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Report Highlights:

China remained the world's largest seafood producer in 2023, with official production estimated at 71 million metric tons (MMT), up 3.5 percent from 2022. Production growth continues to be driven by aquaculture, which, according to official data, increased 4.4 percent year-on-year to 58.1 MMT in 2023. Seafood imports surged in 2023 to 4.6 MMT, valued at \$18.8 billion, led by increased volumes of fresh and frozen fish, crustaceans, and mollusks. Demand for high-value products, including salmon and lobster remains strong. Bucking a trend of lower exports of many U.S. commodities to China, U.S. seafood exports rose 2.9 percent year-on-year in volume and 1.5 percent in value in 2023.

Important Note:

Complete official People’s Republic of China (PRC) full year data on seafood production is typically published between May and July in the following year. Thus, the 2023 Fisheries Statistics Report, often cited in this report, contains full year data for 2022 and incomplete data for 2023.

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: Includes 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 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

Based on National Bureau of Statistics (NBS) data, China's 2023 seafood production is 71 MMT, continuing a growing trend from the previous year's 68.7 MMT on consistent demand and expansion of aquaculture. Aquaculture production is reported at 58.12 MMT, up from 55.65 MMT in 2022. Production of ocean and freshwater wild-caught seafood is down slightly to 12.88 MMT compared to 2022. Despite lower priced seafood due to excessive supply of farmed seafood in 2023 and forecast stagnant wild caught volume, China's total seafood production for 2024 is expected to grow on expanded aquaculture area and production efficiency.

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

Category/Year	2018	2019	2020	2021	2022	2023
Total Seafood Production	64.58	64.80	65.49	66.90	68.66	71.0
-Total Aquaculture Production	49.91	50.79	52.24	53.94	55.65	58.12
--- Ocean	20.31	20.65	21.35	22.11	22.76	N/A
--- Freshwater	29.60	30.14	30.89	31.83	32.90	N/A
-Total Wild Caught Production	14.26	14.01	13.25	12.96	13.00	12.88
--- Ocean	12.70	12.2	11.79	11.76	9.51	N/A
--- Freshwater	2.18	1.96	1.84	1.46	1.17	N/A

Source: 2023 China Fishery Statistics Report

A. Wild Caught Seafood

NBS reported total wild-caught seafood production at 12.88 MMT, down 1 percent year-on-year. NBS data on ocean caught versus freshwater caught seafood for 2023 is not yet available. 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. On January 1, 2021, the Ministry of Agriculture and Rural Affairs (MARA) implemented a [10-year fishing ban](#) covering all natural waterways of the Yangtze River and its major tributaries. 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.

According to MARA, in 2023, the PRC enforced a 3 to 4 months fishing ban in most coastal waters and high seas. Official data indicates a decline in marine fishing in recent years, attributed to diminished resources, reduced fishing fleets, and stricter regulations. The scale of China's marine fishing industry, including its distant-water fishing (DWF) fleet, remains a subject of debate.

On October 24, 2023, the PRC 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 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.

MARA has implemented a "zero growth" policy to restrict domestic ocean catch to less than 10 MMT. In 2022, MARA reported wild-caught volume from domestic ocean waters remained at 9.5 MMT,

nearly unchanged from 2021, both down from the 10 MMT in 2020. Additionally, MARA reported a 3.6 percent decline in the 2.33 MMT produced outside domestic ocean waters in 2022, compared to 2021, and a decline in wild-caught freshwater catch to 1.17 MMT in 2022 from 1.2 MMT in 2021.

Aquaculture

China's aquaculture production reached 58.12 MMT in 2023, up 4.4 percent or a net growth of 2.5 MMT compared to the previous year. China retained its position as the world's leading aquaculture producer. The recovery of aquaculture water areas, improved production efficiency through intensification and industrialization, slightly reduced supplies of wild-caught seafood, and an upsurge in demand for pre-prepared seafood in the retail and hospitality sectors are fueling this growth. Although official 2023 data on aquaculture production by type is not yet published, MARA's preliminary statistics indicate freshwater and marine water farmed products reached 23.2 MMT and 17.2 MMT in the first nine months of 2023, respectively, marking a 4.7 percent and 5.3 percent increase from 2022.

Based on MARA feed statistics, in 2023, aquaculture feed production dropped to 23.44 MMT, down 4.9 percent year-on-year. 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 provided numbers. However, the striking difference between MARA feed data and total aquaculture production raises questions on how both sets of data are calculated. A leading industry source estimates 35 MMT of aquaculture products require supplied feed, implying that even at an unrealistic feed conversion ratio of 1 to 1, total aquafeed production would need to reach 35 MMT. China's aquaculture production continues to shift towards industrialization and intensification, both of which are expected to drive feed demand, including for soybean meal, which can account for as much as 28 percent of feed for some species.

The increase in aquaculture production is partly attributed to the recovery of aquaculture area since 2022. As indicated in Table 2, aquaculture area had been declining since 2018 when the government strengthened environmental regulations (see [2022 China Fishery Products Annual](#)). The 2023 “[No. 1 Document](#)” (link in Chinese), a policy providing broad guidance for resource allocation and development goals in the PRC's agricultural sector, emphasized the importance of expanding both freshwater and marine aquaculture.

MARA continues to operate demonstration projects focusing on sustainable, highly efficient aquaculture farming. According to MARA, in 2023, an additional 109 aquaculture regions (county/district/city) and larger aquaculture farming facilities met relevant standards. To address limited freshwater resources and environmental constraints, the PRC is encouraging the enhanced utilization of deep-sea aquaculture. 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 of the end of 2023, more than 20,000 gravity cages, 40 truss cages, and 4 aquaculture vessels have been built in various coastal areas for deep-sea aquaculture. The water body for deep-sea aquaculture covers 43.98 million cubic meters, with a seafood output of 393,000 metric tons (MT).

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

Year	Ocean	Freshwater	Total
2018	2,043,069	5,146,455	7,189,524
2019	1,992,177	5,116,320	7,108,497
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
2022-2021 change	+2.4%	+0.99%	+1.4%
2020-2021 change	+1.5%	-1.12%	-0.38%
2019-2020 change	+0.17%	-1.48%	-1.02%
2019-2018 change	-2.49%	-0.59%	-1.13%

Source: 2023 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 2023 Agriculture Outlook Conference, aquaculture production was forecast to maintain 1 percent yearly growth to reach 58.27 MMT in 2037 and 59.56 MMT in 2032. The share of aquaculture production will reach 82.2 percent in total seafood production by 2032. It appears the target will be reached well ahead of forecast as NBS estimates aquaculture production at 58.12 MMT in 2023, accounting for 81.9 percent out of total seafood production.

Aquaculture Products (Marine-Based and Freshwater Products)

Fish

Fish remains the predominant farmed product, constituting 52.2 percent of aquaculture production in 2022. Total fish production in 2022 increased 2.8 percent year-on-year to 29 MMT. This comprised freshwater production of 27.1 MMT and marine production of 1.92 MMT.

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

Category/Year	2019	2020	2021	2022
Aquaculture products	50,791	52,242	53,944	55,655
--Fish	27,086	27,613	28,247	29,030
--Shrimp, Prawn, and Crab	5,674	6,032	6,439	6,848
--Shellfish	14,579	14,987	15,457	15,886
--Algae	2,544	2,621	2,723	2,724
--Other	907	987	1,079	1,166
Wild Caught Products	14,013	13,249	12,960	13,004

Source: 2023 China Fishery Statistics Report. Note: the 2023 report contains data through 2022.

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 18.7 MMT in 2022—an increase of 1.96 percent from 2021. 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.

China also holds the position of the world's largest tilapia producer, generating 1.74 MMT in 2022, reflecting a 4.6 percent rise from the previous year. Although official data for 2023 is not yet available, tilapia production is expected to remain flat or slightly decline due to decreased 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 2023 and appear to have significantly boosted domestic tilapia production. Guangdong, Hainan, Guangxi, Yunnan, and Fujian retain their positions as the top tilapia-producing provinces, collectively contributing to 97.2 percent of the total tilapia production in 2022.

Catfish production experienced rapid growth in 2022, reaching 416,200 metric tons—a 14.6 percent increase 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 74.2 percent of the total production. Although official production figures for 2023 are not yet available, industry sources anticipate that catfish production will maintain moderate growth.

Crustaceans

In 2022, China's crustacean production reached 6.85 MMT, up from 6.4 MMT in 2021. Of this total, marine-based crustacean production increased to 1.95 MMT, up from 1.85 MMT in 2021, while freshwater production reached 4.9 MMT, up from 4.6 MMT. China is the largest aquaculture shrimp (*Penaeus vannamei*) producer globally, producing nearly 2.1 MMT in 2022, up 6.1 percent from 2021.

Crayfish is another local aquatic species being heavily promoted in the domestic market. Chinese industry associations have joined with local governments to carry out chef competitions, tasting events, and restaurant promotions to further boost consumer interest. According to an industry report, China's crayfish industry expanded with total production at 2.9 MMT in 2022, with Hubei, Anhui, Hunan, Jiangsu, and Jiangxi provinces accounting for nearly 92 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, will drive the forecast growth in aquaculture crustacean production in 2023.

Shellfish

Shellfish production in 2022 reached 15.9 MMT, up from the 15.5 MMT in 2021. The outlook for shellfish production in 2023 is anticipated to remain stable, primarily due to government-imposed restrictions on further expanding marine production areas. The top six provinces for marine-based farmed shellfish production in China are Shandong, Fujian, Liaoning, Guangdong, Zhejiang, and Guangxi, collectively accounting for 93 percent of the total production in 2022.

Seafood Production by Province

In 2022, China's top seafood-producing provinces were Guangdong, Shandong, and Fujian, benefitting from advantageous coastal locations, abundant freshwater resources, and well-established production facilities. Among the leading freshwater aquaculture producers were Hubei, Guangdong, and Jiangsu provinces, with combined production at 12.8 MMT, or 38.9 percent of the nation's total in 2022.

Table 4. China: Top Seafood Producing Provinces in 2022 (Unit: 1,000 metric tons)

Province	Total production	Aquaculture production	Wild-caught production
Guangdong	8,940	7,677	1,263
Shandong	8,813	6,651	2,162
Fujian	8,614	6,395	2,219
Zhejiang	6,217	2,803	3,414
Jiangsu	5,049	4,443	605
Hubei	5,004	4,980	24
Liaoning	4,892	4,224	668
Guangxi	3,657	3,078	579
Other	17,473	15,404	2,070
Total	68,659	55,655	13,004

Source: 2023 China Fishery Statistics Yearbook

B. Seafood Processing

According to MARA, processed seafood production reached 21.48 MMT in 2022, a slight increase from the 21.3 MMT recorded in 2021. Total seafood sent for processing saw a 1.3 percent year-on-year rise to 25.56 MMT, with ocean products accounting for 19.76 MMT and freshwater products contributing 5.8 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 2022, there were 9,331 seafood processing facilities in operation in China, up from 9,202 in 2021, boasting a total processing capacity of 29.7 MMT. China remains a global processing hub for mackerel, salmon, cod, and herring. Leading seafood processing provinces, namely Shandong, Fujian, Liaoning, Zhejiang, and Guangdong, collectively produced 16.1 MMT of processed seafood in 2022, representing 75 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 is expected to face challenges. The recent U.S. government 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. These hubs process large amounts of Russian seafood, much of which is traditionally exported to the United States and the EU. 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. Some processors will need to find more EU buyers, despite Europe’s recent increase in tariffs for Russian seafood, including processed Russian seafood.

II. 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 PRC COVID-related restrictions, demand rebounded in 2023 as the economy reopened.

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

Year	2018	2019	2020	2021	2022
<i>Per Capita Consumption of Seafood Products</i>					
Urban	14.3	16.7	16.6	16.7	16.2
Rural	7.8	9.6	10.3	10.9	10.7
<i>Per Capita Consumption of Pork, Beef, Poultry, and Mutton</i>					
Urban	41	40.1	40.4	46.7	47.1
Rural	35.5	34.7	33.8	43.3	45.1

Source: 2023 China Statistical Yearbook

According to NBS data, food service revenue in 2022 declined 6.3 percent year-on-year. However, the sector quickly rebounded in 2023 with revenue increasing 20.4 percent (see Chart 1).

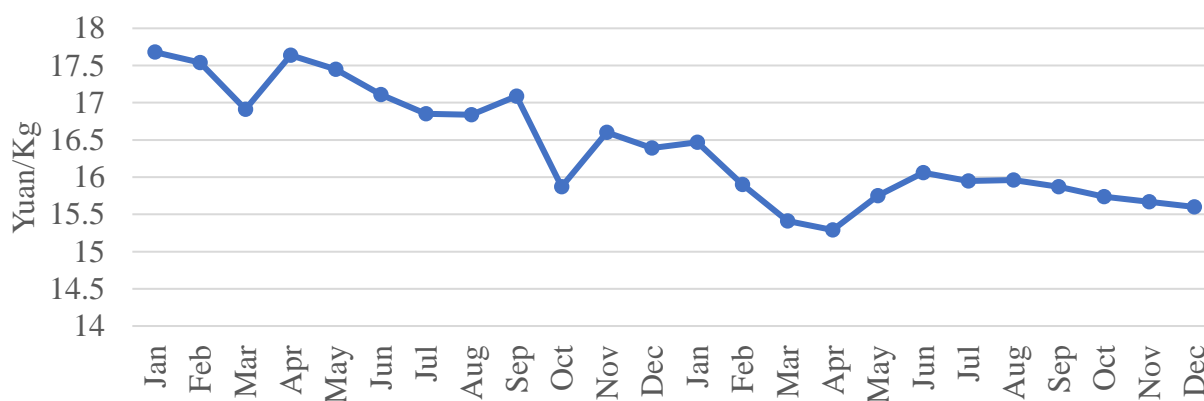
Chart 1. China: Food Service Revenue Recovered in 2023



Source: NBS

In a positive sign for continued growth in consumption, prices for most seafood products remain affordable for China’s increasingly price-conscious consumers. According to MARA, prices for some major aquaculture products declined in 2023. Chart 2 illustrates the average wholesale price for carp from January 2022 to November 2023. Higher production of carp combined with weaker demand in 2022 resulted in a significant drop in average wholesale prices through Q1 of 2023.

Chart 2. China: Carp Price (January 2022 to December 2023)



Source: MARA; Note: Exchange rate 1 Yuan = about \$ 7.1 USD in 2023.

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 is shrimp products including frozen whole or processed.

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 2023 is not available, it is believed that the impact of COVID-19 and related control measures accelerated changes in consumer purchasing behavior. 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, 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. For additional information on e-commerce opportunities in China, see GAIN Report [China Cross-Border E-commerce Market Opportunities for US Agricultural Products](#).

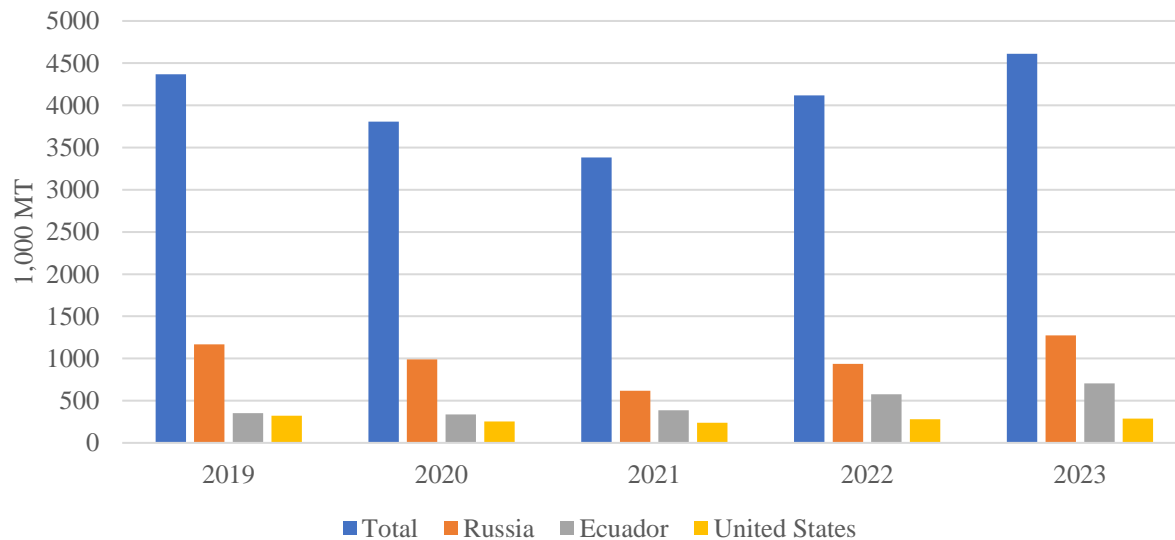
III. Trade

A. Imports

China’s seafood imports expanded in 2023, mainly due to increased domestic consumption and gradual recovery of overseas demand for processed seafood. In 2023, China’s seafood imports reached 4.6 MMT, valued at \$18.8 billion. This represents a 12 percent increase in volume and a 0.5 percent increase in value compared to the previous year. Growth was led by higher volume imports of frozen fish and crustaceans, which rose 15.5 percent and 13.6 percent, respectively, from the previous year, strong consumer demand for high-value products, an economic rebound following the end of PRC zero-COVID policies, and competitive prices for imported products. Total seafood imports exceeded the record 4.37 MMT reached in 2019, pre-COVID.

Seafood imports from the United States showed a 2.9 percent year-on-year growth in volume and 1.5 percent in value in 2023; however, they are still 7.8 percent lower compared with pre-COVID volumes in 2019. Russia remains China’s largest seafood supplier with total volume of 1.27 MMT in 2023, followed by Ecuador at 0.7 MMT, India at 0.35 MMT, Vietnam at 0.3 MMT and the United States at 0.29 MMT.

Chart 3. China: Seafood Imports Hit Record in 2023

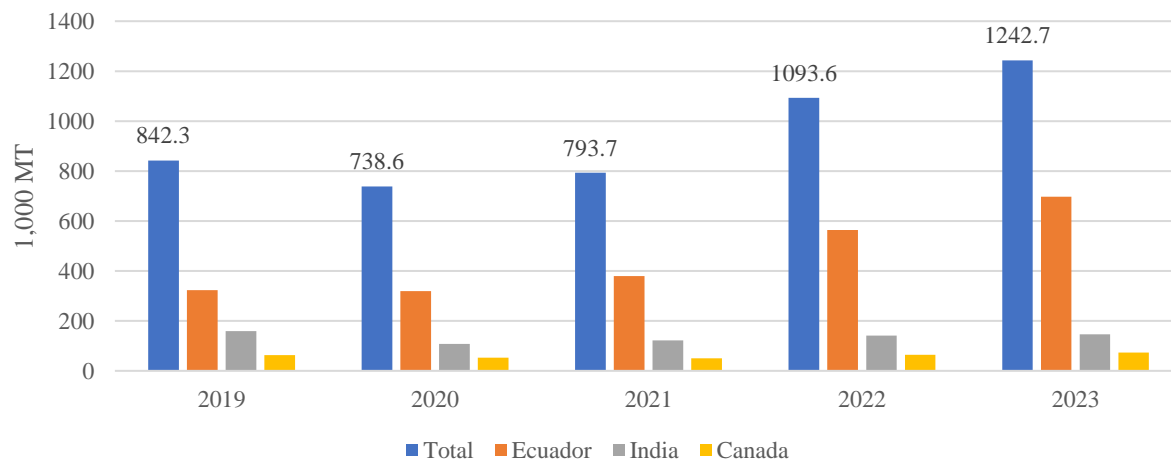


Source: Trade Data Monitor, LLC.

In 2023, frozen fish accounted for 51.7 percent of imports at nearly 2.38 MMT. Russia surged to the top supplier of frozen fish to China taking 50.3 percent of market share in 2023, distantly followed by the United States at 9.3 percent. Crustacean imports were 1.24 MMT, and mollusk imports were 0.55 MMT. China’s imports of frozen fish (HS Code 0303), fresh fish (HS Code 0302), and crustaceans (HS Code

0306) increased by 15.5 percent, 42 percent, and 13.6 percent, respectively, compared to the previous year. However, imports of fish fillet (HS Code 0304) decreased by 29 percent. The decline in fish fillet imports is attributed to an adequate supply of similar domestic products, including tilapia and carp, available at reasonable prices, while higher demand for crustaceans was driven by a 12 percent decline in 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 73.8 percent of total import volumes.

Chart 4. China: Imports of Crustaceans



Source: Trade Data Monitor, LLC.

Salmon imports also surged, rising 25.3 percent year-on-year to 252,256 MT in 2023 though still well below record imports of 300,000 MT in 2018. Imports from the United States exceeded 89,800 MT, 21.7 percent higher than 2022. The strong recovery demonstrated continued market demand for the higher-end fish, driven in part by lower prices, which declined 12 percent from the previous year. Many seafood exporting countries recognize the potential for their higher end products in China’s hotel, restaurant, and institutional (HRI) sector. Norway, typically known for its salmon, recently carried out a series of marketing campaigns to promote farmed Atlantic cod, or “snow cod”, to HRI buyers in major cities. Trying to build up a high-end image, the cod were shipped to China chilled and displayed alongside sashimi grade Norwegian chilled salmon.



recent Norwegian fish promotion. Photo courtesy of ATO Guangzhou.

Imports of lower-priced Vietnamese basa fish decreased rapidly. China's imports of basa fillet surged 67 percent to 228,000 MT in 2022 but fell to 128,000 MT in 2023. Industry sources noted that the decline in imports was due to a combination of quality concerns that often resulted in delayed entry inspection and greater availability of similar domestic products. 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

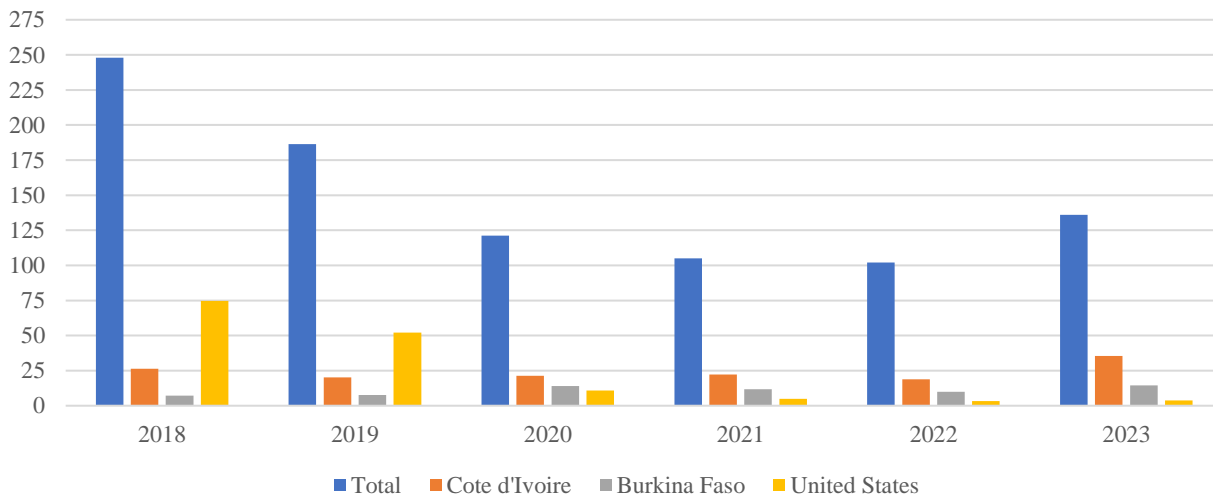
China primarily exports processed seafood products. Seafood exports by volume in 2023 were 3.52 MMT, almost unchanged from the previous year but down 12.7 percent in value. Exports remain below the pre-pandemic period when volumes exceeded 4 MMT annually from 2017 to 2019. The slow rebound in exports underscores weaker recovery of overseas demand and increased competition. Exports declined to all top 12 markets in value in 2023 from the previous year.

In 2023, Japan remained the PRC's largest seafood product export destination, followed by the United States and South Korea. However, total seafood exports to the United States decreased both in volume and value, down 14.4 percent and 21.6 percent, respectively, 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 fell 31 percent and 15.4 percent, respectively, from the previous year. However, the United States remains the PRC's top catfish market, receiving 59 percent of its 11,256 MT of catfish exports in 2023.

By category, exports of fish fillet (HS Code 0304) in 2023 also declined by 14.6 percent in volume and 18.5 percent in value from the previous year. Exports of prepared and packaged fish and caviar (HS Code 1604) declined 9.5 percent in value; although, volumes only fell 1.5 percent. Exports of prepared and preserved crustaceans and mollusks (HS Code 1605) decreased 9.7 percent in value and 3 percent in volume.

In recent years, China’s exports of tilapia products declined due to strong competition from lower-priced Vietnamese basa fish in international markets, while increased domestic demand shifted some supply away from exporters. In 2023, China’s exports of tilapia products recovered to 136,000 MT, mainly frozen tilapia, up 33 percent from the previous year but still far below an average yearly export volume of 216,000 MT from 2018 to 2019. Tilapia exports to the United States dropped significantly to 3,800 MT from 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 (1000 MT)



Source: Trade Data Monitor, LLC.

China's exports of crayfish products in 2023 remain small at about 8,900 MT, 9.5 percent lower compared to the previous year, mainly due to robust local demand and weak global demand.

IV. Policy

U.S. Ban on Russian Seafood Products

On December 22, 2023, 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 2023, China’s imports of frozen fish from Russia increased by 35.2 percent year-on-year, reaching 1.2 MMT. This accounted for 26 percent of China’s total seafood imports and 50.4 percent of frozen fish (HS Code 0303) imports. Conversely, China’s exports of fish products (HS Codes: 0303, 0304, and 0305) to the United States totaled 103,000 MT, representing a 24 percent decrease year-on-year. Industry estimates suggest that in 2022, the United States imported approximately \$300 million worth of wild salmon and cod processed products from China, with most of the raw materials originating from Russia. The ban is expected to reduce China’s exports of processed seafood to the United States in 2024. However, China’s seafood imports are diverse, and the domestic demand for wild-caught seafood, including the specified species, remains robust. The 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. The United States Food and Drug Administration is responsible for submitting lists of U.S. exporters for registration with the General Administration of Customs of China (GACC). The Animal and Plant Inspection Service of the United States Department of Agriculture is responsible for market access of aquatic species for breeding stocks and ornamental use and the lists of exporters for registration with GACC.

GACC is responsible for approval of imports of aquatic species from foreign countries. The Department for Supervision of Inspection and Quarantine of Animals and Plants of GACC manages and publishes 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 manages and publishes 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 to December of 2023 from the average 48,000 MT in the same period in the previous two years. China's imports of seafood from Japan reached 155,000 MT in 2022.

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 shrimps, fish, and fish oil. Duties on these products will be reduced to zero over time from the current 5 to 20 percent.

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.

Draft Revised Fishery Law

In August 2019, MARA released a revised Draft Fishery Law for public comment. It is an update of the existing Fishery Law from 2013. The update places greater emphasis on environmental protection in the aquaculture sector, disease prevention, and the control and the use of inputs. On May 30, 2023, [China's State Council's Notice on 2023 Legislative Work Plan](#) indicated "Preparing to submit the draft revision to the Fisheries Law to the National People's Congress Standing Committee for review;" however, no further updates are available. MARA 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. In recent years, the PRC has enacted a provisional lower tariff rate of between 2 and 5 percent for some products. Tariff rates, MFN rates, and provisional special tariff rates are listed on the Ministry of Finance website at [2024 Customs Import and Export Tariff](#).

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](#).

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		2020	2021	2022	2023
		Total	3,808,566	3,382,952	4,123,163
0302	Fish, Fresh	64,704	77,824	64,567	91,524
0303	Fish, Frozen	2,196,526	1,615,175	2,064,990	2,382,034
0304	Fish, Fillet	276,465	166,775	263,581	187,203
0305	Fish, Dried, Salted, Brined	69,195	42,919	80,898	72,571
0306	Crustaceans	738,593	793,747	1,094,806	1,242,666
307	Mollusks & Other	401,150	612,986	499,639	552,754
1604	Prepared or Packaged Fish and Caviar	34,765	25,793	21,912	21,682
1605	Prepared or Packaged Crustaceans and Mollusks	27,168	47,732	32,769	61,275

Source: Trade Data Monitor, LLC.

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

HS Code		2019	2020	2021	2023
		Total	12,430	13,835	18,705
0302	Fish, Fresh	421	713	852	1,166
0303	Fish, Frozen	3,917	3,510	5,105	4,795
0304	Fish Fillets	527	396	745	508
0305	Fish, Dried, Salted, Brined	172	130	261	294
0306	Crustaceans	5,912	6,974	9,570	9,565
0307	Mollusks & other	1,185	1,769	1,824	1,980
1604	Prepared or Packaged Fish and Caviar	163	137	115	114
1061605	Prepared or Packaged Crustaceans and Mollusks	136	206	234	359

Source: Trade Data Monitor, LLC.

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

Country/Year	2020	2021	2022	2023
World	12,432	13,835	18,705	18,781
Ecuador	1,720	2,187	3,562	3,562
Russia	1,840	1,861	2,762	2,891
Canada	822	1,063	1,209	1,324
United States	778	976	1,138	1,155
India	841	961	1,264	1,253
Norway	505	726	914	958
Vietnam	1,066	717	1,680	794
Indonesia	654	685	761	828
New Zealand	430	465	498	451
Thailand	390	414	424	461
Japan	247	401	546	339
Peru	148	321	190	507

Source: Trade Data Monitor, LLC.

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

HS Code		2020	2021	2022	2023
	Total	3,571,725	3,562,061	3,519,752	3,519,046
0302	Fish, Fresh	33,219	35,712	44,102	37,685
0303	Fish, Frozen	891,155	707,684	677,991	889,904
0304	Fish, Fillet	695,742	638,877	726,041	620,012
0305	Fish, Dried, Salted, Brined	64,002	55,093	61,568	53,324
0306	Crustaceans	115,517	119,889	88,211	79,428
0307	Mollusks and Other	454,310	509,813	510,016	446,620
1604	Prepared or Packaged Fish and Caviar	976,965	1,057,605	961,693	947,614
1605	Prepared or Packaged Crustaceans and Mollusks	340,834	437,388	450,123	436,300

Source: Trade Data Monitor, LLC.

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

HS Code		2020	2021	2022	2023
	Total	17,621	20,286	21,179	18,490
0302	Fish, Fresh	207	248	334	277
0303	Fish, Frozen	2,377	2,363	2,263	2,256
0304	Fish, Fillet	3,345	3,163	4,078	3,323
0305	Fish, Dried, Salted, Brined	394	365	421	365
0306	Crustaceans	952	1,000	827	814
0307	Mollusks and Other	2,721	3,118	3,378	2,526
1604	Prepared or Packaged Fish and Caviar	4,155	5,101	4,641	4,199
1605	Prepared or Packaged Crustaceans and Mollusks	3,469	4,927	5,238	4,729

Source: Trade Data Monitor, LLC.

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

Country/Year	2020	2021	2022	2023
World	17,621	20,286	21,179	18,490
Japan	3,153	3,375	3,387	2,979
United States	2,032	2,368	2,497	1,959
South Korea	1,510	1,567	1,653	1,553
Thailand	1,364	1,510	1,664	1,298
Hong Kong	1,217	1,446	1,297	1,144
Malaysia	752	1,307	1,636	1,385
Taiwan	1,281	1,210	1,255	1,063
Philippines	627	1,013	996	731
Mexico	480	720	611	513
Canada	381	430	519	377
Spain	360	401	405	404
Germany	428	396	576	471
Vietnam	266	371	427	383

Source: Trade Data Monitor, LLC.

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

Country/Year	2020	2021	2022	2023
World	2,196,551	1,615,175	2,064,990	2,382,034
Russia	963,879	574,157	886,237	1,197,998
United States	205,592	185,570	214,467	221,466
Norway	120,276	157,309	154,597	110,151
Indonesia	144,838	103,736	84,770	77,903
India	97,435	72,418	128,662	166,444
Vietnam	42,067	49,276	74,244	74,712
Greenland	35,814	36,692	36,905	39,279
Malaysia	40,442	36,069	39,378	29,213
South Korea	59,492	35,984	28,491	41,914

Source: Trade Data Monitor, LLC.

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

Country/Year	2020	2021	2022	2023
World	130,968	144,503	201,359	252,256
United States	20,882	43,566	54,131	58,882
Russia	47,927	37,471	73,880	89,859
Norway	18,291	26,139	24,458	40,599
Chile	25,462	11,487	23,928	34,608
Australia	9,323	11,637	11,618	14,152

Source: Trade Data Monitor, LLC.

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

Country/Year	2019	2020	2021	2023
World	738,602	793,747	1,094,806	1,242,666
Ecuador	318,688	378,888	564,747	697,660
India	107,778	122,264	141,224	145,947
Canada	52,223	50,730	64,898	73,423
Thailand	23,657	28,659	30,191	30,662
Vietnam	44,469	27,468	54,907	19,762
Russia	19,114	21,240	27,939	46,543
Malaysia	16,453	19,509	11,563	11,843
Indonesia	17,996	16,225	25,131	24,057
Argentina	26,318	13,913	18,506	29,965
Greenland	19,016	13,907	27,469	24,643

Source: Trade Data Monitor, LLC.

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

Country/Year	2020	2021	2022	2023
World	695,724	638,877	726,041	620,012
Japan	119,966	122,883	129,693	112,594
United States	139,737	107,830	130,973	90,340
Germany	112,681	101,440	134,237	113,989
United Kingdom	53,462	46,235	50,634	51,852
South Korea	24,424	32,083	37,113	33,635
France	35,806	30,202	35,872	32,426
Canada	27,538	26,945	30,016	17,740
Poland	21,242	22,408	16,785	14,539
Spain	17,374	19,312	23,159	20,292
Philippines	15,327	17,967	23,708	20,120

Source: Trade Data Monitor, LLC.

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

Country/Year	2020	2021	2022	2023
World	340,839	437,388	450,123	436,300
Japan	99,063	106,698	102,830	96,252
United States	48,025	53,223	41,914	35,463
Thailand	23,653	43,916	50,023	49,034
South Korea	36,143	39,842	44,426	51,715
Malaysia	19,740	39,013	65,847	69,662
Taiwan	23,698	29,625	30,999	29,011
Hong Kong	17,216	25,064	21,532	19,290
Singapore	8,847	10,874	12,854	12,305
Canada	11,333	13,903	13,270	10,954
Chile	6,452	13,664	6,179	7,491

Source: Trade Data Monitor, LLC.

Attachments:

No Attachments.