



**MARKET ACCESS SECRETARIAT
Global Analysis Report**

Competitive Trade Analysis

Fresh, Frozen and Processed Molluscs in China

July 2016



REPORT CONTENT SUMMARY

- This report looks to highlight molluscs 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 mollusc imports, of which Canada may be 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\$595.4 million, is the world’s eighth-largest importer of molluscs. China imported C\$42.3 million worth of molluscs from Canada, making Canada their third-largest supplier after Peru and Japan.
- China’s top mollusc imports, in 2014, were prepared/preserved cuttle fish and squid, frozen, salted, dried, or brined scallops, and mollusc flour, meal, and pellets for 2014.
- China’s mollusc imports from Canada have been increasing at almost the same rate as their imports from the world, resulting in a stable supply gap.

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TRADE OVERVIEW

China is a net exporter of molluscs. In 2014, China's molluscs trade surplus was C\$2.8 billion with imports valued at C\$595.4 million, and C\$3.4 billion of exports. Canada is the third-largest supplier of molluscs to China and has seen little fluctuation in market share from 2012 to 2014.

China's Top Ten Suppliers of Molluscs, C\$ Millions

Country		2010	2011	2012	2013	2014	CAGR % 2010-14
World		247.52	376.82	415.60	485.34	595.35	24.53
1	Peru	52.79	112.69	120.31	126.77	196.85	38.96
2	Japan	33.21	18.51	51.85	85.69	114.15	36.16
3	Canada	20.36	25.92	37.40	34.18	42.27	20.03
4	Mexico	8.28	38.27	12.43	21.94	33.54	41.87
5	South Korea	16.60	21.59	15.33	16.53	30.35	16.28
6	United States	22.47	28.55	40.91	46.20	25.70	3.42
7	Australia	23.49	35.18	25.63	24.57	25.57	2.14
8	Russia	21.25	28.33	30.77	34.71	19.12	-2.60
9	New Zealand	1.01	2.51	4.52	7.38	16.54	100.94
10	Chile	3.90	11.55	8.48	4.88	15.31	40.72

China's Top Ten Suppliers of Molluscs, % Share

Country		2010	2011	2012	2013	2014
1	Peru	21.3	29.9	28.9	26.1	33.1
2	Japan	13.4	4.9	12.5	17.7	19.2
3	Canada	8.2	6.9	9.0	7.0	7.1
4	Mexico	3.3	10.2	3.0	4.5	5.6
5	South Korea	6.7	5.7	3.7	3.4	5.1
6	United States	9.1	7.6	9.8	9.5	4.3
7	Australia	9.5	9.3	6.2	5.1	4.3
8	Russia	8.6	7.5	7.4	7.2	3.2
9	New Zealand	0.4	0.7	1.1	1.5	2.8
10	Chile	1.6	3.1	2.0	1.0	2.6

China's Supply Gap, C\$ Millions

	2010	2011	2012	2013	2014	CAGR % 2010-14
China's imports from the world	247.52	376.82	415.60	485.34	595.35	24.53
China's imports from Canada	20.36	25.92	37.40	34.18	42.27	20.03
Supply gap	227.16	350.90	378.20	451.16	553.08	24.91



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

District	2010	2011	2012	2013	2014
All Districts	247.52	376.82	415.60	485.34	595.35
Qingdao	100.46	150.45	162.65	179.98	239.72
Dalian	24.91	36.38	74.45	97.19	108.40
Shenzhen	15.23	40.06	21.31	45.72	69.66
Shanghai	48.15	64.21	66.55	77.13	66.25
Nanjing	8.65	18.89	25.71	16.69	36.21
Guangzhou	3.70	8.68	11.63	16.78	23.57
Ningbo	10.09	19.05	20.61	13.04	18.52
Beijing	13.55	19.77	17.35	13.30	12.07
Fuzhou	0.21	1.17	3.13	13.71	5.83
Tianjin	1.31	1.33	3.11	5.49	5.69

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

Transport Mode	2010	2011	2012	2013	2014
All Transport Modes	247.52	376.82	415.60	485.34	595.35
Sea	171.31	254.28	304.33	344.30	436.79
Air	65.94	92.20	95.42	103.75	93.98
Auto	10.18	30.11	15.85	37.18	63.99



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

Commodity	Description	Canada Dollars			% Share		
		2012	2013	2014	2012	2013	2014
Total Fresh/frozen Molluscs		415.60	485.34	595.35	100	100	100
160554	Prepared/preserved cuttle fish and squid	125.99	117.32	191.20	30.31	24.17	32.12
030729	Frozen, dried, salted, or brined scallops	50.45	77.38	101.69	12.14	15.94	17.08
030799	Molluscs, flours, meals, and pellets	59.96	73.53	88.93	14.43	15.15	14.94
030791	Live, fresh or chilled, molluscs	71.94	93.84	81.28	17.31	19.34	13.65
030781	Live, fresh or chilled abalone	24.19	23.23	23.75	5.82	4.79	3.99
030771	Live, fresh or chilled clams	5.62	13.02	23.37	1.35	2.68	3.93
030711	Live, fresh or chilled oysters	9.00	11.32	18.19	2.16	2.33	3.06
030739	Frozen mussels	6.73	8.78	14.17	1.62	1.81	2.38
030759	Frozen octopus	36.15	40.92	11.66	8.7	8.43	1.96
030779	Clams, cockles and ark shells	7.58	7.55	10.30	1.83	1.56	1.73



1. PREPARED/PRESERVED CUTTLE FISH AND SQUID

China's Top 10 Suppliers of Prepared/Preserved Cuttle Fish and Squid, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	125.99	117.32	191.20	100.00	100.00	100.00
Peru	118.51	113.84	180.36	94.06	97.03	94.33
Chile	6.84	2.66	8.89	5.43	2.26	4.65
China	0.00	0.18	0.42	0.00	0.15	0.22
Vietnam	0.00	0.21	0.35	0.00	0.18	0.18
North Korea	0.17	0.01	0.35	0.14	0.00	0.18
Malaysia	0.01	0.01	0.27	0.01	0.01	0.14
Thailand	0.01	0.00	0.17	0.01	0.00	0.09
South Korea	0.27	0.12	0.11	0.21	0.11	0.06
India	0.00	0.00	0.08	0.00	0.00	0.04
Taiwan	0.10	0.09	0.07	0.08	0.08	0.04

Note: Canada exports a small amount of Cuttlefish and Squid products but is not a supplier of China.

Prepared/Preserved Cuttle Fish and Squid Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	125.99	117.32	191.20	23.19%
China's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	125.99	117.32	191.20	23.19%

N/C: Not calculable



2. SCALLOPS FROZEN, DRIED, SALTED, OR BRINED

China's Top Ten Suppliers of Frozen Scallops, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	50.45	77.38	101.69	100.00	100.00	100.00
Japan	46.03	75.63	99.58	91.23	97.74	97.93
Peru	0.27	0.00	0.61	0.53	0.00	0.60
Thailand	0.00	0.00	0.45	0.00	0.00	0.44
Canada	0.25	0.91	0.41	0.50	1.18	0.40
Russia	0.00	0.00	0.19	0.00	0.00	0.18
United States	1.29	0.26	0.17	2.57	0.34	0.17
Greenland	0.00	0.00	0.16	0.00	0.00	0.16
Australia	0.02	0.10	0.07	0.03	0.13	0.06
Ireland	0.00	0.07	0.04	0.01	0.09	0.03
New Zealand	0.00	0.06	0.01	0.00	0.08	0.01

Frozen Scallops Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	50.45	77.38	101.69	41.97%
China's imports from Canada	0.25	0.91	0.41	27.33%
Supply gap	50.20	76.46	101.28	42.04%



3. MOLLUSCS, FLOUR, MEAL AND PELLETS

China's Top Ten Suppliers of Molluscs, Flour, Meal and Pellets, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	59.96	73.53	88.93	100.00	100.00	100.00
South Korea	11.70	12.47	22.87	19.52	16.95	25.71
Russia	30.77	34.71	18.84	51.32	47.21	21.19
Peru	0.00	11.95	13.99	0.00	16.25	15.73
China	0.00	0.12	6.42	0.00	0.17	7.22
Chile	0.12	1.82	6.19	0.20	2.48	6.96
Senegal	0.98	0.92	3.41	1.64	1.26	3.84
Taiwan	0.02	0.29	3.02	0.03	0.39	3.40
Bulgaria	0.35	0.38	2.94	0.58	0.52	3.30
Ireland	0.86	2.00	2.09	1.44	2.72	2.35
Japan	2.30	1.64	2.07	3.83	2.23	2.33
Canada (13)	7.77	2.05	1.04	12.95	2.79	1.17

Molluscs, Flours, Meals and Pellets, Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	59.96	73.53	88.93	21.79%
China's imports from Canada	7.77	2.05	1.04	-63.36%
Supply gap	52.20	71.48	87.89	29.76%



4. LIVE MOLLUSCS

China's Top Ten Suppliers of Live Molluscs, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	71.94	93.84	81.28	100.00	100.00	100.00
Mexico	11.96	19.52	32.83	16.63	20.80	40.39
Canada	16.98	20.07	24.84	23.60	21.39	30.56
United States	37.52	44.90	13.49	52.16	47.85	16.59
Indonesia	0.29	6.26	6.15	0.41	6.67	7.56
Thailand	4.00	1.17	1.17	5.56	1.25	1.44
Pakistan	0.76	1.01	1.04	1.06	1.08	1.28
India	0.00	0.31	0.86	0.00	0.33	1.05
Ireland	0.00	0.03	0.44	0.00	0.03	0.54
Korea North	0.00	0.03	0.35	0.00	0.03	0.44
Korea South	0.21	0.46	0.07	0.29	0.49	0.09

Live Molluscs, Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	71.94	93.84	81.28	6.30%
China's imports from Canada	16.98	20.07	24.84	20.96%
Supply gap	54.96	73.77	56.44	1.34%



5. LIVE ABALONE

China's Top Ten Suppliers of Live Abalone, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	24.19	23.23	23.75	100.00	100.00	100.00
Australia	23.11	22.62	23.32	95.52	97.39	98.20
New Zealand	0.28	0.23	0.23	1.16	1.00	0.97
South Africa	0.67	0.35	0.20	2.79	1.49	0.83
Japan	0.01	0.01	0.00	0.03	0.02	0.00
Korea South	0.00	0.02	0.00	0.01	0.10	0.00
France	0.00	0.00	0.00	0.00	0.00	0.00
United States	0.00	0.00	0.00	0.00	0.00	0.00
Norway	0.04	0.00	0.00	0.18	0.00	0.00
Philippines	0.08	0.00	0.00	0.31	0.00	0.00

Note: Canada exports a small amount of Cuttlefish and Squid products but is not a supplier of China.

Live Abalone Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	24.19	23.23	23.75	-0.92%
China's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	24.19	23.23	23.75	-0.92%

N/C : not calculable



6. LIVE CLAMS

China's Top Ten Suppliers of Live Clams, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	5.62	13.02	23.37	100.00	100.00	100.00
United States	0.01	0.01	8.54	0.21	0.08	36.53
Thailand	4.13	10.86	7.85	73.53	83.40	33.58
Canada	0.00	0.00	3.33	0.01	0.00	14.24
Ireland	0.08	0.90	1.53	1.39	6.90	6.55
South Korea	0.01	0.90	0.76	0.22	6.92	3.27
Pakistan	0.01	0.07	0.61	0.14	0.50	2.62
North Korea	1.37	0.17	0.32	24.37	1.28	1.37
Myanmar	0.00	0.00	0.22	0.00	0.00	0.96
Mexico	0.00	0.01	0.13	0.00	0.04	0.57
New Zealand	0.00	0.01	0.04	0.01	0.05	0.18

Live Clams Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	5.62	13.02	23.37	103.95%
China's imports from Canada	0.00	0.00	3.33	7436.06%
Supply gap	5.62	13.02	20.04	88.88%



7. LIVE OYSTERS

China's Top Ten Suppliers of Live Oysters, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	9.00	11.32	18.19	100.00	100.00	100.00
France	5.67	8.19	12.90	62.99	72.37	70.93
New Zealand	0.07	0.48	1.53	0.78	4.23	8.42
Australia	0.89	1.00	1.20	9.88	8.85	6.57
South Korea	0.94	0.54	0.81	10.48	4.79	4.47
Canada	0.14	0.19	0.62	1.52	1.64	3.40
Namibia	0.36	0.18	0.55	3.99	1.62	3.00
United States	0.75	0.64	0.45	8.37	5.63	2.46
Ireland	0.00	0.02	0.04	0.00	0.14	0.24
Mexico	0.00	0.00	0.04	0.00	0.00	0.23
Japan	0.16	0.05	0.04	1.82	0.41	0.21

Live Oysters Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	9.00	11.32	18.19	42.20%
China's imports from Canada	0.14	0.19	0.62	112.63%
Supply gap	8.86	11.14	17.57	40.84%



8. FROZEN MUSSELS

China's Top Ten Suppliers of Frozen Mussels, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	6.73	8.78	14.17	100.00	100.00	100.00
New Zealand	3.84	6.26	13.26	56.95	71.29	93.55
Canada	2.64	2.48	0.91	39.13	28.18	6.45
Australia	0.00	0.03	0.00	0.00	0.37	0.00
Spain	0.00	0.00	0.00	0.01	0.02	0.00
Chile	0.26	0.00	0.00	3.91	0.00	0.00
Indonesia	0.00	0.01	0.00	0.00	0.14	0.00
Ireland	0.00	0.00	0.00	0.00	0.00	0.00

Frozen Mussels Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	6.73	8.78	14.17	45.06%
China's imports from Canada	2.64	2.48	0.91	-41.12%
Supply gap	4.10	6.31	13.26	79.83%



9. FROZEN OCTOPUS

China's Top Ten Suppliers of Frozen Octopus, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	36.15	40.92	11.66	100.00	100.00	100.00
Mauritania	5.30	23.58	5.20	14.67	57.63	44.57
Japan	2.07	1.57	1.85	5.74	3.84	15.84
Vietnam	1.54	1.03	1.10	4.26	2.52	9.44
Indonesia	0.98	1.49	1.09	2.71	3.64	9.34
Thailand	0.18	0.34	1.05	0.50	0.83	9.03
North Korea	0.01	0.10	0.70	0.04	0.24	5.99
Myanmar	0.02	0.06	0.18	0.05	0.14	1.58
India	1.15	0.16	0.15	3.18	0.40	1.29
Senegal	0.22	0.23	0.15	0.61	0.55	1.28
Malaysia	0.26	0.40	0.05	0.71	0.99	0.46

Note: Canada exports a small amount of Cuttlefish and Squid products but is not a supplier of China.

Frozen Octopus Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	36.15	40.92	11.66	-43.21%
China's imports from Canada	0.00	0.00	0.00	N/C
Supply gap	36.15	40.92	11.66	-43.21%

N/C: Not calculable.



10. CLAMS, COCKLES AND ARK SHELLS

China's Top Ten Suppliers of Clams, Cockles and Ark Shells, C\$ Millions

Country	Canada Dollars			% Share		
	2012	2013	2014	2012	2013	2014
World	7.58	7.55	10.30	100.00	100.00	100.00
Canada	7.45	7.39	9.87	98.16	97.94	95.88
Ireland	0.00	0.03	0.19	0.00	0.42	1.87
Pakistan	0.02	0.00	0.11	0.24	0.00	1.08
India	0.05	0.12	0.11	0.59	1.62	1.06
South Korea	0.02	0.00	0.01	0.21	0.00	0.08
United States	0.01	0.00	0.00	0.09	0.02	0.03
New Zealand	0.00	0.00	0.00	0.00	0.00	0.00
Netherlands	0.00	0.00	0.00	0.00	0.00	0.00
Iceland	0.00	0.00	0.00	0.00	0.00	0.00
Peru	0.05	0.00	0.00	0.70	0.00	0.00

Clams, Cockles and Ark Shells Supply Gap, C\$ Millions

	2012	2013	2014	CAGR % 2012-14
China's imports from the world	7.58	7.55	10.30	16.51%
China's imports from Canada	7.45	7.39	9.87	15.15%
Supply gap	0.14	0.16	0.42	74.62%



RETAIL ENVIRONMENT

According to Euromonitor International's report on *Fish and Seafood in China*, molluscs, the second largest subcategory within fish and seafood, saw the smallest volume growth (4.6%) in 2014. Production of molluscs was reduced due to bad weather in many aquaculture bases, which led to limited growth. Euromonitor International is predicting that the molluscs category will continue to grow at a modest compound annual growth rate of 4.7% through 2019.

Historic Retail Volume in Tonnes ('000) of Molluscs 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%
Molluscs and Cephalopods	8,497.10	8,762.20	9,169.10	9,609.30	10,080.10	4.36%

*CAGR: Compound Annual Growth Rate.

Forecast Retail Volume in Tonnes ('000) of Molluscs 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%
Molluscs and Cephalopods	10,584.10	11,134.50	11,668.90	12,205.70	12,730.60	4.72%

*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	15	15	15	15

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. Also, the majority (98.8%) of overall fish and seafood is sold unpackaged in China (Euromonitor International, 2015-A).



CONCLUSION

China is the world's third-largest importer of fish and seafood products. Canada is ranked as its fifth-largest supplier having registered an increase in supply value since 2010. In terms of China's imports of molluscs, Canada was their largest supplier of clams in 2014. China's imports from Canada have been increasing at almost the same rate as their imports from the rest of the world. This has created a steady supply gap between China and Canada.

While China does produce a significant amount of molluscs domestically the growth rate has been low since 2010 (4.36%), whereas their imports have been growing significantly faster (24%) over that same period of time. If these trends continue there will be more opportunities for exporting molluscs to China.

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

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

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

RESOURCES

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

Global Trade Atlas, October 2015 - Data



Competitive Trade Analysis: Fresh, Frozen and Processed Molluscs in China

Global Analysis Report

Prepared by: Chris Emond, Market Analyst

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please contact:

Agriculture and Agri-Food Canada, Global Analysis
1341 Baseline Road, Tower 5, 3rd floor
Ottawa, ON
Canada, K1A 0C5
E-mail: infoservice@agr.gc.ca

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