United States Department of Agriculture
Foreign Agricultural Service

GAIN
Global Agricultural Information Network

Voluntary Report – Voluntary - Public Distribution **Date:** May 19, 2025

Report Number: UP2025-0012

Report Name: US Seafood Exports to Ukraine Reach 10-Year High

Country: Ukraine

Post: Kyiv

Report Category: Fishery Products

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Report Highlights:

Ukraine's fish and seafood imports from the United States reached a 10-year high in 2024. The United States retained its position as Ukraine's third largest supplier of seafood with exports exceeding $96 million. All market segments grew, with the highest growth in the white fish segment. Ukraine also remained a large and growing market for U.S. premium seafood products, including wild-caught salmon and salmon roe.

Report Summary

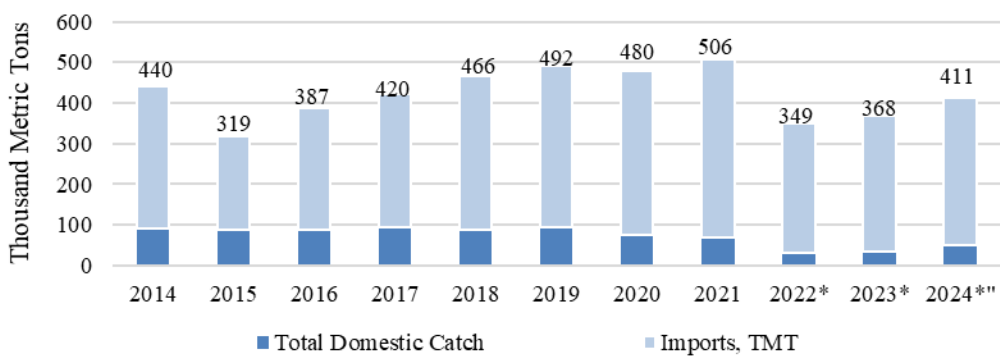
After a significant drop in 2022 due to the Russia-Ukraine war, Ukraine's fish and seafood imports grew in 2023 and 2024, reaching an all-time high of $1.0 billion. U.S. exports in 2024 increased by 26 percent to $96.6 million. U.S. market share increased by 1 percentage point to 9 percent, and the United States retained its position as a top three exporter after Norway and Iceland. In 2024, total U.S. exports reached a 10-year high, with increasing per capita consumption. FAS/Kyiv expects 2025 exports to be substantial; however, increased seafood prices and a slowdown in Ukraine's economic recovery may result in market performance similar to 2024. Note that USDA's Bulk, Intermediate & Consumer Oriented product definition for fish and seafood will be used here and throughout the report.

Seafood Market Performance and Trends

Domestic Catch

Ukraine relies on imports as its primary source of fish and seafood products (Figure 1). In 2024 and 2025, Ukraine's domestic catch remained limited to domestic freshwater production. Ukraine simplified fish production in 2023 by lifting the boat navigation ban introduced after the start of the Russia-Ukraine war. However, limitations on industrial catch in rivers and lakes close to the front line remained in place as of 2025. Sea catch remains very limited due to military operations in the Black Sea, attacks on vessels, and sea mines. Russian occupation has also cut off access to the Sea of Azov. Historically, domestic seawater catch was somewhat limited, with goby and anchovy species harvested for further processing (predominately canning), responsible for the most significant share. Domestic seafood products occupy the most affordable market segment in Ukraine.

Figure 1: Ukraine's Seafood Supplies by Source



* Russia-Ukraine war
" FAS/Kyiv estimate for 2024 (no official data available)
Source: State Statistics Service of Ukraine

Import Trends

After a significant drop in 2022, seafood imports strongly recovered in 2023 and 2024, driven by increased demand in all market segments. The top three seafood suppliers have not changed from pre-2022, with U.S. market share growing from 8 to 9 percent in the last year (Table 1). The 2025 seafood market situation will depend on foreign catch volume and value, the Russia-Ukraine war, and macroeconomic developments. Incomes grew in January-March 2025, with seafood imports somewhat below 2024 levels. Industry notes increased world market seafood prices are responsible for the import slowdown.

Table 1: Ukraine's Fish and Seafood Imports, 2022-2024

	Partner Country	2022		2023		2024	
		Mln. USD	Quantity, TMT	Mln. USD	Quantity, TMT	Mln. USD	Quantity, TMT
1	Norway	223	62	300	71	325	78
2	Iceland	76	46	115	61	116	52
3	**United States**	**58**	**21**	**77**	**23**	**97**	**32**
4	Ecuador	15	4	25	5	55	11
5	China	24	6	42	9	51	11
6	Spain	27	12	28	11	39	15
7	Latvia	31	23	28	22	35	15
8	United Kingdom	24	12	27	12	32	13
9	Estonia	25	36	30	31	31	29
10	Chile	15	5	25	8	28	10
	Others not Listed	213	90	244	79	282	95

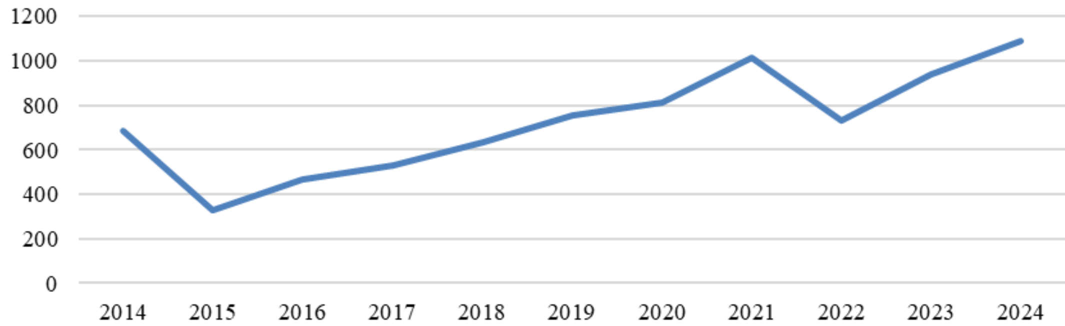
Source: Trade Data Monitor

Historically, Ukrainian importers relied on imports of affordable species to address demand. This resulted in heavy reliance on herring, mackerel, hake, pollock, and similar white meat products. Over time, the market grew in the middle and upper segments, with increased imports of farmed salmon, salmon roe, shrimp and prawns, crab meat, and other similar products.

In early 2024, some seafood imports suffered from a blockade of the Polish-Ukrainian border. Polish truckers and farmers initiated the blockade in early November 2023, and it lasted until the end of April 2024. Many trucks carrying imported seafood were stuck in long queues for weeks and even months. According to industry, importers had to pay trucking companies EUR 250 to EUR 300 per day delayed to cover fuel costs, trucker salaries, and truck rental fees, not including broken contract costs. As of March 2025, the border is unblocked, although risks associated with new protests remain.

Ukrainian seafood imports have grown in the last decade, except the year following the 2014 Russian occupation of Crimea and at the start of the Russia-Ukraine war in 2022 (Figure 2). Ukrainians generally consider basic seafood products staple foods; therefore, consumption remains stable despite the current war-induced economic turbulence. Consumption of premium seafood products fluctuates but quickly recovers after economic or political shocks.

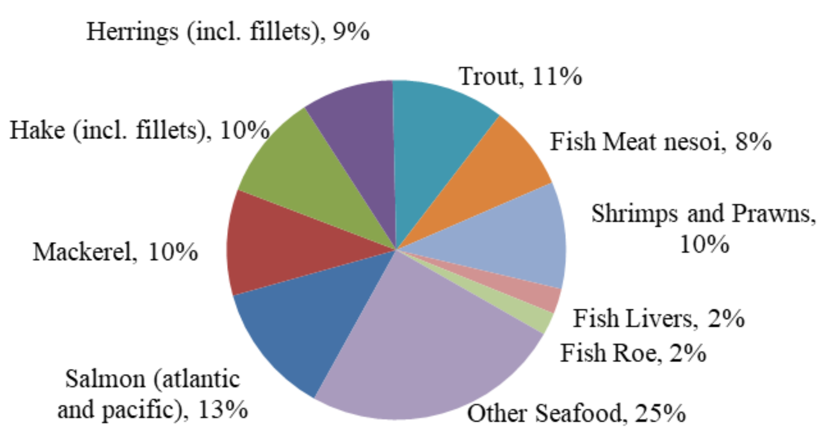
Figure 2: Ukraine's Seafood Imports



Source: Trade Data Monitor

Ukraine's seafood imports are diversified. Ukraine imports seafood from over 100 countries, but a dozen are responsible for most imports. Affordable white fish products constitute the majority (Figure 3). Northern European markets, including Norway, Iceland, Denmark, and Greenland, supply traditional herring for further processing, hake, trout, mackerel, and farmed salmon. Baltic countries play a significant role in supplies of processed seafood, predominately canned fish and surimi, and Northern European and North American seafood transits Baltic ports. U.S. and Canadian suppliers sell traditional mass-market fish, primarily hake and pollock, that was previously shipped from the Soviet Far East/Russia. The United States and Canada are also responsible for many premium products, including wild salmon, shrimp, and salmon roe. Imports from South America (Ecuador, Chile, and Argentina) and Southeast Asia (China and Vietnam) are less significant but important in the value seafood segment. Ukraine also imports high-end seafood for further processing and re-export to the EU and Japan; however, war-related transport restrictions made this business risky due to the potential of spoilage; imported seafood processing for re-export has dropped significantly since 2022.

Figure 3: Ukraine's Seafood Imports in 2024, $1.1 billion



Source: Trade Data Monitor

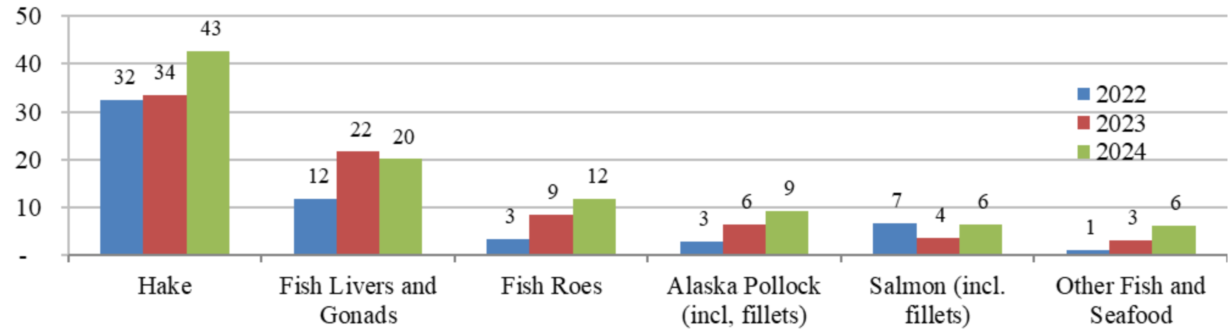
U.S. Seafood Exports to Ukraine

U.S. fish and seafood access to the Ukrainian market is unrestricted. A bilateral import certificate endorsable by NOAA allows free access for most open sea-caught species. Although Ukraine adopted new generic certificates, the bilaterally negotiated certificate remains in place.

In 2024, U.S. suppliers had another successful year, with exports of white fish (hake and pollock) growing by 30 percent (Figure 4). The Pacific Northwest and Alaska are responsible for the majority of exports. Post expects demand for these products to remain stable in 2025.

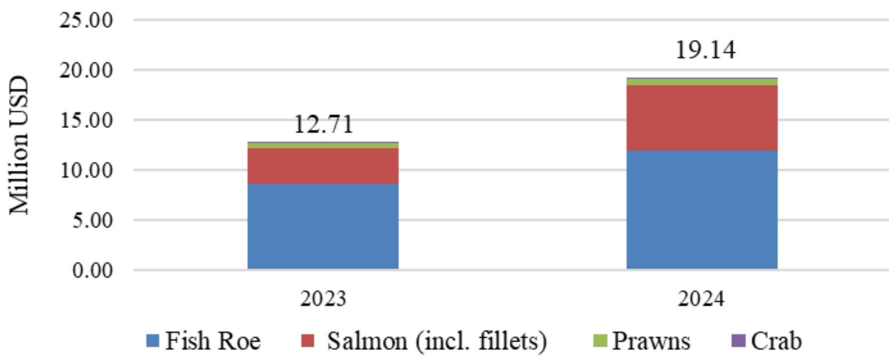
The premium market segment also grew. Affordable salmon prices allowed for increased wild-caught salmon imports, increasing U.S. Pacific salmon competitiveness in comparison to Norwegian farmed salmon. All premium market segments exhibited significant growth, ranging from 30 percent for shrimp and prawns to 255 percent for crab meat (Figure 5).

Figure 4: U.S. Seafood Exports to Ukraine, Million USD



Source: Trade Data Monitor

Figure 5: Premium U.S. Seafood Exports to Ukraine



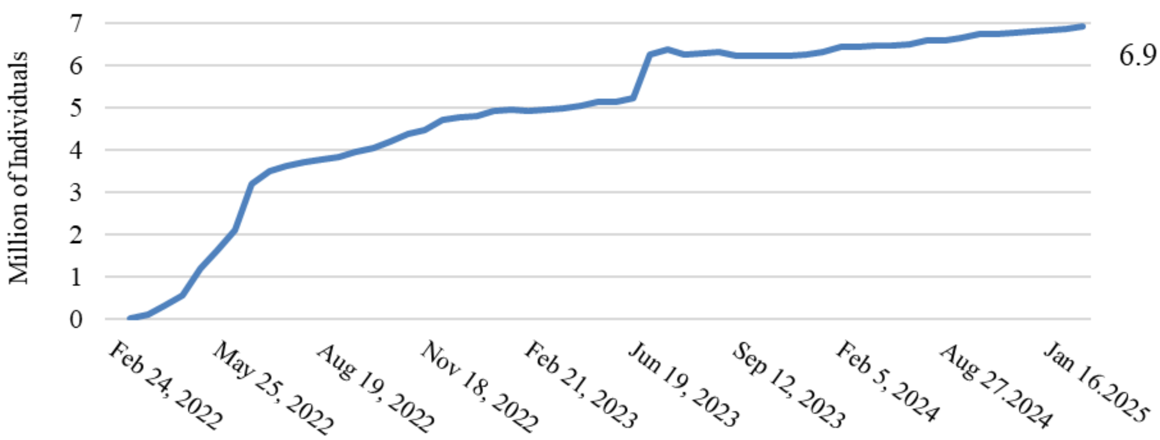
Source: State Statics Service of Ukraine; Trade Data Monitor

U.S. exporters may concentrate on higher value-added products when disposable incomes recover further.

Consumption

Seafood consumption remains depressed due to various war-related factors. The number of consumers is the main obstacle to further growth as the number of officially registered refugees continues to increase (Figure 6). From March 2024 to March 2025, the number of refugees in the EU increased by 0.35 million, while the number of refugees outside the EU increased by 0.1 million, raising the total to 6.9 million. In addition, as of January 2025, the number of internally displaced persons reached 3.6 million. Those individuals moved to different, safer places in Ukraine but lost their income sources and changed their consumption habits.

Figure 6: Number of Refugees from Ukraine

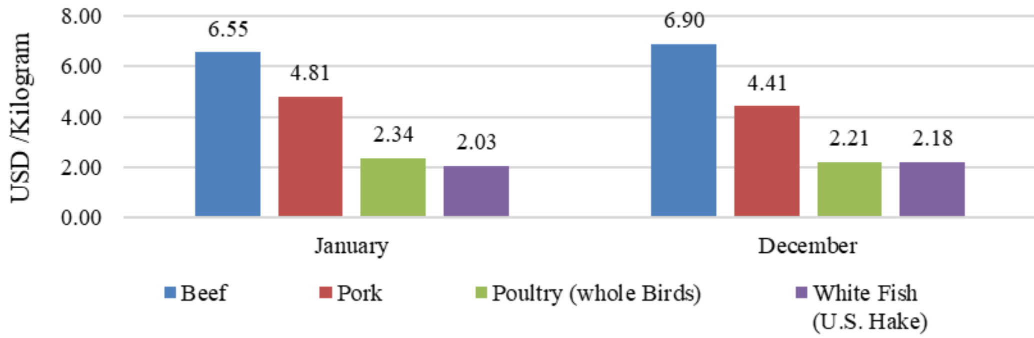


Source: UNHCR (https://data.unhcr.org/)
* This graph does not include individual refugees (refugees who did not apply for temporary protection status)

Ukraine's macroeconomic performance remains stable, with 3.6 percent gross domestic product (GDP) growth in 2024 and a stable 2025 outlook, according to the Ministry of Economy of Ukraine. Good economic performance resulted in disposable incomes returning to pre-war levels. In quarter 3 (Q3) 2024, disposable incomes surpassed pre-war Q3 2021 levels by 7.2 percent, according to the National Bank of Ukraine. The World Bank reclassified Ukraine as an upper-middle-income country in fiscal year 2023 and estimates Ukraine's 2023 per capita GDP at $5,070 ($17,630 in purchasing power parity).

Increased incomes allowed for growing seafood consumption in late 2024 and early 2025. Consumption remained focused on white fish, as middle-class Ukrainians increased their consumption of this affordable protein, facing significant price growth for traditional red meat and poultry (Figure 7).

Figure 7: Ukrainian Market Price of Popular Animal Proteins in 2024



Source: State Statics Service of Ukraine; Trade Data Monitor

In 2025, industry expects imports to remain significant with the market focused on white fish products. Many high-end restaurants responsible for the majority of high-value seafood imports decreased sales substantially or closed; however, industry reported strong seasonal demand for premium salmon roe and remains optimistic about premium segment sales in 2025.

Attachments:

No Attachments.