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Report Highlights:

China remained the world's largest seafood producer in 2024, with production estimated at 74.1 million metric tons (MMT), up 4 percent from 2023. Production growth continues to be driven by aquaculture, which, according to official data, increased 4.5 percent year-on-year to 58.1 MMT. In 2024 seafood imports fell compared to the record high set in 2023 but were the second highest on record in volume terms at 4.4 MMT, and third highest in value terms at \$17.7 billion, driven primarily by imports of fresh and frozen fish, crustaceans, and mollusks. Demand for high-value products, including salmon, lobster and shrimp remains strong, but competition within this sector is high. U.S. seafood exports to China declined slightly both in volume and value terms in 2024. On March 4, 2025, China announced additional retaliatory tariffs of 10 percent on many U.S. fishery products.

FAS China provides this analysis and reporting as a service to the United States agricultural community, and to our farmers, ranchers, agribusiness and fisheries operations, and rural communities in support of a worldwide agricultural information system and a level playing field for U.S. agriculture.

Important Note:

Complete full year official seafood production data from the People's Republic of China (PRC) is typically published between May and July. As such, the 2024 Fisheries Statistics Report, often cited in this report, contains full year data for 2023 and incomplete data for 2024. Full year data for calendar year 2024 is not expected to be available until the second half of 2025.

This report uses Chinese terminology to maintain consistency between Chinese statistics and product categories. Total seafood trade statistics in this report do not include fishmeal.

Definitions:

Seafood products: Include wild caught and aquaculture products from marine and freshwater sources, including oceans, rivers, lakes, and ponds. Also, includes both animal and plant products.

Seafood catch production: Total volume of wild caught seafood products from freshwater and marine sources.

Aquaculture production: Total volume of farmed seafood products from freshwater and marine (saltwater) sources.

Pre-prepared food: A term describing any number of food products that are processed to a stage short of ready-to-eat for the purpose of easy preparation.

I. Production

Post estimates China's 2024 seafood production at 74.1 MMT, up 4.1 percent from the previous year's 71.2 MMT on consistent demand and expansion of aquaculture production. Aquaculture production is estimated at 60.8 MMT, up 2.7 MMT from 58.1 MMT in 2023. Since 2007, China's production has increased every year, except 2018. Production of ocean and freshwater wild-caught seafood is up slightly to 13.3 MMT from 13.1 MMT in 2023. China's total seafood production for 2025 is likely to show moderate growth on expanded aquaculture area and improved production efficiency despite generally lower prices for various seafood items in 2024 and effectively zero-growth for wild caught seafood volumes.

Table 1. China: Seafood Production (Unit: MMT)

Category/Year	2019	2020	2021	2022	2023	2024*
Total Seafood Production	64.8	65.5	66.9	68.7	71.2	74.1
-Total Aquaculture Production	50.8	52.2	53.9	55.6	58.1	60.8
--- Ocean	20.6	21.4	22.1	22.8	23.9	25.2
--- Freshwater	30.1	30.9	31.8	32.9	34.1	35.6
-Total Wild Caught Production	14.0	13.2	13.0	13.0	13.1	13.3
--- Ocean	10.0	9.5	9.5	9.5	9.6	9.7
--- Freshwater	1.8	1.5	1.2	1.2	1.2	1.2
--- Distant ocean caught	2.2	2.3	2.2	2.3	2.3	2.4

Source: 2024 China Fishery Statistics Report containing official data for 2023; The 2024 data are Post's estimates.

A. Wild Caught Seafood

China's National Bureau of Statistics (NBS) reported total wild-caught seafood production at 13.1 MMT in 2023 compared to 13 MMT the previous year. Total wild caught seafood production for 2024 is not yet available. Based on China's Ministry of Agriculture and Rural Affairs (MARA) statistics for 20 provinces¹, in the first 11 months of 2024, marine wild caught production reached 8.94 MMT, up 1.4 percent year-on-year, while freshwater wild caught production remained almost unchanged at 0.88 MMT. Wild-caught seafood production in China's domestic waters faces challenges due to the deterioration of fishery resources in lakes, rivers, and nearby seas. To address this, central, provincial, and local authorities have maintained and, in some cases, expanded coastal and freshwater seasonal fishing bans. According to MARA, the marine fishing ban continued in 2024 from May to September while the ban in the Yangtze River and the Yellow River and their major tributaries lasts from April to the end of July. This ban, along with previous ones (see the [2021 China Fishery Products Annual](#) and [2022 China Fishery Products Annual](#)), has contributed to an overall decline in wild-caught production and improvement of ecological system and fishery resources.

The scale and activities of China's marine fishing industry, including its distant-water fishing (DWF) fleet, remains a subject of debate. In August 2023, the U.S. National Oceanographic and

¹ The 20 provinces (autonomous regions and municipalities) include Beijing, Tianjin, Hebei, Liaoning, Jilin, Heilongjiang, Shanghai, Jiangsu, Zhejiang, Anhui, Fujian, Jiangxi, Shandong, Hubei, Hunan, Guangdong, Guangxi, Hainan, Chongqing, and Sichuan.

Atmospheric Administration (NOAA) released its biennial [Report to Congress on Improving International Fisheries Management](#). In this report, NOAA identified seven nations and entities for illegal, unreported, and unregulated (IUU) fishing: Angola, Grenada, Mexico, the People's Republic of China, Taiwan, The Gambia, and Vanuatu.

On October 24, 2023, the China released a "[White Paper on China's Distant Ocean Fishing](#)" (link in Chinese). According to this document, in 2022, China had 177 approved distant-water fishery (DWF) enterprises and 2,551 DWF vessels, with 1,498 operating on the high seas. Operating areas include the Pacific, Indian, and Atlantic high seas; Antarctic waters; and waters under the jurisdiction of relevant cooperative countries. According to MARA, total distant ocean (not domestic ocean) fishing production remained stable at about 2.3 MMT yearly in 2022 and 2023. This trend appears to continue in 2024 although official data are not available yet as of this report.

MARA has implemented a "zero growth" policy to restrict yearly domestic ocean catch to less than 10 MMT. In a press briefing held at the end of September 2024, MARA said it formulated and implemented a "dual control" system for total marine fishery resource management and marine fishing. The objective is to control the total domestic marine fishing production volume (at or below 10 MMT annually), and to control the number of large and medium-sized marine fishing vessels (at or below the existing 50,000 vessels). MARA estimates the maximum sustainable production of offshore fishery resources remains above 10 MMT per year. According to its estimates, China's domestic ocean fishing production stabilized at around 9.5 MMT per year from 2018 to 2023. The fishing production of major economic fishes such as hairtail, anchovy, mackerel, and swimming crab remained stable, while the fishing production of Spanish mackerel, pomfret, squid, etc. increased steadily.

Aquaculture

In 2024, China retained its position as the world's leading aquaculture producer. Aquaculture production reached 58.1 MMT in 2023, up 4.4 percent or a net growth of 2.5 MMT compared to the previous year. A number of factors contributed to continued growth including production efficiency through intensification and industrialization, an increase in area under production, slightly reduced supplies of wild-caught seafood, and an upsurge in demand for pre-prepared seafood in the retail and hospitality sectors. Although official 2024 data on aquaculture production by type is not yet available, MARA's preliminary statistics indicate production of freshwater and marine water aquaculture products reached 27.3 MMT and 20.7 MMT, respectively in the first ten months of 2024. This is a 5.3 percent and 4.3 percent increase from 2023.

Based on MARA feed statistics, China's aquaculture feed production dropped 3.5 percent year-on-year in 2024. Industry sources suggest that lower prices and margins for aquatic products likely contributed to reduced compound feed demand and increased use of self-mixed feed by farmers, a factor not reflected in the official estimates. In the long term, China's aquaculture production continues to shift towards industrialization and intensification, both of which are expected to drive feed demand. In the short run though, improved feed conversion ratios due to

new feed technologies and improvements in fish breeding has the potential to slow feed consumption growth.

As mentioned above, this year’s increase in aquaculture production is partly attributable to the recovery of aquaculture production area which began in 2023 and continued into 2024. Aquaculture area had been declining since 2018 when the PRC strengthened environmental regulations (see [2022 China Fishery Products Annual](#)). The 2025 “[No. 1 Document](#)” (link in Chinese), a policy providing broad guidance for resource allocation and development goals in the PRC’s agricultural sector. In June 2023, MARA and other relevant government agencies published the document “[Opinions on Accelerating the Development of Deep-Sea Aquaculture](#)” (link in Chinese). The document emphasizes the need to accurately understand overall requirements, optimize spatial layout, promote the entire industry chain, strengthen ecological and environmental protection, encourage technological innovation, and implement inspection registration requirements. As shown in Table 2, total aquaculture water area rebounded greatly in 2023, up 7.3 percent, with ocean and freshwater aquaculture area both up 6.8 percent and 7.5 percent, respectively, from 2022. Chinese industry sources expect a further moderate growth in 2024 with ocean aquaculture area up more than 2 percent from 2023. Future growth in the sector will in part depend upon continuing this trend of increasing production area.

Table 2. China: Aquaculture Area (Unit: hectares)

Year	Ocean	Freshwater	Total
2020	1,995,550	5,040,556	7,036,106
2021	2,025,510	4,983,870	7,009,380
2022	2,074,420	5,033,084	7,107,504
2023	2,214,870	5,409,730	7,624,600
2023-2022 change	+6.77%	+7.48%	+7.28%
2022-2021 change	+2.4%	+0.99%	+1.4%
2021-2020 change	+1.5%	-1.12%	-0.38%
2020-2019 change	+0.17%	-1.48%	-1.02%

Source: 2024 China Fishery Statistics Report

Aquaculture will continue to be the PRC’s major means to increase domestic seafood supply. Consumer demand for high-quality seafood and changes in consumption patterns towards more processed and pre-prepared seafood are expected to continue driving growth in the industry. At the PRC’s 2024 Agriculture Outlook Conference, aquaculture production was forecast to maintain 1.1 percent yearly growth to reach 62.53 MMT in 2033 while the wild catch production will remain stable in general. The share of aquaculture production will reach 82.8 percent in total seafood production by 2033.

Aquaculture Products (Marine-Based and Freshwater Cultured Products)

Fish

Fish remains the predominant cultured product, constituting 51.2 percent of aquaculture production in 2023. Total fish production in 2023 increased 2.6 percent year-on-year to 29.8

MMT. This comprised freshwater production of 27.7 MMT, up 2.2 percent year-on-year, and marine production of 2.1 MMT.

Table 3. China: Seafood Production by Category (1,000 metric tons)

Category/Year	2020	2021	2022	2023
Aquaculture products	52,242	53,944	55,655	58,096
--Fish	27,613	28,247	29,030	29,773
--Shrimp, Prawn, and Crab	6,032	6,439	6,848	7,384
--Shellfish	14,987	15,457	15,886	16,659
--Algae	2,621	2,723	2,724	2,883
--Other	987	1,079	1,166	1,397
Wild Caught Products	13,249	12,960	13,004	13,066

Source: 2024 China Fishery Statistics Report.

Five species of carp, namely grass carp, bighead carp, silver carp, cyprinoid carp, and crucian carp, retain their status as the most popular freshwater fish in aquaculture, collectively yielding 18.9 MMT in 2023, an increase of 1 percent from 2022. The persistent demand for carp is attributed to its cost advantage, widespread availability, and freshness. Production takes place in ponds, lakes, and reservoirs in nearly every province. Official production data for these carp for 2024 is not yet available but is expected to maintain moderate growth to meet the demand.

China also holds the position of the world's largest tilapia producer, generating 1.82 MMT in 2023, up from the 1.74 MMT in 2022, reflecting a 4.6 percent rise from the previous year. Although official data for 2024 is not yet available, tilapia production is expected to remain flat or slightly decline due to weak export demand (refer to Chart 2 in the trade section of this report) and an influx of lower-priced Vietnamese basa fish.

Chinese industry associations and major tilapia-producing provinces like Hainan have intensified promotional efforts for tilapia products in the domestic market, employing online and restaurant promotions featuring various processed products. These marketing initiatives have continued into 2024 and appear to have significantly boosted domestic tilapia consumption. The southern provinces of Guangdong, Hainan, Guangxi, Yunnan, and Fujian retain their positions as the top tilapia-producing provinces, collectively contributing to 97.3 percent of the total tilapia production in 2023.

Catfish production experienced consistent growth in 2023, reaching 441,000 MT, up 6 percent from the previous year, driven by steady growth in domestic consumption. The leading provinces in catfish production include Sichuan, Guangdong, Hubei, Henan, and Guangxi, accounting for 76.9 percent of the total production. Although official production figures for 2024 are not yet available, industry sources anticipate that catfish production will grow moderately.

Crustaceans

In 2023, China's crustacean production reached 7.38 MMT, up from the 6.85 MMT in 2022. Of this total, marine-based crustacean production increased to 2.06 MMT, up from the 1.95 MMT in 2022, while freshwater production reached 5.33 MMT, up 8.8 percent from the 4.9 MMT in 2022. China is the largest aquaculture shrimp (*Penaeus vannamei*) producer globally, producing nearly 2.24 MMT in 2023, up 6.7 percent from 2022. However an influx of lower-priced imported shrimp may slow domestic shrimp production growth in 2024 and beyond.

Crayfish is another local aquatic species being heavily promoted in the domestic market. Chinese industry associations have joined with local governments to carry out various chef competitions, tasting events, and restaurant promotions to further boost consumers' interest. According to NBS data, crayfish production reached 3.2 MMT in 2023, up 9.4 percent from the 2.9 MMT in 2022, with Hubei, Anhui, Hunan, Jiangsu, and Jiangxi provinces accounting for over 90 percent of total crayfish production.

Increased domestic demand, especially from high-end consumers and a robust recovery of the food service sector, which according to NBS, reported a 20.4 percent increase in total revenue in 2023, is expected to drive growth in total aquaculture crustacean production in 2024.

Shellfish

Shellfish production in 2023 reached 16.7 MMT, up from the 15.9 MMT in 2022. The outlook for shellfish production in 2024 is anticipated to expand, primarily due to an increase in marine aquaculture production areas in 2023. The top six provinces for marine-based cultured shellfish production in China are Shandong, Fujian, Liaoning, Guangdong, Zhejiang, and Guangxi, which collectively accounted for 93 percent of the total production in 2023.

Seafood Production by Province

In 2023, China's top seafood-producing provinces continue to be Guangdong, Shandong, Fujian and Zhejiang, benefitting from advantageous coastal locations, abundant freshwater resources, and well-established production facilities. The combined production of these four provinces accounts for 47.5 percent of the nation's total seafood production in 2023. Among the leading freshwater aquaculture producers were Hubei, Guangdong, and Jiangsu provinces, with combined production at 13.2 MMT, or 38.7 percent of the nation's total in 2023. The top four marine aquaculture producers including Shandong, Fujian, Liaoning and Guangdong with combined production at 18.7 MMT, accounting for 79 percent of the nation's total in 2023.

Table 4. China: Top Seafood Producing Provinces in 2023 (Unit: 1,000 metric tons)

Province	Total production	Aquaculture production	Wild-caught production
Guangdong	9,240	7,957	1,283
Shandong	9,139	6,939	2,200
Fujian	8,902	6,749	2,153
Zhejiang	6,479	2,999	3,480

Jiangsu	5,220	4,572	649
Hubei	5,228	5,206	21
Liaoning	5,081	4,380	701
Guangxi	3,786	3,214	572
Other	18,105	16,080	2,007
Total	71,162	58,096	13,066

Source: 2024 China Fishery Statistics Yearbook

B. Seafood Processing

According to MARA, processed seafood production reached 22 MMT, up from the 21.48 MMT in 2022. Total seafood sent for processing saw a 2.6 percent year-on-year rise to 26.2 MMT, with ocean products accounting for 19.8 MMT and freshwater products contributing 6.4 MMT. While live seafood products are still favored by many Chinese consumers, there is an increasing trend in processing freshwater aquatic products into pre-prepared items, catering to the demands of consumers who may not have the time to shop for or prepare live seafood.

As of the end of 2023, there were 9,433 seafood processing facilities in operation in China, up from 9,331 in 2022, boosting total processing capacity to 30.2 MMT. According to industry sources, China remains a global processing hub for mackerel, salmon, cod, and herring. Leading seafood processing provinces, namely Shandong, Fujian, Liaoning, Zhejiang, and Hubei, collectively produced 16.1 MMT of processed seafood in 2023, representing 73 percent of the nation's total. These provinces, in addition to being major seafood producers, host numerous foreign-owned processing facilities and are well-equipped with ports and cold storage facilities for importing, processing, and re-exporting seafood. While the PRC's processing sector is gradually recovering to pre-pandemic levels, many companies are encountering challenges associated with the weak recovery in overseas demand and rising processing costs.

In general, China's seafood processing industry in 2024 continues to face challenges. The U.S. government's executive order sanctioning all Russian seafood, even if these products are processed in third countries (see the Policy section of this report), will likely impact exports of processed seafood to the United States. This new policy will pose a major challenge to Chinese seafood processors in Qingdao and Dalian where the leading seafood processing hubs are located. Chinese seafood processors are looking for alternatives to Russian seafood to maintain their U.S. buyers, although U.S. supply is limited and some processors have noted difficulty in securing product from the United States due to increased demand.

Consumption and Marketing

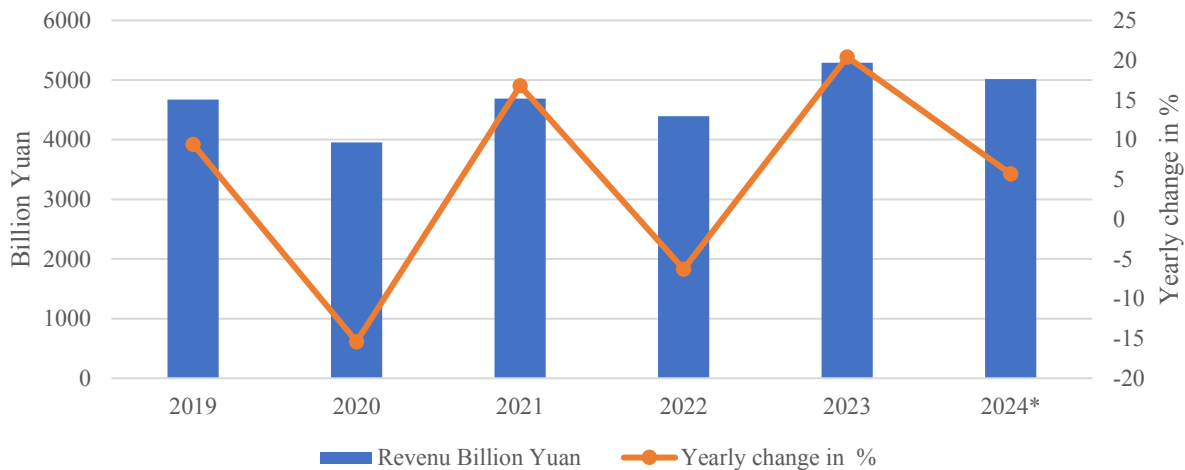
The longtime global leader in seafood consumption, Chinese consumers increasingly display preferences for high-quality and value-added seafood products. Although per capita seafood consumption dropped slightly in 2022, due to the impact of the PRC's COVID-related restrictions, demand rebounded greatly in 2023 as the economy reopened. An adequate supply of various seafood products from both home and abroad at affordable prices is expected to boost consumption in 2024 and beyond.

Table 5. China: Protein Consumption Trends (Unit: kilograms)

Year	2019	2020	2021	2022	2023
<i>Per Capita Consumption of Seafood Products</i>					
Urban	16.7	16.6	16.7	16.2	17.4
Rural	9.6	10.3	10.9	10.7	12.2
<i>Per Capita Consumption of Pork, Beef, Poultry, and Mutton</i>					
Urban	40.1	40.4	46.7	47.1	52.2
Rural	34.7	33.8	43.3	45.1	52.1

Source: 2024 China Statistical Yearbook

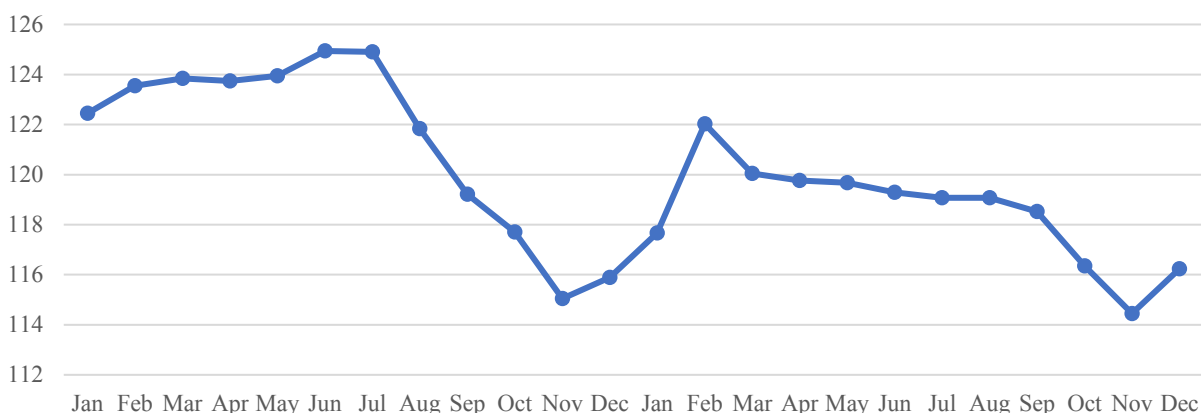
According to NBS, in 2024, the PRC achieved 5 percent GDP growth and per capita disposable income increased 5.3 percent from 2023. The food service sector continued growing in line with past trends with revenue again increasing by 5.3 percent in 2024 (see Chart 1). Food service revenue in 2023 surged 20.4 percent year-on-year from the low revenue in 2022 due to COVID restriction.

Chart 1. China: Food Service Revenue Grew in 2024

Source: NBS; *data of January to November 2024

In a positive sign for continued consumption growth, prices for most seafood products remain affordable for China's increasingly price-conscious consumers. According to MARA, prices for many major aquaculture products declined in 2024. Chart 2 illustrates the overall price trend for aquatic products from January 2023 to December 2024. Higher domestic production and increased imported seafood and other meats for domestic market in 2024 resulted in a significant drop in average wholesale prices.

Chart 2. China: Aquatic Product Price Index (January 2023 to December 2024)



Source: MARA; Note: The price index is a combined price indicator of aquatic products defined by MARA

Seafood consumption is highest in coastal regions, where it has been a traditional source of protein and where populations generally have higher levels of disposable income. Consumers in these regions tend to prefer live or fresh seafood over frozen or processed products. However, there is a steady increase in the consumption of frozen and processed seafood. This shift is attributed to improvements in processing techniques, distribution networks (including e-commerce), and the development of cold chain systems. The rising popularity of high-end supermarkets and consumer interest in diverse and nutritious diets featuring seafood also contribute to the growing consumption of frozen and processed seafood. In addition, consumer awareness about potential food safety risks associated with live seafood is playing a role in this shift, as some consumers are opting for frozen and other processed fishery products over live seafood (for market information on live seafood, see GAIN Report [CH2024-0038](#)). Industry sources reported the most popular seafood online category is shrimp products including frozen whole and processed shrimp.

E-commerce

The growth of e-commerce trade has played a significant role in boosting domestic seafood consumption in China. Among the most popular aquatic products for e-commerce are fresh and frozen shrimp, ready-to-eat seafood products, and fresh and frozen fish products. While an updated report for 2024 is not available, there has been a shift from buying fresh and live seafood at traditional wet markets to purchasing fresh and frozen seafood through e-commerce channels. While these adjustments may have originally been intended to limit physical contact with others during the period of strict COVID-19 restrictions, the platforms and supply chains that were developed have won over a segment of consumers who increasingly value the convenience of having products delivered. Accordingly, industry contacts anticipate that much of this shift in consumer demand will persist, particularly for key demographics like young, urban consumers with disposable income who prefer the convenience and time-saving benefits of ordering seafood online. A TikTok survey report covering September 2023 to September 2024 shows its online sales of seafood products in Guangdong Province surged 50 percent from the same period in

2022 to 2023. For additional information on e-commerce opportunities in China, see GAIN Report [China Cross-Border E-commerce Market Opportunities for US Agricultural Products](#).

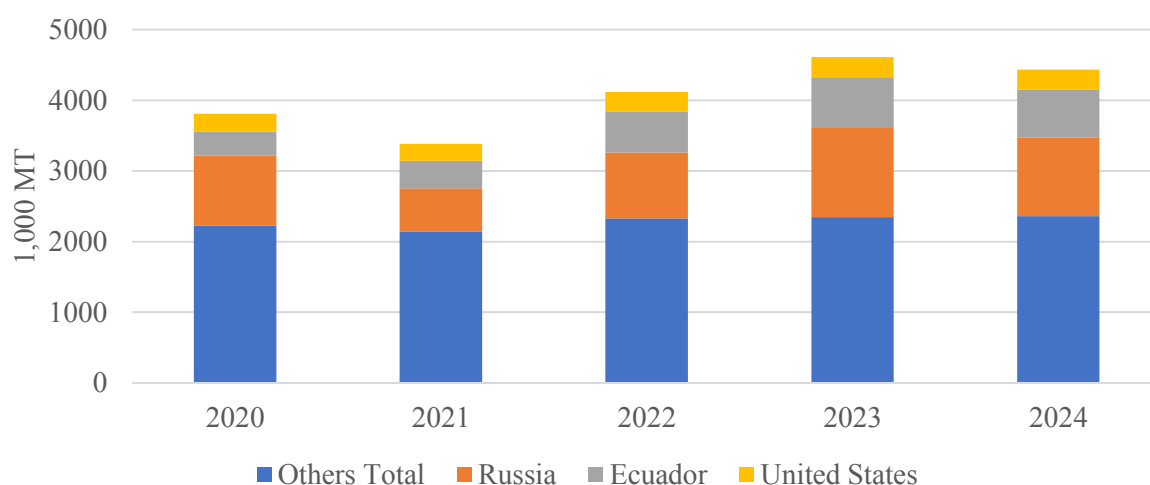
III. Trade

A. Imports

China's seafood imports remained strong in 2024, at 4.6 MMT, mainly due to increased domestic consumption and gradual recovery of overseas demand for processed seafood. This was a decline from the record level of imports reached in 2023 but was still the second highest level on record. In 2024, total seafood imports reached 4.4 MMT valued at \$17.7 billion, down 3.8 percent and 5.5 percent, respectively, from the previous year. Strong imports were led by higher volume imports of frozen fish at 2.4 MMT and crustaceans at 1.2 MMT, which were almost unchanged in volume from the previous year. Demand for high-value products, an economic rebound and competitive prices for imported products all drove seafood imports. Seafood imports are expected to remain strong in 2025 on consumer's growing demand along with economic growth.

Seafood imports from the United States showed a 3.6 percent year-on-year decline in volume and 4.9 percent fall in value to \$1.01 billion in 2024. Russia remains China's largest seafood supplier with total volume of 1.11 MMT in 2024, followed by Ecuador at 0.7 MMT, Vietnam at 0.33 MMT, India at 0.32 MMT, Indonesia and the United States both at 0.28 MMT.

Chart 3. China: Seafood Imports Remained Strong in 2024

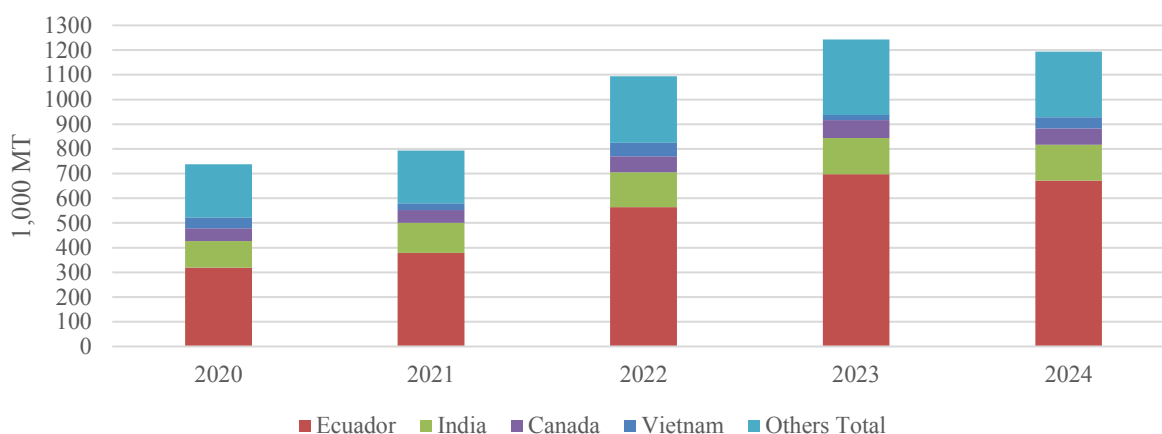


Source: Trade Data Monitor, LLC.

In 2024, frozen fish (HS Code 0303) accounted for 53.6 percent of imports at nearly 2.38 MMT, almost unchanged from the previous year. Russia remained the top supplier of frozen fish to China taking 42.4 percent of the market in 2024, distantly followed by the United States at 9.1 percent. Crustacean imports (HS Code 0306) were 1.19 MMT, almost unchanged from the

previous year and mollusk imports were 0.44 MMT. Imports of fresh fish fillet (HS Code 0302) increased by 22 percent. Imports of fish fillet (HS Code 0304) remained low on adequate supply of similar domestic products, including tilapia and carp, available at reasonable prices, while strong demand for crustaceans was driven by relatively low import prices and an improved economic situation generating greater demand for both food service and home use. Ecuador, India, and Canada remained top suppliers of crustaceans to China, accounting for a combined 73.9 percent of total import volume.

Chart 4. China: Imports of Crustaceans



Source: Trade Data Monitor, LLC.

Salmon imports were 190,000 MT, significantly down from the high of 252,000 MT in 2023, and well below record imports of 300,000 MT in 2018. Imports from the United States dropped to 38,200 MT, down from 58,800 MT in the previous year. U.S. salmon imports have fallen due to several factors. Consumer demand has softened, and upscale consumers continue to seek out novel imported seafood of different species. Other countries, such as Norway have made inroads in selling to the hotel, restaurant, and institutional (HRI) sector and in addition to salmon have also promoted products like farmed Atlantic cod, or “snow cod”, and mackerel.

Imports of lower-priced Vietnamese basa fish have fallen rapidly in recent years. China’s imports of basa fillets surged 67 percent to 228,000 MT in 2022 but fell to 93,000 MT in 2024. Industry sources noted that the decline was due to a combination of quality concerns that often resulted in delayed entry inspection and greater availability of similar domestic products. Imports of fish fillet from Russia, however, surged 70 percent year-on-year to 42,000 MT in 2024, and this was most likely wild caught pollock which is increasingly favored by Chinese consumers. Despite challenges in certain segments, industry sources remain optimistic about robust domestic demand for seafood, particularly for wild-caught fish, high-value fish, and crustacean products.

The northern ports of Qingdao and Dalian remain the two primary arrival ports for seafood.

B. Exports

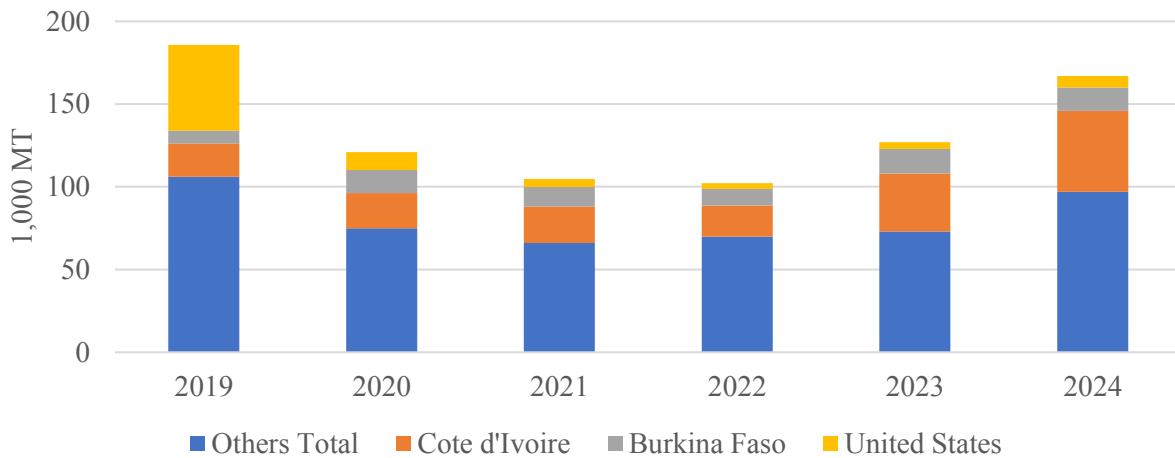
China primarily exports processed seafood products. Seafood exports hit record by volume in 2024 at 3.99 MMYT, up from the 3.52 MMT in the previous year. Exports rebounded to close to level in the pre-pandemic period when volumes exceeded 4 MMT annually from 2017 to 2019. The slow growth in exports underscores weaker recovery of overseas demand and increased competition. Despite 13 percent year-on-year increase in export volume, the export value in 2024 declined 1.6 percent from the previous year implying overall low export prices.

In 2024, Japan remained the PRC's largest seafood product export destination, followed by the United States and South Korea. However, while total seafood exports to the United States increased in volume, up 9.8 percent, they were almost unchanged in value from the previous year. Notably, the export volume of fish fillet (HS Code 0304) and prepared and packaged crustaceans/mollusks (HS Code 1605) to the United States increased 23 percent and 19 percent, respectively, from the previous year. The United States remains the PRC's top catfish market, receiving 49 percent of its 18,887 MT catfish exports in 2024.

By category, in 2024, export volume of all major categories increased with exports of frozen fish (HS Code 0303), fish fillet (HS Code 0304) and prepared and preserved fish and caviar (HS Code 1604) up by 15 percent, 12 percent and 16 percent in volume, respectively, from 2023.

In 2024, China's exports of tilapia products continued to recover to over 167,000 MT, up 23 percent from 2023 but still much lower than the yearly average at 280,000 MT seen between 2014 to 2018. China's exports of tilapia products has declined due to strong competition from lower-priced Vietnamese basa fish in international markets, while increased domestic demand shifted some supply away from exporters. Three western Africa countries Cote d'Ivoire, Burkina Faso and Mali took 45 percent of China's tilapia exports in 2024. Tilapia exports to the United States were 7,400 MT in 2024, far below the average 63,000 MT in 2018 to 2019 despite a U.S. [Section 301](#) tariff exclusion issued on March 26, 2020, for imports of frozen tilapia under HS code 0304.61.000. For additional information please see the U.S. Trade Representative "[China Section 301-Tariff Actions and Exclusion Process](#)" or contact the Section 301 Hotline at (202) 395-5725.

Chart 5. China: Exports of Tilapia Products



Source: Trade Data Monitor, LLC.

China's exports of crayfish products in 2024 surged 45 percent year-on-year to 12,900 MT mainly due to China's relatively low export prices, however, this level is still below the crayfish export volume in 2019.

IV. Policy

U.S. Ban on Russian Seafood Products

On December 22, 2023, then-President Biden signed two executive orders, expanding trade sanctions against Russia. One of these orders, [EO 14068 amendment](#), specifically addresses seafood and took immediate effect. The amendment grants U.S. authorities the authority to prohibit the import of certain products caught in Russian waters or on Russian-flagged vessels, even if these products undergo transformation in a third country.

Following this, the U.S. Department of the Treasury issued a [determination](#) stating that prohibitions “shall apply to the following categories of fish, seafood, and preparations thereof, that were produced wholly or in part in the Russian Federation, or harvested in waters under the jurisdiction of the Russian Federation or by Russia-flagged vessels, notwithstanding whether such fish, seafood, and preparations thereof have been incorporated or substantially transformed into another product outside of the Russian Federation: salmon, cod, pollock, and crab. As a result, the importation and entry into the United States, including importation for admission into a foreign trade zone located in the United States, of such salmon, cod, pollock, or crab is prohibited, except to the extent provided by law, or unless licensed or otherwise authorized by the Office of Foreign Assets Control.” This decision became effective on December 22, 2023, with a 60-day grace period for products ordered before the ban was implemented.

In 2024, China's imports of frozen fish from Russia remained high at 1 MMT but down from the 1.2 MMT in 2023. This accounted for 23 percent of China's total seafood imports and 42 percent of its frozen fish (HS Code 0303) imports. China's exports of fish products (HS Codes: 0303, 0304, and 0305) to the United States totaled 142,000 MT in 2024, representing a 23 percent increase year-on-year, however they remained lower than years before 2022. The ban is expected to continue affecting China's exports of processed seafood to the United States. However, China's seafood imports are diverse, and the domestic demand for wild-caught seafood, including the specified species, remains robust. The longer-term impact will depend on how China's industry restructures its trade strategy to minimize the effects on imports from Russia and exports to the United States as well as any measures undertaken by the United States to enforce the determination.

Market Access for U.S. Aquatic Species

The United States National Oceanic and Atmospheric Administration (NOAA) is responsible for market access for U.S. aquatic species to China and for submitting lists of U.S. exporters shipping live seafood as well as fishmeal to the General Administration of Customs of China (GACC). The United States Food and Drug Administration (FDA) is responsible for submitting lists of U.S. exporters handling processed seafood for registration with GACC. The Animal and Plant Inspection Service (APHIS) of the United States Department of Agriculture is responsible for market access of aquatic species for breeding stock and ornamental use and the lists of exporters of those products for registration with GACC.

GACC is responsible for approval of imports of aquatic species from foreign countries. The Department for Plant and Animal Quarantine of GACC manage and publish lists of U.S. aquatic species including Edible Aquatic Animals, Breeding Stock and Ornamental Aquatic Animals approved for import to China. The lists are available on the [GACC website](#). The Import and Export Food Safety Bureau of GACC manage and publish a list of U.S. seafood species (not live) approved for import to China, which is available [here](#). U.S. exporters are advised to confirm the market access status for specific aquatic species or registration of seafood exporting facilities prior to export.

Registration for Exporters of Seafood/Aquatic Animals to China

The GACC Bureau of Import and Export Food Safety updates and publishes [Registration Information of Overseas Food Manufacturers of Imported Food](#), which contains the U.S. seafood exporting facilities registered with GACC.

The Department of Animal and Plant Quarantine of GACC is responsible for the registration of overseas suppliers of live aquatic animals. The Department maintains [3 Lists of Registered U.S. Exporters for Exports of Aquatic Animals \(including Edible Live Aquatic Animals, Breeding Stock and Ornamental Aquatic Animals\) to China](#). U.S. exporters should verify their company is listed on the appropriate GACC list prior to exporting products to China.

PRC Suspends Imports of Aquatic Products from Japan

On August 24, 2023, GACC suspended all imports of aquatic products (including edible aquatic animals) from Japan, effective immediately. The announcement follows Japan's announced plans to begin releasing more than one MMT of treated radioactive water from the Fukushima power plant into the Pacific Ocean (See [PRC Suspends Imports of Aquatic Products from Japan](#)). This suspension resulted in seafood imports from Japan dropping to zero from September 2023 to November of 2024. China's imports of seafood from Japan reached 155,000 MT in 2022. In September 2024, the PRC and Japan conducted discussion on the releasing of treated radioactive water. In late January 2025, A Chinese industry source reported that the test of the water samples collected from the treated radioactive water releasing region by China's expert in October 2024 show "no abnormal" results though whether this will result in trade resuming remains to be seen.

PRC – Ecuador Free Trade Agreement

In May 2023, the PRC and Ecuador signed a [free trade agreement](#), which was ratified by Ecuador's National Assembly in February 2024 (see the PRC announcement on the agreement [here](#)). The agreement allows for preferential tariffs on over 95 percent of Ecuador's exports to China, including numerous seafood products, such as white shrimp, fish, and fish oil. Duties on these products will over time be reduced to zero from the current 5 to 20 percent. China's imports of seafood from Ecuador are expected to remain strong although imports in 2024 declined 2.6 percent from the previous year. Out of the total imports of 685,000 MT, 98 percent are crustaceans (HS Code 0306).

WTO Agreement on Fisheries Subsidies

On June 17, 2022, the World Trade Organization (WTO) [Agreement on Fisheries Subsidies](#), was adopted at the 12th Ministerial Conference (MC12). On June 27, 2023, the PRC submitted China's letter of acceptance of the Protocol to the WTO "Agreement on Fisheries Subsidies" to the WTO. WTO members continued to [negotiate](#) details of the agreement at the 13th Ministerial Conference (MC13), held in Abu Dhabi, UAE in February 2024. Based on industry source, as of March 2024, 72 WTO member countries have accepted the Agreement on Fisheries Subsidies.

Draft Revised Fishery Law

In August 2019, MARA started working on revising the Fishery Law for which the previous slight amendments were done in 2013. On December 25, 2024, China's National People's Congress (NPC) website published the "[Fishery Law of the People's Republic of China \(Revised Draft\)](#)" (link in Chinese) and solicited comments from the public and requested comments to be submitted before January 30, 2025. This is the first revision of the "Fisheries Law" in the 38 years since its implementation. The "Revised Draft" has a total of 7 chapters and 88 articles. It makes relatively comprehensive revisions to the current "Fisheries Law" in terms of promoting and regulating fish farming, strict fishing management, strengthening the proliferation and protection of fishery resources, and strengthening fishery supervision and management. The Law mainly focus on domestic fishery governance. The PRC has not yet notified a draft of the law to the WTO.

Chinese Exports of *Siluriformes* to the United States

In November 2019, FSIS listed the PRC as eligible to export *Siluriformes* fish and fish products to the United States. Only raw *Siluriformes* fish and fish products produced in FSIS-eligible Chinese establishments are eligible for export to the United States. The list of eligible facilities is available on the [FSIS website](#).

VAT and Import Duties for Domestically Consumed Seafood Imports

Imported seafood processed and sold in China for domestic consumption is subject to tariffs ranging from 7 to 14 percent. Tariff rates, MFN rates, and provisional special tariff rates are listed on the Ministry of Finance website at [2025 Customs Import and Export Tariff](#). (link in Chinese) and see more in GAIN report [Updated MFN Tariff Rates Published](#). China increased the tentative MFN tariff rates on certain frozen fish products (HS Code 03033110, 03033200, 03035100, 03036300, 03036700) to 5 percent from 2 percent. Likewise, the tentative MFN tariff rates previously applied to prepackaged pet food (HS Code 23091010, 23091090) was increased to 10 percent from 4 percent. China has also removed the tentative MFN tariff rates previously applied to certain fishery products (HS Code 03061640, 03061790, 03078190), orange juice (HS 20091200, 20091900), and alcoholic beverages (HS Code 22082000, 22083000). These products face normal MFN tariff rates as of January 1, 2025.

For information on the additional Chinese tariffs on U.S. fishery products, see the February 2020 USDA GAIN report [China Announces Reductions in Certain Additional Tariffs](#).

On March 4, 2025, China announced new retaliatory tariffs on most U.S. fishery products. For more information, please refer to the March 2025 USDA Gain report [Compendium of Tariffs on United States Agricultural and Related Products_Beijing_China - People's Republic of_CH2025-0050](#)

U.S. seafood exporters are advised to consult with their importers regarding the tariff and VAT rates for specific seafood species. Chinese importers may apply for exclusions from the additional tariffs on U.S. products. For more information about the tariff exclusion process, see GAIN report [CH2020-0017](#).

Trade Tables

Table 6. China: Imports of Seafood Products by Category (Unit: Metric Tons)

HS Code		2021	2022	2023	2024
	Total	3,382,952	4,123,163	4,611,710	4,433,623
0302	Fish, Fresh	77,824	64,567	91,524	111,615
0303	Fish, Frozen	1,615,175	2,064,990	2,382,034	2,378,125
0304	Fish, Fillet	166,775	263,581	187,203	178,897
0305	Fish, Dried, Salted, Brined	42,919	80,898	72,571	67,282
0306	Crustaceans	793,747	1,094,806	1,242,666	1,193,513
307	Mollusks & Other	612,986	499,639	552,754	460,292
1604	Prepared or Packaged Fish and Caviar	25,793	21,912	21,682	18,893
1605	Prepared or Packaged Crustaceans and Mollusks	47,732	32,769	61,275	25,006

Source: Trade Data Monitor, LLC.

Table 7. China: Imports of Seafood Products by Category (Unit: Million USD)

HS Code		2020	2021	2023	2024
	Total	13,835	18,705	18,781	17,746
0302	Fish, Fresh	713	852	1,166	1,174
0303	Fish, Frozen	3,510	5,105	4,795	4,729
0304	Fish Fillets	396	745	508	438
0305	Fish, Dried, Salted, Brined	130	261	294	279
0306	Crustaceans	6,974	9,570	9,565	9,079
0307	Mollusks & other	1,769	1,824	1,980	1,766
1604	Prepared or Packaged Fish and Caviar	137	115	114	99
1061605	Prepared or Packaged Crustaceans and Mollusks	206	234	359	182

Source: Trade Data Monitor, LLC.

Table 8. China: Imports of Seafood Products by Country of Origin (Unit: Million USD)

Country/Year	2021	2022	2023	2024
World	13,835	18,705	18,781	17,746
Ecuador	2,187	3,562	3,562	3,117
Russia	1,861	2,762	2,891	2,741
Canada	1,063	1,209	1,324	1,266
United States	976	1,138	1,155	1,098
India	961	1,264	1,253	1,147
Norway	726	914	958	984
Vietnam	717	1,680	794	1,200
Indonesia	685	761	828	1,011
New Zealand	465	498	451	453
Thailand	414	424	461	420
Japan	401	546	339	0
Peru	321	190	507	155

Source: Trade Data Monitor, LLC.

Table 9. China: Exports of Seafood Products by Category (Unit: Metric Tons)

HS Code		2021	2022	2023	2024
	Total	3,562,061	3,519,752	3,519,046	3,987,224
0302	Fish, Fresh	35,712	44,102	37,685	36,908
0303	Fish, Frozen	707,684	677,991	889,904	1,020,954
0304	Fish, Fillet	638,877	726,041	620,012	696,684
0305	Fish, Dried, Salted, Brined	55,093	61,568	53,324	60,143
0306	Crustaceans	119,889	88,211	87,587	94,912
0307	Mollusks and Other	509,813	510,016	446,620	524,288
1604	Prepared or Packaged Fish and Caviar	1,057,605	961,693	947,614	1,098,351
1605	Prepared or Packaged Crustaceans and Mollusks	437,388	450,123	436,300	454,984

Source: Trade Data Monitor, LLC.

Table 10. China: Exports of Seafood Products by Category (Unit: Million USD)

HS Code		2021	2022	2023	2024
	Total	20,286	21,179	18,490	18,789
0302	Fish, Fresh	248	334	277	248
0303	Fish, Frozen	2,363	2,263	2,256	2,257
0304	Fish, Fillet	3,163	4,078	3,323	3,402
0305	Fish, Dried, Salted, Brined	365	421	365	359
0306	Crustaceans	1,000	827	814	809
0307	Mollusks and Other	3,118	3,378	2,526	2,553
1604	Prepared or Packaged Fish and Caviar	5,101	4,641	4,199	4,742
1605	Prepared or Packaged Crustaceans and Mollusks	4,927	5,238	4,729	4,418

Source: Trade Data Monitor, LLC.

Table 11. China: Exports of Seafood Products by Country of Destination (Unit: Million USD)

Country/Year	2021	2022	2023	2024
World	20,286	21,179	18,490	18,789
Japan	3,375	3,387	2,979	3,054
United States	2,368	2,497	1,959	2,136
South Korea	1,567	1,653	1,553	1,558
Thailand	1,510	1,664	1,298	1,016
Hong Kong	1,446	1,297	1,144	946
Malaysia	1,307	1,636	1,531	1,475
Taiwan	1,210	1,255	1,063	928
Philippines	1,013	996	731	543
Mexico	720	611	513	697
Canada	430	519	377	384
Spain	401	405	404	521
Germany	396	576	471	328
Vietnam	371	427	383	433

Source: Trade Data Monitor, LLC.

Table 12. China: Imports of Fish, Frozen by Country of Origin (Unit: Metric Tons)

Country/Year	2021	2022	2023	2024
World	1,615,175	2,064,990	2,382,034	2,378,125
Russia	574,157	886,237	1,197,998	1,012,427
United States	185,570	214,467	221,466	217,172
Norway	157,309	154,597	110,151	138,068
Indonesia	103,736	84,770	77,903	139,210
India	72,418	128,662	166,444	152,982
Vietnam	49,276	74,244	74,712	93,884
Greenland	36,692	36,905	39,279	41,191
Malaysia	36,069	39,378	29,213	32,882
South Korea	35,984	28,491	41,914	81,712

Source: Trade Data Monitor, LLC.

Table 13. China: Imports of Salmon by Country of Origin (Unit: Metric Tons)

Country/Year	2021	2022	2023	2024
World	144,503	201,359	252,256	189,652
United States	43,566	54,131	58,882	38,221
Russia	37,471	73,880	89,859	37,672
Norway	26,139	24,458	40,599	43,762
Chile	11,487	23,928	34,608	34,193
Australia	11,637	11,618	14,152	12,347

Source: Trade Data Monitor, LLC.

Table 14. China: Imports of Crustaceans by Country of Origin (Unit: Metric Tons)

Country/Year	2020	2021	2023	2024
World	793,747	1,094,806	1,242,666	1,193,513
Ecuador	378,888	564,747	697,660	672,319
India	122,264	141,224	145,947	144,558
Canada	50,730	64,898	73,423	65,726
Thailand	28,659	30,191	30,662	28,698
Vietnam	27,468	54,907	19,762	45,080
Russia	21,240	27,939	46,543	45,938
Malaysia	19,509	11,563	11,843	7,419
Indonesia	16,225	25,131	24,057	21,648
Argentina	13,913	18,506	29,965	17,417
Greenland	13,907	27,469	24,643	26,000

Source: Trade Data Monitor, LLC.

Table 15. China: Exports of Fish Fillet by Destination (Unit: Metric Tons)

Country/Year	2021	2022	2023	2024
World	638,877	726,041	620,012	696,684
Japan	122,883	129,693	112,594	126,073
United States	107,830	130,973	90,340	111,560
Germany	101,440	134,237	113,989	90,995
United Kingdom	46,235	50,634	51,852	56,122
South Korea	32,083	37,113	33,635	38,085
France	30,202	35,872	32,426	40,254
Canada	26,945	30,016	17,740	21,048
Poland	22,408	16,785	14,539	16,513
Spain	19,312	23,159	20,292	28,170
Philippines	17,967	23,708	20,120	21,158

Source: Trade Data Monitor, LLC.

Table 16. China: Exports of Prepared and Preserved Crustacean and Mollusks by Destination (Unit: Metric Tons)

Country/Year	2021	2022	2023	2024
World	437,388	450,123	436,300	454,984
Japan	106,698	102,830	96,252	100,080
United States	53,223	41,914	35,463	42,115
Thailand	43,916	50,023	49,034	33,227
South Korea	39,842	44,426	51,715	59,736
Malaysia	39,013	65,847	69,662	71,634
Taiwan	29,625	30,999	29,011	27,618
Hong Kong	25,064	21,532	19,290	21,253
Singapore	10,874	12,854	12,305	13,016
Canada	13,903	13,270	10,954	12,022
Chile	13,664	6,179	7,491	12,323

Source: Trade Data Monitor, LLC.

Attachments:

No Attachments.