



**MARKET ACCESS SECRETARIAT  
Global Analysis Report**

# Competitive Trade Analysis

## Fresh, Frozen and Processed Crustaceans in China

**June 2016**



### REPORT CONTENT SUMMARY

- This report looks to highlight crustacean imports into China, and attempts to identify the best opportunities for Canadian exports.
- Specifically, the data analysis that follows focusses on the top ten Chinese fresh, frozen or processed crustacean imports, of which Canada maybe a supplier. It identifies the gap between China’s imports from the world and the proportion provided by Canada, and then outlines top international competitors.
- Unless otherwise specified, all figures in this document are based on import data as reported by China Customs, and were sourced from Global Trade Atlas (2015).

### CHINESE MARKET SUMMARY

- In 2014, China, with imports of C\$9.9 billion, is the third-largest importer of fish and seafood in the world. Canada’s share of Chinese fish and seafood imports was C\$514.9 million or 5.2%. Of Canada’s overall imports, C\$378.1 million came from imports of crustacean such as lobster, shrimp and crabs, thus making Canada the largest supplier of these products to China.
- China’s top imported products were live, fresh/chilled, dried, salted, or in brine rock lobster and other sea crawfish accounting for 24.1% of overall crustacean imports, in 2014, followed by live, fresh/chilled, dried, salted, or in brine crab (19.9%), and frozen shrimp and prawns (17.9%).
- China’s crustacean imports from Canada have been increasing on par with China’s imports from the world, resulting in a stable supply gap and a steady market share.

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## TRADE OVERVIEW

China is a net exporter of crustaceans. In 2014, China's crustacean trade surplus was C\$2.7 billion with imports valued at C\$1.8 billion, and C\$4.6 billion in exports. However, China also imported a variety of crustacean products from the world with their top imports being live rock lobster, live crab, and frozen shrimp and prawns. The top three supplying countries were Canada, the United States, and New Zealand. Canada was the top ranked supplier out of the 56 supplying countries to China, and has seen little fluctuation in market share over the last few years.

### China's Top Ten Suppliers of Crustaceans, C\$ millions

Country	2010	2011	2012	2013	2014	CAGR % 2010-14
<b>World</b>	<b>541.21</b>	<b>830.95</b>	<b>1,133.07</b>	<b>1,481.06</b>	<b>1,847.18</b>	<b>35.92</b>
1 Canada	153.42	198.41	247.16	306.27	378.13	25.30
2 United States	31.85	89.34	190.15	236.97	276.62	71.67
3 New Zealand	9.49	64.52	145.45	214.64	257.54	128.25
4 Ecuador	6.56	36.82	39.09	57.34	156.11	120.84
5 Indonesia	28.92	36.71	78.11	97.33	116.90	41.79
6 Thailand	69.78	61.57	92.78	104.35	106.11	11.04
7 Argentina	1.28	9.79	16.23	38.90	58.56	159.95
8 India	14.01	17.32	29.71	58.68	53.52	39.80
9 Myanmar	33.90	38.77	44.96	47.59	47.94	9.05
10 Bangladesh	14.29	22.45	31.58	41.90	45.85	33.83

### China's Top Ten Suppliers of Crustaceans, % Share

Country	2010	2011	2012	2013	2014	PP Change 2010-14
1 Canada	28.35	23.88	21.81	20.68	20.47	-7.88
2 United States	5.89	10.75	16.78	16.00	14.98	9.09
3 New Zealand	1.75	7.76	12.84	14.49	13.94	12.19
4 Ecuador	1.21	4.43	3.45	3.87	8.45	7.24
5 Indonesia	5.34	4.42	6.89	6.57	6.33	0.99
6 Thailand	12.89	7.41	8.19	7.05	5.74	-7.15
7 Argentina	0.24	1.18	1.43	2.63	3.17	2.93
8 India	2.59	2.08	2.62	3.96	2.90	0.31
9 Myanmar	6.26	4.67	3.97	3.21	2.60	-3.66
10 Bangladesh	2.64	2.70	2.79	2.83	2.48	-0.16

### Crustacean Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
China's imports from the world	541.21	830.95	1,133.07	1,481.06	1,847.18	35.92
China's imports from Canada	153.42	198.41	247.16	306.27	378.13	25.30
Supply gap	387.79	632.54	885.91	1,174.79	1,469.04	39.51



### Value of Global Crustacean Imports in China by Top Ten Districts, C\$ Millions

District	2010	2011	2012	2013	2014
<b>All Districts</b>	<b>541.21</b>	<b>830.95</b>	<b>1,133.07</b>	<b>1,481.06</b>	<b>1,847.18</b>
Shanghai	144.37	292.75	388.47	507.43	639.21
Qingdao	120.37	185.00	230.34	248.42	265.27
Guangzhou	21.27	55.46	106.18	182.72	189.61
Shenzhen	54.28	56.19	86.08	131.75	174.03
Tianjin	35.01	19.48	36.18	70.30	165.51
Dalian	46.85	78.08	99.59	125.34	150.76
Beijing	36.17	59.50	90.96	93.87	104.39
Zhanjiang	33.26	20.55	18.64	24.24	40.21
Ningbo	15.08	13.43	27.40	29.61	33.00
Xiamen	5.96	15.79	15.35	20.60	24.55

### Value of Global Crustacean Imports in China by Transport Mode, C\$ Millions

Transport Modes	2010	2011	2012	2013	2014
<b>All Transport Modes</b>	<b>541.21</b>	<b>830.95</b>	<b>1,133.07</b>	<b>1,481.06</b>	<b>1,847.18</b>
Air	169.43	396.72	563.08	783.64	953.12
Sea	358.64	404.54	497.89	581.46	718.74
Auto	12.98	28.98	72.08	114.70	174.10

### China's Historic Production of Crustaceans, Tonnes

Ocean Area	Species	2009	2010	2011	2012	2013
<b>Grand Total (Inland Waters and Marine Areas)</b>		<b>5,324,306</b>	<b>5,587,937</b>	<b>5,723,127</b>	<b>6,148,150</b>	<b>6,427,682</b>
Inland Waters	Freshwater crustaceans	1,751,021	1,866,338	1,828,418	1,996,193	2,152,660
	Shrimp and prawns	537,299	615,010	659,961	690,747	617,384
<b>Total Inland Waters</b>		<b>2,288,320</b>	<b>2,481,348</b>	<b>2,488,379</b>	<b>2,686,940</b>	<b>2,770,044</b>
Marine Areas	Crabs and sea-spiders	764,025	821,621	849,967	891,087	993,162
	Krill and planktonic crustaceans	-	1,956	16,020	4,265	31,944
	Misc. marine crustaceans	303,002	315,360	294,752	292,862	294,151
	Shrimp and prawns	1,968,959	1,967,652	2,074,009	2,272,996	2,338,381
<b>Total Marine Areas</b>		<b>3,035,986</b>	<b>3,106,589</b>	<b>3,234,748</b>	<b>3,461,210</b>	<b>3,657,638</b>

Source: FAO - Fisheries and Aquaculture Information and Statistics Branch



**China's Top Ten Crustacean Commodity Imports from the World,  
C\$ Millions and % Share**

Commodity	Description	C\$ Millions			% Share			% Change 2014/2013
		2012	2013	2014	2012	2013	2014	
<b>Total Crustaceans</b>		<b>1,133.07</b>	<b>1,481.06</b>	<b>1,847.18</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>24.72</b>
030621	Live, fresh/chilled, dried, salted, or in brine rock lobster and other sea crawfish	262.91	392.62	445.65	23.20	26.51	24.13	13.51
030624	Live, fresh/chilled, dried, salted, or in brine crab	252.57	340.90	369.33	22.29	23.02	19.99	8.34
030617	Frozen shrimp and prawns	152.93	205.24	330.37	13.50	13.86	17.89	60.97
030622	Live, fresh/chilled, dried, salted, or in brine lobster	45.27	70.47	177.10	4.00	4.76	9.59	151.31
030614	Frozen crab, including in shell	207.68	163.91	175.96	18.33	11.07	9.53	7.35
030616	Frozen cold-water shrimp and prawns,	78.67	149.32	164.51	6.94	10.08	8.91	10.17
030627	Fresh shrimp and prawns, except cold-water	69.04	93.05	116.06	6.09	6.28	6.28	24.73
030629	Live, fresh/chilled, dried, salted, or in brine Crustaceans, not elsewhere specified	23.88	34.13	39.79	2.11	2.30	2.15	16.57
030612	Frozen lobster, including in shell,	14.55	11.99	10.88	1.28	0.81	0.59	-9.28
030615	Frozen Norway lobster	2.05	1.89	3.87	0.18	0.13	0.21	105.10



## TOP TEN CRUSTACEAN COMMODITY IMPORTS

### 1. LIVE ROCK LOBSTER AND OTHER SEA CRAWFISH

China's Top Suppliers of Live Rock Lobster and Other Sea Crawfish,  
C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
<b>World</b>	<b>262.91</b>	<b>392.62</b>	<b>445.65</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>13.51</b>
New Zealand	129.18	211.26	251.14	49.13	53.81	56.35	18.88
United States	36.16	63.35	61.40	13.76	16.14	13.78	-3.09
Australia	5.92	12.05	25.30	2.25	3.07	5.68	110.03
South Africa	18.46	26.85	25.04	7.02	6.84	5.62	-6.75
Indonesia	21.81	24.32	21.59	8.30	6.19	4.85	-11.21
Mexico	12.90	12.98	10.45	4.91	3.31	2.34	-19.52
Canada	23.42	21.75	8.28	8.91	5.54	1.86	-61.93
Myanmar	5.66	4.71	6.48	2.15	1.20	1.45	37.50
India	0.83	2.87	5.69	0.32	0.73	1.28	98.15
Tanzania	0.57	4.30	5.28	0.22	1.10	1.19	22.88

Live Rock Lobster and Other Sea Crawfish Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	262.91	392.62	445.65	14.10
China's imports from Canada	23.42	21.75	8.28	-22.89
Supply gap	239.49	370.87	437.37	16.25



## 2. LIVE CRAB

### China's Top Ten Suppliers of Live Crab, C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change
	2012	2013	2014	2012	2013	2014	2014/2013
<b>World</b>	<b>252.57</b>	<b>340.90</b>	<b>369.33</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>8.34</b>
Canada	42.04	64.52	79.44	16.64	18.93	21.51	23.13
United States	60.45	78.41	66.70	23.93	23.00	18.06	-14.93
Indonesia	33.60	51.30	52.66	13.30	15.05	14.26	2.66
Bangladesh	30.72	40.82	44.83	12.16	11.97	12.14	9.84
Myanmar	29.16	23.87	20.85	11.55	7.00	5.65	-12.64
Madagascar	0.17	8.77	19.50	0.07	2.57	5.28	122.32
North Korea	3.53	15.36	18.10	1.40	4.51	4.90	17.81
United Kingdom	7.40	8.76	17.45	2.93	2.57	4.72	99.27
Philippines	7.16	10.76	12.38	2.83	3.16	3.35	15.07
India	6.63	7.76	9.57	2.62	2.28	2.59	23.33

### Live Crab Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	252.57	340.90	369.33	9.97
China's imports from Canada	42.04	64.52	79.44	17.25
Supply gap	210.53	276.39	289.89	8.32



### 3. FROZEN SHRIMP AND PRAWNS

#### China's Top Ten Suppliers of Frozen Shrimp and Prawns, C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
<b>World</b>	<b>152.93</b>	<b>205.24</b>	<b>330.37</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>60.97</b>
Ecuador	37.91	55.37	147.42	24.79	26.98	44.62	166.23
Argentina	11.51	35.43	49.73	7.52	17.26	15.05	40.39
India	22.18	48.04	36.16	14.51	23.41	10.95	-24.73
Thailand	30.40	15.24	22.39	19.88	7.43	6.78	46.89
Indonesia	9.55	3.34	18.25	6.24	1.63	5.52	446.24
Myanmar	4.39	6.63	11.45	2.87	3.23	3.47	72.76
Pakistan	1.52	1.90	7.57	0.99	0.92	2.29	298.77
Vietnam	2.34	6.30	6.87	1.53	3.07	2.08	9.08
Australia	3.43	3.55	5.73	2.24	1.73	1.73	61.46
Canada	4.74	8.44	5.42	3.10	4.11	1.64	-35.83

#### Frozen Shrimp and Prawns Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	152.93	205.24	330.37	21.24
China's imports from Canada	4.74	8.44	5.42	3.43
Supply gap	148.19	196.79	324.96	21.69



#### 4. LIVE LOBSTER

\*except Rock lobster

#### China's Top Ten Suppliers of Live Lobster, C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
<b>World</b>	<b>45.27</b>	<b>70.47</b>	<b>177.10</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>151.31</b>
Canada	16.28	35.77	91.70	35.95	50.76	51.78	156.33
United States	21.03	31.76	84.48	46.46	45.06	47.70	166.02
United Kingdom	0.07	0.03	0.66	0.15	0.04	0.37	2509.00
France	0.02	0.03	0.08	0.05	0.04	0.05	182.57
Mauritania	-	0.03	0.06	0.00	0.05	0.04	91.76
Taiwan	-	0.00	0.06	0.00	0.00	0.03	8484.33
Sri Lanka	0.55	-	0.03	1.22	0.00	0.02	N/C
Japan	-	0.00	0.02	0.00	0.00	0.01	5535.13
Indonesia	0.26	-	0.00	0.58	0.00	0.00	N/C
South Africa	0.08	0.00	0.00	0.17	0.01	0.00	-84.14

N/C: Not Calculable

#### Live Lobster Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	45.27	70.47	177.10	40.64
China's imports from Canada	16.28	35.77	91.70	54.07
Supply gap	29.00	34.70	85.41	31.00





## 5. FROZEN CRAB

### China's Top Ten Suppliers of Frozen Crab, C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
<b>World</b>	<b>207.68</b>	<b>163.91</b>	<b>175.96</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>7.35</b>
Canada	110.37	84.90	100.83	53.15	51.79	57.31	18.78
United States	60.44	46.94	40.67	29.10	28.64	23.11	-13.37
Chile	6.90	11.46	11.19	3.32	6.99	6.36	-2.32
Russia	10.81	8.72	5.80	5.20	5.32	3.30	-33.49
United Kingdom	1.34	1.96	2.65	0.65	1.20	1.51	34.94
South Korea	7.14	1.97	2.53	3.44	1.20	1.44	28.22
Argentina	3.25	0.59	2.44	1.57	0.36	1.39	311.74
North Korea	1.63	0.68	2.07	0.79	0.42	1.18	203.34
Namibia	1.16	1.17	2.01	0.56	0.71	1.14	71.87
Ireland	0.15	0.74	1.63	0.07	0.45	0.92	121.29

### Frozen Crab Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	207.68	163.91	175.96	-4.06
China's imports from Canada	110.37	84.90	100.83	-2.23
Supply gap	97.31	79.01	75.12	-6.26



## 6. FROZEN COLD-WATER SHRIMP AND PRAWNS

### China's Top Ten Suppliers of Frozen Cold-Water Shrimp and Prawns, C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
<b>World</b>	<b>78.67</b>	<b>149.32</b>	<b>164.51</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>10.17</b>
Canada	43.69	83.71	82.39	55.54	56.06	50.08	-1.58
Greenland	13.92	22.54	22.91	17.70	15.09	13.92	1.65
Denmark	7.46	15.01	13.54	9.48	10.05	8.23	-9.80
Russia	4.47	4.78	9.84	5.69	3.20	5.98	106.09
Ecuador	1.19	1.97	8.69	1.51	1.32	5.28	342.03
Argentina	1.47	2.82	6.38	1.87	1.89	3.88	126.09
Estonia	1.47	4.68	4.32	1.87	3.13	2.62	-7.76
China	-	2.75	3.91	0.00	1.84	2.38	42.27
India	-	-	2.08	0.00	0.00	1.26	N/C
Myanmar	-	4.67	1.54	0.00	3.13	0.94	-67.03

N/C: Not Calculable

### Frozen Cold-Water Shrimp and Prawns Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	78.67	149.32	164.51	20.25
China's imports from Canada	13.92	22.54	22.91	17.19
Supply gap	34.98	65.61	82.12	23.78



## 7. **FRESH SHRIMP AND PRAWNS\***

\*except cold-water shrimp and prawns

### China's Top Ten Suppliers of Fresh Shrimp and Prawns\*\*, C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change
	2012	2013	2014	2012	2013	2014	2014/2013
<b>World</b>	<b>69.04</b>	<b>93.05</b>	<b>116.06</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>24.73</b>
Thailand	49.23	71.57	69.40	71.30	76.92	59.80	-3.03
Vietnam	6.26	3.14	19.98	9.07	3.38	17.22	535.54
United States	9.05	12.91	19.63	13.11	13.88	16.91	52.00
Malaysia	0.09	0.01	2.68	0.13	0.01	2.31	43105.67
Singapore	2.89	4.46	2.63	4.19	4.79	2.27	-40.93
Indonesia	0.75	0.36	0.89	1.09	0.39	0.77	145.78
Taiwan	0.38	0.58	0.82	0.55	0.62	0.70	41.13
Japan	0.00	0.01	0.01	0.00	0.01	0.01	66.84
North Korea	-	-	0.01	0.00	0.00	0.01	N/C
Sri Lanka	-	-	0.00	0.00	0.00	0.00	N/C

\*\*Note: Canada exports a small amount of fresh shrimp and prawns to the world, but is not a supplier to China

N/C: Not Calculable

### Fresh Shrimp and Prawns Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2010-14
China's imports from the world	69.04	93.05	116.06	13.87
China's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	69.04	93.05	116.06	13.87

N/C: Not Calculable



## 8. LIVE CRUSTACEANS

### China's Top Ten Suppliers of Live Crustaceans\*, C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
<b>World</b>	<b>23.88</b>	<b>34.13</b>	<b>39.79</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>16.57</b>
Indonesia	11.72	17.13	22.05	49.10	50.20	55.43	28.72
Myanmar	5.21	7.21	6.96	21.84	21.12	17.50	-3.41
Cambodia	3.18	3.39	4.23	13.31	9.93	10.63	24.84
Thailand	2.55	4.80	4.08	10.69	14.06	10.26	-14.88
Philippines	0.81	1.25	1.63	3.41	3.66	4.10	30.61
Vietnam	-	0.04	0.42	0.00	0.13	1.06	867.21
Malaysia	0.17	0.10	0.26	0.71	0.29	0.65	163.51
Norway	0.19	0.19	0.07	0.81	0.56	0.19	-61.26
Taiwan	0.00	-	0.04	0.00	0.00	0.10	N/C
South Korea	0.03	0.01	0.03	0.11	0.04	0.07	129.63

\*Note: Canada exports a small amount of live crustacean to the world, but is not a supplier to China

N/C: Not Calculable

### Live Crustaceans Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2010-14
China's imports from the world	23.88	34.13	39.79	13.61
China's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	23.88	34.13	39.79	13.61

N/C: Not Calculable



## 9. **FROZEN LOBSTER**

\*except frozen Norway lobster

### China's Top Ten Suppliers of Frozen Lobster, C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
<b>World</b>	<b>14.55</b>	<b>11.99</b>	<b>10.88</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>-9.28</b>
Canada	3.88	4.62	9.59	26.68	38.50	88.12	107.63
United Kingdom	0.83	-	0.45	5.68	0.00	4.14	N/C
Mauritania	-	0.20	0.23	0.00	1.65	2.10	15.21
Mozambique	0.38	1.60	0.22	2.64	13.31	2.02	-86.21
New Zealand	0.00	0.10	0.11	0.01	0.81	1.01	13.63
Myanmar	0.06	0.31	0.10	0.40	2.57	0.90	-68.15
Ireland	0.00	-	0.06	0.03	0.00	0.59	N/C
United States	0.55	0.24	0.06	3.77	2.02	0.55	-75.15
South Africa	-	-	0.03	0.00	0.00	0.24	N/C
Iceland	-	0.32	0.02	0.00	2.65	0.23	-92.18

N/C: Not Calculable

### Frozen Lobster Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2010-14
China's imports from the world	14.55	11.99	10.88	-7.00
China's imports from Canada	3.88	4.62	9.59	25.37
Supply gap	10.67	7.38	1.29	-41.00



## 10. FROZEN NORWAY LOBSTER

### China's Top Ten Suppliers of Frozen Norway Lobster\*, C\$ Millions and %Share

Country	Canada Dollars			% Share			% Change 2014/2013
	2012	2013	2014	2012	2013	2014	
<b>World</b>	<b>2.05</b>	<b>1.89</b>	<b>3.87</b>	<b>100.00</b>	<b>100.00</b>	<b>100.00</b>	<b>105.10</b>
United Kingdom	1.89	1.18	3.63	92.23	62.69	93.73	206.65
Iceland	0.00	-	0.16	0.14	0.00	4.01	N/C
Ireland	-	0.60	0.08	0.00	31.94	1.97	-87.34
Spain	0.01	0.03	0.01	0.35	1.55	0.29	-61.95
Denmark	0.00	-	-	0.01	0.00	0.00	N/C
New Zealand	0.15	0.07	-	7.26	3.83	0.00	-100.00

\*Note: Canada exports a small amount of frozen Norway lobster to the world, but is not a supplier to China

N/C: Not Calculable

### Frozen Norway Lobster Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2010-14
China's imports from the world	2.05	1.89	3.87	17.26
China's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	2.05	1.89	3.87	17.26

N/C: Not Calculable



## RETAIL ENVIRONMENT

According to Euromonitor International's report on *Fish and Seafood in China*, crustaceans, although the smallest subcategory within fish and seafood, saw the largest volume growth (8%) in 2014. This growth was in large part due to the increased consumption of lobster at inexpensive restaurants or outdoor food stalls. Euromonitor International is predicting that the crustacean subcategory will perform well over the next few years due to their greater popularity in restaurants and among consumers.

### Historic Retail Volume in Tonnes ('000) of Crustaceans in China

Subsectors	2010	2011	2012	2013	2014	2010-14 CAGR* %
Fish and Seafood	31,575.20	32,857.70	34,659.60	36,612.70	38,738.00	5.24%
Crustaceans	3,278.70	3,446.80	3,717.20	4,010.90	4,331.70	7.21%

\*CAGR: Compound Annual Growth Rate.

### Forecast Retail Volume in Tonnes ('000) of Crustaceans in China

Subsectors	2015	2016	2017	2018	2019	2015-19 CAGR* %
Fish and Seafood	41,056.70	43,594.80	46,151.00	48,757.50	51,368.20	5.76%
Crustaceans	4,686.90	5,075.90	5,482.00	5,898.60	6,329.20	7.80%

\*CAGR: Compound Annual Growth Rate.

### Distribution of Fish and Seafood in China, by Format (%)

	2010	2011	2012	2013	2014
Retail	56.4	55.6	55	54.8	54.6
Foodservice	28.6	29.4	30	30.2	30.4
Institutional	15.0	15.0	15.0	15.0	15.0

Source for all: Euromonitor International, 2015

In 2014, over 85% of fish and seafood consumed in China were distributed either through retail or foodservice establishments. The most popular type of fish and seafood in China is standard with 99.5% followed by organic with 0.5%. In addition the majority (98.8%) of overall fish and seafood in sold unpackaged in China (Euromonitor International, 2015-A).



## CONCLUSION

China is the world's third-largest importer of fish and seafood products. Canada ranked as its fifth-largest supplier having registered an increase in supply value since 2010. In terms of China's imports of crustaceans such as lobster, crab and shrimp, Canada was their largest supplier among the 56 supplying countries. Despite showing growth, China's crustacean imports from Canada have been increasing on par with their imports from the world. This has created a steady supply gap between China imports of crustaceans from the world and their imports from Canada.

Among China's top ten crustacean import commodities, Canada was their top supplier in five commodities (live crab; live lobster; frozen crab; frozen cold-water shrimp and prawns; and frozen lobster). Four of the five commodities, all except frozen crab, that Canada was China's top supplier also saw increases in their import values over the last five years with imports either growing faster or on par with those imports from the world, this may indicate further potential to lessen the supply gap.

Exporters must ensure any additives used in their fish products are approved for use for products exported to China. Exporters should also carefully discuss with CFIA representatives or their Chinese importers the current regulations to ensure that their interpretation is current and accurate.

## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in China**  
<http://www.tradecommissioner.gc.ca/eng/offices-china.jsp?cid=512>
- **Find a Trade Commissioner**  
[www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp](http://www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp)

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- [ats-sea.agr.gc.ca](http://ats-sea.agr.gc.ca)

For additional information on China Fisheries and Seafood Expo 2015, please contact:

**Ben Berry, Deputy Director**  
Trade Show Strategy and Delivery  
Agriculture and Agri-Food Canada  
[ben.berry@agr.gc.ca](mailto:ben.berry@agr.gc.ca)

## RESOURCES

Euromonitor international, 2015-A – *Fish and Seafood in China, April 2015*

Food and Agriculture Organization (FAO) - Fisheries and Aquaculture Information and Statistics Branch, data retrieved on October 13, 2015





## **Competitive Trade Analysis: Fresh, Frozen and Processed Crustaceans in China**

*Global Analysis Report*

Prepared by: Stephanie Clarke, Market Analyst

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