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# CANADA'S FISH AND SEAFOOD TRADE WITH THE PEOPLE'S REPUBLIC OF CHINA, 2018



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## CANADA'S FISH AND SEAFOOD TRADE WITH CHINA, 2018

### Highlights

- Canada's fish and seafood exports to China (Canada's second largest export destination by value after the US) were valued at **\$1.17B<sup>1</sup>**, accounting for 17 per cent of total Canadian fish and seafood exports by value.
- Canadian fish and seafood export value to China increased 23 per cent (+\$216M) between 2017 and 2018.
- Quantity of exports was 119 thousand tonnes with a 7 per cent increase from 2017, while fish and seafood export prices to China increased 15 per cent during the same period.

#### CANADA'S TOP 3 FISH AND SEAFOOD EXPORTS TO CHINA, 2018

SPECIES	VALUE of Exports (\$M)	CHANGE <sup>2</sup> of Values (%)	CHANGE of Volumes (%)	CHANGE of Prices (%)	SHARE of Exports (%)	CAGR <sup>3</sup> of Value (%)
Crab	324	-2.8	-12.5	11.1	24.8	10.0
Lobster	298	44.2	58.2	-8.9	13.4	40.3
Shrimp/Prawn	205	15.8	5.5	9.8	43.7	29.8
Other	342	45.0	4.2	39.1	11.7	26.0
<b>Total</b>	<b>1,169</b>	<b>22.7</b>	<b>7.0</b>	<b>14.6</b>	<b>16.9</b>	<b>23.2</b>

- Top species exported to China were **crab<sup>4</sup>** (\$324M), **lobster<sup>5</sup>** (\$298M) and **shrimp/prawn** (\$205M), accounting for 71 per cent of total Canadian fish and seafood export value to China.
- Main other species exported to China were clam and geoduck (\$94M), salmon (\$60M) and Greenland turbot (\$34M).
- Top exporting provinces were **Nova Scotia** (\$525M), **British Columbia** (\$306M) and **Newfoundland and Labrador** (\$248M).
- Canada's fish and seafood imports from China were valued at \$562M, representing 14 per cent of total Canadian fish and seafood imports by value. The top imported species by value were shrimp/prawn (\$114M), haddock (\$44M) and squid (\$44M).

<sup>1</sup> Trade statistics are sourced from Statistics Canada, and were accessed through: Fisheries and Oceans Canada (2019), EXIM [database], Ottawa. Accessed: March 07, 2019.

<sup>2</sup> The term "change" indicates yearly change from the previous year.

<sup>3</sup> Compound annual growth rate from 2014 to 2018.

<sup>4</sup> Canadian exports of crab refer to snow crab, Dungeness crab and unspecified crab species.

<sup>5</sup> Lobster refers to the *Homarus* species.



## ACRONYMS AND NOTES

<b>CAGR</b>	Compound annual growth rate
<b>DFO</b>	Department of Fisheries and Oceans Canada
<b>EU</b>	European Union
<b>US</b>	United States of America

- 1) Unless otherwise indicated, trade statistics are sourced from Statistics Canada, and were accessed through: Fisheries and Oceans Canada (2019), EXIM [database], Ottawa. Accessed: March 07, 2019.
- 2) When sources other than Statistics Canada are indicated, note that export statistics reported by one territory are often not the same as the import statistics reported by its trade partner. Import statistics often include additional shipping costs, and territories may apply different rules in the accounting of international trade.
- 3) Values are nominal not accounting for inflation.
- 4) Throughout this report's tables, the term "change" indicates yearly change from the previous year, unless otherwise specified.
- 5) Compound annual growth rate (CAGR) is used to take into account variances in growth during interim years.
- 6) Unless otherwise specified, lobster refers to the *Homarus* species.
- 7) Canadian exports of crab refer to snow crab, Dungeness crab and unspecified crab species, unless otherwise specified. Based on exporting provinces and Canadian crab species landings data, total Canadian exports of crab consist principally of snow crab.



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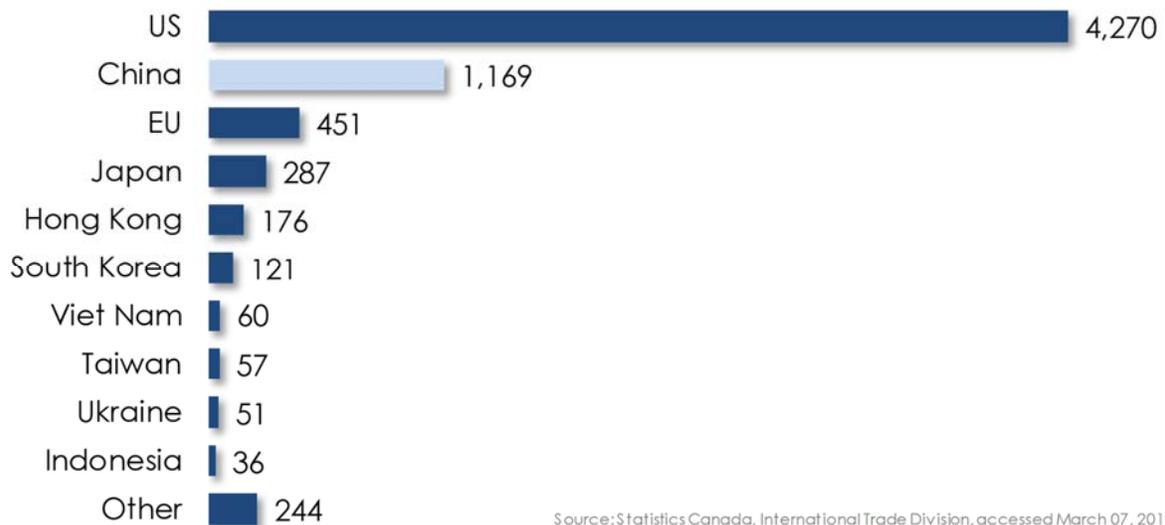
### CANADA'S FISH AND SEAFOOD EXPORTS

In 2018, Canada's total fish and seafood exports were valued at \$6.92B with an increase of 1 per cent from the previous year. The top five destinations for Canadian fish and seafood exports in rank order of value were:

United States (US)	\$4.27B
China	\$1.17B
European Union (EU)	\$0.45B
Japan	\$0.29B
Hong Kong	\$0.18B

Together, these destinations accounted for 92 per cent of Canada's fish and seafood total export value in 2018.

**FIGURE 1 CANADA'S FISH AND SEAFOOD EXPORTS BY DESTINATION, 2018 (\$M)**



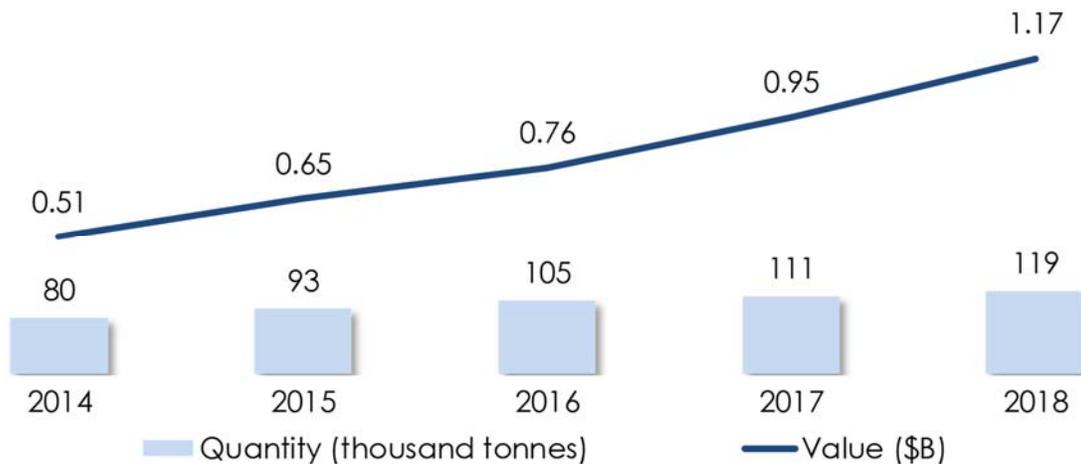
Source: Statistics Canada, International Trade Division, accessed March 07, 2019

**CANADA'S FISH AND SEAFOOD EXPORTS TO CHINA**

In 2018, Canada's fish and seafood exports to China were valued at \$1.17B, representing 17 per cent of total Canadian fish and seafood exports by value.

Canadian fish and seafood export value to China increased 23 per cent (+\$216M) between 2017 and 2018. In 2018, quantity of fish and seafood exports to China was 119 thousand tonnes with a 7 per cent increase from the previous year, while fish and seafood export prices to China increased 15 per cent during the same period.

**FIGURE 2 CANADA'S FISH AND SEAFOOD EXPORTS TO CHINA, 2014-2018**



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

Since 2014, Canadian fish and seafood exports to China have increased at an annual growth rate of 23 per cent driven by both price and quantity increases, as fish and seafood export prices and quantity to China both grew by 11 per cent annually.

**TABLE 1 CANADA'S FISH AND SEAFOOD EXPORTS TO CHINA, 2014-2018**

YEAR	VALUE of Exports (\$B)	CHANGE of Values (%)	CHANGE of Volumes (%)	CHANGE of Prices (%)	SHARE of Exports (%)
2014	0.51	14.5	2.0	12.3	10.3
2015	0.65	28.3	17.3	9.3	10.9
2016	0.76	17.6	12.6	4.4	11.7
2017	0.95	24.6	6.0	17.6	13.9
2018	1.17	22.7	7.0	14.6	16.9
<b>Average</b>	<b>0.81</b>	<b>CAGR 23.2</b>	<b>CAGR 10.7</b>	<b>CAGR 11.4</b>	<b>12.7</b>

## CANADA'S FISH AND SEAFOOD TRADE WITH CHINA, 2018

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The value of Canada's overall fish and seafood exports to China overtook those to the EU in 2012 and Japan in 2010, Canada's 3<sup>rd</sup> and 4<sup>th</sup> most valuable destination markets respectively. In 2018, China maintained its position as the 2<sup>nd</sup> most valuable export destination for Canada's fish and seafood, while the US remained, by far, the largest export destination.

In 2018, China (\$19.3B) remained the world's fourth largest fish and seafood importer by value after the EU (\$40.6B), the US (\$30.1B) and Japan (\$20.4B).<sup>6</sup> Canada was the 4<sup>th</sup> largest supplier of fish and seafood to China by value, providing 7 per cent of China's fish and seafood imports, following Russia (15 per cent), Peru (10 per cent) and the US (10 per cent).<sup>7</sup> China's imports of seafood are largely influenced by other countries' outsourcing for processing (and possible re-export) and the increasing consumption of species not domestically produced in China.<sup>8</sup>

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<sup>6</sup> China's reported import statistics collected by China Customs, retrieved March 31, 2019 via the Global Trade Atlas.

<sup>7</sup> *Id.*

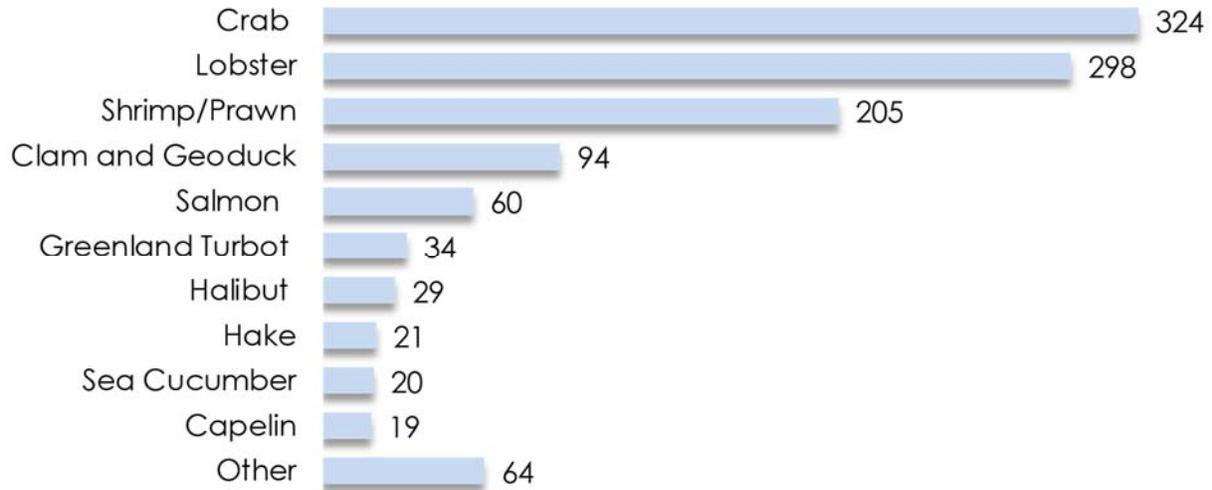
<sup>8</sup> FAO. 2018. The State of World Fisheries and Aquaculture 2018 - Meeting the sustainable development goals. Rome. Licence: CC BY-NC-SA 3.0 IGO.



### CANADA'S FISH AND SEAFOOD EXPORTS TO CHINA BY SPECIES

In 2018, Canada's top fish and seafood exports by value to China were crab (\$324M), lobster (\$298M) and shrimp/prawn (\$205M). Together, these three species accounted for 71 per cent of total Canadian fish and seafood exports by value to China.

FIGURE 3 CANADA'S TOP 10 FISH AND SEAFOOD EXPORTS TO CHINA, 2018 (\$M)

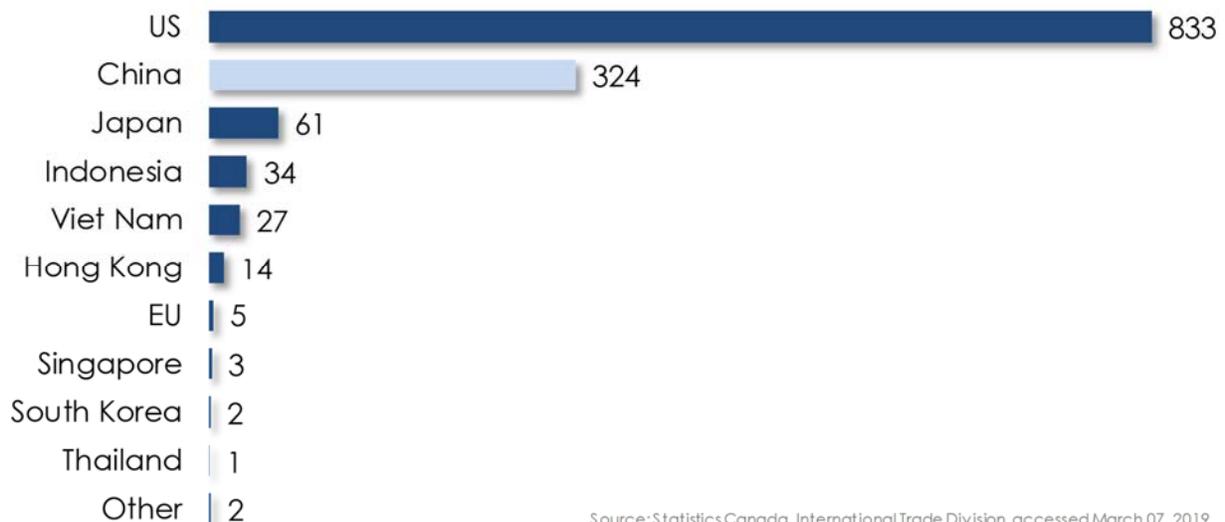


Source: Statistics Canada, International Trade Division, accessed March 07, 2019

### Crab (largest export)

In 2018, crab exports to China were valued at \$324M, representing 25 per cent of Canada's total crab exports by value. China ranked 2<sup>nd</sup>, behind the US (\$833M) as a destination for Canada's crab. Canada's crab exports to China were mainly a combination of frozen (55 per cent by value in 2018) and fresh (44 per cent) crab.

FIGURE 4 CANADA'S CRAB EXPORTS BY DESTINATION, 2018 (\$M)



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

## CANADA'S FISH AND SEAFOOD TRADE WITH CHINA, 2018

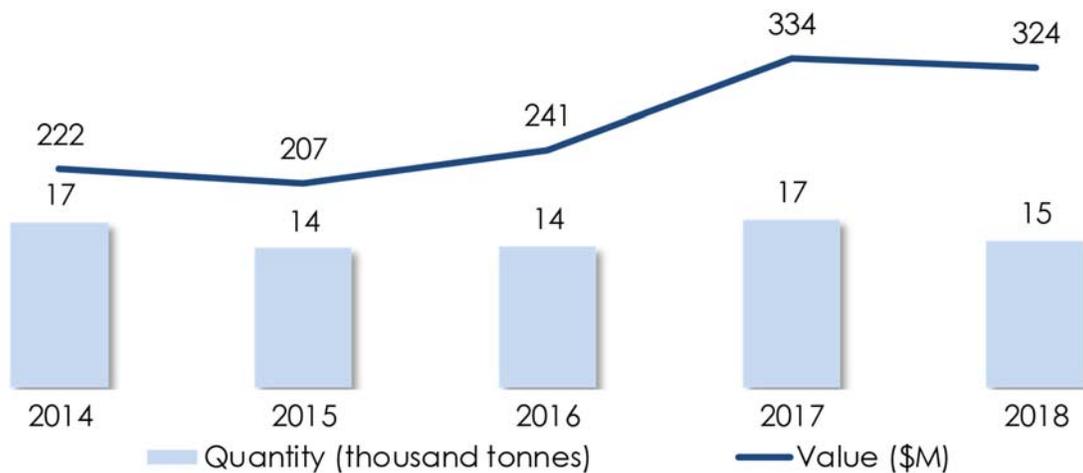
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British Columbia (\$146M), Nova Scotia (\$85M) and Newfoundland and Labrador (\$70M) were the main provinces exporting crab products to China, accounting for 93 per cent of Canada's crab export value to China in 2018. British Columbia's exports of crab to China consisted principally of "live, fresh or chilled crabs", while Nova Scotia and Newfoundland and Labrador mostly exported frozen snow crab. Notably, the value of Nova Scotia's crab exports to China increased considerably since 2014, from \$33M in 2014 to \$85M in 2018.

Canada's crab export value to China experienced a 38 per cent increase (+\$93M) between 2016 and 2017. Canada's crab export value to China seems to have stabilized in 2018 with a 3 per cent (-\$9M) decrease from 2017. Quantities of crab exported to China declined by 13 per cent while export prices increased 11 per cent during the same period.

Canada's crab export value to China has nonetheless increased at a compound annual growth rate of 10 per cent since 2014. During the same period, quantity of crab exported to China decreased 3 per cent annually, while export prices increased 13 per cent per annum.

FIGURE 5 CANADA'S CRAB EXPORTS TO CHINA, 2014-2018



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

### Lobster (2<sup>nd</sup> largest export)

In 2018, Canada's lobster exports to China were valued at \$298M, representing 13 per cent of Canada's total lobster export value. China maintained its position as the 2<sup>nd</sup> most valuable export destination for Canadian exports of lobster, while the US (\$1.52B) remained, by far, the largest export destination.

**FIGURE 6 CANADA'S LOBSTER EXPORTS BY DESTINATION, 2018 (\$M)**



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

The majority of Canadian lobster was exported live (86 per cent by value in 2018) to China. According to statistics from China's customs authority, Canada and the US were essentially the only suppliers of live lobster<sup>9</sup> to China, with respectively 72 per cent and 27 per cent of the import market share in 2018.<sup>10</sup>

Nova Scotia (\$265M) was by far the main province exporting lobster to China, with 89 per cent of Canada's lobster export value to China in 2018, followed by New Brunswick (\$16M) and Prince Edward Island (\$13M).

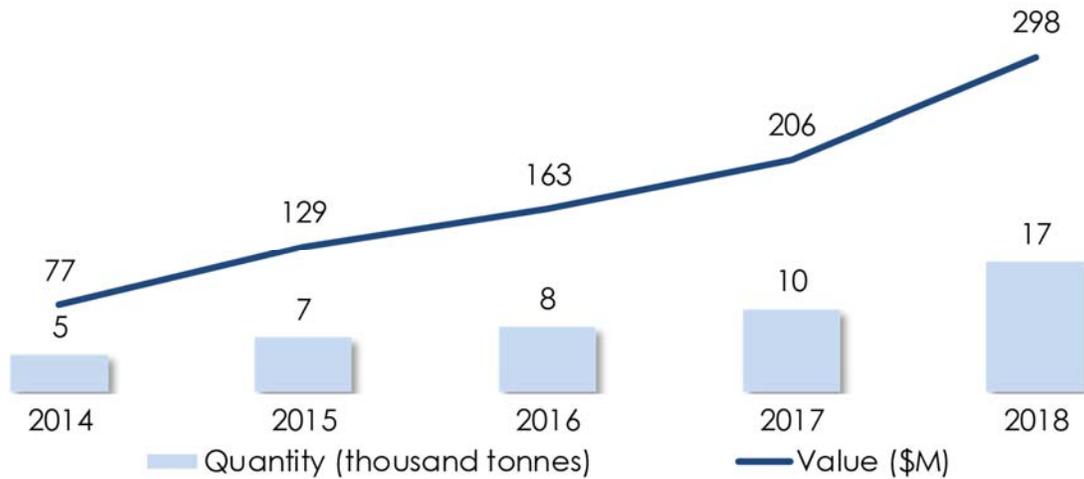
In 2018, Canada's value of lobster exports to China increased 44 per cent (+\$91M) from the previous year. This growth was mostly attributable to an increase in quantity exported (+58 per cent) as export prices of lobster to China experienced a 9 per cent decrease during the same period.

From 2014 to 2018, lobster was one of Canada's largest growing fish and seafood exports to China by value. With a 40 per cent compound annual growth rate, the value of Canadian exports of lobster to China almost quadrupled in recent years, from \$77M in 2014 to \$298M in 2018. This growth in export value is mainly attributable to a 37 per cent annual increase in the quantity of lobster exported while export prices of lobster have grown 2 per cent annually since 2014.

<sup>9</sup> HS Code 030632

<sup>10</sup> China's reported import statistics collected by China Customs, retrieved March 11, 2019 via the Global Trade Atlas.

FIGURE 7 CANADA'S LOBSTER EXPORTS TO CHINA, 2014-2018

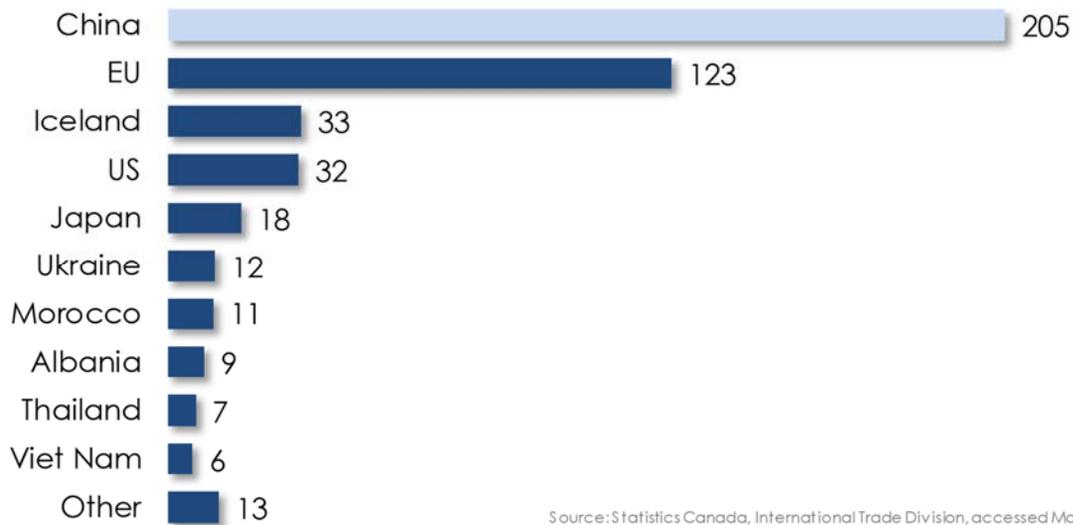


Source: Statistics Canada, International Trade Division, accessed March 07, 2019

**Shrimp/Prawn (3<sup>rd</sup> largest export)**

In 2018, China (\$205M) remained the largest export destination for Canadian shrimp/prawn, representing 44 per cent of Canada's total shrimp/prawn export value. The value of Canada's shrimp/prawn exports to China overtook those to the EU in 2017.

FIGURE 8 CANADA'S SHRIMP/PRAWN EXPORTS BY DESTINATION, 2018 (\$M)



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

By value, essentially all (98 per cent in 2018) of Canada's shrimp/prawn exports to China were frozen cold-water shrimps and prawns. According to statistics from China's customs authority, Canada was China's largest source for frozen cold-water shrimps

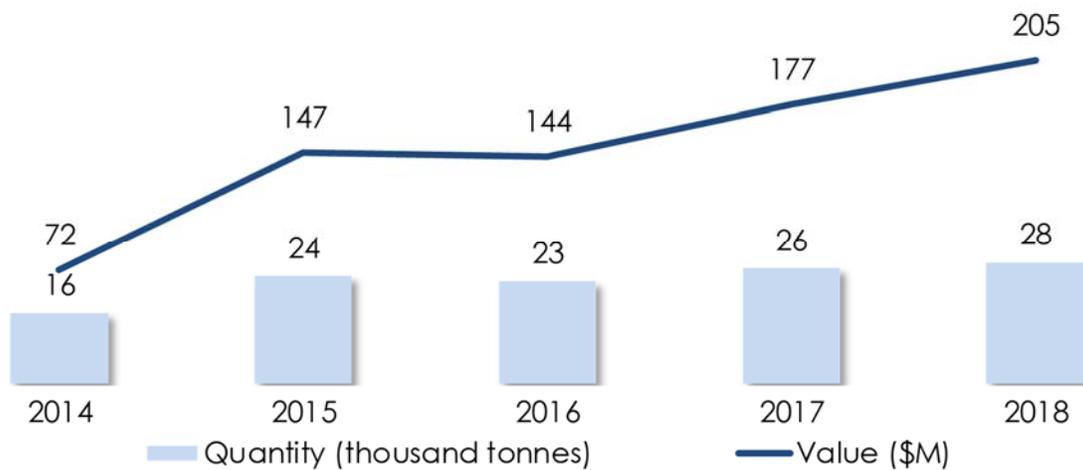
and prawns<sup>11</sup> in 2018 (53 per cent of import market share by value), followed by Greenland (26 per cent) and Russia (6 per cent).<sup>12</sup>

Newfoundland and Labrador (\$104M) followed by Nova Scotia (\$72M) were the main provinces exporting shrimp/prawn products to China, accounting for 85 per cent of Canada's shrimp/prawn export value to China in 2018.

From 2017 to 2018, Canada's value of shrimp/prawn exports to China increased 16 per cent (+\$28M). Quantity exported increased 6 per cent and export prices of shrimp/prawn to China increased 10 per cent during the same period.

Since 2014, Canada's shrimp/prawn exports to China grew at an annual rate of 30 per cent by value. Shrimp/prawn export prices to China increased 13 per cent annually, while quantity exported experienced an yearly rate of growth of 15 per cent during the same period.

**FIGURE 9 CANADA'S SHRIMP/PRAWN EXPORTS TO CHINA, 2014-2018**



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

## Other Species

In 2018, Canadian exports of species other than crab, lobster and shrimp/prawn to China were valued at \$342M, representing 29 per cent of Canada's total fish and seafood export value to China. The main other species exported to China in 2018 were clam and geoduck (\$94M), salmon (\$60M) and Greenland turbot (\$34M).

In 2018, Canada's exports of clam and geoduck to China represented 54 per cent of the value of Canada's total world exports of clam and geoduck. China was the main export destination for Canada's clams and geoducks, followed by the US (\$35M) and

<sup>11</sup> HS Code 030616

<sup>12</sup> China's reported import statistics collected by China Customs, retrieved March 11, 2019 via the Global Trade Atlas.

## CANADA'S FISH AND SEAFOOD TRADE WITH CHINA, 2018

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Hong Kong (\$19M). By value, clam and geoduck exports to China consisted of live, fresh or chilled geoduck (32 per cent in 2018) and other clam species (68 per cent), mostly frozen. British Columbia was essentially the only province (99.9 per cent by value) exporting geoduck to China. Notably, Canada's value of clam and geoduck exports to China increased 28 per cent (+\$21M) between 2017 and 2018. This growth was mostly attributable to an increase in quantity exported (+26 per cent) as export prices of clam and geoduck to China experienced a 2 per cent increase during the same period.

Canada also exported salmon, Greenland turbot and halibut to China, with significant increase in export values and quantities between 2017 and 2018. Notably, 71 per cent of Canada's (mostly Newfoundland and Labrador) Greenland turbot export value was destined to China in 2018.

**TABLE 2 CANADA'S TOP 10 FISH AND SEAFOOD EXPORTS TO CHINA, 2018**

<b>SPECIES</b>	<b>VALUE</b> of Exports (\$M)	<b>CHANGE</b> of Values (%)	<b>CHANGE</b> of Volumes (%)	<b>CHANGE</b> of Prices (%)	<b>SHARE</b> of Exports (%)
Crab	324	-2.8	-12.5	11.1	24.8
Lobster	298	44.2	58.2	-8.9	13.4
Shrimp/Prawn	205	15.8	5.5	9.8	43.7
Clam and Geoduck	94	28.4	25.9	2.0	53.9
Salmon	60	131.2	42.3	62.4	5.0
Greenland Turbot	34	589.1	650.6	-8.2	71.1
Halibut	29	1012.1	971.5	3.8	16.2
Hake	21	-30.2	-34.2	6.1	18.3
Sea Cucumber	20	95.8	44.5	35.5	57.6
Capelin	19	-36.6	-35.3	-2.0	45.5
Other	64	12.0	-5.5	18.5	5.6
<b>Total</b>	<b>1,169</b>	<b>22.7</b>	<b>7.0</b>	<b>14.6</b>	<b>16.9</b>

## CANADA'S FISH AND SEAFOOD EXPORTS TO CHINA BY PROVINCE AND TERRITORY

In 2018, Nova Scotia continued to be the top exporting province of fish and seafood products to China. The province exported \$525M worth of fish and seafood products to China, with lobster (\$265M), crab (\$85M) and shrimp/prawn (\$71M) as the main species exported by value. The other top exporting provinces in 2018 were British Columbia (\$306M) and Newfoundland and Labrador (\$248M). A significant portion of British Columbia's fish and seafood exports to China in 2018 were crab (\$146M). Within the same year, the majority of Newfoundland and Labrador's fish and seafood exports to China were of shrimp/prawn (\$104M).

**TABLE 3 CANADA'S FISH AND SEAFOOD EXPORTS TO CHINA BY PROVINCE AND TERRITORY, 2018**

PROVINCE AND TERRITORY	VALUE	QUANTITY	MAIN SPECIES	
	(\$M)	(thousand tonnes)	Share* %	
Nova Scotia	525	42	Lobster	50.5
			Crab	16.1
			Shrimp/Prawn	13.7
British Columbia	306	36	Crab	47.6
			Salmon	13.5
			Clam and Geoduck	9.8
Newfoundland and Labrador	248	35	Shrimp/Prawn	41.7
			Crab	28.3
			Greenland turbot	12.2
New Brunswick	54	4	Salmon	32.3
			Crab	31.6
			Lobster	29.5
Quebec	16	1	Crab	32.5
			Sea cucumber	12.2
			Halibut	11.8
Prince Edward Island	14	1	Lobster	90.9
			Crab	8.8
			Sea cucumber	0.4
Other	6	1	Eel	18.9
			Sea cucumber	17.8
			Freshwater smelt	15.4

\* of province's fish and seafood exports to China

## CANADA'S FISH AND SEAFOOD IMPORTS FROM CHINA

In 2018, Canada continued to be a net exporter of fish and seafood products to China, with imports from China to Canada worth \$562M. With 14 per cent of Canada's total fish and seafood imports by value, China ranked second, behind the US, in Canada's reported import value of fish and seafood.

In 2018, Canadian fish and seafood import value from China increased 1 per cent (+\$6M) relative to 2017. Quantity of imports was 70 thousand tonnes with a 4 per cent decline since 2017, while fish and seafood import prices from China increased 5 per cent during the same period.

**TABLE 4 CANADA'S FISH AND SEAFOOD IMPORTS FROM CHINA, 2014-2018**

YEAR	VALUE of Imports (\$M)	CHANGE of Values (%)	CHANGE of Volumes (%)	CHANGE of Prices (%)
2014	465	13.3	3.3	9.7
2015	466	0.2	-13.0	15.1
2016	544	16.9	20.0	-2.7
2017	556	2.1	-2.4	4.6
2018	562	1.0	-3.7	4.9
<b>Average</b>	519	CAGR 4.8	CAGR -0.4	CAGR 5.3

In 2018, the top species imported from China were shrimp/prawn (\$114M), haddock (\$44M) and squid (\$44M). Together, these three species accounted for 36 per cent of total Canadian fish and seafood imports by value from China.

China was Canada's third largest supplier of shrimp/prawn, following Viet Nam (\$205M) and India (\$176M).

China was the principal supplier of haddock and squid to Canada by value. In 2018, China provided essentially all (90 per cent) of Canada's total imports of haddock by value. Haddock imported from China to Canada consisted mostly of frozen fillets of haddock (87 per cent by value in 2018).

In 2018, China was Canada's top supplier of squid (48 per cent by value) followed by Thailand (16 per cent) and Taiwan (11 per cent). In 2018, 93 per cent of Canada's import value of squid from China was frozen.

# CANADA'S FISH AND SEAFOOD TRADE WITH CHINA, 2018

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**TABLE 5 CANADA'S TOP 10 FISH AND SEAFOOD IMPORTS FROM CHINA, 2018**

<b>SPECIES</b>	<b>VALUE of Imports (\$M)</b>	<b>CHANGE of Values (%)</b>	<b>CHANGE of Volumes (%)</b>	<b>CHANGE of Prices (%)</b>	<b>SHARE of Imports (%)</b>
Shrimp/Prawn	114	9.1	13.4	-3.8	16.6
Haddock	44	11.6	0.7	10.8	89.8
Squid	44	5.2	2.9	2.3	48.2
Cod	41	19.7	-2.7	23.1	39.0
Salmon	34	-0.5	-5.7	5.6	5.0
Sole	26	-3.4	-19.0	19.2	94.9
Scallop	21	-23.9	-13.2	-12.4	24.3
Tilapia	14	5.3	19.6	-12.0	30.8
Halibut	13	-29.3	0.8	-29.9	26.6
Eel	11	73.6	26.1	37.6	23.9
Other	199	-4.5	-11.2	7.5	9.5
<b>Total</b>	<b>562</b>	<b>1.0</b>	<b>-3.7</b>	<b>4.9</b>	<b>14.2</b>

*Note: In preparing this document, the authors have taken care to provide information that is timely and accurate at the time of publication. Since exports market conditions are dynamic, some information presented here may have changed since this document was published. Information contained in this document does not necessarily reflect official policies of Fisheries and Oceans Canada.*

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