



CANADA'S FISH AND SEAFOOD TRADE WITH JAPAN, 2019



Economics, Statistics and Data Governance Directorate
Strategic Policy Sector
Fisheries and Oceans Canada



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Canada's Fish and Seafood Trade with Japan, 2019

Highlights

- Canada's fish and seafood exports to Japan were valued at **\$285M¹** in 2019, accounting for 4 per cent of total Canadian fish and seafood exports by value. Japan is Canada's fourth largest export destination by value after the US, China and the EU.
- Canadian fish and seafood export value to Japan decreased 1 per cent (-\$2M) between 2018 and 2019.
- Quantity of exports was 30 thousand tonnes with a 7 per cent increase from the previous year, while fish and seafood export prices decreased 7 per cent during the same period.

Canada's Top 3 Fish and Seafood Exports to Japan, 2019

Species	Value of Exports (\$M)	Change ² of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share ³ of Exports (%)	CAGR ⁴ of Value (%)
Crab	66	7.5	5.1	2.3	4.5	1.2
Lobster	63	32.8	30.3	1.9	2.4	4.8
Herring	32	-4.6	28.2	-25.6	21.4	0.1
Other	124	-14.5	-5.2	-9.8	3.8	2.1
Total	285	-0.9	7.2	-7.5	3.8	2.2

- Top species exported were **crab⁵** (\$66M which is virtually all snow crab), **lobster⁶** (\$63M) and **herring** (\$32M), accounting for 57 per cent of total Canadian fish and seafood export value to Japan.
- Main other species exported to Japan were shrimp (\$30M), salmon (\$26M) and halibut (\$10M).
- Top exporting provinces were **British Columbia** (\$91M), **Nova Scotia** (\$71M) and **New Brunswick** (\$64M).
- Canada's fish and seafood imports from Japan were valued at \$48M, representing 1 per cent of total Canadian fish and seafood imports by value. The top imported species by value were scallop (\$8M), salmon (\$3M) and octopus (\$2M).

¹ Trade statistics are sourced from Statistics Canada, and were accessed through: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed: February 17, 2020. No endorsement of this product by Statistics Canada is implied.

² The term "change" indicates yearly change from the previous year, unless otherwise specified.

³ Share of Canada's total exports for the given species/total.

⁴ Compound annual growth rate from 2015 to 2019.

⁵ Canadian exports of crab refer to snow crab, Dungeness crab and unspecified crab species. Based on exporting provinces and Canadian crab species landings data, Canadian exports of crab consist principally of snow crab.

⁶ Lobster refers to the *Homarus* species.

Acronyms and Notes

CAGR	Compound annual growth rate
CPTPP	Comprehensive and Progressive Agreement for Trans-Pacific Partnership
DFO	Department of Fisheries and Oceans Canada
EU	European Union
US	United States of America

- 1) Unless otherwise indicated, trade statistics are sourced from Statistics Canada, and were accessed through: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed: February 17, 2020. No endorsement of this product by Statistics Canada is implied.
- 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 Trade with Japan, 2019

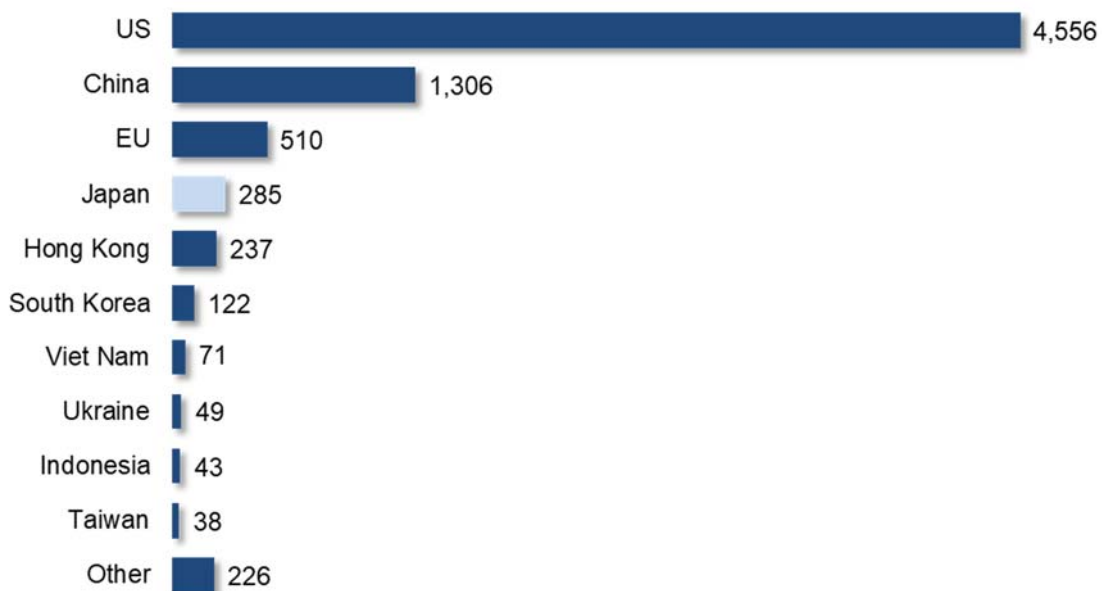
Canada's Fish and Seafood Exports

In 2019, Canada's total fish and seafood exports were valued at \$7.44B with an increase of 7 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)	\$4.56B
China	\$1.31B
European Union (EU)	\$0.51B
Japan	\$0.29B
Hong Kong	\$0.24B

Together, these destinations accounted for 93 per cent of Canada's fish and seafood total export value in 2019.

Figure 1. Canada's Fish and Seafood Exports by Destination, 2019 (\$M)



Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

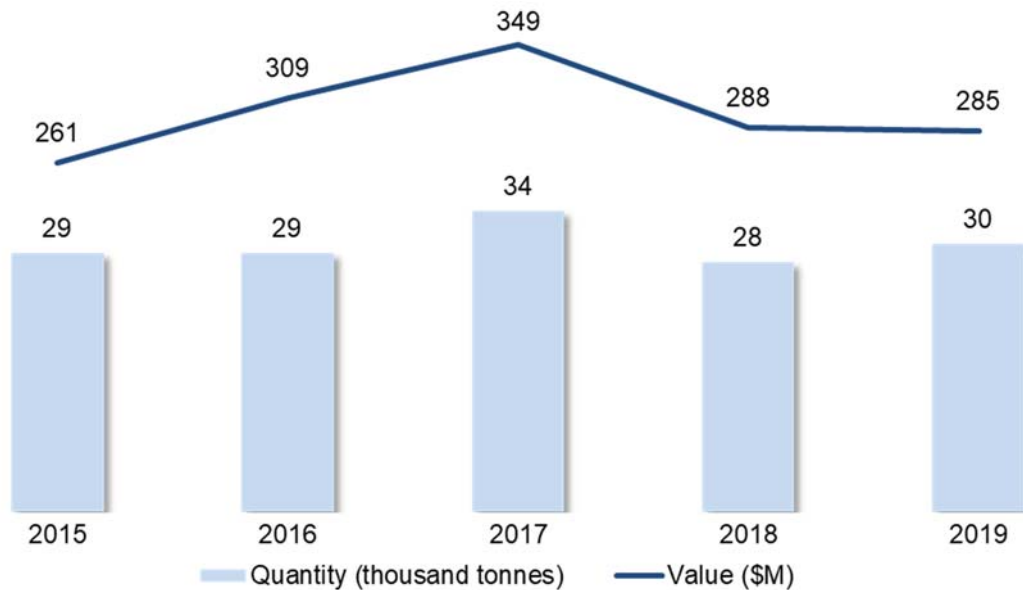


Canada's Fish and Seafood Exports to Japan

In 2019, Canada's fish and seafood exports to Japan were valued at \$285M, representing 4 per cent of total Canadian fish and seafood exports by value. Japan was Canada's fourth largest export destination by value after the US, China and the EU.

After a 18 per cent decrease between 2017 and 2018, the value of Canadian fish and seafood exports to Japan remained stable between 2018 and 2019 (with less than a 1 per cent decrease). In 2019, the quantity of fish and seafood exports to Japan was 30 thousand tonnes with a 7 per cent increase since 2018, while fish and seafood export prices to Japan decreased 7 per cent during the same period.

Figure 2. Canada's Fish and Seafood Exports to Japan, 2015-2019



Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Canada's fish and seafood exports to Japan reached a peak in 2017, due mainly to a peak in exports of crab and herring. Despite the subsequent drop in exports, Canadian fish and seafood exports to Japan have netted an overall annualized growth rate of 2 per cent between 2015 and 2019, driven by both price and quantity increases, as fish and seafood export prices and quantity both grew by an average of 1 per cent annually.

Canada's Fish and Seafood Trade with Japan, 2019

Table 1. Canada's Fish and Seafood Exports to Japan, 2015-2019

Year	Value of Exports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Exports (%)
2015	261	-2.5	-4.0	1.6	4.4
2016	309	18.4	-0.3	18.7	4.7
2017	349	12.9	16.3	-3.0	5.1
2018	288	-17.6	-16.9	-0.9	4.2
2019	285	-0.9	7.2	-7.5	3.8
Average	298	CAGR 2.2	CAGR 0.8	CAGR 1.4	4.4

Traditionally a society with a strong fish and seafood diet, Japan continued to be in 2019 the world's fourth largest fish and seafood importer by value (\$20.6B) after the EU (\$40.5B), the US (\$31.2B) and China (24.6B).⁷ In 2019, the top three fish and seafood suppliers by value to Japan were China (18 per cent import market share by value), Chile (10 per cent) and the US (8 per cent). Canada was the 12th largest supplier by value of fish and seafood to Japan and held 3 per cent of the import market share in 2019.⁸

In January of 2018, Canada reached a deal in the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), a plurilateral free trade agreement among eleven Pacific nations. The agreement was originally signed in early 2016, but was renegotiated as the US decided to withdraw. The CPTPP entered into force on December 30, 2018 and eliminates most tariffs on fish and seafood imports from Canada, with the remaining tariffs being phased out over a period of up to 15 years.⁹ Preferential access to the Japanese market is expected to put Canada on a more level playing field with Japan's other major trading partners while better positioning Canada within the Asia-Pacific seafood markets.

⁷ Retrieved March 9, 2020 via the Global Trade Tracker

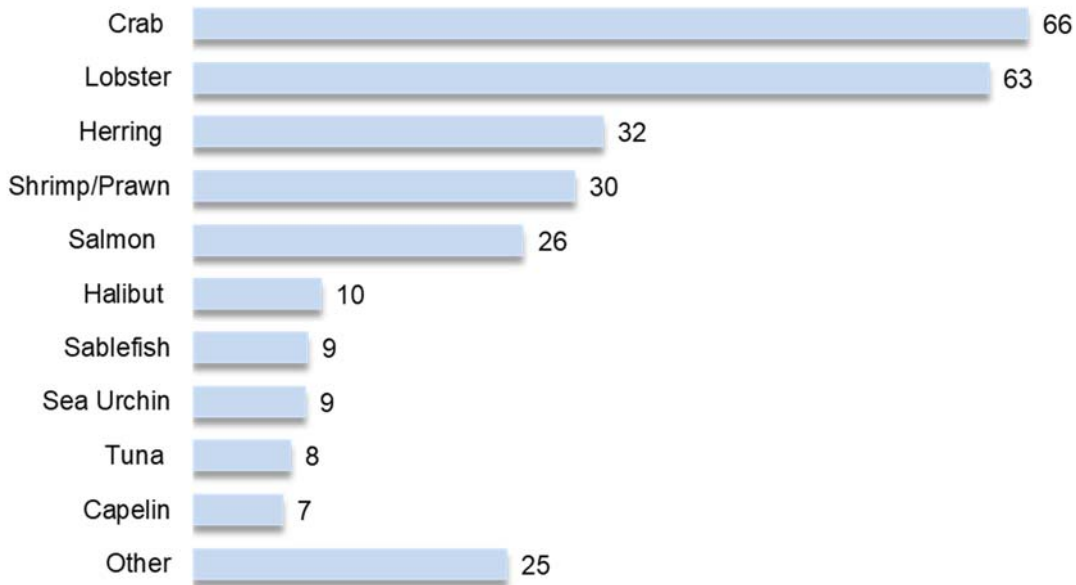
⁸ Japan's reported import statistics collected by the Japan Ministry of Finance, retrieved March 9, 2020 via the Global Trade Tracker. Import data reported by one country may differ from the reported exports of its trade partners.

⁹ Global Affairs Canada, "What does the CPTPP mean for the fish and seafood sector?" Last modified on February 14, 2018, <http://international.gc.ca/trade-commerce/trade-agreements-accords-commerciaux/agr-acc/cptpp-ptppg/sectors-secteurs/fish-poisson.aspx?lang=eng>.

Canada's Fish and Seafood Exports to Japan by Species

In 2019, Canada's top fish and seafood exports by value to Japan were crab (\$66M, virtually all of which was snow crab), lobster (\$63M) and herring (\$32M). Together, these three species accounted for 57 per cent of total Canadian fish and seafood exports by value to Japan.

Figure 3. Canada's Top 10 Fish and Seafood Exports to Japan, 2019 (\$M)

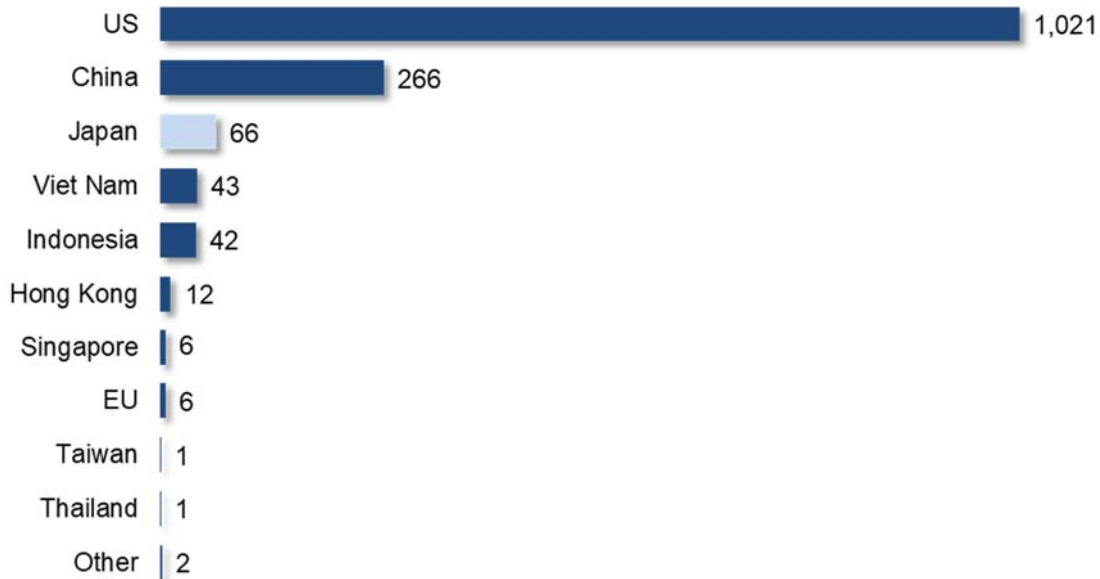


Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Crab (largest export)

In 2019, Canadian crab exports to Japan were valued at \$66M, accounting for 4 per cent of Canada's total crab export value. Japan ranked third, behind the US (\$1.02B) and China (\$266M) in Canada's reported export value of crab.

Figure 4. Canada's Crab Exports by Destination, 2019 (\$M)



Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

In 2019, New Brunswick (\$28M) was the main province exporting crab to Japan, representing 42 per cent of Canada's total crab export value to Japan. Nova Scotia (\$15M), Newfoundland and Labrador (\$12M) and Quebec (\$11M) followed. In 2019, essentially all of Canadian crab exports to Japan were frozen snow crab¹⁰.

According to Japan's reported import values, Canada was the second top supplier of frozen crab¹¹ to Japan in 2019 (23 per cent import market share by value). The top supplier of frozen crab to Japan in 2019 was Russia, with a market share of 59 per cent by value.¹²

The value of Canada's crab exports to Japan remained relatively stable between 2018 and 2019 (+\$5M). Of note, as strong Japanese buying drove prices to historic highs,

¹⁰ In 2019, 76 per cent (\$50M) of Canada's crab exports to Japan was labelled as frozen snow crab and another 23 per cent (\$15M) was labelled as unspecified frozen crab, which, based on exporting provinces and Canadian crab species landings data, would mostly be snow crab.

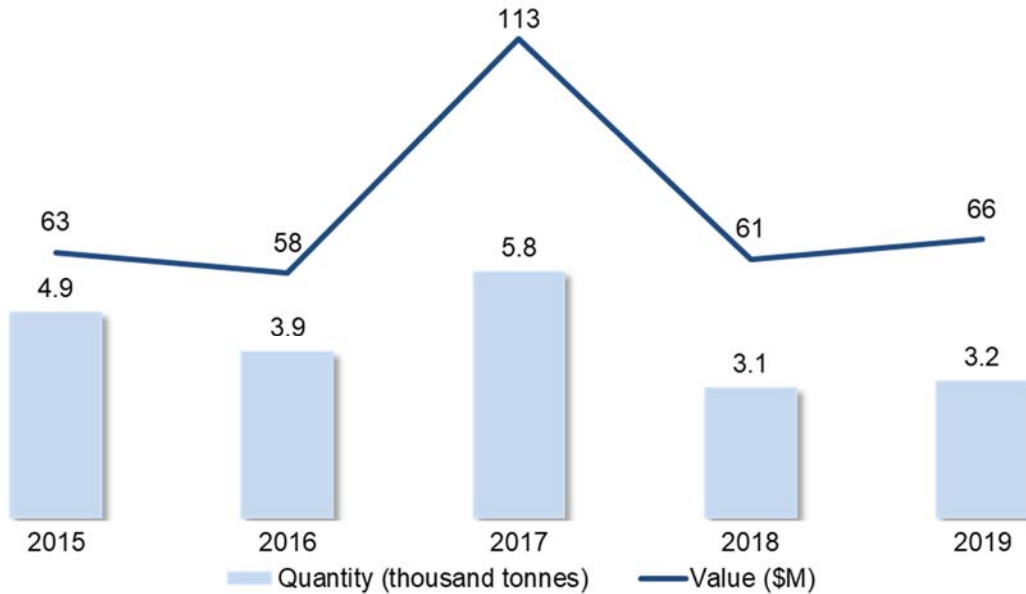
¹¹ HS code 030614

¹² Japan's reported import statistics collected by Japan Ministry of Finance, retrieved March 9, 2020 via the Global Trade Tracker.

Canada's Fish and Seafood Trade with Japan, 2019

export value of crab to Japan grew substantially in 2017, with a 95 per cent increase over 2016. Subsequently, crab exports to Japan dropped from the 2017 peak value (\$113M) to values closer to the average over the last number of years (~\$60M).

Figure 5. Canada's Crab Exports to Japan, 2015-2019



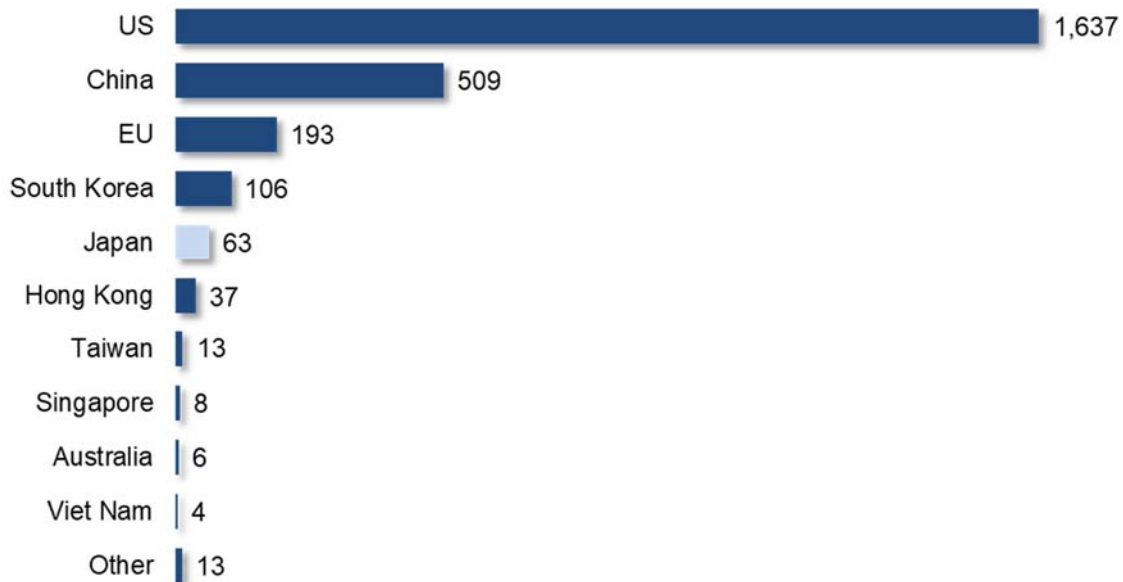
Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.



Lobster (2nd largest export)

In 2019, Canada's lobster exports to Japan were valued at \$63M, representing 2 per cent of Canada's total lobster export value. Japan ranked fifth, behind the US (\$1.64B), China (\$509M), the EU (\$193M) and South Korea (\$106M), in Canada's reported export value of lobster.

Figure 6. Canada's Lobster Exports by Destination, 2019 (\$M)



Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

New Brunswick (\$29M) followed by Nova Scotia (\$25M) were the main provinces exporting lobster products to Japan, accounting respectively for 46 and 40 per cent of Canada's lobster export value to Japan in 2019. The majority of Canadian lobster products exported to Japan were frozen (44 per cent by value in 2019) or live (18 per cent).

According to Japan's customs authority, Canada dominated the Japanese lobster¹³ market in 2019 (89 per cent import market share by value), compared to the other top supplier: the US (6 per cent).¹⁴

In 2019, Canada's value of lobster exports to Japan increased 33 per cent (+\$16M) from the previous year. This growth was mostly attributable to an increase in quantity exported (+30 per cent) as export prices of lobster to Japan experienced a 2 per cent increase during the same period.

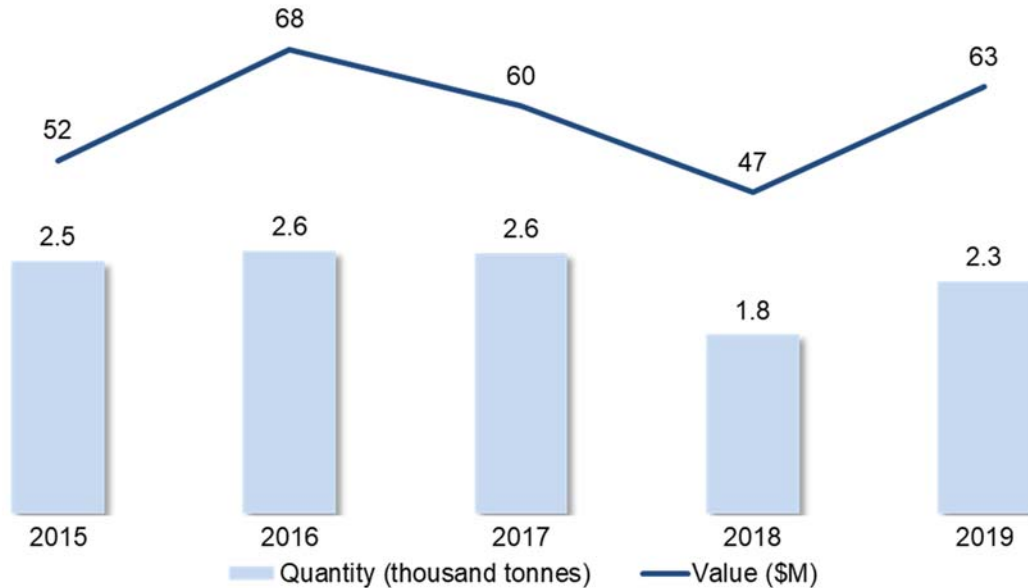
¹³ HS codes: 030612, 030632 and 030692

¹⁴ Japan's reported import statistics collected by Japan Ministry of Finance, retrieved March 9, 2020 via the Global Trade Tracker.

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Since 2015, Canada's lobster export value to Japan has fluctuated, the net effect over this period being an annual growth rate of 5 per cent. During the same period, quantity of lobster exported to Japan decreased 2 per cent annually, while export prices increased 7 per cent per annum.

Figure 7. Canada's Lobster Exports to Japan, 2015-2019



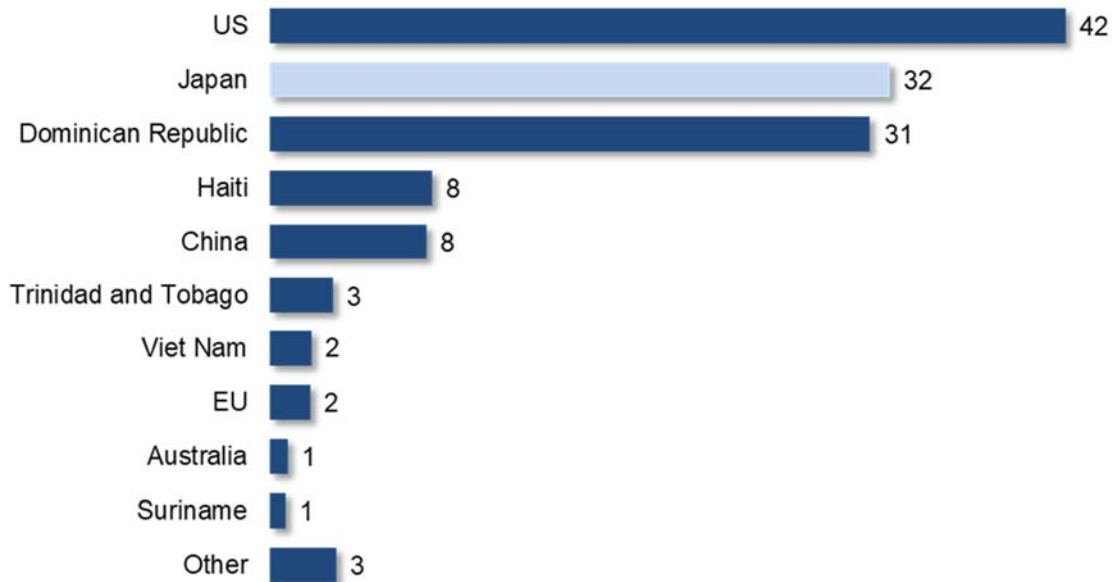
Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Canada's Fish and Seafood Trade with Japan, 2019

Herring (3rd largest export)

In 2019, Canada's herring exports to Japan were valued at \$32M, accounting for 24 per cent of Canada's total herring export value. Japan ranked second, behind the US (\$42M), in Canada's reported export value of herring.

Figure 8. Canada's Herring Exports by Destination, 2019 (\$M)



Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

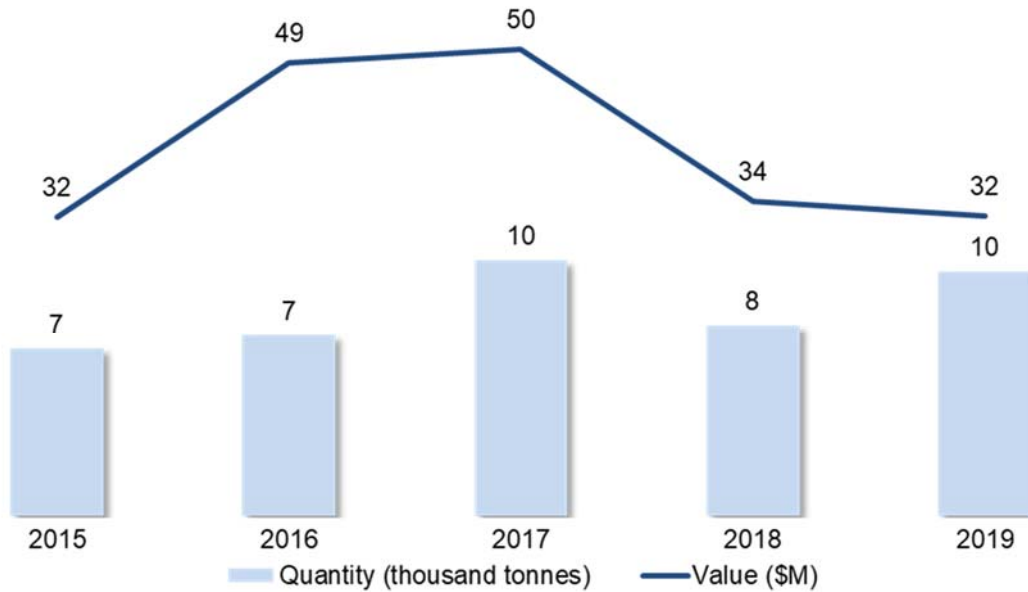
British Columbia (\$22M) was the main province exporting herring products to Japan, with 67 per cent of the value of Canada's total herring exports to Japan. New Brunswick (\$6M) and Nova Scotia (\$4M) followed. The majority of Canadian herring exports to Japan were herring roe and milt (74 per cent by value in 2019). Japan is particularly fond of this dish, also known as "kazunoko" which represents a key market for Canada's herring products. In 2019, 79 per cent of Canadian herring roe and milt exports were destined for Japan.

The value of Canada's herring exports to Japan remained relatively stable between 2018 and 2019 (-\$2M or a 5 per cent decline), while quantity exported increased 28 per cent and export prices dropped 26 per cent.

Canada's herring exports to Japan peaked in 2016/2017, due to peak prices in 2016 and peak quantities in 2017. A subsequent decline means that since 2015, Canada's herring export value to Japan has experienced a close to zero annual growth rate. During the same period, quantity of herring exported to Japan increased 10 per cent annually, while export prices decreased 9 per cent per year.

Canada's Fish and Seafood Trade with Japan, 2019

Figure 9. Canada's Herring Exports to Japan, 2015-2019



Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Other Species

In 2019, Canadian exports of species other than crab, lobster and herring to Japan were valued at \$124M, representing 43 per cent of Canada's total fish and seafood export value to Japan. The main other species exported to Japan in 2019 were shrimp (\$30M), salmon (\$26M) and halibut (\$10M).

Japan also represented an important market for Canada for a number of other species. For example, in 2019, an important percentage of Canadian exports of sablefish (40 per cent), sea urchin (35 per cent) and tuna (21 per cent) was destined to Japan.

In 2019, via British Columbia exclusively, Canada exported \$9M of sablefish to Japan. Japan was Canada's top destination for sablefish, followed by the EU (\$7M). All sablefish exported from Canada to Japan in 2019 were frozen whole sablefish.

Japan (\$9M) was also Canada's top destination for sea urchin, followed by the US (\$7M). British Columbia was essentially the only province exporting sea urchin products, mostly fresh or chilled, to Japan in 2019.

Canada's Fish and Seafood Trade with Japan, 2019

Table 2. Canada's Top 10 Fish and Seafood Exports to Japan, 2019

Species	Value of Exports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Exports (%)
Crab	66	7.5	5.1	2.3	4.5
Lobster	63	32.8	30.3	1.9	2.4
Herring	32	-4.6	28.2	-25.6	24.1
Shrimp	30	67.2	47.6	13.3	6.8
Salmon	26	-55.3	-51.7	-7.4	2.5
Halibut	10	12.9	55.3	-27.3	5.4
Sablefish	9	-8.3	-6.6	-1.7	40.3
Sea Urchin	9	-16.4	-21.6	6.7	35.2
Tuna	8	21.4	28.3	-5.4	21.5
Capelin	7	83.7	39.0	32.1	10.7
Other	25	-14.2	1.7	-15.7	1.7
Total	285	-0.9	7.2	-7.5	3.8

Canada's Fish and Seafood Exports to Japan by Province and Territory

In 2019, British Columbia remained the top exporting province of fish and seafood to Japan. The province exported \$91M worth of fish and seafood products to Japan, with salmon (\$26M), herring (\$22M) and shrimp (\$19M) as the main species exported by value. The other top exporting provinces in 2019 were Nova Scotia (\$71M) and New Brunswick (\$64M). A significant portion of fish and seafood exports from these two provinces to Japan in 2019 was lobster and crab. Note that essentially all of Canadian crab exports to Japan was frozen snow crab.

Table 3. Canada's Fish and Seafood Exports to Japan by Province and Territory, 2019

Province and Territory	Value (\$M)	Quantity (thousand tonnes)	Main Species	Share* %
British Columbia	91	14	Salmon	28.6
			Herring	23.8
			Shrimp	21.1
Nova Scotia	71	6	Lobster	35.4
			Crab	21.1
			Halibut	11.3
New Brunswick	64	4	Crab	45.6
			Lobster	43.3
			Herring	9.8
Newfoundland and Labrador	34	5	Crab	36.1
			Shrimp	21.1
			Greenland turbot	14.7
Quebec	14	1	Crab	74.7
			Lobster	18.8
			Halibut	3.1
Prince Edward Island	7	1	Lobster	47.7
			Mussel	27.8
			Tuna	21.1
Other	4	0	Lobster	61.0
			Freshwater smelt	31.9
			Salmon	0.5

* Share of province's fish and seafood exports to Japan

Canada's Fish and Seafood Imports from Japan

In 2019, Canada imported \$48M of fish and seafood products from Japan, accounting for 1 per cent of Canada's total fish and seafood import value. Japan ranked as the 14th supplier of fish and seafood to Canada in 2019, by value.

In 2019, Canada's fish and seafood import value from Japan increased 13 per cent (+\$5M) relative to 2018. Quantity of imports was 8 thousand tonnes with a 13 per cent increase since 2018, while fish and seafood import prices from Japan remained stable during the same period.

Table 4. Canada's Fish and Seafood Imports from Japan, 2015-2019

Year	Value of Imports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)
2015	40	13.6	6.3	6.9
2016	38	-5.4	20.1	-21.3
2017	43	12.5	10.1	2.2
2018	43	-0.7	-1.3	0.6
2019	48	12.6	12.6	0.0
Average	42	CAGR 4.4	CAGR 10.1	CAGR -5.1

In 2019, Canada's top fish and seafood imported from Japan by value were scallop (\$8M), salmon (\$3M) and octopus (\$2M).

Canada's Fish and Seafood Trade with Japan, 2019

Table 5. Canada's Top 10 Fish and Seafood Imports from Japan, 2019

Species	Value of Imports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Imports (%)
Scallop	8	20.2	57.0	-23.4	9.1
Salmon	3	-47.1	-35.8	-17.6	0.3
Octopus	2	-5.5	0.5	-6.0	8.0
Mackerel	1	53.7	-6.8	64.9	7.0
Abalone	1	88.6	17.7	60.2	11.1
Tuna	1	-22.1	-58.8	89.1	0.5
Squid	1	0.7	-8.5	10.1	1.2
Crab	1	*	*	-57.3	0.4
Oyster	1	-19.7	-28.0	11.5	1.9
Sea Urchin	<0.5	40.7	17.9	19.3	17.4
Other	28	21.1	19.6	1.3	1.0
Total	48	12.6	12.6	0.0	1.1

* a very large percentage increase in crab imports was noted in 2019, but absolute values are not large.

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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