EU TRADE EXPLORER

# Market evolution: Crustaceans (CN 0306) — 2015–2025

## Introduction

The EU's extra-EU trade in crustaceans (CN 0306) expanded strongly between 2015 and 2025, driven by rising consumption and dynamic production within the Union. Imports grew markedly, while exports also increased, but the trade deficit widened. The period was marked by a notable reconfiguration of supply sources, increasing market concentration, and several price shocks linked to the pandemic, Brexit, and geopolitical tensions.

## 1. Surging imports and a deepening trade deficit

### Imports are the dominant driver, with value up 24.7 % and volume up 28.2 %

EU imports of crustaceans rose from EUR 3.45 billion in 2015 to EUR 4.30 billion in 2025 (+24.7 %), while the imported volume increased from 488.8 thousand tonnes to 626.9 thousand tonnes (+28.2 %). The General Overview shows that import prices edged down slightly from EUR 7 060/t to EUR 6 864/t (–2.8 %), helping sustain demand.

### Export growth is robust but starts from a much lower base

Exports climbed from EUR 418.4 million to EUR 612.2 million (+46.3 %), with volumes up 32.3 % (from 78.0 kt to 103.2 kt). The average export price rose 10.6 %, from EUR 5 367/t to EUR 5 934/t. However, the absolute export value remains small relative to imports.

### The trade deficit worsened, while EU production surged

The EU trade deficit in crustaceans widened by 21.7 %, reaching EUR 3.69 billion in 2025. At the same time, domestic production expanded substantially: from 298.3 kt in 2015 to 428.3 kt in 2024 (+43.6 % in quantity), according to production data. This production growth helped reduce the EU's net import reliance from 74.4 % to 58.6 % over the period (see Net import reliance).

## 2. Reconfiguration of supply sources and rising concentration

### Ecuador becomes the dominant import supplier

The most striking shift among top import partners is Ecuador's surge. Imports from Ecuador rose by 132.6 %, from EUR 549.3 million to EUR 1 277.8 million, making it by far the largest source. India also increased its deliveries significantly (+32.2 % to EUR 600.9 million), while Argentina's value declined 11.6 %. Venezuela, from a very low base, saw phenomenal growth of 319.4 %.

| Import partner | 2015 (EUR M) | 2025 (EUR M) | Change (%) |
|---|---|---|---|
| Ecuador | 549.3 | 1 277.8 | +132.6 |
| India | 454.7 | 600.9 | +32.2 |
| Argentina | 431.6 | 381.5 | –11.6 |
| United Kingdom | 295.2 | 300.4 | +1.7 |
| Viet Nam | 198.6 | 242.9 | +22.3 |
| Greenland | 105.5 | 182.1 | +72.5 |
| Venezuela | 29.7 | 124.6 | +319.4 |

### Export destinations reshaped by geopolitics and new opportunities

On the export side, China became the leading market, growing 283.3 % to EUR 234.6 million. In contrast, exports to Russia collapsed from EUR 30.9 million to virtually zero (–100.0 %), mainly due to sanctions, and exports to the United Kingdom fell 59.3 %, reflecting post-Brexit trade frictions. Iceland and Albania registered dynamic growth (+105.5 % and +2 345.3 %, respectively), although in absolute terms their values remain moderate.

| Export partner | 2015 (EUR M) | 2025 (EUR M) | Change (%) |
|---|---|---|---|
| China | 61.2 | 234.6 | +283.3 |
| Morocco | 101.8 | 73.9 | –27.4 |
| Norway | 36.9 | 46.3 | +25.4 |
| United Kingdom | 75.6 | 30.7 | –59.3 |
| Iceland | 11.9 | 24.5 | +105.5 |
| Albania | 0.69 | 16.9 | +2 345.3 |
| Russian Federation | 30.9 | 0.0 | –100.0 |

### Market concentration increases on both sides

The HHI for imports rose from 810 to 1 319 (+62.8 %), driven largely by Ecuador's growing share. Export concentration also climbed, from 1 322 to 1 820 (+37.6 %), as China consolidated its position as the main destination. The import volume HHI almost doubled (from 938 to 1 908, +103.4 %), underlining a narrower set of large-volume suppliers.

### Volatility highlights geopolitical and commercial risks

The most volatile import partners (by quantity) were Venezuela (CV 0.52), Ecuador (CV 0.36) and Nicaragua (CV 0.35). On the export side, Ukraine (CV 0.69), Russia (CV 0.65) and Albania (CV 0.55) exhibited extreme instability, largely linked to political and security disruptions. The volatility analysis confirms the vulnerability of certain trade lanes.

## 3. Price shocks, product specialisation, and EU autonomy

### Price shocks hit import and export flows

Several price shock events are detected:

- **India (imports, 2022):** a price jump of +14.9 % alongside stable volumes, likely reflecting supply tightness in the shrimp market.
- **China (exports, 2020):** a sharp price drop of –21.5 % while EU export volumes to China remained high, probably related to COVID-19 disruptions in Chinese demand and logistics.
- **Russia (exports, 2023):** a +59.5 % price spike on a negligible remaining volume, marking the final phase of trade before the complete exit.
- **United Kingdom (exports, 2021):** a +11.3 % price increase coinciding with a halving of exported volumes after Brexit.

### EU member states show clear specialisation patterns

In 2025, Denmark, Portugal, Spain, Ireland and Belgium display the highest revealed symmetric comparative advantage (RSCA) in crustaceans (see specialisation data). Denmark (RSCA 0.67) is the leading exporter, while Spain, despite being a large importer, also has a high RSCA (0.52), highlighting its dual role as a processing and consumption hub. Conversely, Finland, Slovakia and Hungary have virtually no specialisation in this sector.

### Net import reliance declines as domestic production grows

The EU's net import reliance fell from 74.4 % to 58.6 % (–21.3 %), meaning a larger share of apparent consumption is now covered by EU production. Trade intensity also decreased (from 84.2 % to 67.6 %, –19.7 %), and export propensity collapsed from 32.9 % to 16.5 % (–49.9 %), indicating that an increasing proportion of EU-produced crustaceans is absorbed within the internal market (see export propensity).

### Product composition: shrimp dominate both imports and exports

The product segment breakdown confirms that frozen warm-water shrimps and prawns (CN 030617) account for the bulk of imports – 524 kt and EUR 3.39 billion in 2025. On the export side, frozen cold-water shrimps and prawns (CN 030616) lead with 58 kt and EUR 281 million, reflecting the EU's strength in northern fisheries. Live and fresh lobsters (CN 030632) and frozen crabs (CN 030614) also represent significant traded items, but their shares are far smaller.

## Conclusion

EU trade in crustaceans over 2015–2025 has been characterised by robust import growth, a widening external deficit, and a marked reorientation of trade partners. Ecuador's ascent and the decline of traditional partners such as Russia and the UK have heightened import concentration, while China has become the dominant export market. Domestic production gains have reduced the EU's net import reliance, though the sharp fall in export propensity signals an increasingly inward-oriented sector. Price shocks related to the pandemic, Brexit, and sanctions underscore the sector's exposure to external disruptions, calling for continued attention to supply-chain resilience and diversification.

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