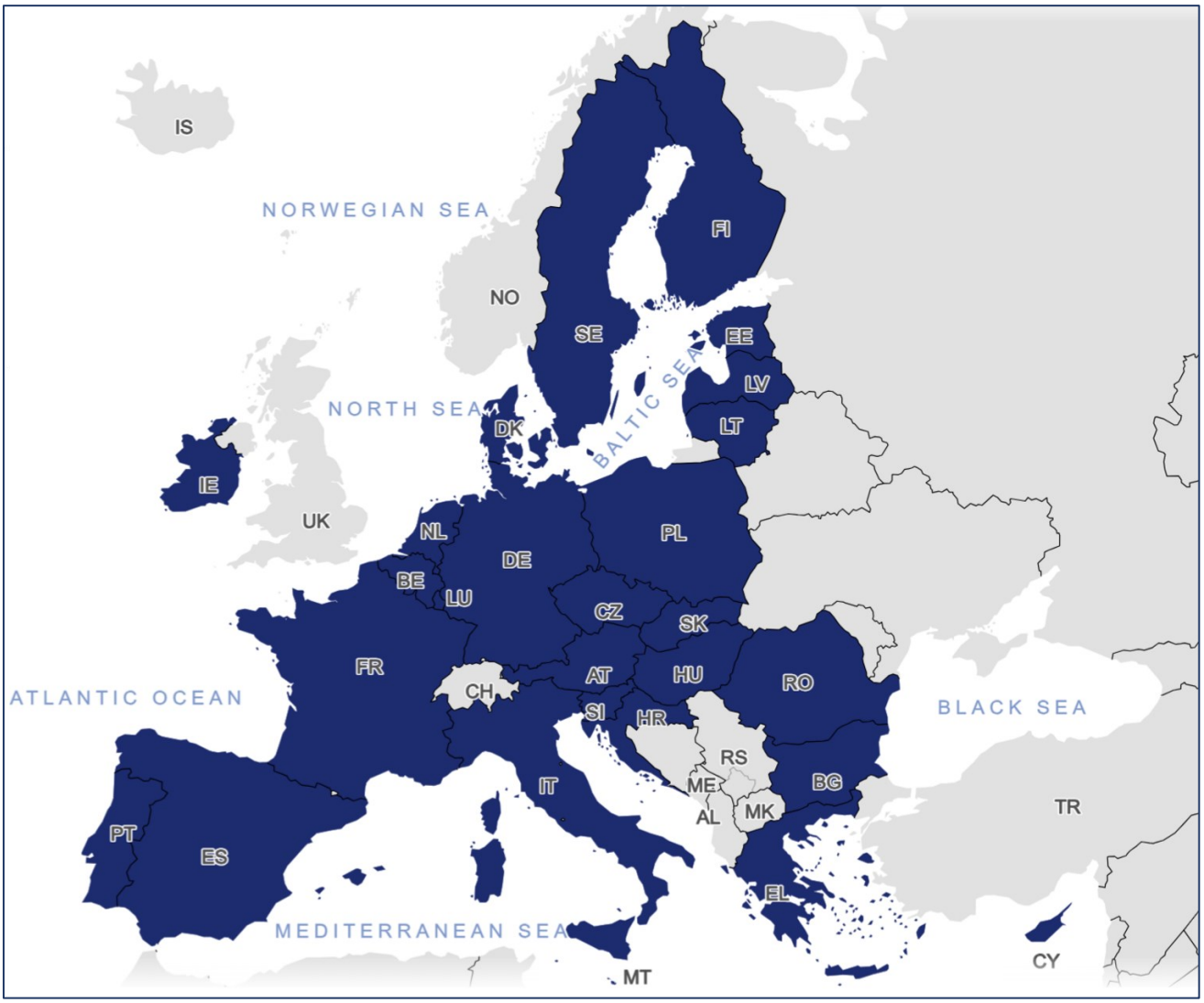
EU trade in fishery and aquaculture products with the Russian Federation



Source: Gisco.-Eurostat-European commission

The trade in FAPs between the EU and Russia has for decades been significant, especially EU imports of ground fish species which serves as an important source for raw material for fish processors and distributors in the EU. However, the trade has faced different challenges in terms of sanctions against Russia following the Russian military annexation of Crimean Peninsula in 2014 and following the war of aggression against Ukraine since 2022.

1.1 Trade development

The EU and the Russian Federation

Russia is still a significant supplier of specific species of fishery and aquaculture products to the EU. In 2024, the country ranked as the 13th largest non-EU supplier of FAPs to the EU market by value, with imports amounting to approximately EUR 709 million. A significant portion of these imports includes whitefish species such as cod, haddock, and Alaska pollock. These products enter the EU market every week, either directly or through non-EU countries where they are processed, with destination markets in the EU and other markets[1].

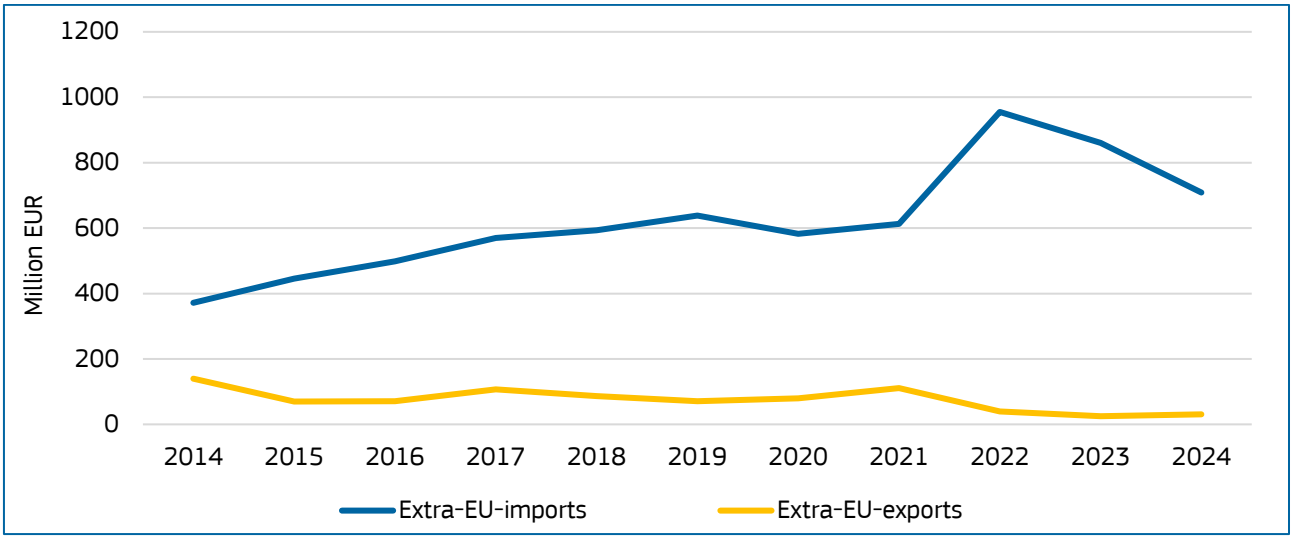
1 The Barents Observer, ' EU considers stricter seafood sanctions, but cod from Murmansk goes free' October 2, 2024, https://www.thebarentsobserver.com/news/eu-considers-stricter-seafood-sanctions-but-cod-from-murmansk-goes-free/231884

In Norway, the authorities are still allowing Russian fishing vessels to land their catches in three ports (Kirkenes, Båtsfjord and Tromsø). In 2024, their landings in Norway amounted to around 80.000 tonnes whereof the majority was cod, haddock and saithe[2]. The fish is transported to foreign markets, like China, and to the EU for processing.

However, the annexation of the Crimea area in 2014 and Russia's war of aggression in Ukraine since 2022 have impacted some of the seafood trade the past years[3]. The sanctions included restrictions on imports of certain fishery and aquaculture products from Russia. Russian caviar and substitutes and crustaceans are banned but this has limited impact as Russia exports very small quantities of these products to the EU market[4]. Looking into the import figures, a large share of the cod and Alaska pollock imported by the EU is still of Russian origin, and the value and volume of imports exceed the pre-2022 level.

Russia has responded to the EU's bans on certain fishery and aquaculture products with its own sanctions, including bans of ready-to-eat or canned fish, sturgeon caviar, fish roe substitutes and different prepared or canned products. Imports of fishery and aquaculture products from the EU into Russia were already banned by Russia for all unprocessed products in 2014 following the Crimea annexation. After 24 February 2022, the EU export to Russia was ended for the remaining FAP product categories intended for human consumption[5] due to Russian import restrictions.

Figure 1. **EU TRADE FLOW WITH RUSSIA (million EUR)**



Source: EUMOFA elaboration of Eurostat-Comext data.

1.2 Import

EU Import of fishery and aquaculture products from Russia

In 2024, EU import of fishery and aquaculture products from Russia amounted to 179.000 tonnes valued at EUR 709 million. Compared to 2023 this was an 8% decrease in terms of volume and a 18% decrease in terms of value. Compared to 2020, import volumes increased by 18% and values by 22%. The largest EU importers in 2024 were the Netherlands (54.000 tonnes), Germany (36.000 tonnes), France (34.000 tonnes) and Poland (27.000 tonnes).

The overall largest main commercial species in terms of both volume and value were **cod** amounting to 73.000 tonnes valued at EUR 411 million in 2024. This was a 15% decrease in volume and a 16% decrease in value from 2023. Frozen cod and cod fillets were the largest products accounting for 53% and 26% of the volumes and 40% and 35% of the values respectively. In 2024, the largest cod importing EU countries were the Netherlands, Portugal and Poland together covering 80% of cod import volumes from Russia.

In terms of value, **Alaska pollock** were the second largest main commercial species amounting to 80.000 tonnes valued at EUR 186 million. This was a 4% decrease in volume and a 30% decrease in value compared to 2023. Frozen Alaska pollock fillets were the main product accounting for 86% of the volumes and 91% of the values in 2024. The largest Alaska pollock importing EU countries

2 Norwegian Directorate of Fisheries, "open catch data – linked with vessel registry data" - 2024 (data available in Norwegian language only), https://www.fiskeridir.no/statistikk-tall-og-analyse/data-og-statistikk-om-yrkesfiske/apne-data-fangstdata-seddel-koblet-med-fartoydata

3 European Commission, Food Safety, 'Russian import ban on EU products', https://food.ec.europa.eu/horizontal-topics/international-affairs/eu-russia-sps-issues/russian-import-ban-eu-products_en

4 European Commission, 'EU sanctions against Russia following the invasion of Ukraine', 'Import and export bans', https://commission.europa.eu/topics/eu-solidarity-ukraine/eu-sanctions-against-russia-following-invasion-ukraine/import-and-export-bans_en

5 European Council, 'EU sanctions against Russia', 'Timeline - Packages of sanctions against Russia since February 2022', https://www.consilium.europa.eu/en/policies/sanctions-against-russia/timeline-packages-sanctions-since-february-2022/

were Germany, France and Poland responsible for 84% of Alaska pollock import volumes from Russia in 2024. A significant share of the Alaska pollock is also processed in China and exported to the EU. This is Alaska pollock of Russian origin, which does not appear in the imports from Russia. However, since 2024, Russian fish cannot benefit from the EU ATQ (autonomous tariff quotas) tariff reductions when imported to the EU.

Other major products imported from Russia were unspecified freshwater fish ranked as the third largest in value by the main commercial species. Of importance is also salmon which increased by 122% in volume and 49% in value from 2023 to 2024. This consists of different products of pacific salmon whereof frozen fillets accounted for 63% of the volumes and 70% of the values in 2024. Imports of haddock increased by 10% in volume and decreased by 2% in value from 2023 to 2024.

Table 1. **TOTAL EU IMPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM RUSSIA (volume in tonnes product weight, value in million EUR)**

	2020		2021		2022		2023		2024		% Change 23/24	
MCS	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Cod	82.500	356	90.600	355	95.100	522	88.500	488	75.300	411	-15 %	-16 %
Alaska pollock	44.100	125	57.600	166	82.600	305	84.000	265	80.400	186	-4 %	-30 %
Other freshwater fish[6]	5.600	31	5.500	30	5.200	38	4.500	39	3.400	27	-24 %	-31 %
Salmon	2.100	11	3.400	22	5.600	31	2.300	17	5.100	25	122 %	49 %
Haddock	5.100	22	2.800	8	5.600	21	5.100	19	5.600	18	10 %	-2 %
Other marine fish[7]	100	0	100	0	100	0	200	1	2.200	11	1000 %	1010 %
European plaice	2.100	4	1.800	4	1.600	6	2.300	8	3.200	9	39 %	11 %
Caviar, livers and roes (*)	100	3	100	3	200	5	100	4	300	7	200 %	89 %
Other non-food use[8]	600	7	600	6	600	7	600	7	400	6	-33 %	-19 %
Saithe (=Coalfish)	100	0	100	0	700	3	1.100	4	900	4	-18 %	-13 %
Squid	0	0	0	0	0	0	100	0	500	1	400 %	300 %
Other (*)	9.800	24	6.000	18	4.600	17	6.300	9	2.100	4	-67 %	-56 %
Total	**152.200**	**583**	**168.600**	**613**	**201.900**	**955**	**195.100**	**861**	**179.400**	**709**	**-8 %**	**-18 %**

Source: EUMOFA elaboration of Eurostat-Comext data

(*) The product categories include products which from April 2022 are banned as imports to the EU. The CN codes for the banned products are: Caviar, livers and roes, 1604 31 00 (caviar) and 1604 32 00 (caviar substitutes) and Other, products which falls under the CN section 0306 (crustaceans).

1.3 Export

EU export of fishery and aquaculture products to Russia

The export volume from the EU to Russia reached 14.800 tonnes in 2024, a 59% increase compared to 2023. A more than 6.000 tonnes increase in the exports of fish and marine mammal soluble was the main reason to the increase. The total value reached EUR 31 million, up from EUR 25 million in 2023 (+23%). Compared to 2020, export volume decreased by 50% and export value decreased by 62%.

EU export to Russia consists mainly of products in the category **other non-food use**. In 2024, export volume reached nearly 13.700 tonnes valued at EUR 23 million, a 80% increase in volume and a 73% increase in value from 2023. Compared to 2020, export volume increased by 291% and export value increased by 388%. The products in the category other non-food use consist mainly of fish or marine mammal soluble, seaweeds and algae. In 2024, the other non-food use category accounted for 92% of the exported

[6] Frozen fillets of freshwater fish, n.e.s. Fresh or chilled fillets of freshwater fish, n.e.s. Frozen freshwater fish, n.e.s. Frozen fillets of carp "Cyprinus spp., Carassius spp., Ctenopharyngodon idellus, Hypophthalmichthys spp., Cirrhinus spp., Mylopharyngodon piceus, Catla catla, Labeo spp., Osteochilus hasselti, Leptobarbus hoeveni, Megalobrama spp.", eels "Anguilla spp."

[7] Frozen raw fish fillets, coated with batter or breadcrumbs, whether pre-fried in oil (excl. salmonidae, herrings, sardines, sardinella, brisling or sprats, tunas, skipjack and Atlantic bonito, bonito "sarda spp.", mackerel, anchovies, fish of spe. Fish, dried, even salted but not smoked, n.e.s. (excl. fillets and offal). Fish, only salted or in brine (excl. herring, cod, anchovies, tilapia, catfish, carp, eels, Nile perch, snakeheads, Boreogadus saida, Atlantic halibut, Pacific salmon, Atlantic salmon, Danube salmon and fillets and offal)

[8] Products of fish or crustaceans, molluscs or other aquatic invertebrates (excl. fish waste); dead fish, crustaceans, molluscs or other aquatic invertebrates, unfit for human consumption. Fish waste

volumes and 74% of the values. The largest non-food use exporters were Spain, Italy and France together accounting for 96% of the non-food use export volumes to Russia in 2024.

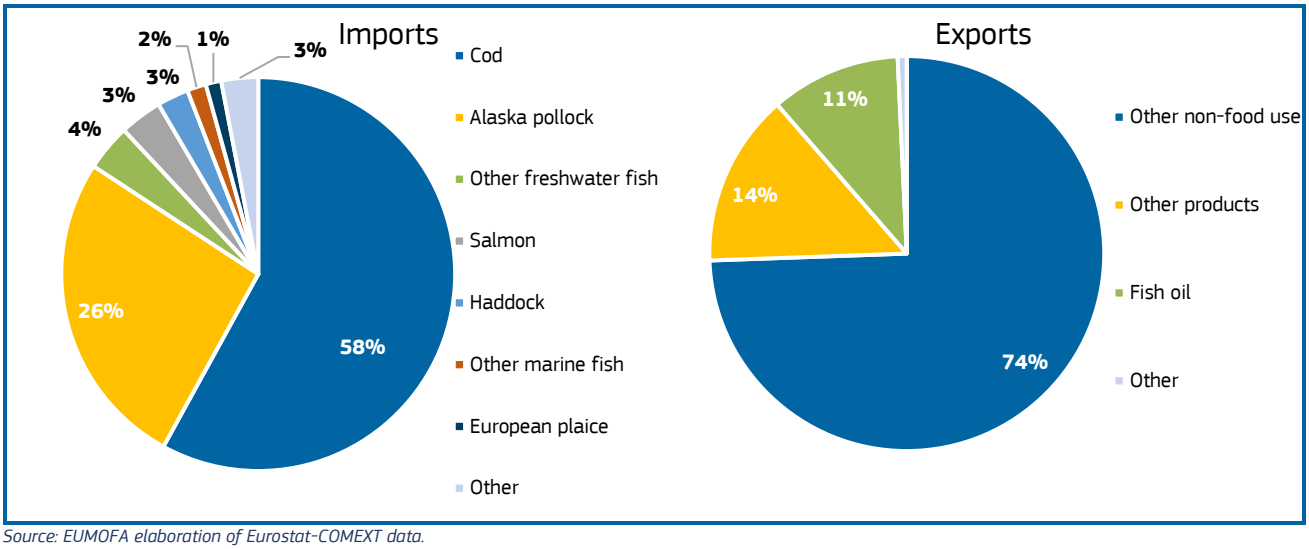
The export of fishery and aquaculture products from the EU to Russia used to be higher before the war of aggression against Ukraine in 2022 and even higher before the annexation of the Crimea area in 2014. The exports prior to 2014 consisted much of sprat, sardinellas and sardines, salmon, coldwater shrimps, mackerel, herring, fishmeal and trout. In the period from 2013 to 2024 total export volumes decreased by 90%. In 2022, export volumes decreased by 64% from the year before and decreased further in 2023 by 37%. In 2024, no FAP intended for human consumption was exported from the EU to Russia.

Table 2. **TOTAL EXPORT OF FISHERY AND AQUACULTURE PRODUCTS FROM THE EU TO RUSSIA BY MCS (volume in tonnes, value in million EUR)**

	2020		2021		2022		2023		2024		% Change 23/24	
MCS	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**	**Volume**	**Value**
Other non-food use	3.500	5	3.500	5	4.600	8	7.600	13	13.700	23	80%	73%
Other products	5.200	15	3.100	10	1.400	5	1.000	5	900	4	-10%	-5%
Fish oil	1.000	5	1.300	5	1.000	6	400	4	300	3	-25%	-16%
Other cephalopods	0,0	0,0	0,0	0,0	0,0	0,2	0,0	0,3	0,0	0,2	-	-31%
Other	19.800	56	33.300	92	7.900	21	300	3	0	0	-100%	-99%
Total	**29.400**	**80**	**41.200**	**111**	**14.900**	**40**	**9.300**	**25**	**14.800**	**31**	**59%**	**23%**

Source: EUMOFA elaboration of Eurostat-COMEXT data.

Figure 2. **EU EXPORTS TO RUSSIA (RIGHT) AND EU IMPORTS FROM RUSSIA (LEFT); BY MAIN COMMERCIAL SPECIES IN 2024 – IN VALUE TERMS**



Source: EUMOFA elaboration of Eurostat-COMEXT data.