



Agriculture and
Agri-Food Canada

Agriculture et
Agroalimentaire Canada

**International
Markets
Bureau**

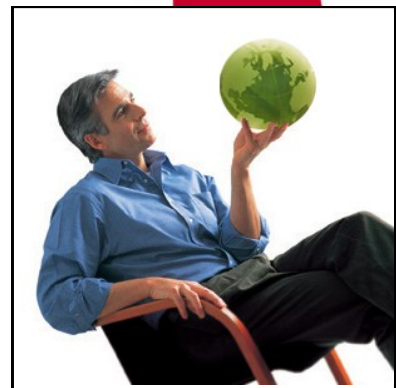
MARKET INDICATOR REPORT | DECEMBER 2011



Inside the Chinese Seafood Trade



Source: Shutterstock





► TRADE SUMMARY

Although China is not currently a large market for Canadian exports of fish and seafood, its importance has been growing. From 2007 to 2010, seafood exports to China doubled, accounting for 7.5% of all Canadian agri-food and seafood exports.

From a global perspective, China is a large importer of fish and seafood, despite being able to supply much of its own demand. China imported over CAD\$4.5 billion of fish and seafood in 2010, an increase of 11.0% from 2009. Primary suppliers were Russia, with 28.3% of total imports, followed by the United States (16.2%), Norway (8.9%) and Japan (6.7%).

China's main fish and seafood imports from all countries in 2010 included frozen fish with bones (CAD\$1.5 billion), frozen Pacific salmon (excluding fillets, CAD\$478.7 million), frozen cod (excluding fillets, CAD\$375.3 million), frozen shrimp and prawns (CAD\$193.2 million), non-frozen crab (CAD\$122.9 million), and frozen crab (CAD\$89.5 million).

In 2010, China exported just over \$13.6 billion in fish and seafood products worldwide, an increase of 17.5% from the previous year. Most of China's exports came from fish fillets and other fish meat (\$3.8 billion), crustaceans (\$1.6 billion), and frozen fish (\$1.4 billion). Top destinations included Japan (23.7%), the United States (19.9%), and South Korea (9.9%).

► CANADIAN PERFORMANCE

In 2010, Canada was the fifth-largest supplier of fish and seafood to China, with sales of CAD\$224.6 million (based on Chinese import data). Fish and seafood exports to China have increased 23.3% from 2009 to 2010. Much of this increase can be attributed to increases in exports of fresh crab (CAD\$44.3 million), frozen crab (CAD\$55.4 million) and prawns (CAD\$40.2 million). China received 7.5% of Canada's fish and seafood exports in 2010, while the United States received 62.3%, and Japan 7.6%.

For Canada, fish and seafood is the thirteenth most significant export sector to China, behind other commodities such as wood pulp, ores, machinery, oil, plastic and wood, and fat and oils. The fish and seafood sector represented just 2.2% of all products exported to China in 2010.

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► DID YOU KNOW?

CHINA IS THE WORLD'S
TOP PRODUCER AND
CONSUMER OF
FISH AND SEAFOOD
PRODUCTS.

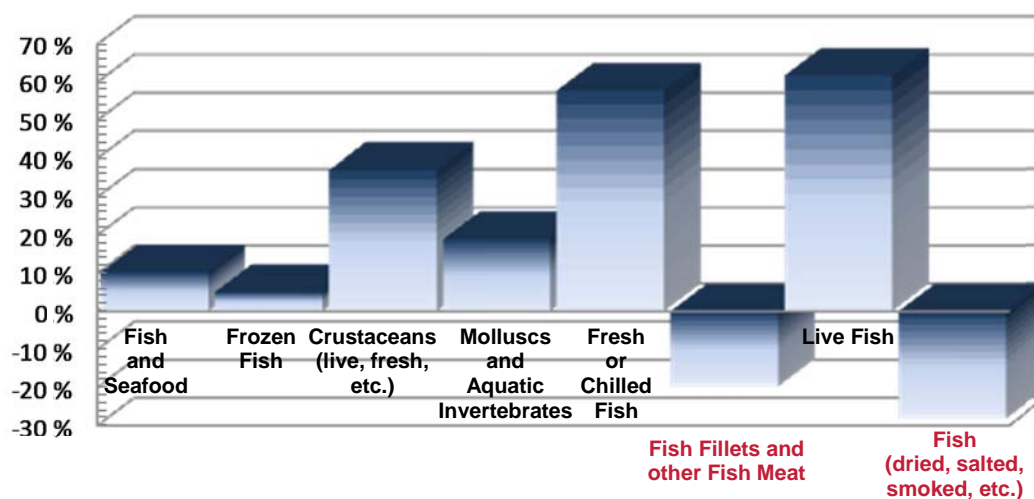
► **BY THE NUMBERS**



Top Chinese Seafood Imports in 2010	Total Value (CAD\$ billions)	Top Supplier
Total	4.591	World
Frozen fish, with bones	1.539	Russia
Pacific Salmon (excluding fillets)	0.478	United States
Frozen Cod (excluding fillets)	0.375	Russia
Frozen Plaice	0.199	United States
Haddock (excluding fillets)	0.131	Norway
Frozen shrimp and prawns	0.193	Canada
Crabs raw (not frozen)	0.122	Canada

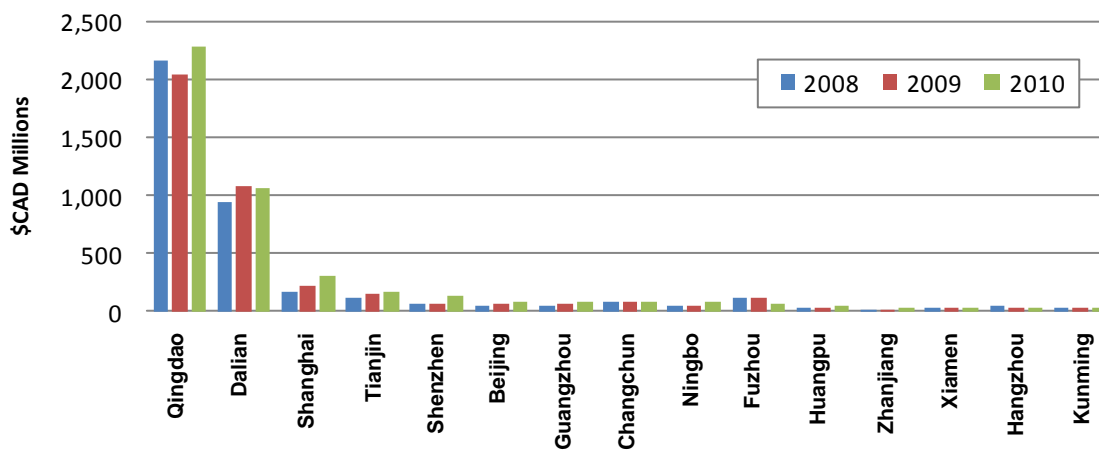
Source: Global Trade Atlas, 2011

Chinese Fish and Seafood Imports from the World - Percentage Change 2009/2010 based on Import Value



Source: Global Trade Atlas, 2011

Top Chinese Cities/Districts for Fish and Seafood Imports from the World



Source: Global Trade Atlas, 2011



► TOP TEN SEAFOOD SUPPLIERS TO CHINA - 2010

All of the figures listed below are in \$CAD.

<p><u>1. Imports from Russia</u></p> <ul style="list-style-type: none"> ▶ Frozen fish, with bones: \$849.8M ▶ Frozen cod, excluding fillets: \$162.2M ▶ Frozen Pacific salmon, excl. fillets: \$103.7M ▶ Frozen herring excluding fillets : \$45.1M ▶ Frozen haddock, excl. fillets: \$33.6M 	<p><u>2. Imports from the United States</u></p> <ul style="list-style-type: none"> ▶ Frozen Pacific salmon, excl. fillets: \$181.6M ▶ Frozen plaice, excl. fillets: \$165.1M ▶ Frozen fish, with bones: \$110.9M ▶ Frozen cod, excl. fillets: \$63.6M ▶ Frozen sockeye salmon excl. fillets \$15.7M
<p><u>3. Imports from Norway</u></p> <ul style="list-style-type: none"> ▶ Frozen mackerel, excl. fillets: \$98.1M ▶ Frozen haddock, excl. fillets: \$77.4M ▶ Frozen cod, excl. fillets: \$45.70M ▶ Frozen fish, with bones: \$42.6M ▶ Atlantic Pollock excl. fillets \$25.1M 	<p><u>4. Imports from Japan</u></p> <ul style="list-style-type: none"> ▶ Frozen Pacific salmon, excl. fillets: \$158.2M ▶ Frozen fish, with bones: \$44.6M ▶ Frozen mackerel, excl. fillets: \$12.0M ▶ Frozen, salted, dried cuttlefish and squid: \$10.0M ▶ Frozen cod, excl. fillets: \$7.3M
<p><u>5. Imports from Canada</u></p> <ul style="list-style-type: none"> ▶ Frozen crab, in shell: \$55.4M ▶ Live or cooked crab: \$44.3M ▶ Frozen shrimp and prawns, in shell: \$40.2M ▶ Frozen fish, with bones: \$12.0M ▶ Frozen halibut/Greenland turbot, excl. fillets: \$7.8M 	<p><u>6. Imports from India</u></p> <ul style="list-style-type: none"> ▶ Frozen fish, with bones: \$119.3M ▶ Frozen, dried, salted cuttlefish: \$18.0M ▶ Frozen shrimp and prawns, in shell: \$10.7M ▶ Frozen sole, excl. fillets: \$2.2M ▶ Live or cooked crab: \$2.6M
<p><u>7. Imports from South Korea</u></p> <ul style="list-style-type: none"> ▶ Frozen, fish with bones \$53.8M ▶ Frozen cuttlefish and squids: \$45.7M ▶ Live, chilled, salted, frozen, dried snails: \$14.2M ▶ Frozen cod excl. fillets: \$11.2M ▶ Frozen plaice, excl. fillets: \$3.3M 	<p><u>8. Imports from Thailand</u></p> <ul style="list-style-type: none"> ▶ Frozen fish, with bones: \$49.5M ▶ Frozen, dried, salted cuttlefish and squid \$45.7M ▶ Frozen shrimp and prawns, in shell: \$37.2M ▶ Fresh, chilled, salted, dried shrimp and prawns: \$12.2M ▶ Frozen crabs, in shell: \$3.2M
<p><u>9. Imports from the Netherlands</u></p> <ul style="list-style-type: none"> ▶ Frozen cod, excl. fillets: \$50.2M ▶ Frozen fish, with bones: \$35.5M ▶ Frozen haddock, excl. fillets: \$18.6M ▶ Frozen Atlantic Pollock, excl. fillets: \$4.2M ▶ Frozen mackerel, excl. fillets: \$4.0M 	<p><u>10. Imports from New Zealand</u></p> <ul style="list-style-type: none"> ▶ Frozen fish, with bones: \$49.0M ▶ Frozen, dried, salted, cuttlefish and squid: \$16.7M ▶ Frozen cod, excl. fillets: \$12.6M ▶ Frozen Atlantic Pollock, excl. fillets: \$4.6M ▶ Frozen whiting and hake, excl. fillets: \$3.1M

Source: Global Trade Atlas, 2011



► COMPETITIVE LANDSCAPE

Chinese Fish and Seafood Sector Import Analysis

Products	Imports from the World (Kg)			Top 3 Suppliers and % Share 2010			Canadian % Share		
	2008	2009	2010	#1	#2	#3	2008	2009	2010
Lobster									
Lobsters, Nes*, Frozen, In Shell, Including Boiled In Shell (030612)	1,963,295	2,466,454	4,448,842	Thailand (72.2%)	U.K. (27.5%)	Canada (0.2%)	0.1%	0.2%	0.2%
Rock Lobster & Other Sea Crawfish Not Frozen, In Shell Or Not, Including Boiled In Shell (030621)	906,117	742,239	3,554,810	Indonesia (19.3%)	South Africa (19.2%)	New Zealand (13.7%)	0.3%	0.9%	0.7%
Rock Lobster & Other Sea Crawfish, Frozen In Shell Or Not, Including Boiled In Shell (030611)	47,847	185,112	506,137	Canada (59.7%)	U.S. (17.3%)	Cuba (15.5%)	22.1%	44.0%	59.7%
Lobsters, (Homarus Spp), Not Frozen, In Shell, Including Boiled In Shell (030622)	102,996	200,988	467,211	Canada (87.6%)	Thailand (8.8%)	U.S. (3.3%)	67.4%	59.8%	87.6%
Lobster, Prepared Or Preserved (160530)	0	42,580	32,951	Taiwan (86.2%)	Spain (13.4%)	U.S. (0.3%)	0.0%	67.8%	0.1%
Crab									
Crabs Frozen, In Shell Or Not, Including Boiled In Shell (030614)	32,289,157	26,793,691	24,188,740	Canada (52.3%)	U.S. (16.1%)	Russia (10.5%)	41.4%	38.5%	52.3%
Crabs, Not Frozen, In Shell Or Not, Including Boiled In Shell (030624)	9,092,070	16,075,455	23,905,380	Myanmar (26.5%)	Canada (19.3%)	Bangladesh (14.3%)	21.6%	19.0%	19.3%
Crab, Prepared Or Preserved (160510)	2,515,709	734,535	2,023,513	Canada (60.1%)	Greenland (34.7%)	Russia (1.5%)	55.9%	27.0%	60.1%
Salmon									
Salmon, Pacific, Frozen, Excluding Heading 03.04, Livers and Roes, Nes* (030319)	91,484,406	182,385,602	156,064,293	U.S. (37.9%)	Japan (32.1%)	Russia (24.2%)	0.2%	1.1%	0.5%
Salmonidae, Nes*, Frozen, Excluding Heading 03.04, Livers And Roes (030329)	8,140,211	10,940,762	8,744,68	Japan (62.2%)	U.S. (25.1%)	Chile (4.4%)	0.0%	1.3%	1.6%
Sockeye Salmon (Red Salmon) (Oncorhynchus Nerka), Frozen, Excluding Heading 03.04, Livers and Roes (030311)	17,411,079	10,952,624	4,465,650	U.S. (76.3%)	Canada (9.7%)	Japan (7.3%)	0.0%	1.4%	9.7%
Salmon, Atlantic & Danube, Frozen, Excluding Heading 03.04, Livers and Roes (030322)	2,119,439	4,791,239	2,263,474	U.S. (26.4%)	Norway (25.6%)	Chile (19.2%)	0.0%	0.2%	2.2%
Salmon Pacific, Atlantic & Danube, Fresh Or Chilled, Excluding Heading 03.04, Livers And Roes (030212)	5,458,466	8,101,079	13,176,707	Norway (94.4%)	Australia (4.8%)	Canada (0.8%)	1.6%	0.1%	0.8%
Salmonidae, Nes*, Fresh Or Chilled, Excluding Heading 03.04, Livers And Roes (030219)	136	303	20,022	Japan (99.9%)	New Zealand (0.1%)	-	16.9%	0.0%	0.0%
Salmon, Pacific, Atlantic and Danube, Smoked Including Fillets (030541)	36,025	7,829	30,799	Norway (91.6%)	Australia (5.2%)	France (1.4%)	0.0%	0.0%	0.0%
Salmon Prepared Or Preserved, Whole Or In Pieces, but Not Minced (160411)	39,198	6,669	7,070	Thailand (64.8%)	U.S. (12.7%)	Japan (9.9%)	0.0%	3.5%	2.5%

*NES = not otherwise specified

Source: Global Trade Atlas, 2011

► **COMPETITIVE LANDSCAPE (CONTINUED)**



Products	Imports from the World (Kg)			Top 3 Suppliers and % Share 2010			Canadian % Share		
	2008	2009	2010	#1	#2	#3	2008	2009	2010
Sardines									
Sardines, Sardinella, Brisling Or Sprats, Frozen, Excluding Heading 03.04, Livers & Roes (030371)	11,043,050	12,678,674	13,748,170	U.S. (24.2%)	Morocco (21.9%)	France (13.4%)	0.1%	5.3%	6.0%
Sardines, Sardinella, Brisling/Sprats, Fresh/Chilled, Excluding Heading 03.04, Livers & Roes (030261)	663	2,117	3,031	Japan (99.8%)	France (0.2%)	-	0.0%	0.0%	0.0%
Sardines, Sardinella & Brisling/Sprats Prepared Or Preserved, Whole Or Pieces Excluding Minced (160413)	60,742	56,447	89,567	Thailand (50.9%)	Taiwan (25.1%)	Malaysia (13.7%)	0.1%	0.0%	1.2%
Herring									
Herrings, Frozen, Excluding Heading 03.04, Livers And Roes (030351)	63,846,696	62,511,172	106,039,217	Russia (79.7%)	U.S. (7.8%)	Netherlands (5.2%)	0.2%	0.0%	0.4%
Herrings, Fresh Or Chilled, Excluding Heading 03.04, Livers And Roes (030240)	193	2,018	79	Norway (74.7%)	Japan (25.3%)	-	0.0%	0.0%	0.0%
Herrings, Salted Or In Brine, But Not Dried Or Smoked (030561)	0	337	839	Norway (75.5%)	Sweden (21.9%)	U.K. (1.4%)	0.0%	0.0%	0.0%
Herrings Smoked, Including Fillets (030542)	280	0	22	Belgium (100.0%)	-	-	0.0%	0.0%	0.0%
Herrings, Prepared Or Preserved, Whole Or In Pieces But Not Minced (160412)	46,726	27,143	33,173	Japan (86.5%)	Germany (12.2%)	Canada (0.7%)	0.0%	0.8%	0.7%
Shark									
Dogfish, Other Shark Excluding Fillet, Liver, Roe, Frozen (030375)	6,704,824	5,666,490	4,506,038	Thailand (43.6%)	Spain (28.6%)	Singapore (12.8%)	0.6%	0.5%	0.2%
Other Prepared/Preserved Shark's Fin, Minced (16042099)	237,370	9,858	158,798	Japan (78.8%)	U.S. (21.78%)	Taiwan (0.15%)	0.0%	0.0%	0.0%
Prepared/Preserved Shark's Fin In Airtight Containers, Minced	1,560	57,307	15,844	Taiwan (100%)	-	-	0.0%	0.0%	0.0%
Mussels									
Mussels, Shelled Or Not, Frozen, Dried, Salted Or In Brine (030739)	949,761	1,107,709	1,050,173	India (63.8%)	Japan (14.6%)	New Zealand (9.6%)	45.1%	14.9%	9.6%
Mussels, Shelled Or Not, Live, Fresh Or Chilled (030731)	2,158,618	2,170,125	897,995	North Korea (99.6%)	U.S. (0.2%)	Norway (0.1%)	0.0%	0.0%	0.0%
Sea Cucumbers									
Sea Cucumbers, Frozen, Dried, Salted Or In Brine	5,486,983	4,464,754	11,404,419	Japan (37.48%)	Canada (25.88%)	Australia (6.94%)	39.5%	27.3%	25.1%

Source: Global Trade Atlas, 2011

► TOP DISTRICTS OF ENTRY



District	Quantity			% Share			% Change 10/09
	2008	2009	2010	2008	2009	2010	
Commodity 03: Fish and Crustaceans, Molluscs and other Aquatic Invertebrates							
Qingdao	1,118,374,452	1,029,287,832	1,177,324,503	48.0	46.7	47.8	14.38
Dalian	597,027,054	611,092,941	702,964,424	25.6	27.7	28.6	15.03
Tianjin	95,780,269	101,420,497	108,506,722	4.1	4.6	4.4	6.99
Shanghai	57,502,539	53,809,535	61,482,611	2.5	2.4	2.5	14.26
Changchun	41,354,582	59,282,780	56,804,925	1.8	2.7	2.3	-4.18
Shenzhen	32,626,561	35,525,743	51,326,601	1.4	1.6	2.1	44.48
Huangpu	32,722,617	31,476,537	48,188,922	1.4	1.4	2.0	53.09
Fuzhou	146,930,427	93,141,517	47,500,271	6.3	4.2	1.9	-49
Guangzhou	29,124,741	29,460,341	46,483,346	1.3	1.3	1.9	57.78
Ningbo	26,413,729	35,178,788	42,268,548	1.1	1.6	1.7	20.15
All Districts	2,327,773,097	2,204,007,176	2,460,512,738	100.0	100.0	100.0	11.64
Commodity 1605: Crustaceans, Molluscs And Other Aquatic Invertebrates, Prepared Or Preserved							
Qingdao	18,627,874	18,877,347	23,302,622	68.9	71.8	54.9	23.44
Ningbo	2,468,402	2,096,882	5,959,509	9.1	8.0	14.0	184.21
Nanjing	21,062	19,193	5,831,362	0.1	0.1	13.7	∞
Dalian	1,389,785	689,392	5,188,773	5.1	2.6	12.2	652.66
Hangzhou	2,916,993	2,778,139	1,096,748	10.8	10.6	2.6	-60.52
Guangzhou	184,561	140,152	227,482	0.7	0.5	0.5	62.31
Xiamen	9,894	49,031	177,876	0.0	0.2	0.4	262.78
Changchun	450,154	98,380	164,460	1.7	0.4	0.4	67.17
Shijiazhuang	0	23,761	157,083	0.0	0.1	0.4	561.1
Shanghai	127,418	44,259	97,103	0.5	0.2	0.2	119.4
All Districts	27,036,210	26,291,370	42,460,364	100.0	100.0	100.0	61.5

Source: Global Trade Atlas, 2011

► TOP DISTRICTS OF ENTRY (CONTINUED)



District	Quantity			% Share			% Change 10/09
	2008	2009	2010	2008	2009	2010	
Commodity 1604: Prepared Or Preserved Fish; Caviar & Caviar Substitutes Prepared From Fish Eggs							
Shanghai	1,649,046	1,500,823	1,671,935	27.3	46.5	41.4	11.4
Dalian	469,141	591,425	701,494	7.8	18.3	17.4	18.61
Shenzhen	307,011	422,751	515,018	5.1	13.1	12.8	21.83
Xiamen	237,172	213,158	306,139	3.9	6.6	7.6	43.62
Qingdao	3,075,198	143,829	175,453	50.9	4.5	4.4	21.99
Gongbei	1,647	1,611	164,476	0.0	0.1	4.1	∞
Nanjing	1,061	11,637	121,677	0.0	0.4	3.0	945.6
Ningbo	6,270	63,024	112,810	0.1	2.0	2.8	79
Beijing	77,414	81,467	97,098	1.3	2.5	2.4	19.19
Huangpu	12,632	63,834	70,826	0.2	2.0	1.8	10.95
All Districts	6,038,016	3,226,015	4,036,782	100.0	100.0	100.0	25.13
Commodity 1603: Extracts & Juices Of Meat, Fish Or Crust, Molluscs Or Other Aquatic Invertebrates							
Qingdao	43,206	8,120	46,000	17.1	9.3	25.3	466.5
Xiamen	13,900	8,050	43,500	5.5	9.2	23.9	440.37
Dalian	22,257	32,310	27,440	8.8	36.9	15.1	-15.07
Huangpu	100,800	20,000	24,000	39.8	22.9	13.2	20
Shanghai	55,187	11,817	13,649	21.8	13.5	7.5	15.5
Nanjing	0	0	12,610	0.0	0.0	6.9	n/a
Guangzhou	2,000	989	6,219	0.8	1.1	3.4	528.82
Gongbei	12,887	4,500	6,000	5.1	5.1	3.3	33.33
Jiangmen	54	18	1,016	0.0	0.0	0.6	5544.44
Hangzhou	2,700	1,580	850	1.1	1.8	0.5	-46.2
All Districts	252,995	87,480	181,834	100.0	100.0	100.0	107.86

Source: Global Trade Atlas, 2011



► TOP DISTRICTS OF ENTRY (CONTINUED)

Chinese Imports of Fish and Seafood from Canada All Transport Modes Via All Districts										
District	Value (CAD\$)			Volume (KG)			% Share			% Change 10/09
	2008	2009	2010	2008	2009	2010	2008	2009	2010	
All Districts	197,315,035	182,205,040	224,680,394	na	na	na	100	100	100	23.31
Qingdao	73,542,703	54,142,247	78,588,544	21,483,923	17,541,177	25,302,432	37.27	29.72	34.98	45.15
Shanghai	40,006,241	53,578,487	65,383,136	8,644,151	9,509,015	10,300,981	20.28	29.41	29.1	22.03
Dalian	50,306,873	41,025,343	38,671,275	20,588,399	16,543,839	14,823,032	25.5	22.52	17.21	-5.74
Beijing	8,104,349	9,469,562	13,988,990	1,461,446	1,412,185	1,737,024	4.11	5.2	6.23	47.73
Tianjin	7,581,083	9,268,518	11,937,143	2,309,282	3,488,156	4,367,134	3.84	5.09	5.31	28.79
Shenzhen	11,899,099	7,598,024	8,834,098	8,912,810	6,221,317	6,696,743	6.03	4.17	3.93	16.27
Guangzhou	1,234,047	3,211,096	2,675,545	1,282,643	3,384,016	2,812,277	0.63	1.76	1.19	-16.68
Haikou	1,164,598	646,836	1,497,780	93,350	78,060	109,659	0.59	0.36	0.67	131.55
Huangpu	744,558	712,839	931,314	903,142	615,970	430,779	0.38	0.39	0.41	30.65
Ningbo	68,777	585,489	852,433	24,000	544,606	413,278	0.03	0.32	0.38	45.59
Hangzhou	108,774	221,842	545,183	48,940	36,436	75,309	0.06	0.12	0.24	145.75
Xiamen	85,246	166,108	309,869	9,072	44,161	203,126	0.04	0.09	0.14	86.55
Zhanjiang	1,407,838	542,577	289,675	430,842	165,304	92,866	0.71	0.3	0.13	-46.61
Jiangmen	161,974	93,238	154,159	108,028	77,730	96,993	0.08	0.05	0.07	65.34
Gongbei	0	82,291	20,464	0	19,469	8,120	0	0.05	0.01	-75.13
Nanjing	0	0	783	0	0	959	0	0	0	n/a
Nanning	0	111,994	0	0	170,334	0	0	0.06	0	-100
Harbin	0	35,661	0	0	1,398	0	0	0.02	0	-100
Fuzhou	898,874	712,889	0	743,163	299,424	0	0.46	0.39	0	-100

Source: Global Trade Atlas, 2011

Chinese Fish and Seafood Imports by District of Entry and Value, 2010			
	Canada	World	Canada's Share
Qingdao	78,588,544	2,275,060,156	3.45%
Shanghai	65,383,136	304,186,404	21.49%
Dalian	38,671,275	1,067,720,789	3.62%
Beijing	13,988,990	86,595,312	16.15%
Tianjin	11,937,143	171,003,692	6.98%
Shenzhen	8,834,098	127,512,917	6.93%
Guangzhou	2,675,545	85,546,997	3.13%
Haikou	1,497,780	18,535,850	8.08%
Huangpu	931,314	44,689,698	2.08%
Ningbo	852,433	80,629,685	1.06%

Source: Global Trade Atlas, 2011



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Inside the Chinese Seafood Trade

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