



CASE STUDY

EU TRADE IN FISHERY AND AQUACULTURE PRODUCTS

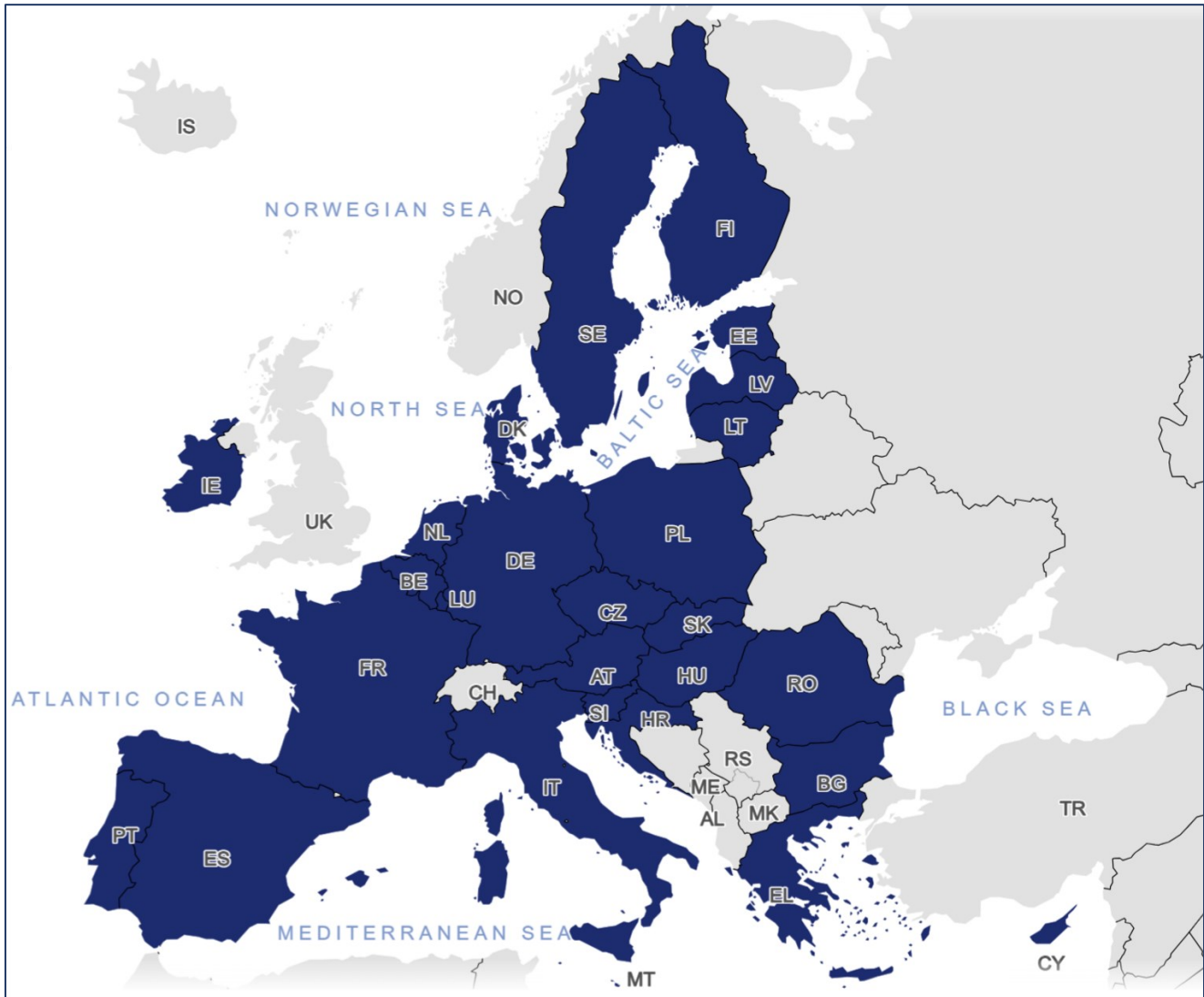


E U M O F A

European Market Observatory for
Fisheries and Aquaculture Products

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WWW.EUMOFA.EU

EU trade in fishery and aquaculture products with the United States of America



Source: [Gisico](#)-Eurostat-European commission

The EU is a major world market for fishery and aquaculture products (FAP), whose internal demand is mostly covered by import from other countries. The trade between EU Member States is also of significant importance to cover the demand for FAPs in the different markets within the EU. The preference for fishery and aquaculture products varies between Member States with Portugal having the highest apparent per capita consumption of 54,5 kg LWE in 2022 followed by Spain (41,9 kg LWE) and France (32,6 kg LWE). Czechia had the lowest with 5,9 kg LWE per capita in 2022¹.

Trade policies, tariffs and geopolitical developments affect the trade between the EU and third countries. The EU imports a variety of FAPs from the US which are important to meet the EU's demand for certain products. In addition, the US market has increasingly become important as a destination market for fishery and aquaculture products from the EU.

1 EUMOFA, The EU fish market 2024, https://eumofa.eu/documents/20124/145239/EFM2024_EN.pdf/bd21aeb4-4a3e-3f6e-9f3f-b386fcb0a6ec?t=1733150606293

1.1 Trade development and tariffs

The EU and the US

According to the EU import statistics, trade in fishery and aquaculture products between the US and the EU is significant. In 2024, the US ranked as the 7th largest non-EU supplier of seafood to the EU market by value with exports amounting to around EUR 873 million. A significant share of this includes white fish species like Alaska pollock and hake as well as salmon and surimi products. During the past 10 years, import values of fishery and aquaculture products from the US to the EU increased by 16% while export values to the US increased by 364% to nearly EUR 1,2 billion. The US, as a market for fishery and aquaculture products from the EU, has increasingly become more important in export value and volume over the past 10 years. Since 2021, export values have exceeded import values.

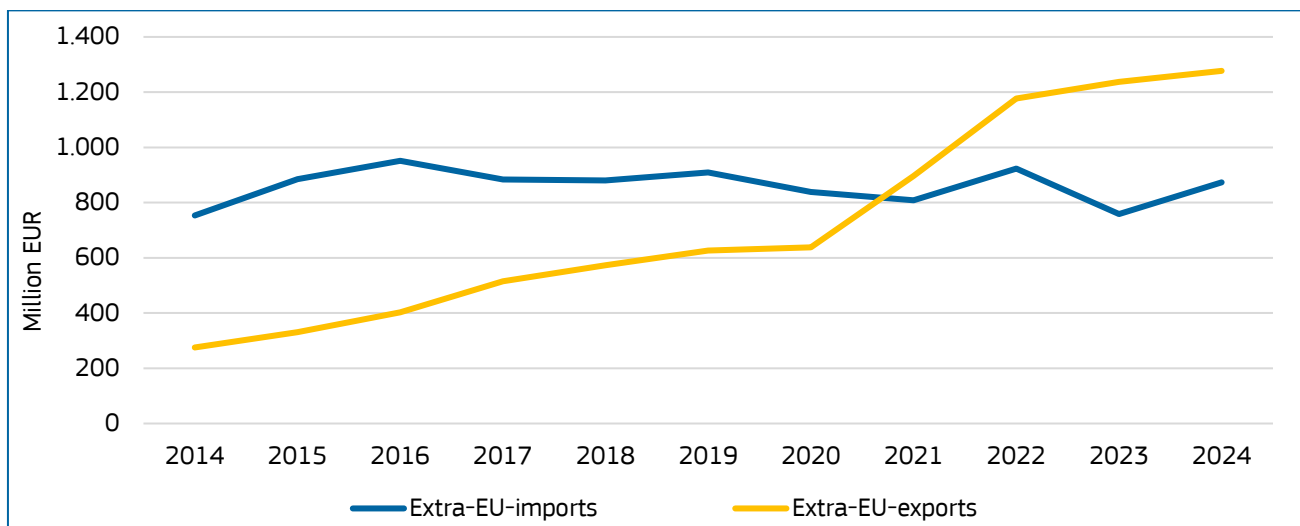
The US and the EU have negotiated various trade agreements that provide access to markets and has the world's largest bilateral trade and investment relationship. These agreements often include reduced tariffs and other benefits, providing better market access², including for FAPs.

The trade in FAP is governed by various regulations and standards to ensure food safety and sustainability. The US Food and Drug Administration (FDA) and the National Oceanic and Atmospheric Administration (NOAA) play crucial roles in certifying and monitoring these exports³. In the EU, The Directorate-General for Trade (DG TRADE) develops and carries out the Commission's policies on trade and economic security⁴.

In addition, the EU established Autonomous Tariff Quotas (ATQs) for certain fishery and aquaculture products, allowing a specified quantity to be imported at reduced tariff rates. This helps meet the demand of the EU processing industry when local supply is insufficient⁵.

From 5 April 2025, the US imposed a 10% tariff on nearly all seafood imports which also includes FAP from the EU. These tariffs are part of broader trade policies that have been affecting various goods, including FAP. In late July 2025, both the EU and the USA announced that an agreement on tariffs was reached, where the general tariff level for FAPs originating from EU of 15%. Details from the agreement is still not known.

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



Source: EUMOFA elaboration of Eurostat-Comext data.

2 European Commission, 'Trade and Economic Security, United States', https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/united-states_en

3 NOAA Fisheries, 'Seafood Commerce and Trade: International Trade', <https://www.fisheries.noaa.gov/topic/seafood-commerce-and-trade/international-trade> Seafood

4 European Commission, Directorate-General Trade, 'Trade and Economic Security', https://commission.europa.eu/about/departments-and-executive-agencies/trade-and-economic-security_en

5 European Commission, Oceans and Fisheries, 'Trade', https://oceans-and-fisheries.ec.europa.eu/fisheries/markets-and-trade/trade_en

1.2 Import

EU Import of fishery and aquaculture products from the US

In 2024, EU import of fishery and aquaculture products from the US amounted to 217.000 tonnes valued at EUR 873 million. Compared to 2023 this was a 33% increase in terms of volume and a 15% increase in value. Compared to 2020, import volumes decreased by 12% and values increased by 4%. The largest EU importers in 2024 were France (42.000 tonnes), Germany (38.000 tonnes), the Netherlands (27.000 tonnes) and Denmark (25.000 tonnes).

The overall largest main commercial species in terms of both volume and value were **Alaska pollock** amounting to 84.000 tonnes valued at EUR 272 million in 2024. This was a 74% increase in volume and a 40% increase in value from 2023. Frozen Alaska pollock fillets was the largest product accounting for 92% of the volumes and 96% of the values. In 2024, the largest Alaska pollock importing EU countries were Germany, the Netherlands and France together covering 75% of Alaska pollock import volumes from the US.

In terms of value, in 2024 **salmon** were the second largest main commercial species amounting to nearly 20.000 tonnes valued at EUR 136 million. This was a 19% increase in volume and a 20% increase in value in comparison to 2023. Frozen sockeye salmon and frozen fillets of pacific salmon were the main product accounting for 53% and 18% of the volumes and 62% and 20% of the values respectively in 2024. The largest salmon importing EU countries were France, Lithuania and the Netherlands together covering 53% of salmon import volumes from the US.

In terms of value, **surimi** was the third largest in 2024 but in terms of volume it ranked second. In this year imports of surimi from the US amounted to 41.300 tonnes valued at EUR 94 million which was a 3% increase in volume and 24% decrease in value. In 2024, 73% of the volumes and 71% of the values was surimi from Alaska pollock. The rest came from several other species. The largest surimi importing EU countries were France, Lithuania and Spain covering 94% of surimi import volumes from the US.

Even though ending lower than in 2020, EU import volume of **fish oil** showed recovered strongly in 2024. Import volume from the US amounted to 12 500 tonnes, valued EUR 52 million. The 2024 import volume was 15 times higher than in 2023. The by far largest importer among member states was Denmark, with an import share of 93% in 2024, followed by Belgium (6%).

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

MCS	2020		2021		2022		2023		2024		% Change 23/24	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Alaska pollock	101.800	309	87.000	257	59.500	224	48.400	195	84.400	272	74 %	40 %
Salmon	18.500	127	19.600	162	19.700	190	16.600	114	19.800	136	19 %	20 %
Surimi	48.700	124	46.800	119	43.100	146	40.100	124	41.300	94	3 %	-24 %
Lobster <i>Homarus</i> spp. ⁶	1.400	22	2.500	52	3.100	62	3.100	63	3.000	69	-3 %	9 %
Hake	19.300	54	19.300	54	20.900	74	20.900	78	20.800	60	0 %	-23 %
Fish oil	18.400	30	10.100	17	3.700	13	800	4	12.500	52	1463 %	1353 %
Other flatfish ⁷	200	1	1.300	3	6.600	16	5.500	14	9.800	30	78 %	120 %
Caviar, livers and roes	2.400	32	2.300	32	2.300	38	3.200	43	2.100	29	-34 %	-32 %
Shrimp, miscellaneous ⁸	2.200	18	3.200	20	3.700	27	3.000	22	4.100	29	37 %	31 %
Cod	10.500	34	5.700	16	4.400	18	6.600	28	6.100	27	-8 %	-3 %
Squid	3.900	12	4.100	12	8.400	31	5.600	22	4.700	21	-16 %	-7 %
Other	18.400	75	13.500	64	15.700	85	9.100	53	8.100	54	-11 %	1 %
Total	245.700	839	215.500	809	191.100	923	162.800	759	216.800	873	33 %	15 %

Source: EUMOFA elaboration of Trade Data Monitor data.

1.3 Export

EU export of fishery and aquaculture products the US

The export volume from the EU to the US reached 147.000 tonnes in 2024, a 14% increase compared to 2023. The total value reached EUR 1,27 billion, up from EUR 1,23 billion in 2023 (3%). Compared to 2020, export volume increased by 42% and export value increased by 100%.

Salmon exports in 2024 were valued at EUR 595 million, down by 3% compared to 2023. Export volumes amounted to 35.000 tonnes, a 5% decrease from 2023. Export of salmon accounted for 24% of the export volume and 47% of the export values of all species exported to the US in 2024. Compared to 2020, export volume increased by 41% and export value increased by 96%. Most of the salmon is exported as fresh or frozen fillet and smoked salmon. The largest salmon exporters were the Netherlands, Denmark and Poland accounting for 89% of the salmon export volumes to the US in 2024.

Octopus exports in 2024 were valued at EUR 149 million representing an increase of 14% over 2023. Export volumes amounted to 13.700 tonnes, a 19% increase from the year before. Export of octopus accounted for 9% of the export volume and 12% of the export values of all species exported to the US in 2024. Compared to 2020, export volume increased by 153% and export value increased by 235%. Octopus is mainly sold frozen or prepared or preserved. The largest octopus exporters were Spain, Portugal and Italy together accounting for 99% of the octopus export volumes to the US in 2024.

In terms of value, **European seabass** was the third largest main commercial species exported to the US in 2024. Export volumes reached 6.700 tonnes valued at EUR 57 million representing a 6% decrease in volume and value from the year before. Export of seabass accounted for 5% of the volumes and 4% of the values in 2024. Compared to 2020, export volumes increased by 104% and values increased by 174%. The seabass exported to the US is sold fresh. The largest seabass exporters were Greece, Spain and the Netherlands together accounting for 99% of the seabass export volumes to the US in 2024.

⁶ Live lobsters "*Homarus* spp." Frozen lobsters "*Homarus* spp.", even smoked, whether in shell or not, incl. lobsters in shell, cooked by steaming or by boiling in water (excl. whole)

⁷ Frozen flatfish "*Pleuronectidae*, *Bothidae*, *Cynoglossidae*, *Soleidae*, *Scophthalmidae* and *Citharidae*" (excl. halibut, plaice, sole, turbot, flounder, *Rhombosolea* spp., *Pelotreis flavilatus* and *Peltorhamphus novaezelandiae*). Frozen fillets of flatfish "*Pleuronectidae*, *Bothidae*, *Cynoglossidae*, *Soleidae*, *Scophthalmidae* and *Citharidae*" (excl. plaice, flounder and megrim)

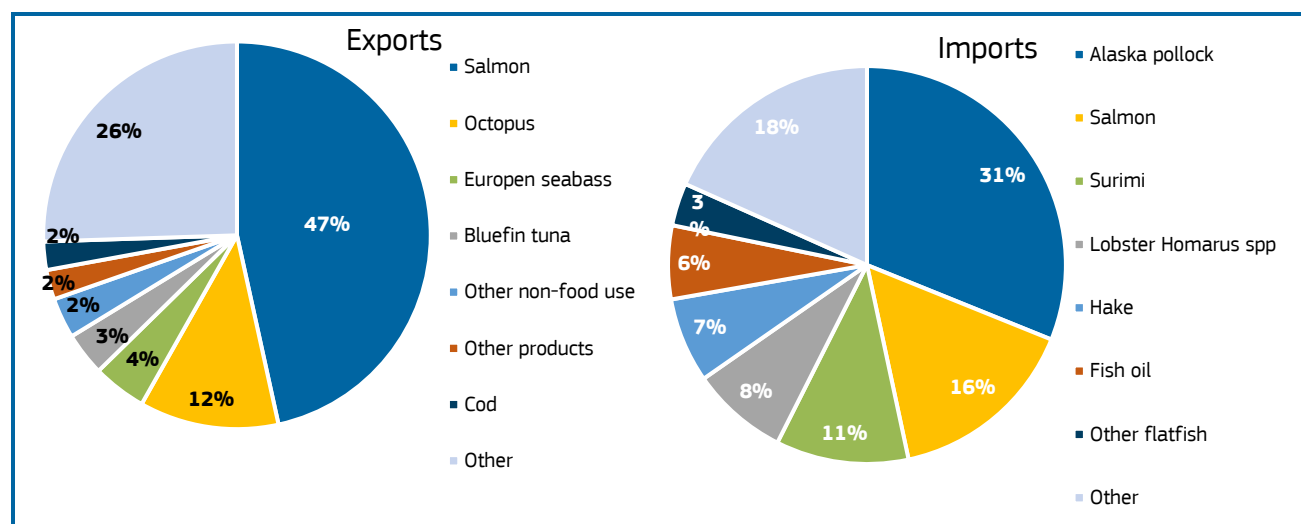
⁸ Shrimps and prawns prepared or preserved, in immediate packings of a net content of > 2 kg (excl. merely smoked, and in airtight containers). Frozen shrimps and prawns, even smoked, whether in shell or not, incl. shrimps and prawns in shell, cooked by steaming or by boiling in water (excl. "*Pandalidae*", "*Crangon*", deepwater rose shrimps "*Parapenaeus longirostris*" and "*Penaeus*"). Shrimps and prawns prepared or preserved, in immediate packings of a net content of ≤ 2 kg (excl. merely smoked, and in airtight containers).

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

MCS	2020		2021		2022		2023		2024		% Change 23/24	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Salmon	25.100	304	30.900	394	35.100	549	37.100	616	35.200	595	-5%	-3%
Octopus	5.400	44	12.800	126	11.500	141	11.500	131	13.700	149	19%	14%
Seabass, European	3.300	21	4.900	34	7.400	62	7.100	61	6.700	57	-6%	-6%
Tuna, bluefin	300	7	700	14	900	23	1.500	39	1.900	46	27%	19%
Other non-food use	20.500	11	16.900	14	18.200	20	23.700	33	34.600	43	46%	31%
Other products	10.700	27	9.000	27	9.000	26	8.800	27	11.800	32	34%	18%
Cod	1.500	11	2.300	18	4.500	39	3.400	38	2.800	30	-18%	-20%
Sardine	8.200	35	6.400	26	5.500	27	4.800	26	5.300	30	10%	16%
Other marine fish	1.300	12	1.400	13	1.600	18	1.900	19	2.700	28	42%	46%
Other cephalopods	3.100	19	3.700	22	2.500	17	2.300	15	3.500	25	52%	65%
Other	24.000	147	31.500	208	38.100	254	27.100	233	28.400	243	5%	4%
Total	103.400	638	120.600	896	134.400	1.177	129.000	1.237	146.600	1.277	14%	3%

Source: EUMOFA elaboration of Eurostat-COMEXT data.

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



Source: EUMOFA elaboration of Eurostat-COMEXT data.