EU trade instruments for fisheries and aquaculture products

MARE.B3

European Commission

Structure of the presentation

EU fish market

EU trade tools for fisheries and aquaculture products

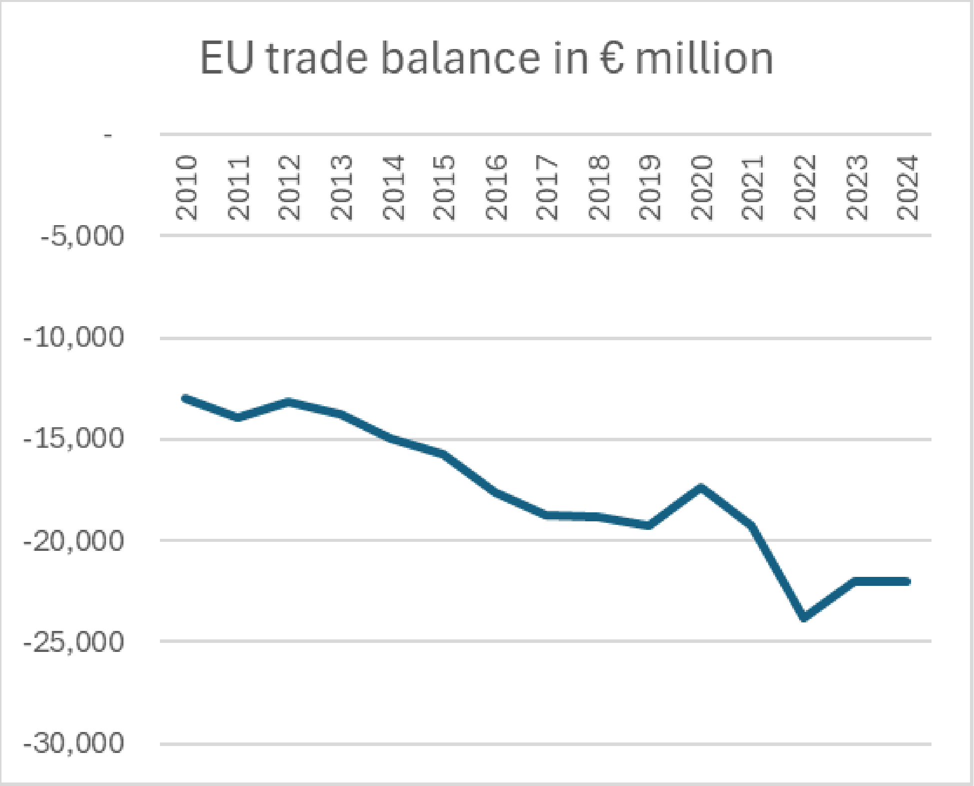
EU fish market

Some trade figures

- EU is a **net importer** of fisheries and aquaculture products – EU self-sufficiency rate is **38%** (2024)
- EU **imported 5.9 million tonnes** worth EUR 29.9 billion from third countries (2024)
- EU **exported 2.2 million tonnes** worth EUR 8.27 billion to third countries (2024)
- For the first time since 2018, the **EU trade deficit narrowed,** decreasing by **2%** to EUR 21.6 billion (2024).

Some caveats:

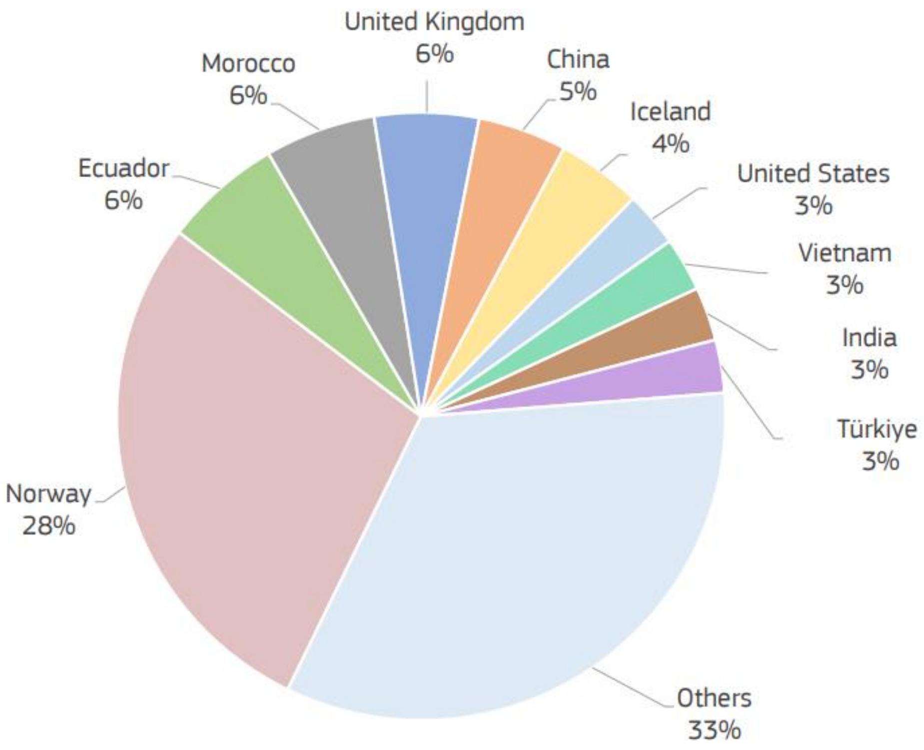
- Not all EU imports are 'foreign' – our import figures include products landed by EU vessels outside the EU
- We import to be able to export
  (e.g. Norwegian salmon for smoking)
- We import to be able to produce (feed for aquaculture)



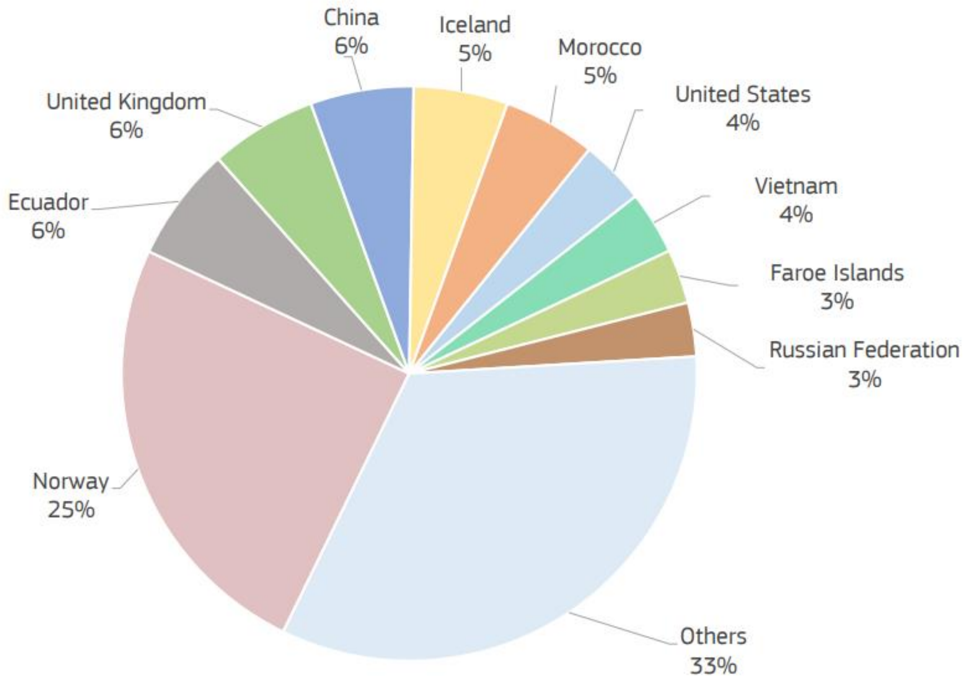
Source: Eurostat COMEXT

Source: EUMOFA, The EU Fish Market - 2025 Edition

Where do our imports come from?



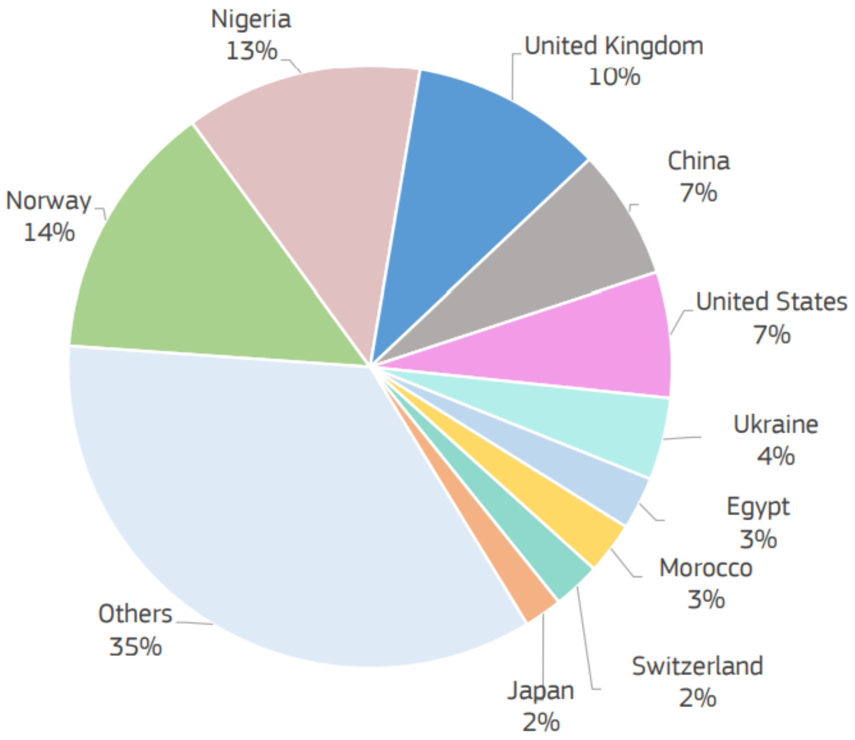
Top non-EU countries of origin in 2024 (value)



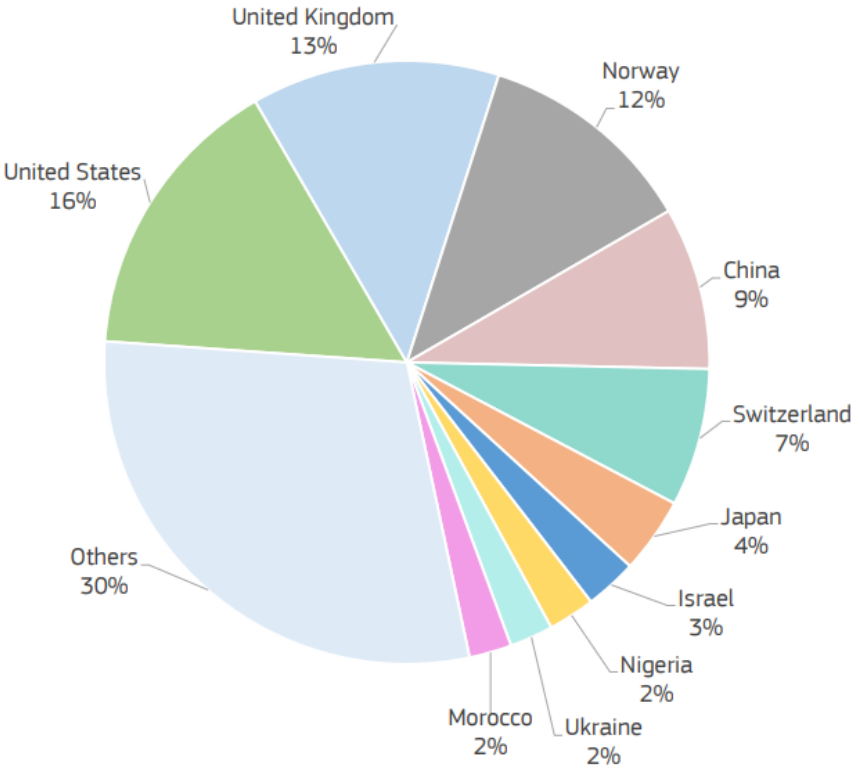
Top non-EU countries of origin in 2024 (volume)

Source: EUMOFA, The EU Fish Market - 2025 Edition

Where do our exports go?



Top non-EU countries of destination in 2024 (value)



Top non-EU countries of destination in 2024 (volume)

Source: EUMOFA, The EU Fish Market - 2025 Edition

What about our self-sufficiency?

Self-sufficiency rates of the 15 most consumed products in the EU (2023)

*Some species are grouped in a single product, namely: mussel, tuna (skipjack, yellowfin, albacore, bigeye, bluefin and miscellaneous) and shrimp (warmwater shrimps, coldwater shrimps, deep-water rose shrimps, shrimp Crangon spp. and miscellaneous shrimps)

*As surimi is made of different species and there are no statistics specifically referring to surimi production, the self-sufficiency rate cannot be calculated for this product.

Products[42] and share of total apparent consumption	Per capita consumption (kg, live weight equivalent)	Self-sufficiency rate
Tuna (12%)	2,68	34%
Salmon (10%)	2,39	1%
Alaska pollock (8%)	1,78	0%
Shrimps (7%)	1,59	11%
Cod (7%)	1,53	5%
Mussel (5%)	1,14	74%
Hake (4%)	1,01	40%
Herring (4%)	0,98	67%
Squid (3%)	0,61	15%
Surimi[43] (2%)	0,54	n.a.
Mackerel (2%)	0,50	87%
Sardine (2%)	0,49	67%
Trout (2%)	0,46	84%
Saithe (=Coalfish) (2%)	0,36	11%
Gilthead seabream (1%)	0,33	74%

Source: EUMOFA, The EU Fish Market - 2025 Edition

EU trade tools for fisheries and aquaculture products

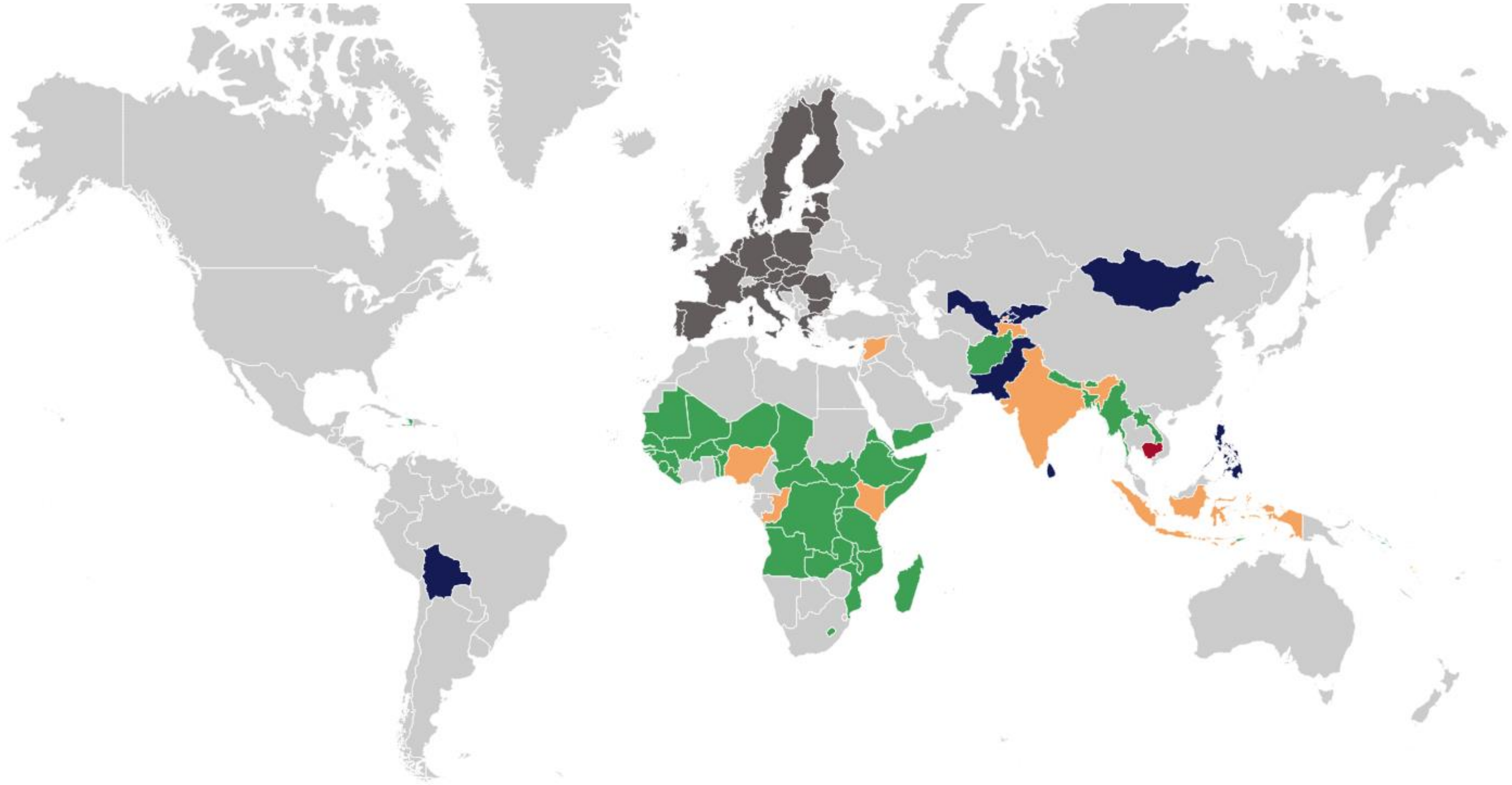
Generalised Scheme of Preferences (GSP)

Three arrangements:

GSP – Tariff reductions for developing countries; conditional on 15 human and labour rights conventions
Examples: India, Indonesia

GSP+ – Enhanced preferences for countries implementing 27 international conventions, including climate and environmental agreements (e.g., CITES)
Examples: Philippines, Cabo Verde

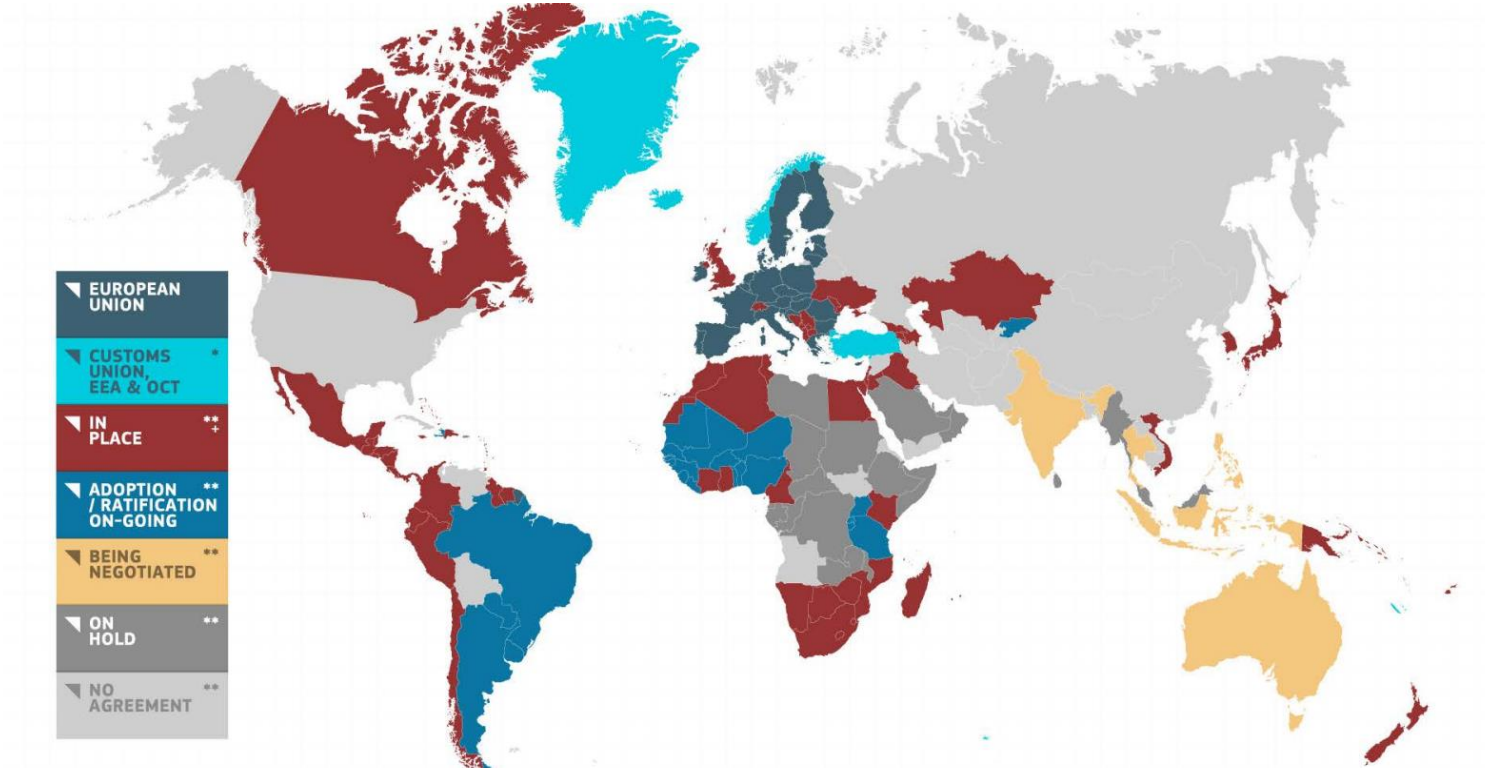
EBA (Everything But Arms) – Duty-free, quota-free access for least developed countries; no sustainability conditions



Free Trade Agreements (FTAs) and Economic Partnership Agreements (EPAs)

- **FTAs**: set terms for foreign fisheries products entering the EU market and support EU exports
- Include rules of origin and rules on trade and sustainable development, including for fisheries and aquaculture products
- **EPAs**: support the development of trade partners from Africa, Caribbean and Pacific Countries, including with include labour, environmental and sustainability commitments

Active negotiations: India FTA, Malaysia FTA, Philippines FTA, Thailand FTA, UAE FTA, Eastern and Southern Africa EPA



- Zero or reduced tariffs on imported fisheries products for processing in the EU
- Quotas based on first-come-first-served
- **NO** sustainability conditions attached
- Between 605,000-640,000 tonnes of fish products were imported annually on average (2016-2023).
- This quantity fell to 409,000 tonnes in 2024 due to exclusion of Russia
- Back-to-back evaluation and impact assessment on the introduction of sustainability conditions into the ATQ regime (first half of 2026)

Structure of EU imports by trade regime

Structure of EU imports by trade regime (in volume) in 2024		
FTA preferences	2,632,496,893	50.54%
MFN (non-0%)	1,819,310,526	34.92%
ATQ regime	392,604,108	7.54%
GSP and GSP+	364,643,507	7.00%
Unknown	137,917	0.00%
Total	5,209,192,950	100%

Source: Eurostat COMEXT

WTO Agreement on Fisheries Subsidies

- First ever multilateral trade deal for sustainability
- First multilateral agreement under WTO since 2013
- Prohibition of
  - Subsidies for illegal, unregulated, and unreported fishing
  - Non-sustainable subsidies for fishing on overfished stocks
  - Subsidies for fishing on unregulated high seas
- Unprecedented transparency and notification provisions
- Subsidies contributing to overcapacity and overfishing to be addressed in second phase

Entry into force on 15 September 2025, with current acceptances from 116 WTO members

Ongoing negotiations on discipline for **subsidies that contribute to overcapacity and overfishing** and the pillar on **special and differentiated treatment**.

Thank you