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CANADA'S FISH AND SEAFOOD TRADE WITH THE PEOPLE'S REPUBLIC OF CHINA, 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 China, 2019

Highlights

- Canada's fish and seafood exports to China (Canada's second largest export destination by value after the US) were valued at **\$1.31B**¹ in 2019, accounting for 18 per cent of total Canadian fish and seafood exports by value.
- Canadian fish and seafood export value to China increased 12 per cent (+\$136M) between 2018 and 2019.
- Quantity of exports was 133 thousand tonnes with a 12 per cent increase from 2018, while fish and seafood export prices to China remained almost the same as in 2018 (a less than 1 per cent decrease).

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

| Species | Value of Exports (\$M) | Change ² of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share ³ of Exports (%) | CAGR ⁴ of Value (%) |
|--------------|------------------------|-----------------------------------|-----------------------|----------------------|-----------------------------------|--------------------------------|
| Lobster | 509 | 70.2 | 73.9 | -2.1 | 19.6 | 40.9 |
| Crab | 266 | -17.9 | -17.1 | -1.0 | 18.2 | 6.4 |
| Shrimp | 185 | -9.6 | -4.2 | -5.6 | 41.5 | 6.0 |
| Other | 346 | 1.1 | 9.8 | -7.9 | 11.8 | 20.0 |
| Total | 1,306 | 11.6 | 12.1 | -0.4 | 17.6 | 19.1 |

- Top species exported to China were **lobster**⁵ (\$509M), **crab**⁶ (\$266M) and **shrimp** (\$185M), accounting for 73 per cent of total Canadian fish and seafood export value to China.
- Main other species exported to China were clams (\$81M), halibut (\$36M) and geoduck (\$36M).
- Top exporting provinces were **Nova Scotia** (\$726M), **British Columbia** (\$293M) and **Newfoundland and Labrador** (\$192M).
- Canada's fish and seafood imports from China were valued at \$628M, representing 15 per cent of total Canadian fish and seafood imports by value. The top imported species by value were shrimp (\$110M), haddock (\$55M) and squid (\$52M).

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 Lobster refers to the *Homarus* species.

⁶ Canadian exports of crab refer to snow crab, Dungeness crab and unspecified crab species.



Acronyms and Notes

| | |
|-------------|---|
| CAGR | Compound annual growth rate |
| 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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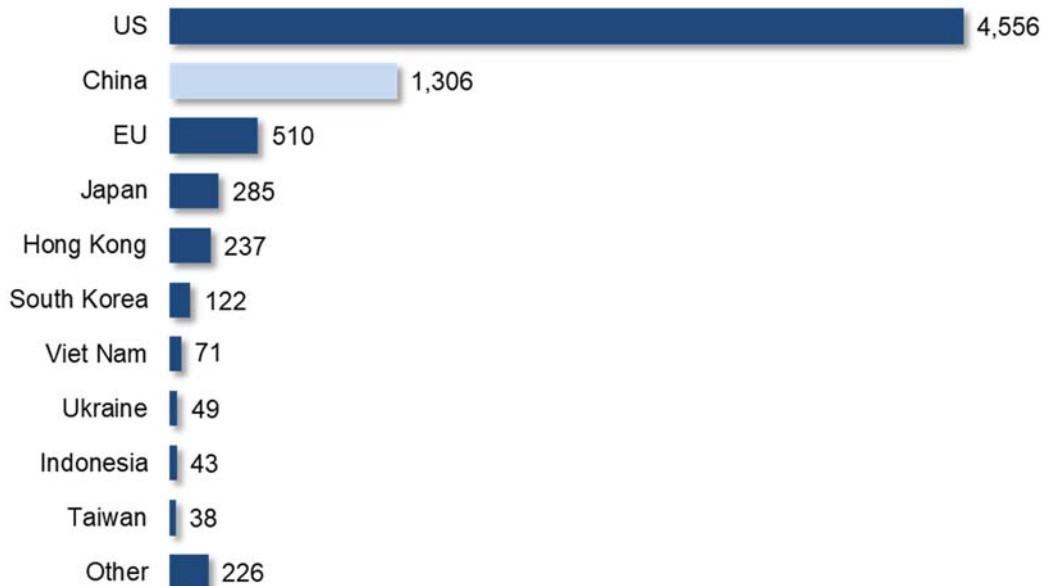
Canada's Fish and Seafood Exports

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 China

In 2019, Canada's fish and seafood exports to China were valued at \$1.31B, representing 18 per cent of total Canadian fish and seafood exports by value.

Canadian fish and seafood export value to China increased 12 per cent (+\$136M) between 2018 and 2019. In 2019, the exported quantity of fish and seafood to China was 133 thousand tonnes with a 12 per cent increase from the previous year, while fish and seafood export prices to China remained almost the same as in 2018 (less than 1 per cent decrease).

Figure 2. Canada's Fish and Seafood Exports to China, 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.

Since 2015, Canadian fish and seafood exports to China increased at an annual growth rate of 19 per cent driven by both price and quantity increases, as fish and seafood export prices and quantity both grew by 9 per cent annually.

Canada's Fish and Seafood Trade with China, 2019

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

| Year | Value of Exports (\$B) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Exports (%) |
|---------|------------------------|----------------------|-----------------------|----------------------|----------------------|
| 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 | 24.7 | 5.7 | 17.9 | 13.9 |
| 2018 | 1.17 | 22.8 | 7.2 | 14.6 | 16.9 |
| 2019 | 1.31 | 11.6 | 12.1 | -0.4 | 17.6 |
| Average | 0.97 | CAGR 19.1 | CAGR 9.4 | CAGR 8.9 | 14.2 |

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 third and fourth most valuable destination markets respectively. In 2019, China maintained its position as the second most valuable export destination for Canada's fish and seafood, while the US remained, by far, the largest export destination.

In 2019, China (\$24.6B) became the world's third largest fish and seafood importer by value after the EU (\$40.5B) and the US (\$31.2B), overtaking Japan (\$20.6B).⁷ Canada was the fifth largest supplier of fish and seafood to China by value, providing 6 per cent of China's fish and seafood imports, following Russia (12 per cent), Ecuador (10 per cent), Peru (8 per cent) and India (7 per cent).⁸ 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.⁹

⁷ Retrieved March 9, 2020 via the Global Trade Tracker.

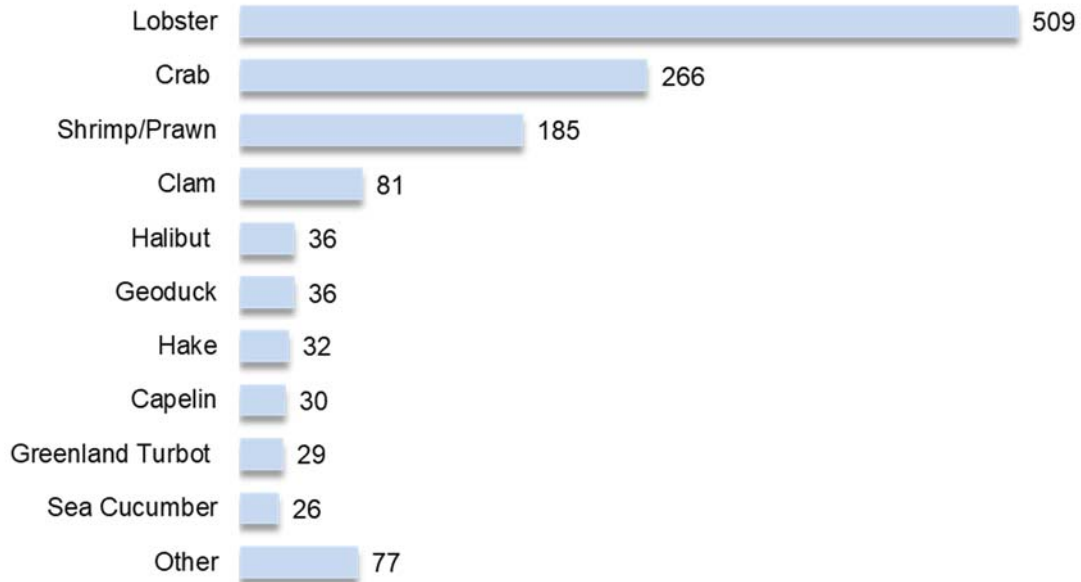
⁸ China's reported import statistics collected by China Customs, retrieved March 9, 2020 via the Global Trade Tracker. Import data reported by one country may differ from the reported exports of its trade partners..

⁹ 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 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.

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



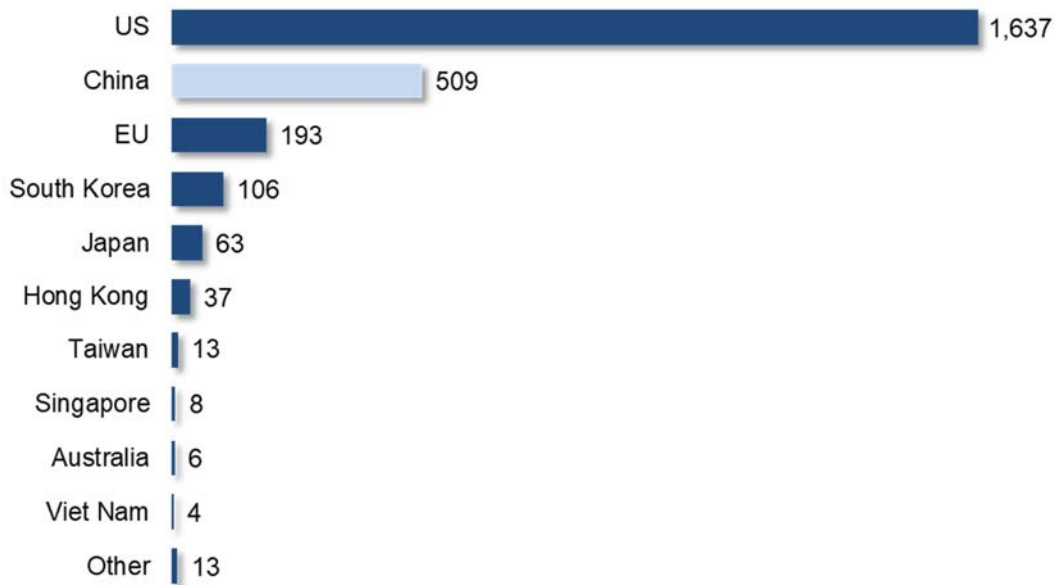
Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Canada's Fish and Seafood Trade with China, 2019

Lobster (largest export)

In 2019, Canada's lobster exports to China were valued at \$509M, representing 20 per cent of Canada's total lobster export value. China maintained its position as the second most valuable export destination for Canadian exports of lobster, while the US (\$1.64B) remained, by far, the largest export destination.

Figure 4. 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.

In 2019, Canada was essentially the only supplier of live lobster¹⁰ to China, with 97 per cent of China's import market share¹¹. Canada and the US have previously shared more equally in supplying China's live lobster import market. However, recent years have been marked by US-China trade disputes and tariff escalation between the two countries. The value of the US live lobster¹² market share in China has plummeted from 41 per cent in 2017, to 27 per cent in 2018, to only 2 per cent in 2019.¹³ 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.

Nova Scotia (\$461M) was by far the main province exporting lobster to China, with 91 per cent of Canada's lobster export value to China in 2019, followed by Prince Edward Island (\$22M) and New Brunswick (\$19M).

¹⁰ HS Code 030632 (live *Homarus* lobsters)

¹¹ China's reported import statistics collected by China Customs, retrieved March 9, 2020 via the Global Trade Tracker

¹² HS Code 030632 (live *Homarus* lobsters)

¹³ China's reported import statistics collected by China Customs, retrieved March 9, 2020 via the Global Trade Tracker

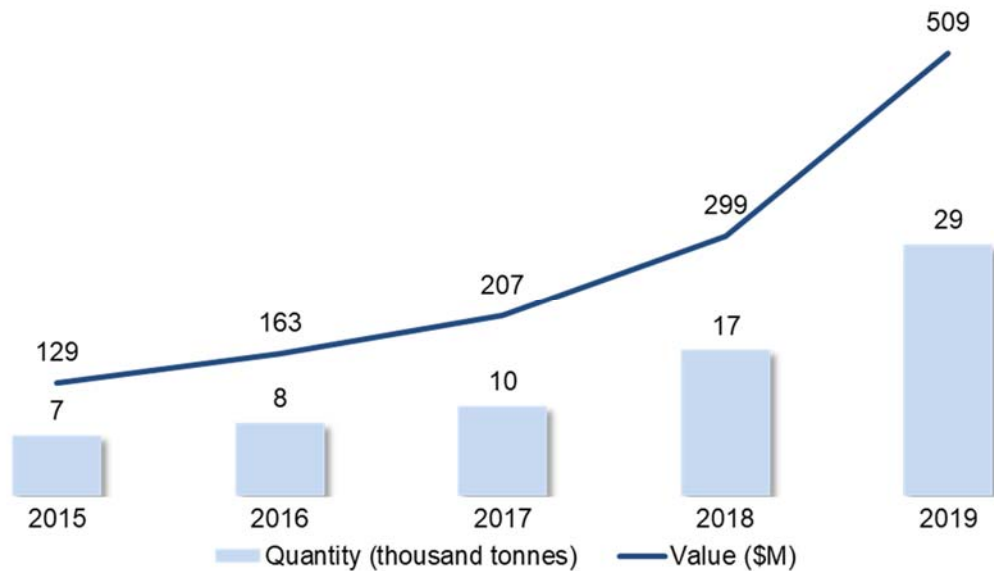


Canada's Fish and Seafood Trade with China, 2019

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.

From 2015 to 2019, lobster was one of Canada's largest growing fish and seafood exports to China by value. With a 41 per cent compound annual growth rate, the value of Canadian exports of lobster to China almost quadrupled in recent years, from \$129M in 2015 to \$509M in 2019. This growth in export value was mainly attributable to a 43 per cent annual increase in the quantity of lobster exported while export prices of lobster have declined, on average, 2 per cent annually since 2015.

Figure 5. Canada's Lobster Exports to China, 2015-2019

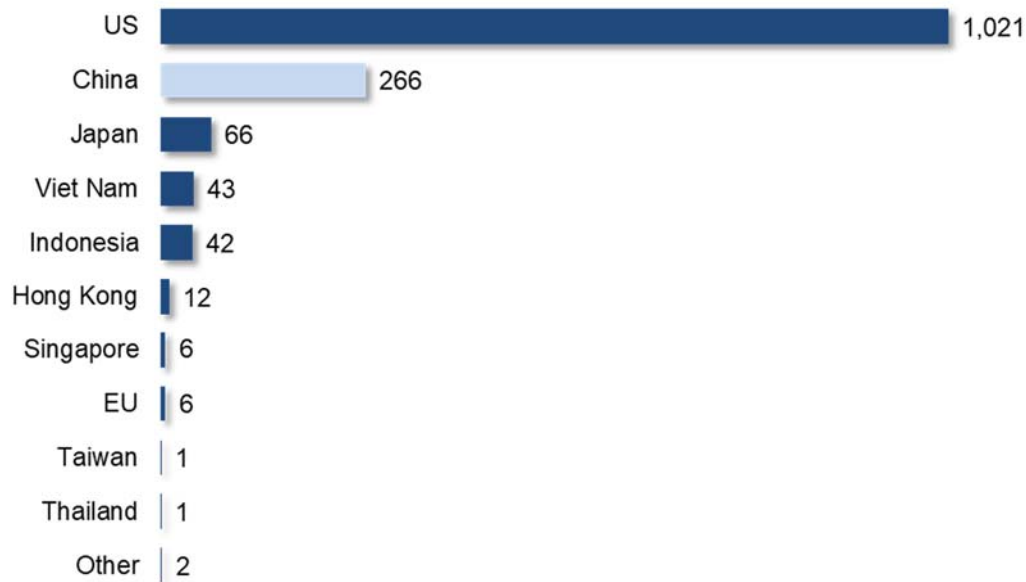


Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Crab (2nd largest export)

In 2019, Canada's crab exports to China were valued at \$266M, representing 18 per cent of Canada's total crab exports by value. China ranked second, behind the US (\$1.02B) as an export destination for Canada's crab. Canadian crab exports to China were a combination of fresh (59 per cent by value in 2019) and frozen (41 per cent) product. China is the primary destination of Canada's live or fresh crab (78 per cent by value and 63 per cent by volume).

Figure 6. 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.

British Columbia (\$160M), Nova Scotia (\$51M) and Newfoundland and Labrador (\$34M) were the main provinces exporting crab products to China, accounting for 92 per cent of Canada's crab export value to China in 2019. British Columbia's exports of crab to China consisted principally of fresh Dungeness crab, while Nova Scotia and Newfoundland and Labrador mostly exported frozen snow crab. By value, China is the destination for approximately 80 per cent of British Columbia's crab exports.

Canada's crab export value to China experienced a 18 per cent decrease (-\$58M) between 2018 and 2019. This decline was mostly attributable to a decrease in quantity exported (-17 per cent) as export prices of crab to China experienced a 1 per cent drop during the same period.

Crab exports to China increased dramatically from 2015 to 2017, mainly due to a rapid increase in price. Despite weakening exports since 2017, Canada's crab export value to

Canada's Fish and Seafood Trade with China, 2019

China has nonetheless increased at a compound annual growth rate of 6 per cent from 2015 to 2019. During the same period, quantity of crab exported to China decreased 3 per cent annually, while export prices increased 10 per cent per annum.

Figure 7. Canada's Crab Exports to China, 2015-2019



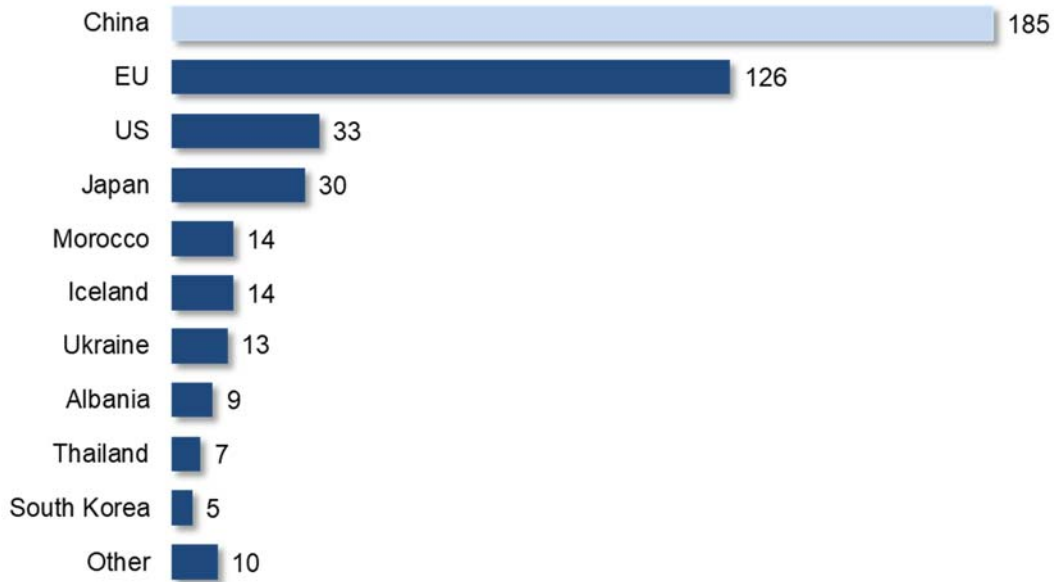
Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.



Shrimp (3rd largest export)

In 2019, China (\$185M) remained the largest export destination for Canadian shrimp, representing 42 per cent of Canada's total shrimp export value. The value of Canada's shrimp exports to China overtook those to the EU in 2017.

Figure 8. Canada's Shrimp 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.

By value, essentially all (98 per cent in 2019) of Canada's shrimp exports to China were frozen cold-water shrimps. According to statistics from China's customs authority, Canada was China's largest source for frozen cold-water shrimps¹⁴ in 2019 (46 per cent of import market share by value), followed by Greenland (29 per cent) and Russia (12 per cent).¹⁵

In 2019, Newfoundland and Labrador (\$82M) and Nova Scotia (\$77M) were the only provinces exporting shrimp products to China.

From 2018 to 2019, Canada's value of shrimp exports to China decreased 10 per cent (-\$20M). Quantity exported decreased 4 per cent and export prices of shrimp to China fell 6 per cent during the same period.

Despite the recent decline, Canada's shrimp exports to China grew at an annual rate of 6 per cent by value between 2015 and 2019. Shrimp export prices to China increased

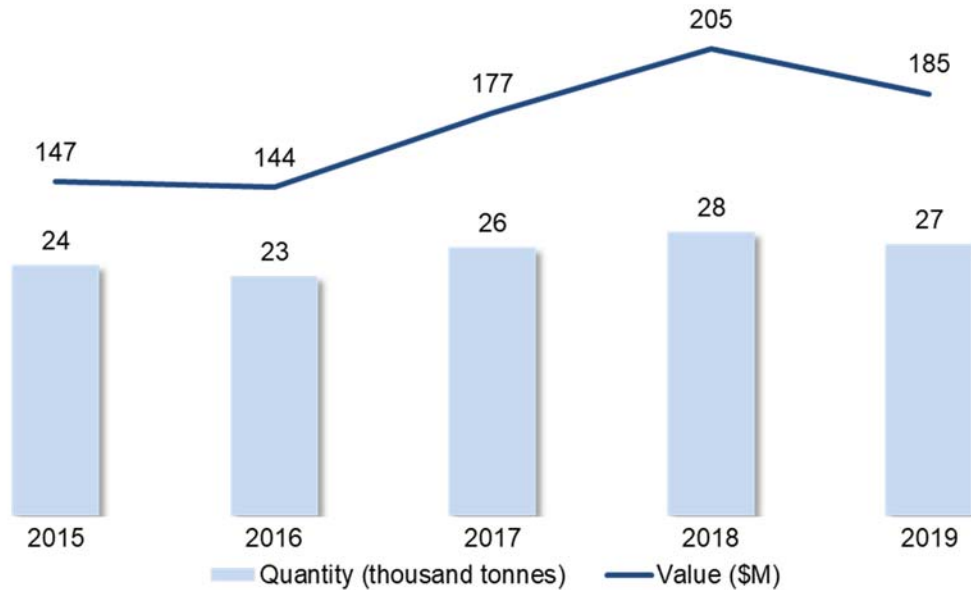
¹⁴ HS Code 030616

¹⁵ China's reported import statistics collected by China Customs, retrieved March 9, 2020 via the Global Trade Tracker.

Canada's Fish and Seafood Trade with China, 2019

4 per cent annually, while quantity exported experienced an yearly rate of growth of 2 per cent during the same period.

Figure 9. Canada's Shrimp Exports to China, 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 shrimp to China were valued at \$346M, representing 27 per cent of Canada's total fish and seafood export value to China. The main other species exported to China in 2019 were clam¹⁶ (\$81M), halibut (\$36M) and geoduck (\$36M).

In 2019, Canada's exports of clam to China represented 61 per cent of the value of Canada's total exports of clam. China was the main export destination for Canada's clams, followed by the US (\$36M). By value, most clam exports to China were frozen clams. Nova Scotia (\$78M) was virtually the only province exporting clam to China.

Canada also exported halibut, geoduck, hake and capelin to China, with significant increase in export values and quantities between 2018 and 2019. Notably, 58 per cent of Canada's (British Columbia) geoduck export value was destined to China in 2019.

¹⁶ all other clams excluding geoduck

Canada's Fish and Seafood Trade with China, 2019

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

| Species | Value of Exports (\$M) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Exports (%) |
|------------------|---------------------------------------|-------------------------------------|--------------------------------------|-------------------------------------|-------------------------------------|
| Lobster | 509 | 70.2 | 73.9 | -2.1 | 19.6 |
| Crab | 266 | -17.9 | -17.1 | -1.0 | 18.2 |
| Shrimp | 185 | -9.6 | -4.2 | -5.6 | 41.5 |
| Clam | 81 | 25.2 | 22.7 | 2.1 | 61.0 |
| Halibut | 36 | 23.9 | 27.6 | -3.0 | 18.9 |
| Geoduck | 36 | 19.0 | 21.3 | -1.9 | 58.1 |
| Hake | 32 | 51.7 | 26.3 | 20.2 | 28.5 |
| Capelin | 30 | 53.2 | 60.6 | -4.6 | 45.0 |
| Greenland Turbot | 29 | -14.3 | -8.0 | -6.9 | 76.6 |
| Sea Cucumber | 26 | 26.9 | 9.5 | 15.8 | 59.7 |
| Other | 77 | -37.9 | -16.3 | -25.8 | 3.4 |
| Total | 1,306 | 11.6 | 12.1 | -0.4 | 17.6 |



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

In 2019, Nova Scotia continued to be the top exporting province of fish and seafood products to China. The province exported \$726M worth of fish and seafood products to China, with lobster (\$461M), clam (\$78M) and shrimp (\$77M) as the main species exported by value. The other top exporting provinces in 2019 were British Columbia (\$293M) and Newfoundland and Labrador (\$192M). A significant portion of British Columbia's fish and seafood exports to China in 2019 were Dungeness crab (\$160M). Within the same year, the majority of Newfoundland and Labrador's fish and seafood exports to China were shrimp (\$82M).

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

| Province and Territory | Value (\$M) | Quantity (thousand tonnes) | Main Species | Share* % |
|---------------------------|-------------|----------------------------|------------------|----------|
| Nova Scotia | 726 | 57 | Lobster | 63.5 |
| | | | Clam | 10.8 |
| | | | Shrimp | 10.6 |
| British Columbia | 293 | 35 | Crab | 54.5 |
| | | | Geoduck | 12.2 |
| | | | Hake | 11.0 |
| Newfoundland and Labrador | 192 | 34 | Shrimp | 42.6 |
| | | | Crab | 17.6 |
| | | | Greenland turbot | 14.2 |
| New Brunswick | 40 | 3 | Lobster | 47.1 |
| | | | Crab | 41.5 |
| | | | Salmon | 8.5 |
| Prince Edward Island | 22 | 1 | Lobster | 99.2 |
| | | | Mussel | 0.8 |
| | | | Oyster | 0.1 |
| Quebec | 15 | 2 | Crab | 24.3 |
| | | | Halibut | 16.8 |
| | | | Lobster | 13.7 |
| Other | 18 | 1 | Eel | 40.5 |
| | | | Lobster | 18.1 |
| | | | Whitefish | 16.8 |

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

Canada's Fish and Seafood Imports from China

In 2019, Canada continued to be a net exporter of fish and seafood products to China, with imports from China to Canada worth \$628M. With 15 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 2019, Canadian fish and seafood import value from China increased 12 per cent (+\$67M) relative to 2018. Quantity of imports was 76 thousand tonnes with a 9 per cent increase since the previous year, while fish and seafood import prices from China increased 2 per cent during the same period.

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

| Year | Value of Imports (\$M) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) |
|---------|------------------------|----------------------|-----------------------|----------------------|
| 2015 | 466 | 0.2 | -13.0 | 15.1 |
| 2016 | 544 | 16.9 | 20.0 | -2.7 |
| 2017 | 557 | 2.3 | -2.2 | 4.6 |
| 2018 | 561 | 0.7 | -3.7 | 4.7 |
| 2019 | 628 | 12.0 | 9.5 | 2.3 |
| | | CAGR | CAGR | CAGR |
| Average | 551 | 7.8 | 5.5 | 2.2 |

In 2019, the top species imported from China were shrimp (\$110M), haddock (\$55M) and squid (\$52M). 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, following Vietnam (\$201M) and India (\$169M).

China was the principal supplier of haddock and squid to Canada by value. In 2019, China provided essentially all (91 per cent) of Canada's total imports of haddock by value. Haddock imported from China to Canada consisted mostly of frozen fillets of haddock (88 per cent by value in 2019).

In 2019, China was Canada's top supplier of squid (51 per cent by value) followed by Thailand (16 per cent) and Taiwan (10 per cent). In 2019, 92 per cent of Canada's import value of squid from China was frozen.

Canada's Fish and Seafood Trade with China, 2019

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

| Species | Value of Imports (\$M) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Imports (%) |
|----------------|---------------------------------------|-------------------------------------|--------------------------------------|-------------------------------------|-------------------------------------|
| Shrimp | 110 | -3.5 | 0.9 | -4.3 | 16.5 |
| Haddock | 55 | 23.7 | 12.8 | 9.7 | 90.8 |
| Squid | 52 | 18.2 | 17.4 | 0.7 | 51.0 |
| Cod | 39 | -3.7 | -10.5 | 7.7 | 34.6 |
| Salmon | 35 | 4.2 | 5.9 | -1.7 | 4.7 |
| Sole | 27 | 6.9 | -2.3 | 9.4 | 90.3 |
| Tilapia | 20 | 45.3 | 39.7 | 4.0 | 37.6 |
| Scallop | 20 | -6.7 | 1.1 | -7.8 | 22.4 |
| Eel | 16 | 26.7 | -5.0 | 33.4 | 13.2 |
| Halibut | 16 | 16.1 | 85.0 | -37.3 | 27.2 |
| Other | 238 | 20.6 | 13.2 | 6.5 | 10.6 |
| Total | 628 | 12.0 | 9.5 | 2.3 | 14.7 |

Note: In preparing this document, the authors have taken care to provide information that is timely and accurate at the time of publication. Since trade 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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