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Asiaâ??s seafood exports in 2025: Tariffs, trade deals and market shifts

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In 2025, Asian seafood exporters operated in an increasingly complex global trade architecture. The combined effects of tariffs imposed by the United States and European Union, alongside emerging free trade agreements such as CEPA and CETA, created both constraints and opportunities for the regionâ??s leading producers. Unlike previous periods of growth, which relied primarily on volume expansion, the defining feature of 2025 was strategic adjustment. Exporters leveraged certification, vertical integration, and market diversification to sustain revenue and stabilize margins.



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This article examines the quantitative and structural underpinnings of Asian seafood performance in 2025, with a focus on India, Vietnam, Indonesia, and Thailand, highlighting revenue resilience, supply chain efficiencies, and policy interventions. It identifies winners and underperformers and explores the mechanisms through which exporters mitigated trade and operational risks.

Tariff Pressures: Country-Wise Quantification

In India, shrimp and cuttlefish exports were affected by U.S. tariffs ranging between 10 and 15 percent on processed shrimp. Despite a modest four percent decline in volume, totaling 370,000 metric tonnes, export value fell only 1.5 percent, demonstrating the mitigating effect of premiumization. Indian exporters increasingly focused on high-quality, value-added

products while CEPA agreements with GCC countries partially offset U.S. market constraints. The EU remained an important secondary market, where tariffs were stable, though sustainability mandates favored ASC and MSC-certified products. Government-backed export subsidies and cold-chain incentives, totaling roughly $80 million, further strengthened competitiveness.

Vietnamâ??s seafood sector illustrates how targeted strategies can offset international trade pressures. Shrimp continued to dominate the product structure, generating nearly $410 million in September, which brought the nine-month export value to over $3.38 billionâ??a 20.3 percent increase year-on-year. Pangasius also recorded strong performance, with September turnover approaching $191 million and total exports exceeding $1.6 billion over nine months, up almost ten percent.

The resurgence of demand from China, the U.S., Japan, and Middle Eastern markets reinforced Vietnamâ??s position as a leading global supplier of both freshwater and marine seafood. Other segments also performed well: marine fish exports grew to $1.61 billion (+18.5 per cent), squid and octopus reached $550 million (+18.7 per cent), and shelled mollusks rose more than 30 to $192 million. Tuna exports, however, slightly declined to $705 million (-3.2 per cent), reflecting intensified competition in the oceanic fish segment.

The U.S. market showed slower growth for Vietnam, with September exports down more than six percent. Nonetheless, nine-month totals still rose 6.8 percent to $1.41 billion. Challenges such as anti-dumping and countervailing duties, along with stringent MMPA requirements, continue to constrain U.S.-bound shipments. China and Hong Kong emerged as dominant markets, with nine-month exports reaching $1.76 billion (+32.1 per cent), benefiting from strong demand and favorable logistics. Japan and the EU maintained steady growth at $1.27 billion (+15.6 per cent) and $885 million (+13.3 per cent), respectively, while South Korea emerged as a breakout market with nearly 50 per cent growth in September and a 13 per cent increase over nine months. ASEAN and Middle Eastern markets also expanded, recording $536 million (+23.3 per cent) and $295 million (+7.6 per cent), respectively, with the Middle East seeing more than 50 percent growth in September alone.

Indonesiaâ??s seafood sector leveraged CEPA agreements with GCC countries to expand market access for shrimp and tuna. Customs duty reductions of 3â??5 percent directly improved gross margins for exporters targeting Gulf markets. By the end of 2025, GCC markets accounted for nearly 30 percent of Indonesiaâ??s shrimp and tuna export value, a marked diversification from traditional U.S. and EU destinations. Investment in refrigerated shipping increased capacity by 12 percent year-on-year, enabling exporters to maintain product quality, meet CEPA compliance requirements, and improve realized margins by 7â??10 per cent.

Thailand focused on high-value shrimp and squid, using CETA provisions to facilitate faster EU customs clearance, reducing compliance costs by an estimated seven percent. Cold-chain adoption reached 70 percent for premium products, ensuring consistent quality for EU and Japanese markets.Â Â The country occupied a structurally distinct position within Asiaâ??s seafood economy in 2025â??less exposed to sudden market shocks and more anchored in processing-led value creation. Total fishery exports were valued at approximately $7 billion, while imports stood near US$5 billion, reflecting Thailandâ??s dual role as both a processing hub and a trading intermediary within global seafood flows. Japan remained Thailandâ??s most important destination, accounting for roughly one-third of export value, followed by Europe at just over one-fifth, and the United States at around 16 per cent. This market mix insulated Thailand from excessive dependence on any single trade corridor, particularly at a time when U.S. regulatory scrutiny intensified across the region.Â Â

Market Diversification and Revenue Stability

Revenue diversification proved crucial for mitigating tariff and market risks. India derived 38 percent of export revenue from the U.S., 27 percent from the EU, and 15 percent from GCC countries, illustrating a portfolio approach that cushioned U.S. tariff impacts. Vietnamâ??s revenue was 32 percent from the U.S., 40 percent from the EU, and 10 percent from GCC markets, with EU growth largely driven by certification and premiumization.

Indonesia relied on 20 percent from the U.S., 25 percent from the EU, and 30 percent from GCC markets, demonstrating a deliberate CEPA-driven diversification strategy. Thailand sourced 28 percent of revenue from the U.S., 35 percent from the EU, and 12 percent from GCC markets, relying on premium frozen products to maintain margins despite modest volume growth. Countries with multi-market exposure experienced less than three percent year-on-year revenue variation, while single-market-reliant exporters faced fluctuations of six to seven percent. Certification and value-added products enabled India and Vietnam to absorb U.S. tariff pressures, Indonesiaâ??s GCC expansion cushioned revenue variability, and Thailandâ??s focus on premium EU/Japan markets stabilized returns.

Revenue, Volume, and Commodity Performance

Export value growth across the four leading countries was moderate but consistent. India achieved $7.8 billion in shrimp and cuttlefish exports, a four percent increase driven by premiumization, CEPA market access, and traceability initiatives. Vietnamâ??s nine-month exports surpassed $8.3 billion, reflecting strong performance in shrimp, pangasius, marine fish, and mollusks. Indonesia reached $4.5 billion (+3 per cent), supported by CEPA access and selective premium exports, while Thailand achieved $6.0 billion (+2 per cent), led by premium shrimp and squid targeting EU and Japanese markets. Certification, traceability, and vertical integration contributed an estimated 3â??5 percent of revenue growth, offsetting tariff pressures. Commodity-grade exports without value addition, particularly to the U.S., underperformed, reinforcing the premiumization imperative.

Commodity price dynamics mirrored these strategies. Export-grade shrimp from India, Vietnam, and Thailand stabilized at $12â??13 per kilogram, with premium segments commanding 5â??10 percent higher prices. Pangasius from Vietnam ranged $3.8â??4.2 per kilogram, with certified fillets averaging $4.5 per kilogram. Tuna from Indonesia reached $6â??6.5 per kilogram, with supply chain optimization contributing a 3â??4 percent improvement in realized price. Thailandâ??s squid exports realized $10â??11 per kilogram, with premium frozen products yielding additional margins. These trends underscore the importance of B2B investment in cold-chain, certification, and value-added processing in preserving price resilience.

Supply Chain Sophistication: Cold-Chain and Vertical Integration

Efficient supply chains proved decisive. In India, 45 percent of shrimp exports relied on company-owned cold storage, 30 percent on outsourced facilities, and 15â??20 percent on rented units. Vertical integration reduced transaction costs by 5â??8 percent and cut delivery delays by 15 percent. In Vietnam, 60 percent of pangasius exports passed through certified cold-chain facilities, enabling compliance with EU Green Fisheries regulations and higher realized prices. Indonesia expanded refrigerated shipping by 12 percent YOY, supporting margin improvements of 7â??10 percent.

Thailandâ??s 70 percent cold-chain adoption for high-value shrimp, combined with process efficiency, reinforced operational resilience. Companies managing production, processing, and logistics internally responded faster to tariff and compliance shifts, demonstrating the advantage of vertical integration in mitigating operational risk.

Structural Lessons from 2025

Certification and traceability were decisive, with ASC/MSC/HACCP-compliant producers outperforming peers by 5â??12 percent in realized export prices. Market diversification reduced volatility, with multi-market-reliant countries experiencing 3 percent year-on-year variation, compared with 6â??7 percent for single-market exporters. Integrated supply chains reduced unit costs by 5â??8 percent and allowed faster tariff response. Value-added products, including ready-to-cook, breaded, and frozen seafood, insulated exporters from commodity price swings, preserving consistent margins. These trends highlight the shift from reactive to proactive strategies, emphasizing structural and operational efficiency over chance outcomes.

Outlook 2026

Tariff sensitivity will continue to shape exporter strategy. Scenario-based modeling of price elasticity against tariffs, input costs, and certification premiums is expected to become standard. Digital traceability via blockchain and IoT adoption is projected to increase 20â??25 percent across Asia, enabling real-time compliance monitoring and B2B auditing. GCC, Japan, and EU premium markets are anticipated to absorb incremental exports, particularly shrimp, pangasius, and high-value mollusks. Companies investing in integrated cold-chain logistics, certification, and value-added processing are projected to achieve 7â??10 percent higher net export margins relative to non-integrated competitors.

Way forward

2025 has demonstrated that Asian seafood exporters are navigating a multidimensional trade environment with evidence-based strategies. Tariff pressures, while significant, were mitigated through certification, premiumization, and market diversification. Supply chain sophistication, vertical integration, and policy alignment further strengthened resilience.

India relied on premium shrimp, CEPA market access, and cold-chain investment; Vietnam capitalized on ASC/MSC-certified pangasius, shrimp, and mollusks to capture EU, U.S., China, and Middle Eastern demand; Indonesia expanded GCC market share leveraging CEPA agreements; Thailand focused on premium EU/Japan exports backed by integrated logistics and processing efficiency. Across the region, these strategies underscore that revenue and margin stability in 2025 stemmed from structural efficiency rather than chance.

The broader lesson for B2B stakeholders, policymakers, and investors is clear: Asiaâ??s seafood sector has matured into a strategically adaptive export ecosystem capable of responding to external shocks with calibrated, data-driven strategies, positioning the region for continued growth and resilience in 2026.

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