



Fisheries and Oceans
Canada

Pêches et Océans
Canada

CANADA'S FISH AND SEAFOOD TRADE IN 2019: OVERVIEW



Economics, Statistics and Data Governance Directorate
Strategic Policy Sector
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Canada's Fish and Seafood Trade in 2019

Highlights

- Value of Canada's fish and seafood exports was **\$7.44B¹** in 2019, with a 7 per cent increase (+\$518M) from the previous year.
- Quantity of exports was **608 thousand tonnes** with a 1 per cent increase from the previous year, while average fish and seafood export prices increased 6 per cent during the same period.
- Top destinations were the **United States** (\$4.56B), **China** (\$1.31B) and the **European Union** (\$510M), accounting for 86 per cent of Canada's fish and seafood total export value.

Canada's Top 3 Fish and Seafood Exports by Destination, 2019

| Destination | Value of Exports (\$B) | Change ² of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Exports (%) | CAGR ³ of Value (%) |
|--------------|------------------------|-----------------------------------|-----------------------|----------------------|----------------------|--------------------------------|
| US | 4.56 | 6.7 | 0.4 | 6.3 | 61.2 | 4.3 |
| China | 1.31 | 11.6 | 12.1 | -0.4 | 17.6 | 19.1 |
| EU | 0.51 | 13.0 | 6.0 | 6.6 | 6.9 | -3.0 |
| Other | 1.07 | 3.6 | -7.2 | 11.7 | 14.4 | 4.7 |
| Total | 7.44 | 7.5 | 1.5 | 5.9 | 100.0 | 5.7 |

- Top species exported were **lobster⁴** (\$2.59B), **crab⁵** (\$1.47B) and **salmon** (\$1.05B), accounting for 69 per cent of total Canadian fish and seafood export value.

Canada's Top 3 Fish and Seafood Exports by Species, 2019

| Species | Value of Exports (\$B) | Change ² of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Exports (%) | CAGR ³ of Value (%) |
|--------------|------------------------|-----------------------------------|-----------------------|----------------------|----------------------|--------------------------------|
| Lobster | 2.59 | 16.4 | 13.9 | 2.2 | 34.8 | 6.2 |
| Crab | 1.47 | 12.3 | 11.2 | 1.0 | 19.7 | 11.0 |
| Salmon | 1.05 | -11.9 | -9.6 | -2.5 | 14.1 | 5.2 |
| Other | 2.34 | 6.1 | 0.2 | 5.9 | 31.4 | 2.5 |
| Total | 7.44 | 7.5 | 1.5 | 5.9 | 100.0 | 5.7 |

- Top exporting provinces were **Nova Scotia** (\$2.31B), **New Brunswick** (\$1.73B), **British Columbia** (\$1.41B) and **Newfoundland and Labrador** (\$931M) accounting for 86 per cent of Canada's fish and seafood total export value.
- Value of Canada's fish and seafood imports was \$4.28B, with a 8 per cent increase from the previous year.
- Top suppliers of fish and seafood to Canada were the United States (\$1.43B), China (\$628M) and Thailand (\$323M), accounting for 56 per cent of Canada's total fish and seafood import value.
- Top species imported were salmon (\$743M), shrimp (\$670M) and lobster (\$421M), accounting for 43 per cent of Canada's total fish and seafood import value.

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

³ Compound annual growth rate from 2015 to 2019.

⁴ Lobster refers to the *Homarus* species.

⁵ Unless otherwise specified, 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.



Acronyms and Notes

| | |
|--------------|--|
| CAGR | Compound annual growth rate |
| CETA | Canada-European Union Comprehensive Economic and Trade Agreement |
| CUSMA | Canada-United States-Mexico Agreement |
| DFO | Department of Fisheries and Oceans Canada |
| MMPA | <i>Marine Mammal Protection Act</i> |
| NAFTA | North American Free Trade Agreement |
| UK | United Kingdom |
| 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.



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- 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 in 2019

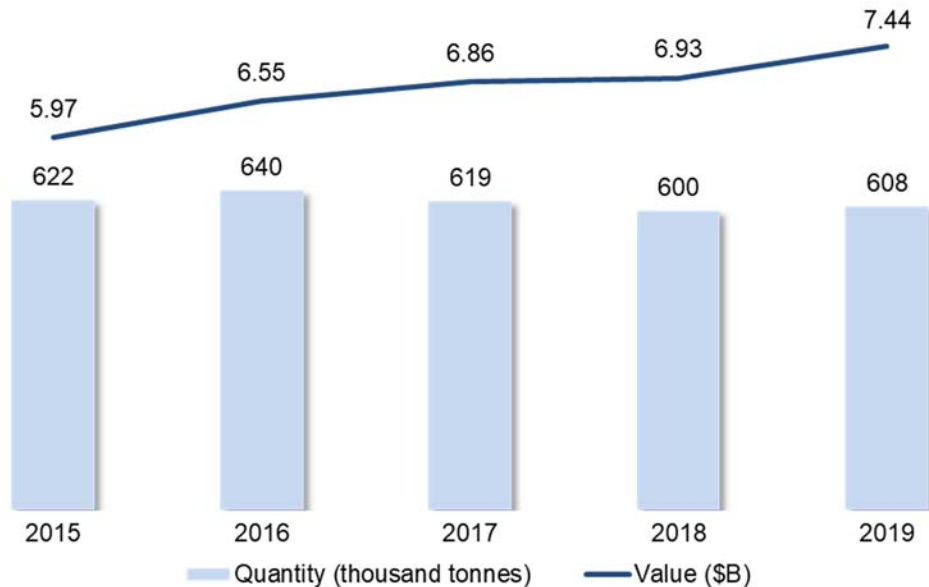
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Canada's Fish and Seafood Exports

In 2019, Canada's fish and seafood exports were valued at \$7.44B with an increase of \$518M (+7 per cent) from the previous year. Canada exported 608 thousand tonnes of fish and seafood with a 1 per cent increase from the previous year. Canadian fish and seafood export prices increased 6 per cent during the same period.

Figure 1. Canada's Fish and Seafood Exports, 2015-2019



Source: Department of Fisheries and Oceans (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.

From 2015 to 2019, Canadian fish and seafood export value experienced an annual rate of growth of 6 per cent. This growth was mainly driven by an annual increase of prices, as Canada's fish and seafood export prices grew by 6 per cent annually and quantity exported experienced a slight (-0.5 per cent) annual decline.

Canada's Fish and Seafood Trade in 2019

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

| Year | Value of Exports (\$B) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) |
|---------|------------------------------|----------------------------|-----------------------------|----------------------------|
| 2015 | 5.97 | 21.6 | 8.9 | 11.7 |
| 2016 | 6.55 | 9.7 | 3.0 | 6.5 |
| 2017 | 6.86 | 4.7 | -3.3 | 8.3 |
| 2018 | 6.93 | 0.9 | -3.1 | 4.2 |
| 2019 | 7.44 | 7.5 | 1.5 | 5.9 |
| | | CAGR | CAGR | CAGR |
| Average | 6.75 | 5.7 | -0.5 | 6.2 |

Canada's Fish and Seafood Exports by Destination

In 2019, the top three destinations for Canadian fish and seafood exports in rank order of value were:

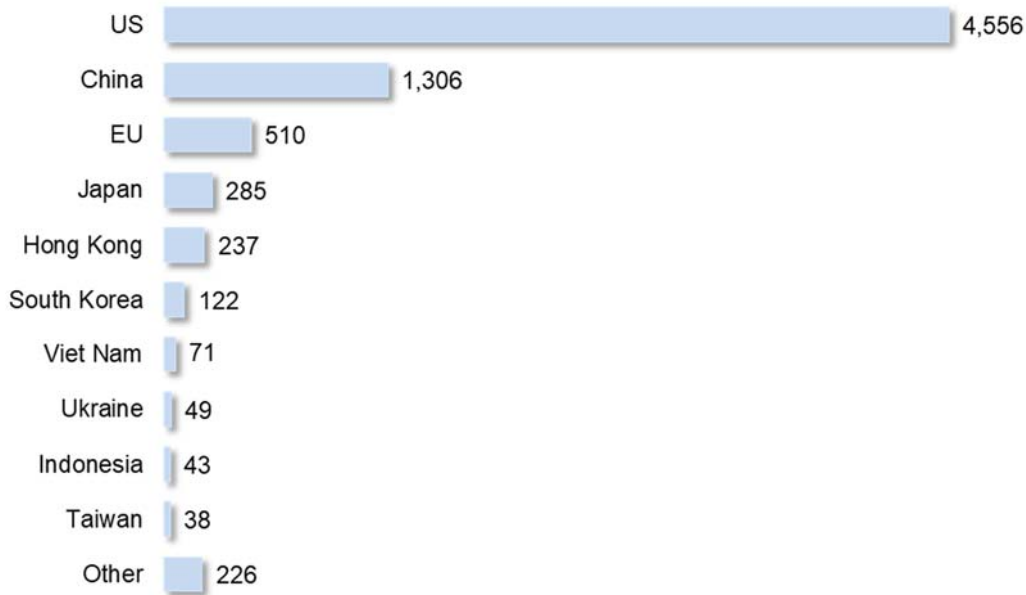
| | |
|---------------------|---------|
| United States (US) | \$4.56B |
| China | \$1.31B |
| European Union (EU) | \$510M |

Together, these destinations accounted for 86 per cent of Canada's fish and seafood total export value in 2019.

In 2019, Canadian exports to the remaining destinations were valued at \$1.07B, representing 14 per cent of Canada's total fish and seafood export value. Among these, other significant destinations for Canada's fish and seafood in 2019 were Japan (\$285M), Hong Kong (\$237M) and South Korea (\$122M).

Canada's Fish and Seafood Trade in 2019

Figure 2. Canada's Fish and Seafood Exports by Destination, 2019 (\$M)



Source: Department of Fisheries and Oceans (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.

United States (largest destination)

In 2019, Canada's fish and seafood exports to the US were valued at \$4.56B, accounting for 61 per cent of total Canadian fish and seafood exports by value. The US remained, by far, Canada's largest fish and seafood export destination.

Canadian fish and seafood export value to the US increased 7 per cent (+\$286M) between 2018 and 2019. Quantity exported was 299 thousand tonnes and remained almost the same as in 2018, with less than a 1 per cent increase. Fish and seafood export prices to the US increased 6 per cent during the same period.

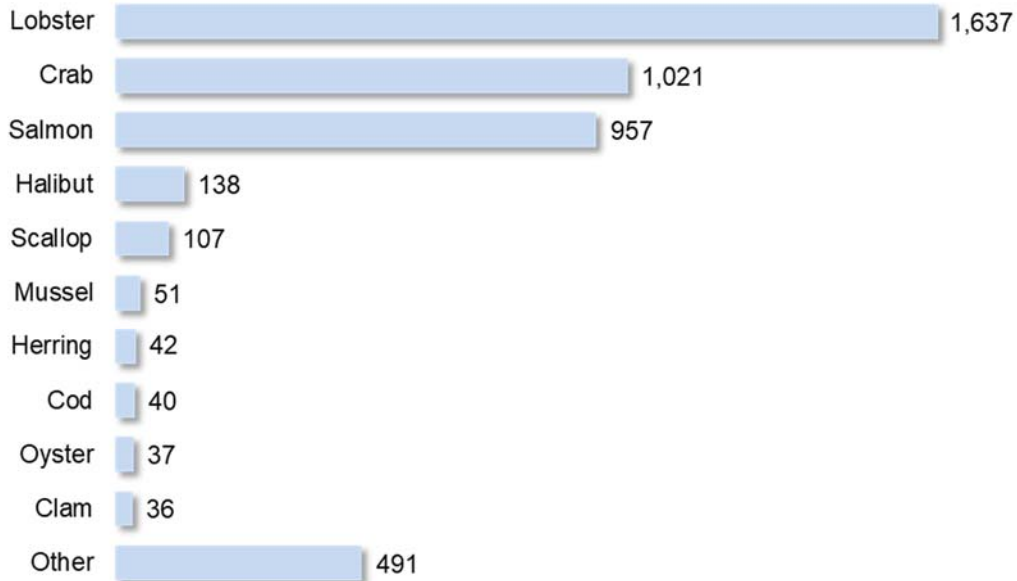
Since 2015, the value of Canada's exports of fish and seafood to the US grew 4 per cent annually. This growth was driven by an annual increase of prices, as fish and seafood export prices grew 7 per cent annually and quantity exported decreased 2 per cent per year.

In 2019, Canada's top fish and seafood exports by value to the US were lobster (\$1.64B), crab (\$1.02B) and salmon (\$957M). Together, these three species accounted for 79 per cent of total Canadian fish and seafood exports by value to the US.



Canada's Fish and Seafood Trade in 2019

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



Source: Department of Fisheries and Oceans (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.

Because of its geographical proximity and close trading relationship, the US remains an important opportunity for Canada's fish and seafood exports. However, the concentration of Canadian fish and seafood exports to the US market could leave Canada vulnerable to fluctuations in the US economy, as was highlighted by the effects of the 2008 global recession, as well as changing consumer demands, changes in US fisheries policies or non-tariff barriers to trade.

For instance, the challenging negotiation of a successor to the North American Free Trade Agreement (NAFTA), the Canada-US-Mexico Agreement (CUSMA), highlighted the risks that come along with the benefits of having convenient access to a single large trade partner. CUSMA will preserve NAFTA's virtually tariff-free market access for Canadian exports, while addressing modern trade challenges, and making it easier for Canadian exporters to claim preferential tariff treatment⁶. On July 1, 2020, the new Canada-United States-Mexico Agreement (CUSMA) entered into force.

From a market access perspective, it is also worth noting that the United States will require fish and seafood imports to comply with the Marine Mammal Protection Act (MMPA) Import Provisions, beginning January 1, 2022. To maintain U.S. market access under the MMPA, exporting nations, including Canada, will have to meet US standards to mitigate harm to marine mammals. Canada is working to meet the

⁶ Global Affairs Canada, The Canada-United States-Mexico Agreement (<https://www.international.gc.ca/trade-commerce/assets/pdfs/agreements-accords/cusma-aceum/CUSMA-impact-repercussion-en.pdf>, accessed March 10 2020)



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requirements of the US MMPA Import Provisions in close collaboration with Canadian harvesters and other stakeholders.

China (2nd largest destination)

In 2019, China maintained its position as the second most valuable export destination for Canada's fish and seafood as Canadian exports to China were valued at \$1.31B, accounting for 18 per cent of Canada's total fish and seafood exports by value. Quantity exported was 133 thousand tonnes.

Canadian fish and seafood export value to China increased 12 per cent (+\$136M) between 2018 and 2019, an increase driven by volume as exported quantity of Canada's fish and seafood to China experienced an equivalent increase (+12 per cent) from the previous year. Prices of Canadian exports of fish and seafood to China remained almost the same as in 2018 (a less than 1 per cent decrease).

Since 2015, the noteworthy yearly growth (+19 per cent per year) of Canada's fish and seafood export value to China was driven by both prices and volume, as fish and seafood export prices and quantity both experienced annual growth rates of 9 per cent.

In 2019, Canada's top fish and seafood exports by value to China were lobster (\$509M), crab (\$266M) and shrimp (\$185M). Together, these three species accounted for 73 per cent of total Canadian fish and seafood exports by value to China.

Notably, Canada's value of lobster exports to China increased 70 per cent (+\$210M) from the previous year. This growth was attributable to an increase in the quantity of lobster exported (+74 per cent) as export prices of lobster to China experienced a 2 per cent decrease during the same period. The majority (90 per cent by value in 2019) of Canada's exports of lobster to China were live lobsters.

In 2019, Canada was essentially the only supplier of live lobster⁷ to China, with 97 per cent of China's import market share⁸. In previous years, Canada and the US had shared more equally in China's live lobster import market. However, 2018 and 2019 were marked by US-China trade disputes and tariff escalation between the two countries, and the value of the US live lobster⁹ market share in China plummeted, from 41 per cent in 2017, to 27 per cent in 2018, to only 2 per cent in 2019¹⁰. This collapse was primarily due to the retaliatory tariffs that China imposed on its US imports of lobster from July 2018 through all of 2019.

⁷ HS Code 030632 (live *homarus* lobsters)

⁸ China's reported import statistics collected by China Customs, retrieved March 9, 2020 via the Global Trade Tracker

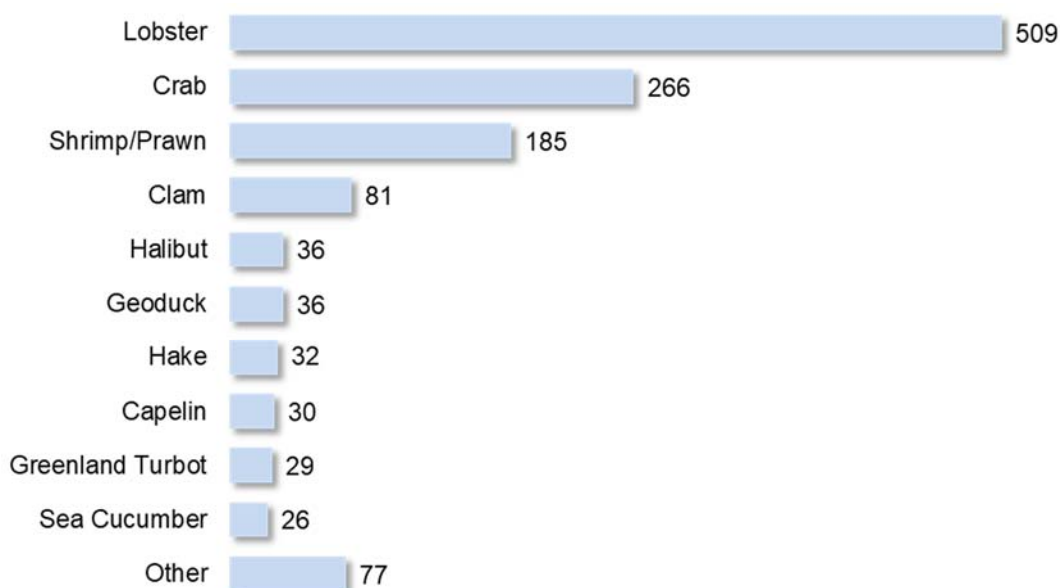
⁹ HS Code 030632 (live *homarus* lobsters)

¹⁰ China's reported import statistics collected by China Customs, retrieved March 9, 2020 via the Global Trade Tracker



Canada's Fish and Seafood Trade in 2019

Figure 4. Canada's Top 10 Fish and Seafood Exports to China, 2019 (\$M)



Source: Department of Fisheries and Oceans (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.

European Union (3rd largest destination)

In 2019, Canada's fish and seafood exports to the EU, third largest export market for Canadian fish and seafood, were valued at \$510M, accounting for 7 per cent of Canada's total fish and seafood exports by value.

The largest export destination for Canada's fish and seafood products within the EU continued to be the United Kingdom (UK), with exports valued at \$101M in 2019. By value, Canadian fish and seafood exports to the UK accounted for 20 per cent of Canada's fish and seafood exports to the EU.

Canadian fish and seafood export value to the EU increased 13 per cent (+\$59M) between 2018 and 2019. In 2019, the quantity of fish and seafood exports to the EU was 52 thousand tonnes with a 6 per cent increase since 2018. Fish and seafood export prices to the EU increased 7 per cent during the same period.

However, from 2015 to 2019, and despite the coming into force of the Canada-EU Comprehensive Economic and Trade Agreement (CETA) in 2017, the value of Canadian fish and seafood exports to the EU have decreased at an annual rate of 3 per cent. This decline was mostly attributable to a decrease in quantity of fish and seafood exported (-7 per cent annually) as export prices of fish and seafood to the EU experienced an annual 4 per cent increase during the same period. For the most part, this decline was attributable to a drop in the quantity of shrimp exported which coincides

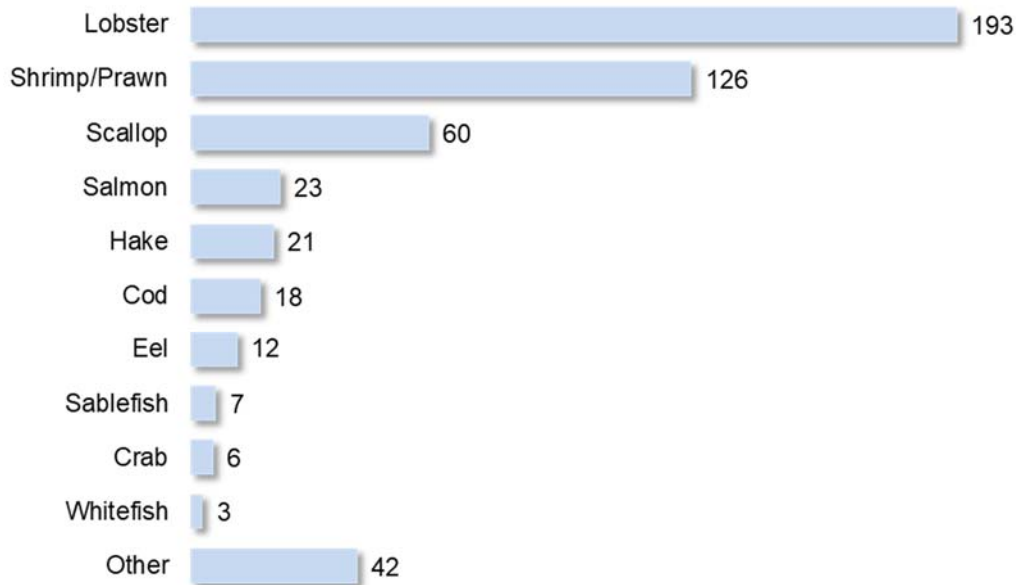


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with a decline in Canadian harvest. Strong and growing demand in China and other parts of Asia may also be drawing Canadian products of shrimp away from the EU.

In 2019, Canada's top fish and seafood exports to the EU by value were lobster (\$193M), shrimp (\$126M) and scallop (\$60M). Together, these three species accounted for 74 per cent of total Canadian fish and seafood exports by value to the EU.

Figure 5. Canada's Top 10 Fish and Seafood Exports to the EU, 2019 (\$M)



Source: Department of Fisheries and Oceans (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.

With the implementation of CETA, Canada now has an opportunity to take advantage of duty-free status on most fish and seafood products, and expand into the EU market of more than 510 million people. However, it is known that well-established trade ties and tariffs amongst the EU member states have made it more difficult for foreign producers to gain market shares in the EU's fish and seafood sector. Furthermore, factors like Brexit and the uncertain future of the EU-UK trading arrangements, instability of some major international trade relations and the decline in Canada's shrimp production create additional challenges for Canadian exporters of fish and seafood to the EU, including the UK.

Other Destinations

In 2019, Canadian exports to the remaining destinations were valued at \$1.07B, representing 14 per cent of Canada's total fish and seafood export value. Among these,



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other significant destinations for Canada's fish and seafood in 2019 were Japan (\$285M), Hong Kong (\$237M) and South Korea (\$122M).

Japan remained a valuable destination for Canada's fish and seafood, as its fourth largest export market in 2019. Canada's top fish and seafood exports by value to Japan were crab (\$66M, virtually all 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.

In 2019, Hong Kong remained the fifth most valuable destination for Canadian fish and seafood exports. By value, the top species exported to Hong Kong were eel (\$137M), lobster (\$37M) and geoduck (\$18M). In 2019, Hong Kong was Canada's top export destination for eel, accounting for 83 per cent of the total value of eel exports. All eels exported to Hong Kong were live glass eels/elvers. Notably the value of eels exported to Hong Kong almost doubled from the previous year – a growth due to an increase in the quantity of eels exported.

Table 2. Canada's Top 10 Fish and Seafood Exports by Destination, 2019

| Destination | Value of Exports (\$M) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Exports (%) |
|--------------------|---------------------------------------|-------------------------------------|--------------------------------------|-------------------------------------|-------------------------------------|
| US | 4,556 | 6.7 | 0.4 | 6.3 | 61.2 |
| China | 1,306 | 11.6 | 12.1 | -0.4 | 17.6 |
| EU | 510 | 13.0 | 6.0 | 6.6 | 6.9 |
| Japan | 285 | -0.9 | 7.2 | -7.5 | 3.8 |
| Hong Kong | 237 | 34.6 | -4.7 | 41.3 | 3.2 |
| South Korea | 122 | 0.6 | 1.2 | -0.7 | 1.6 |
| Vietnam | 71 | 17.5 | -11.0 | 32.1 | 1.0 |
| Ukraine | 49 | -4.6 | -15.1 | 12.4 | 0.7 |
| Indonesia | 43 | 18.7 | 20.7 | -1.6 | 0.6 |
| Taiwan | 38 | -33.4 | -36.7 | 5.3 | 0.5 |
| Other | 226 | -7.2 | -9.6 | 2.7 | 3.0 |
| Total | 7,443 | 7.5 | 1.5 | 5.9 | 100.0 |



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Canada's Fish and Seafood Exports by Species

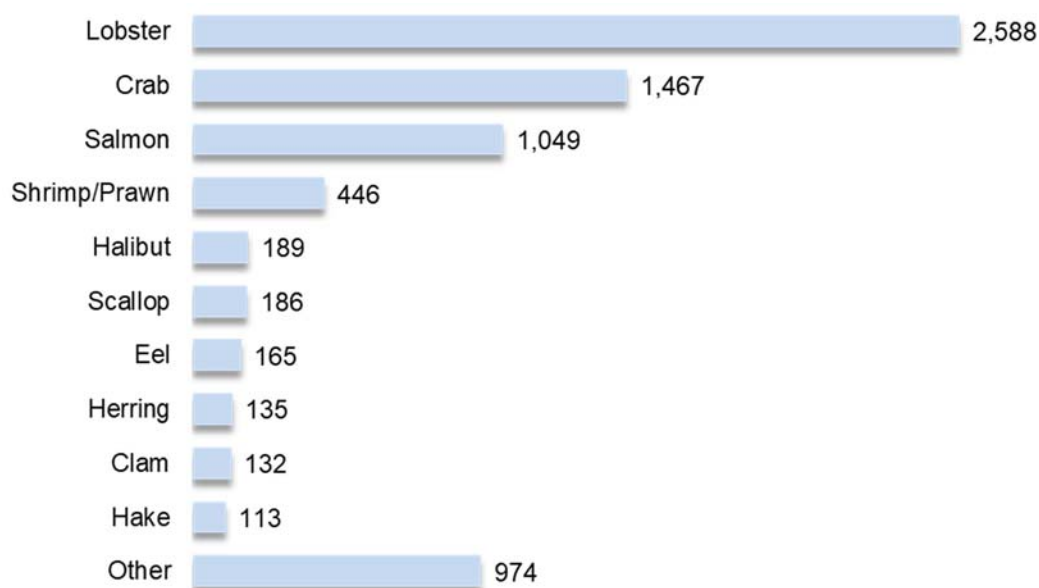
In 2019, Canada's top three fish and seafood exports in rank order of value were:

| | |
|---------|---------|
| lobster | \$2.59B |
| crab | \$1.47B |
| salmon | \$1.05B |

Together, these three species accounted for 69 per cent of total Canadian fish and seafood exports by value.

Canadian exports of other species were valued at \$2.34B, almost a third of Canada's total fish and seafood export value. The main other species exported in 2019 were shrimp (\$446M), halibut (\$189M) and scallop (\$186M).

Figure 6. Canada's Fish and Seafood Exports by Species, 2019 (\$M)



Source: Department of Fisheries and Oceans (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 (largest export)

In 2019, Canada's exports of lobster were valued at \$2.59B, representing 35 per cent of Canada's total fish and seafood export value. Lobster exports mostly consisted of frozen (54 per cent by value) and live (45 per cent) lobster.

In 2019, Nova Scotia (\$1.19B) and New Brunswick (\$962M) continued to be the main provinces exporting lobster products with 46 and 37 per cent, respectively, of Canada's total lobster export share by value. They were followed by Prince Edward Island (\$238M), Quebec (\$118M) and Newfoundland and Labrador (\$72M), sharing respectively 9, 5 and 3 per cent of Canada's lobster export value in 2019.

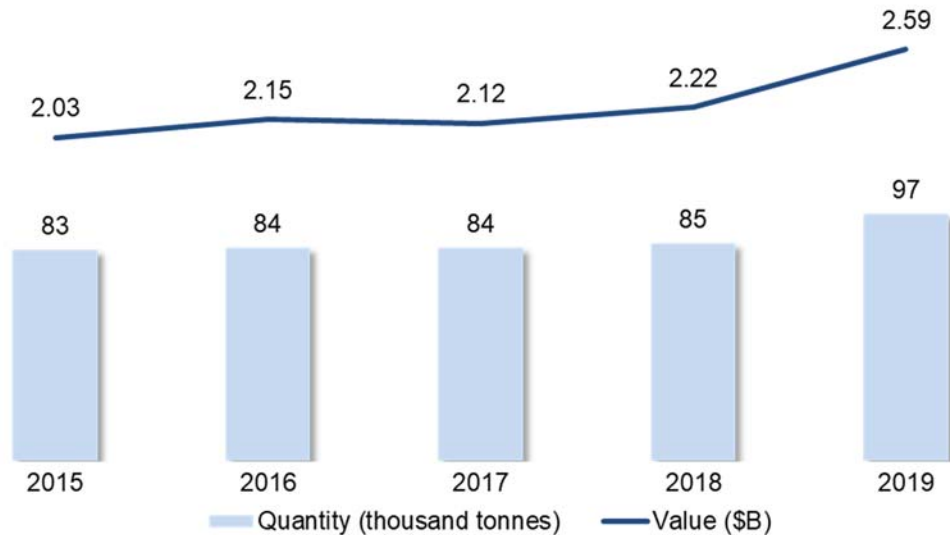


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Canada's lobster export value increased 16 per cent (+\$365M) between 2018 and 2019. This increase was mostly attributable to an increase in quantity of lobster exported (+14 per cent) as Canada's export prices of lobster increased 2 per cent during the same period.

Since 2015, the value of Canada's lobster exports experienced an annual growth rate of 6 per cent. During the same period, quantity of lobster exported increased by 4 per cent annually, while export prices of lobster increased by 2 per cent per annum. Most of the increase in export value occurred between 2018 and 2019, with a 14 per cent increase in the quantity of lobster exported. Most of this was growth in exports to China, Japan, and the European Union.

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



Source: Department of Fisheries and Oceans (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.

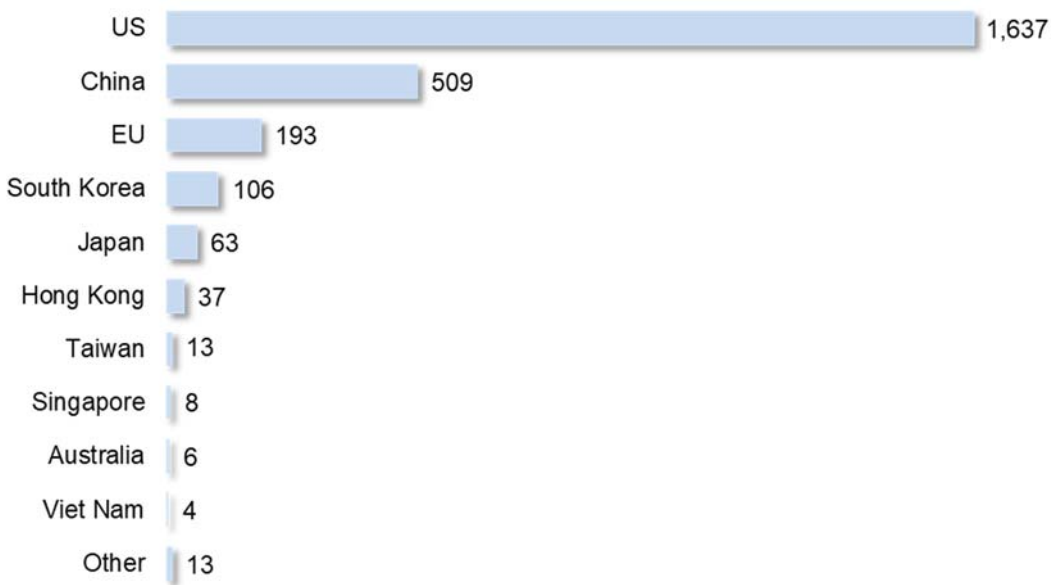
In 2019, the US (\$1.64B) remained by far the largest destination for Canada's exports of lobster, representing 63 per cent of Canada's total lobster export value. By value, Canada's lobster exports to the US mostly consisted of frozen (67 per cent in 2019) and live (32 per cent) lobster. It is important to note that Canada, mainly the province of New Brunswick, imports large amounts of live lobster from the US for processing which is then destined for export back to the US market. Lobster trade flow between the US and Canada reflects a strong integration in the two countries' lobster sector and added value opportunities. Canada's lobster export value to the US increased 8 per cent (+\$121M) between 2018 and 2019, while quantities exported declined 3 per cent and export prices increased 12 per cent.



Canada's Fish and Seafood Trade in 2019

With an annual growth rate of 41 per cent since 2015, Canada's lobster exports to China were valued at \$509M in 2019. China remained the second largest destination for Canada's lobster exports, having surpassed the EU in 2017, and accounting for 20 per cent of Canada's total lobster export value in 2019. Notably in 2019, Canada's value of lobster exports to China increased 70 per cent (+\$210M) from the previous year. This growth was attributable to an increase in quantity exported (+74 per cent) as export prices of lobster to China experienced a 2 per cent decrease during the same period. The majority of Canadian lobster was exported live (90 per cent by value in 2019) to China.

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



Source: Department of Fisheries and Oceans (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 lobster exports to the EU, Canada's third largest destination for lobster by value, were valued at \$193M in 2019. With lobster exports valued at \$119M in 2019, Nova Scotia was, by far, the main province exporting lobster to the EU, representing 62 per cent of Canada's total lobster exports to the EU. New Brunswick (\$34M) and Prince Edward Island (\$24M) followed. Nova Scotia's exports of lobster to the EU consisted principally of live lobster, while New Brunswick and Prince Edward Island mostly exported frozen lobster and frozen lobster in brine.



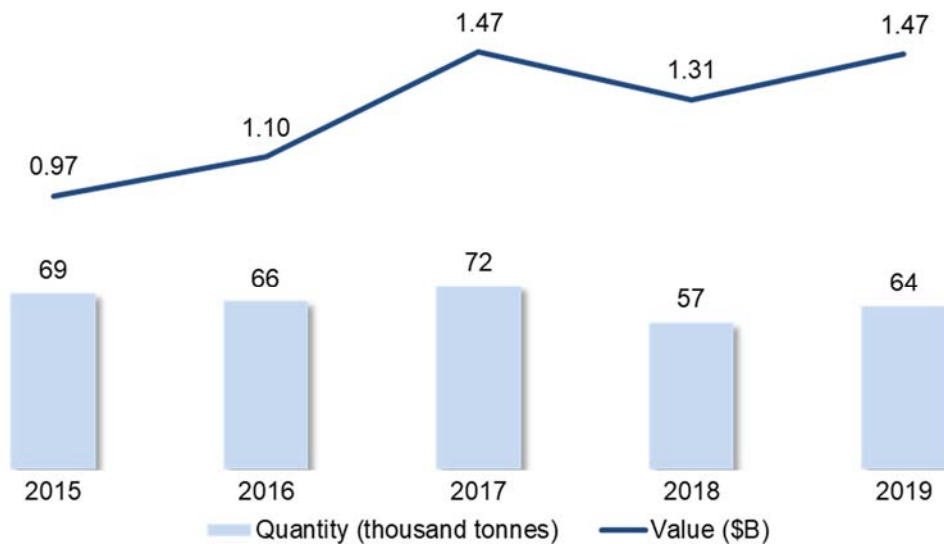
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Crab (2nd largest export)

In 2019, Canada's crab exports were valued at \$1.47B, accounting for 20 per cent of Canada's total fish and seafood export value. By value, 67 per cent of exported Canadian crab was identified as frozen snow crab¹¹.

By value, the Atlantic provinces and Quebec¹² shared 85 per cent of Canadian crab exports, with exports (of mostly snow crab) valued at \$1.26B in 2019. British Columbia, for its part, exported \$207M (or 14 per cent), most of which was live Dungeness crab, mainly exported to China.

Figure 9. Canada's Crab Exports, 2015-2019



Source: Department of Fisheries and Oceans (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.

Since 2015, the value of Canadian exports of crab has grown at an average annual rate of 11 per cent. Crab export prices have increased 13 per cent annually, while quantity exported decreased 2 per cent during the same period. However, essentially all of the increase occurred between 2015 and 2017. Prices for crab have been particularly strong from 2017 to 2019, and changes in export value during that period have largely reflected changes in landed quantities available for export. In 2019, Canada's crab export value increased 12 per cent (+\$160M), after an equivalent drop in the previous year.

¹¹ In 2019, 17 per cent (\$250M) of Canada's crab exports were labelled as unspecified frozen crab, which, based on exporting provinces and Canadian crab species landings data, would mostly be snow crab.

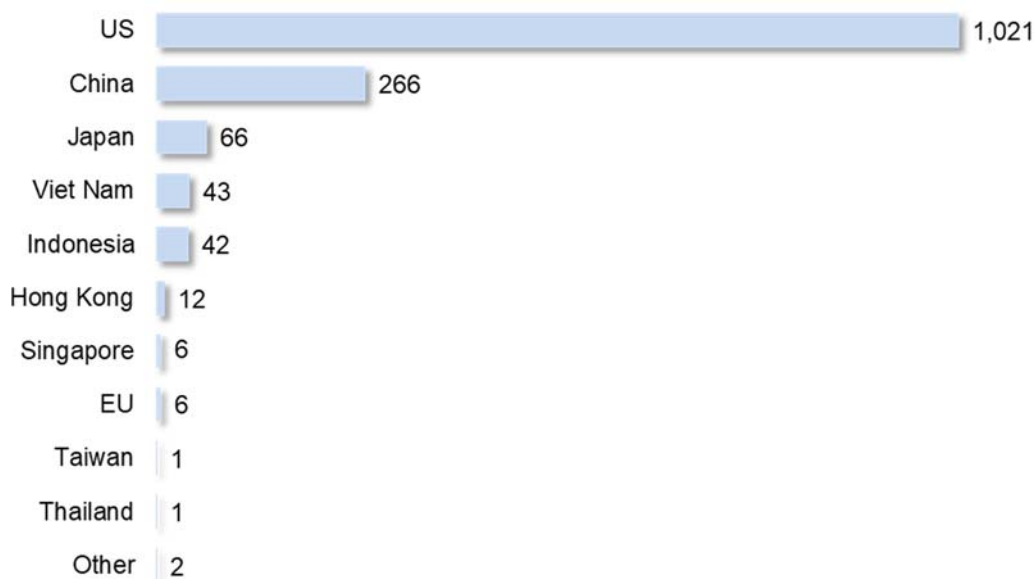
¹² Newfoundland and Labrador (\$415M), New Brunswick (\$295M), Nova Scotia (\$295M), Prince Edward island (\$15M) and Quebec (\$237M)



Canada's Fish and Seafood Trade in 2019

In 2019, the US (\$1.02B) remained the largest export destination for Canadian crab, representing 70 per cent of total crab export value, followed by China (\$266M) and Japan (\$66M), respectively representing 18 per cent and 4 per cent of Canadian crab exports by value.

Figure 10. Canada's Crab Exports by Destination, 2019 (\$M)



Source: Department of Fisheries and Oceans (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.

Salmon (3rd largest export)

In 2019, Canadian salmon exports were valued at \$1.05B and accounted for 14 per cent of Canada's total value of fish and seafood exports. By value, 85 per cent of Canada's exports of salmon was Atlantic salmon, which is commercially produced only from aquaculture.

In 2019, British Columbia (\$701M) and New Brunswick (\$315M) were practically the only exporting provinces of salmon products, sharing respectively 67 and 30 per cent of Canada's total salmon exports by value.

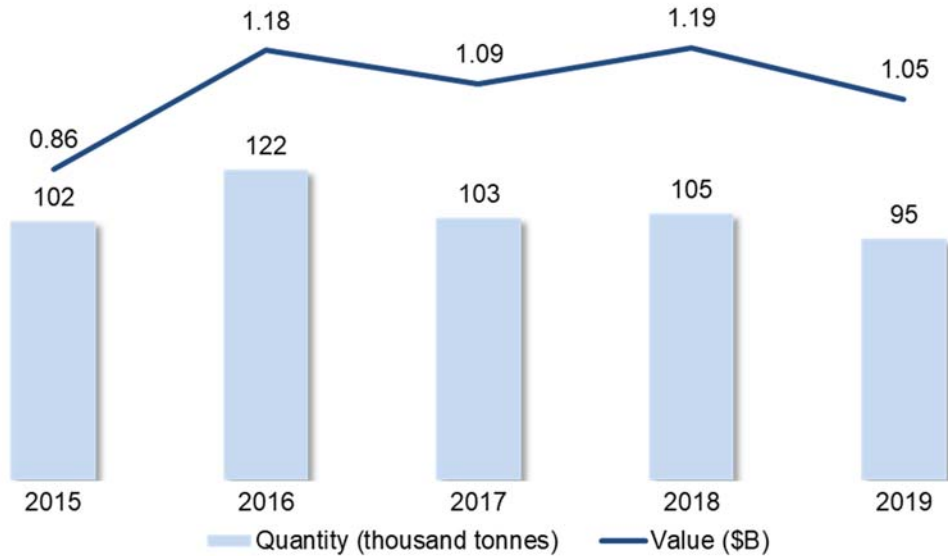
Canada's salmon export value increased substantially between 2015 and 2016, a result of large increases in both quantity and price. Since 2016, quantities have once again decreased but strong prices have kept export value fairly stable. In terms of the annualized change over the 5 year period since 2015, Canadian salmon exports have grown at an annual rate of 5 per cent in value, with growth attributable to a 7 per cent annual increase in salmon export prices, as exported quantities of salmon decreased 2 per cent per annum over the same period.



Canada's Fish and Seafood Trade in 2019

In 2019, Canada's salmon export value decreased 12 per cent (-\$142M) from an equivalent increase the previous year. This decline in the value of Canada's exports of salmon was primarily attributable to a 10 per cent decrease in exported quantities as prices of salmon exported decreased 3 per cent during the same period.

Figure 11. Canada's Salmon Exports, 2015-2019



Source: Department of Fisheries and Oceans (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, the US continued to be the largest export destination for Canadian salmon, representing 91 per cent (\$957M) of Canada's total salmon export value, followed (distantly) by Japan (\$26M) and the EU (\$23M).



Figure 12. Canada's Salmon Exports by Destination, 2019 (\$M)



Source: Department of Fisheries and Oceans (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 lobster, crab and salmon were valued at \$2.34B, representing 31 per cent of Canada's total fish and seafood export value.

The main other species exported in rank order of value were:

| | |
|---------|--------|
| shrimp | \$446M |
| halibut | \$189M |
| scallop | \$186M |
| eel | \$165M |
| herring | \$135M |
| clam | \$132M |
| hake | \$113M |

Canadian export value of shrimp decreased 5 per cent (-\$24M) between 2018 and 2019. This drop was attributable to a 6 per cent decline in the quantity of shrimp exported, as shrimp export prices increased 1 per cent during the same period. In 2019, Canadian exports of shrimp were mainly destined towards China (\$185M or 42 per cent Canadian shrimp exports by value) and the EU (\$126M or 28 per cent). The majority (82 per cent by value) of Canadian shrimp exported in 2019 consisted of frozen cold-water shrimps.

Canada's Fish and Seafood Trade in 2019

Canadian exports of halibut were valued at \$189M in 2019, with the US (\$138M) accounting for 73 per cent of Canada's total halibut export value. Canadian exports of halibut consisted of either fresh (68 per cent of export value) or frozen (32 per cent) halibut.

In 2019, Canada exported \$186M of scallop mainly destined to the US (\$107M) and the EU (\$60M). Nova Scotia was the main province exporting scallop products, with 83 per cent (or \$154M) of Canada's export value of scallop.

Notably, Canadian export value for eel increased considerably, from \$90M in 2018 to \$165M in 2019. By value, essentially all (99 per cent) of Canadian exports of eel were live glass eels/elvers and 83 per cent were destined for Hong Kong (\$137M). Of note, in 2019, the quantity of live glass eels/elvers exported to China significantly increased while exported quantity of frozen eel dropped. The market for live glass eels/elvers fetch substantially higher prices than frozen eel products.

Table 3. Canada's Top 10 Fish and Seafood Exports by Species, 2019

| Species | Value of Exports (\$M) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Exports (%) |
|----------------|---------------------------------------|-------------------------------------|--------------------------------------|-------------------------------------|-------------------------------------|
| Lobster | 2,588 | 16.4 | 13.9 | 2.2 | 34.8 |
| Crab | 1,467 | 12.3 | 11.2 | 1.0 | 19.7 |
| Salmon | 1,049 | -11.9 | -9.6 | -2.5 | 14.1 |
| Shrimp | 446 | -5.0 | -5.8 | 0.8 | 6.0 |
| Halibut | 189 | 5.9 | 10.1 | -3.8 | 2.5 |
| Scallop | 186 | 14.3 | 16.0 | -1.5 | 2.5 |
| Eel | 165 | 83.7 | 18.3 | 55.3 | 2.2 |
| Herring | 135 | -0.8 | 4.9 | -5.4 | 1.8 |
| Clam | 132 | 9.9 | 6.8 | 2.9 | 1.8 |
| Hake | 113 | -2.5 | -10.0 | 8.3 | 1.5 |
| Other | 974 | 4.5 | 3.5 | 1.0 | 13.1 |
| Total | 7,443 | 7.5 | 1.5 | 5.9 | 100.0 |



Canada's Fish and Seafood Trade in 2019

Canada's Fish and Seafood Exports by Province and Territory

In 2019, the top fish and seafood exporting Canadian provinces were Nova Scotia (\$2.31B), New Brunswick (\$1.73B), British Columbia (\$1.41B) and Newfoundland and Labrador (\$931M), accounting for 86 per cent of Canada's total fish and seafood exports by value.

Table 4. Canada's Fish and Seafood Exports by Province and Territory, 2019

| Province and Territory | Value (\$M) | Quantity (thousand tonnes) | Main Species | Share* % |
|---------------------------|----------------|-------------------------------|--------------|----------|
| Nova Scotia | 2,310 | 161 | Lobster | 51.4 |
| | | | Crab | 12.8 |
| | | | Scallop | 6.7 |
| New Brunswick | 1,731 | 100 | Lobster | 55.6 |
| | | | Salmon | 18.2 |
| | | | Crab | 17.0 |
| British Columbia | 1,412 | 181 | Salmon | 49.6 |
| | | | Crab | 14.6 |
| | | | Hake | 7.3 |
| Newfoundland and Labrador | 931 | 103 | Crab | 44.6 |
| | | | Shrimp | 21.2 |
| | | | Lobster | 7.8 |
| Quebec | 435 | 21 | Crab | 54.5 |
| | | | Lobster | 27.2 |
| | | | Shrimp | 7.0 |
| Prince Edward Island | 326 | 23 | Lobster | 73.1 |
| | | | Mussel | 14.1 |
| | | | Crab | 4.6 |
| Other | 298 | 20 | Eel | 36.5 |
| | | | Whitefish | 7.0 |
| | | | Pickarel | 5.4 |

* Share of province's fish and seafood exports



Canada's Fish and Seafood Imports

In 2019, Canada's fish and seafood imports were valued at \$4.28B with an increase of \$299M (+8 per cent) from the previous year. Quantity of fish and seafood imports was 539 thousand tonnes with a 4 per cent increase from the previous year. Canada's fish and seafood import prices also increased 4 per cent during the same period.

Figure 13. Canada's Fish and Seafood Imports, 2015-2019



Source: Department of Fisheries and Oceans (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.

From 2015 to 2019, Canadian fish and seafood import value experienced an annual rate of growth of 5 per cent. This growth was mainly driven by annual increase of prices, as fish and seafood import prices grew 4 per cent annually. Quantity of fish and seafood imported to Canada increased 1 per cent per annum.

Canada's Fish and Seafood Trade in 2019

Table 5. Canada's Fish and Seafood Imports, 2015-2019

| Year | Value of Imports (\$B) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) |
|----------------|---------------------------------------|-------------------------------------|--------------------------------------|-------------------------------------|
| 2015 | 3.52 | 4.9 | -2.1 | 7.1 |
| 2016 | 3.77 | 7.3 | 4.3 | 2.9 |
| 2017 | 3.87 | 2.4 | 0.6 | 1.8 |
| 2018 | 3.98 | 3.0 | -2.6 | 5.8 |
| 2019 | 4.28 | 7.5 | 3.6 | 3.8 |
| Average | 3.88 | CAGR 5.0 | CAGR 1.4 | CAGR 3.5 |



Canada's Fish and Seafood Trade in 2019

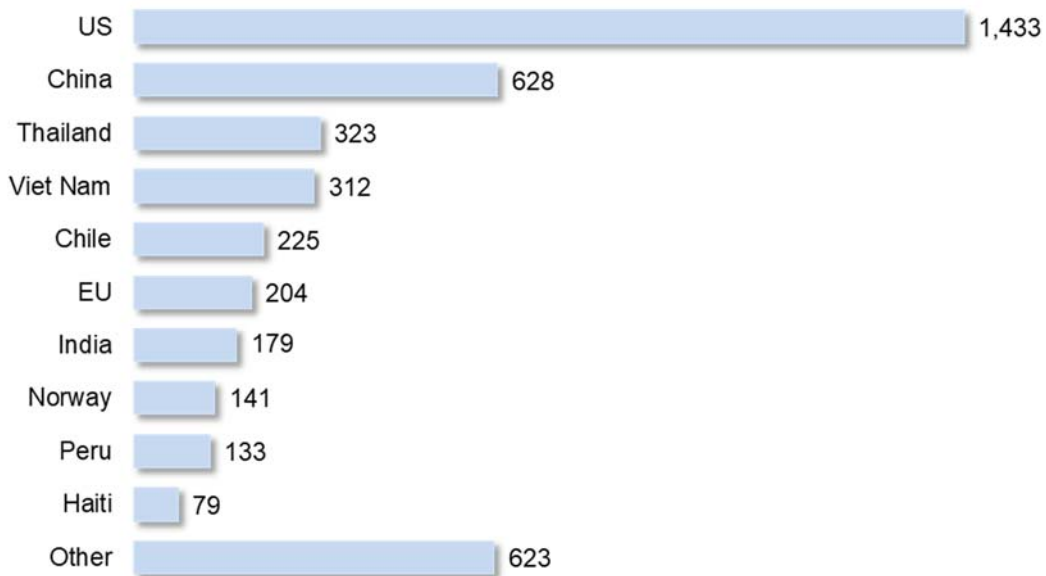
Canada's Fish and Seafood Imports by Origin

In 2019, the top three suppliers of fish and seafood to Canada in rank order of value were:

| | |
|----------|---------|
| US | \$1.43B |
| China | \$628M |
| Thailand | \$323M |

Together, these countries accounted for 56 per cent of Canada's total fish and seafood import value in 2019, with the US alone accounting for 34 per cent of total import value.

Figure 14. Canada's Fish and Seafood Imports by Origin, 2019 (\$M)



Source: Department of Fisheries and Oceans (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, Canadian fish and seafood imports from suppliers other than the top 3 were valued at \$1.89B, representing 44 per cent of Canada's total fish and seafood import value. Other important suppliers of fish and seafood to Canada in 2019 were Vietnam (\$312M), Chile (\$225M) and the EU (\$204M).



Canada's Fish and Seafood Trade in 2019

Table 6. Canada's Top 10 Fish and Seafood Imports by Origin, 2019

| Origin | Value of Imports (\$M) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Imports (%) |
|---------------|---------------------------------------|-------------------------------------|--------------------------------------|-------------------------------------|-------------------------------------|
| US | 1,433 | 4.9 | -5.0 | 10.5 | 33.5 |
| China | 628 | 12.0 | 9.5 | 2.3 | 14.7 |
| Thailand | 323 | 0.7 | 1.0 | -0.4 | 7.5 |
| Vietnam | 312 | 2.3 | 6.5 | -4.0 | 7.3 |
| Chile | 225 | -2.1 | 21.1 | -19.2 | 5.3 |
| EU | 204 | 9.9 | 9.3 | 0.6 | 4.8 |
| India | 179 | -9.6 | -25.7 | 21.6 | 4.2 |
| Norway | 141 | 41.6 | 35.3 | 4.7 | 3.3 |
| Peru | 133 | 19.6 | 31.1 | -8.8 | 3.1 |
| Haiti | 79 | 139.8 | 27.9 | 87.5 | 1.8 |
| Other | 623 | 9.0 | 5.3 | 3.6 | 14.6 |
| Total | 4,279 | 7.5 | 3.6 | 3.8 | 100.0 |



Canada's Fish and Seafood Trade in 2019

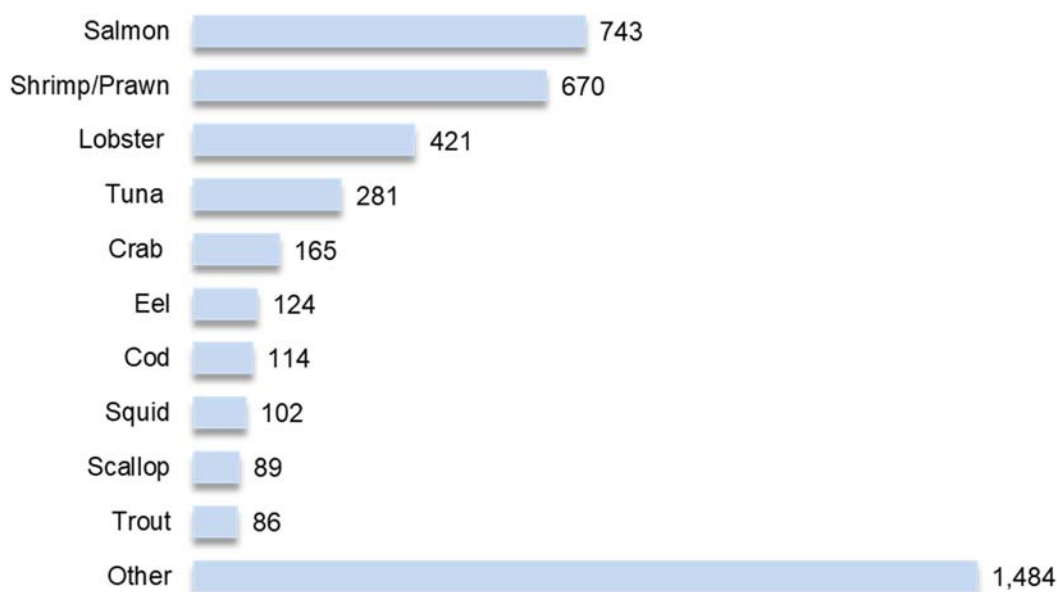
Canada's Fish and Seafood Imports by Species

In 2019, the top three species imported to Canada in rank order of value were:

| | |
|---------|--------|
| salmon | \$743M |
| shrimp | \$670M |
| lobster | \$421M |

Together, these species accounted for 43 per cent of Canada's total fish and seafood import value in 2019.

Figure 15. Canada's Fish and Seafood Imports by Species, 2019 (\$M)



Source: Department of Fisheries and Oceans (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.

The US (55 per cent) and Chile (22 per cent) were Canada's main providers of salmon in 2019, with import values of \$409M and \$163M respectively. Imports of salmon to Canada consisted primarily of fillets of salmon, either fresh (26 per cent by value) or frozen (19 per cent).

In 2019, the top suppliers by value of shrimp to Canada were Vietnam (30 per cent), India (25 per cent), China (16 per cent) and Thailand (14 per cent). By value, most shrimp imported to Canada in 2019 were frozen aquaculture shrimps.

With 99 per cent of total lobster import value to Canada, the US (\$417M in 2019) is considered the sole provider of lobster to Canada. Large quantities of live lobster are in fact imported to Canada from the US for processing into products which are then destined for export back to the US market.



Canada's Fish and Seafood Trade in 2019

Homarus americanus comprises practically all the global supply of *Homarus* lobster and is caught almost entirely in Canada and the US. Small amounts of another *Homarus* species of lobster, the European lobster (*Homarus gammarus*), are also caught in the EU. Unlike rock or spiny lobsters¹³ which have no large edible claws, the *Homarus* species of lobster is clawed and the meat in its claws and body is commercialized in addition to the tail. In contrast, the rock or spiny lobster only has marketable meat in its tail. Another clawed lobster species, the Norway lobster¹⁴, also forms an important global catch, but the species is much smaller and is sold separately on markets, mainly within the EU.

In 2019, Canadian imports of species other than salmon, shrimp and lobster were valued at \$2.45B or 57 per cent of Canada's total fish and seafood import value. The main other species imported in 2019 were tuna (\$281M), crab (\$165M) and eel (\$124M).

Table 7. Canada's Top 10 Fish and Seafood Imports by Species, 2019

| Species | Value of Imports (\$M) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Imports (%) |
|--------------|------------------------|----------------------|-----------------------|----------------------|----------------------|
| Salmon | 743 | 10.6 | 11.5 | -0.8 | 17.4 |
| Shrimp | 670 | -2.7 | -0.5 | -2.3 | 15.7 |
| Lobster | 421 | 8.0 | -12.6 | 23.7 | 9.8 |
| Tuna | 281 | -2.3 | -0.4 | -2.0 | 6.6 |
| Crab | 165 | -0.9 | -16.3 | 18.4 | 3.8 |
| Eel | 124 | 116.0 | -7.5 | 133.6 | 2.9 |
| Cod | 114 | 8.5 | 35.0 | -19.6 | 2.7 |
| Squid | 102 | 11.8 | 8.1 | 3.4 | 2.4 |
| Scallop | 89 | 1.5 | 4.9 | -3.2 | 2.1 |
| Trout | 86 | 14.7 | 6.4 | 7.8 | 2.0 |
| Other | 1,484 | 9.2 | 4.2 | 4.8 | 34.7 |
| Total | 4,279 | 7.5 | 3.6 | 3.8 | 100.0 |

¹³ Of the *Palinuridae* family

¹⁴ *Nephrops norvegicus*



Canada's Fish and Seafood Trade in 2019

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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