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Canada

CANADA'S FISH AND SEAFOOD TRADE WITH THE EUROPEAN UNION, 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 the European Union, 2019

Highlights

- Canada's fish and seafood exports to the EU (Canada's third largest export destination by value after the US and China) were valued at **\$510M**¹ in 2019, accounting for 7 per cent of total Canadian fish and seafood exports by value.
- Canadian fish and seafood export value to the EU increased 13 per cent (+\$59M) between 2018 and 2019.
- Quantity of exports was 52 thousand tonnes with a 6 per cent increase from the previous year, while fish and seafood export prices have increased 7 per cent during the same period.

Canada's Top 3 Fish and Seafood Exports to the EU, 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	193	11.5	13.7	-2.0	7.4	3.1
Shrimp	126	1.4	-2.8	4.3	28.2	-15.1
Scallop	60	66.0	71.0	-3.0	32.4	2.3
Other	131	11.2	4.7	6.2	3.1	4.6
Total	510	13.0	6.0	6.6	6.9	-3.0

- Top species exported to the EU were **lobster**⁵ (\$193M), **shrimp** (\$126M) and **scallop** (\$60M), accounting for 74 per cent of total Canadian fish and seafood export value to the EU.
- Main other species exported were salmon (\$23M), hake (\$21M) and cod (\$18M).
- Top exporting provinces were **Nova Scotia** (\$234M), **Newfoundland and Labrador** (\$114M) and **British Columbia** (\$52M).
- Canada continued to be a net exporter of fish and seafood products to the EU, with imports from the EU to Canada worth \$204M. With 5 per cent of Canada's total fish and seafood imports by value, the EU ranked 6th amongst Canada's reported fish and seafood suppliers. The top imported species by value were salmon (\$41M), tuna (\$27M) and trout (\$12M).

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.

Acronyms and Notes

CAGR	Compound annual growth rate
CETA	Canada-European Union Comprehensive Economic and Trade Agreement
DFO	Department of Fisheries and Oceans Canada
EU	European Union
UK	United Kingdom
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.
- 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.

Table of Contents

Acronyms and Notes	i
Canada's Fish and Seafood Exports	1
Canada's Fish and Seafood Exports to the EU	2
Canada's Fish and Seafood Exports to the EU by Species.....	4
Lobster (largest export)	5
Shrimp (2 nd largest export)	7
Scallop (3 rd largest export)	9
Other Species	10
Canada's Fish and Seafood Exports to the EU by Province and Territory	12
Canada's Fish and Seafood Imports from the EU	13

List of Tables

Table 1. Canada's Fish and Seafood Exports to the EU, 2015-2019	3
Table 2. Canada's Top 10 Fish and Seafood Exports to the EU, 2019	11
Table 3. Canada's Fish and Seafood Exports to the EU by Province and Territory, 2019	12
Table 4. Canada's Fish and Seafood Imports from the EU, 2015-2019	13
Table 5. Canada's Top 10 Fish and Seafood Imports from the EU, 2019	14

List of Figures

Figure 1. Canada's Fish and Seafood Exports by Destination, 2019 (\$M)	1
Figure 2. Canada's Fish and Seafood Exports to the EU, 2015-2019	2
Figure 3. Canada's Top 10 Fish and Seafood Exports to the EU, 2019 (\$M).....	4
Figure 4. Canada's Lobster Exports by Destination, 2019 (\$M).....	5
Figure 5. Canada's Lobster Exports to the EU, 2015-2019	6
Figure 6. Canada's Shrimp Exports by Destination, 2019 (\$M).....	7
Figure 7. Canada's Shrimp Exports to the EU, 2015-2019.....	8
Figure 8. Canada's Scallop Exports by Destination, 2019 (\$M)	9
Figure 9. Canada's Scallop Exports to the EU, 2015-2019	10

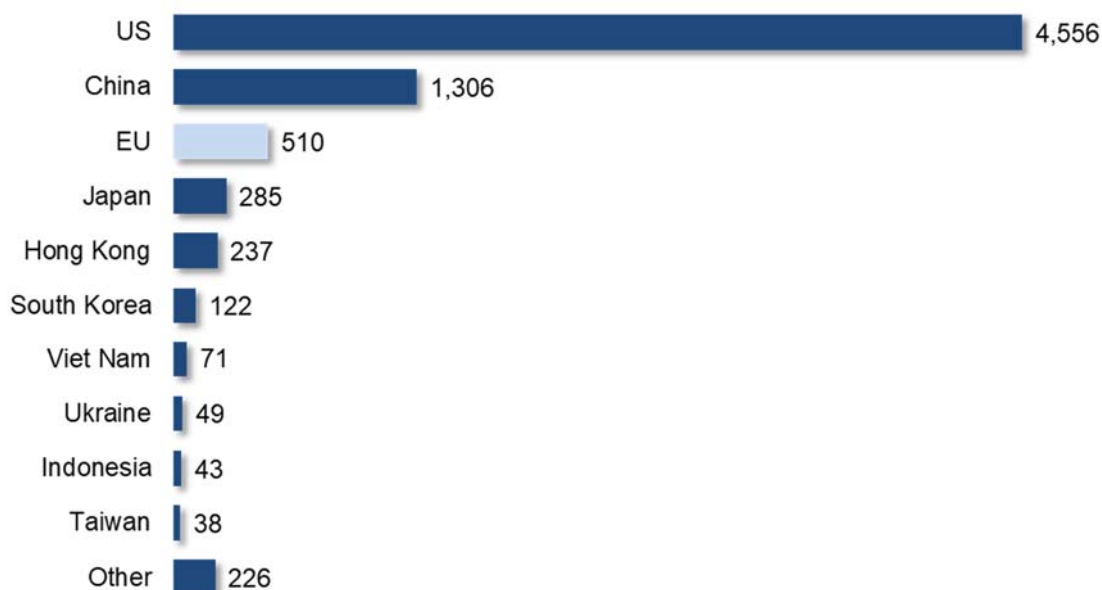
Canada's Fish and Seafood Exports

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)



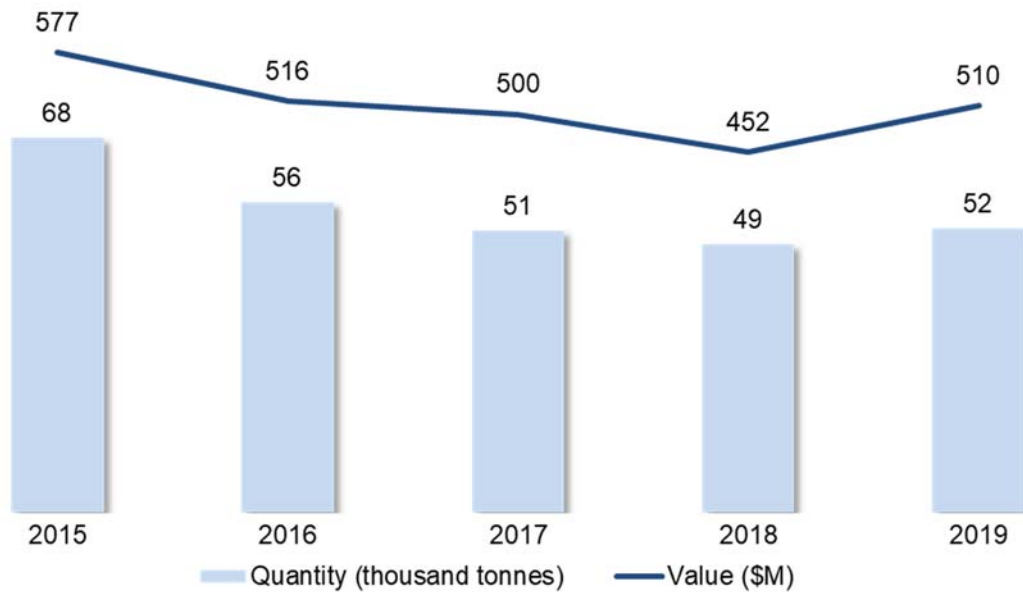
Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Canada's Fish and Seafood Exports to the EU

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

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 have increased 7 per cent during the same period.

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

The increase from 2018 to 2019 reversed a trend of decline that was mostly attributable to a drop in the quantity of shrimp exported, coincident with a decline in Canadian shrimp harvest. Strong and growing demand in China and other parts of Asia may also have drawn Canadian products, including shrimp, away from the EU. However, stronger exports to the EU of Canadian lobster and scallop in 2019 contributed to halting the decline, possibly supported by the coming into force of the Canada-EU Comprehensive Economic and Trade Agreement (CETA) in late 2017.

Despite positive growth in 2019, the value of Canadian fish and seafood exports to the EU have, overall, decreased at an annualized rate of 3 per cent between 2015 and 2019. This decline was mostly attributable to a decrease in quantity of fish and seafood

CANADA'S FISH AND SEAFOOD TRADE WITH THE EUROPEAN UNION, 2019

exported (- 7 per cent annually) as average export prices of fish and seafood to the EU experienced an annual 4 per cent increase during the same period.

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

Year	Value of Exports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Exports (%)
2015	577	25.8	12.5	11.8	9.7
2016	516	-10.7	-17.2	7.9	7.9
2017	500	-3.1	-9.1	6.6	7.3
2018	452	-9.6	-4.8	-5.1	6.5
2019	510	13.0	6.0	6.6	6.9
		CAGR	CAGR	CAGR	
Average	511	-3.0	-6.6	3.9	7.6

In 2019, the EU remained the third top destination for Canada's fish and seafood exports by value, following behind the US, which is by far the largest fish and seafood export destination for Canada, and China. It was in 2012 that Canada's fish and seafood exports to China overtook those to the EU.

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, accounting for 20 per cent of Canadian fish and seafood exports to the EU.

In 2019, the EU remained the world's largest fish and seafood importer (\$40.5B), followed by the US (\$31.2B), China (\$24.6B) and Japan (\$20.6B).⁶ Canada was the 16th largest supplier of fish and seafood to the EU, providing 2 per cent of the EU's fish and seafood imports by value. This represented a drop from the tenth place held in 2015. The top fish and seafood suppliers to the EU were Norway (26 per cent) followed by China (8 per cent) and Iceland (5 per cent)⁷, although most of the EU's total trade of fish and seafood occurs within its borders among member states. Historically, well-established trade ties amongst the EU member states and tariffs make it more difficult for foreign producers to gain and maintain a market share in the EU's fish and seafood sector.

However, 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

⁶ Retrieved March 9, 2020 via the Global Trade Tracker.

⁷ The EU's import statistics were collected by Eurostat, 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.

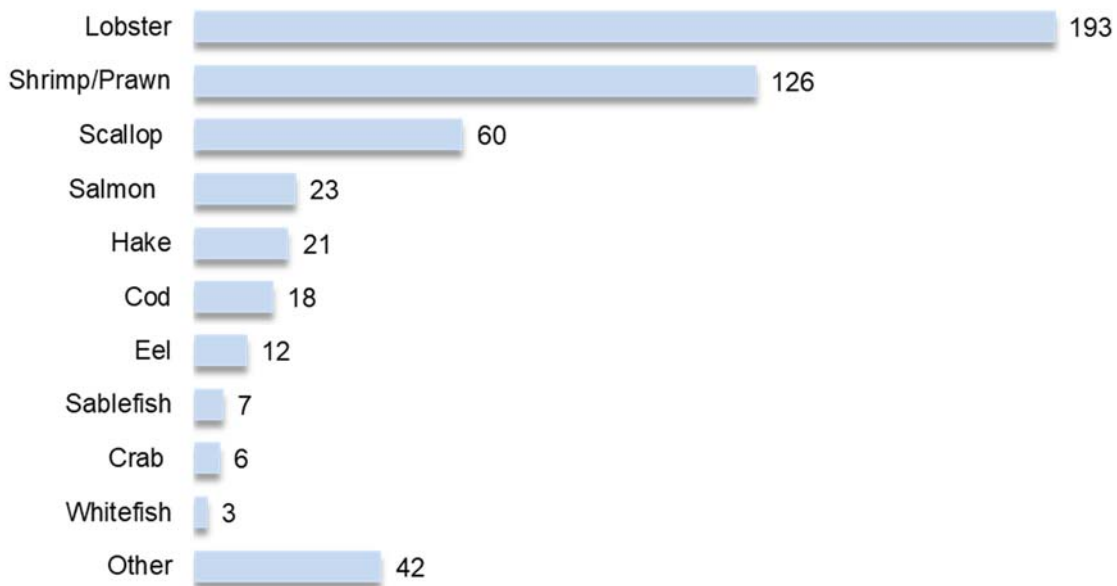
CANADA'S FISH AND SEAFOOD TRADE WITH THE EUROPEAN UNION, 2019

EU market of more than 510 million people. Nonetheless, 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.

Canada's Fish and Seafood Exports to the EU by Species

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



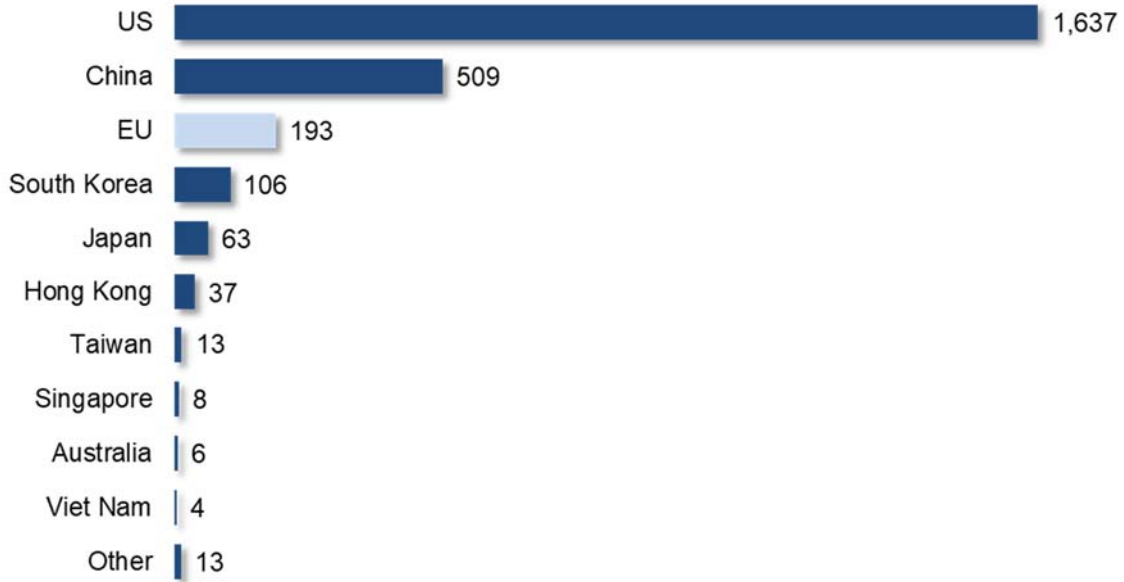
Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.



Lobster (largest export)

In 2019, lobster exports to the EU were valued at \$193M, representing 7 per cent of Canada's total lobster exports by value. The EU ranked third, behind the US (\$1.64B) and China (\$509M), in Canada's reported export value of lobster.

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 remained the top supplier of lobster⁸ by value to the EU (81 per cent) followed by the US (19 per cent). Notably, this proportion changed following implementation of CETA, from 57 per cent for Canada and 42 per cent for the US in 2017.⁹

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, sharing respectively 18 per cent and 12 per cent of Canada's total lobster export value to the EU. 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.

In 2019, Canada's value of lobster exports to the EU increased 11 per cent (+\$20M) from the previous year. This growth was mostly attributable to an increase in quantity

⁸ HS codes: 030612, 030632 and 030692

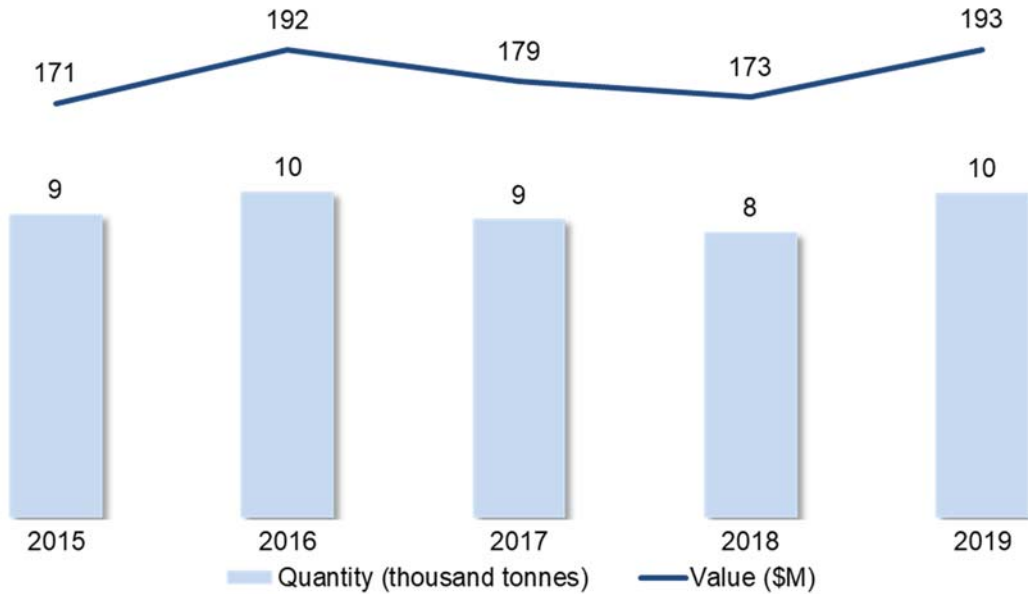
⁹ The EU's import statistics collected by Eurostat, retrieved March 9, 2020 via the Global Trade Tracker.

CANADA'S FISH AND SEAFOOD TRADE WITH THE EUROPEAN UNION, 2019

exported (+14 per cent) as export prices of lobster to the EU experienced a 2 per cent decrease during the same period.

Canada's lobster export value to the EU has shown little trend, the net effect between 2015 and 2019 being an annual growth rate of 3 per cent. During the same period, quantity of lobster exported to the EU increased 2 per cent annually, while exports prices increased 1 per cent.

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



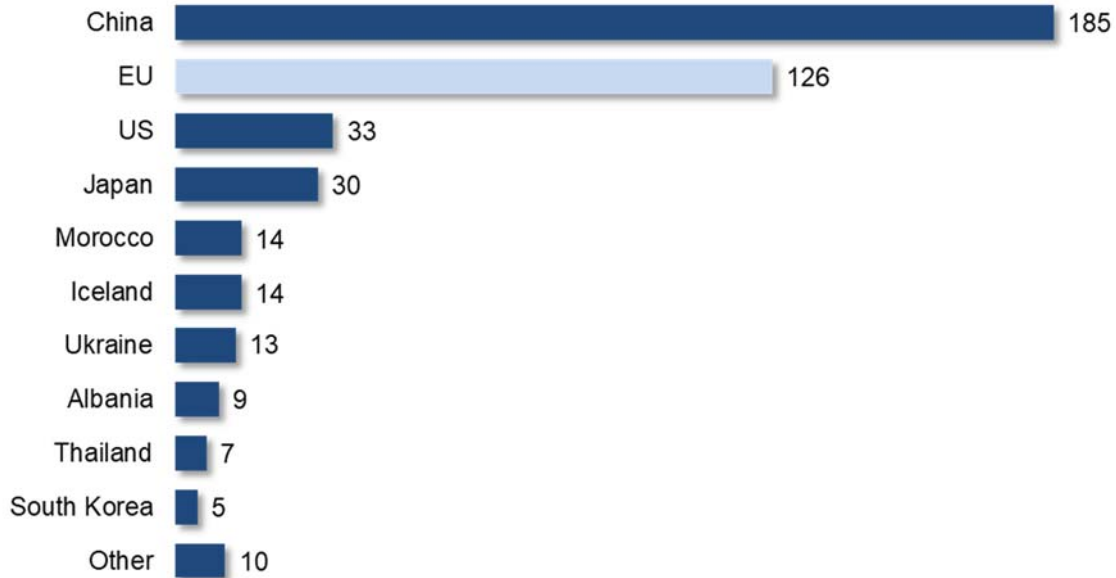
Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020. Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.



Shrimp (2nd largest export)

Canadian shrimp exports to the EU were valued at \$126M in 2019. In 2017, Canada's shrimp exports to China overtook those to the EU, the latter now remaining the second destination in importance for Canadian shrimp exports by value. The EU however remained a key market for Canadian shrimp accounting for 28 per cent of Canada's total shrimp exports by value in 2019.

Figure 6. 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, Denmark (\$76M) and the UK (\$34M) were the main destinations among EU members for Canada's shrimp exports, accounting respectively for 61 per cent and 27 per cent of Canada's shrimp export value to the EU in 2019.

With 53 per cent of the value of shrimp exports in 2019, Newfoundland and Labrador (\$67M) remained the principal exporting province of shrimp products to the EU. It was followed by Nova Scotia (\$40M) and Quebec (\$18M).

The majority of Canadian shrimp exports to the EU were frozen cold-water shrimps (67 per cent by value in 2019). By value, Canada was the EU's second largest supplier of frozen cold-water shrimps¹⁰ in 2019, with 12 per cent of the import market share, following Greenland (80 per cent).¹¹

¹⁰ HS code 030616

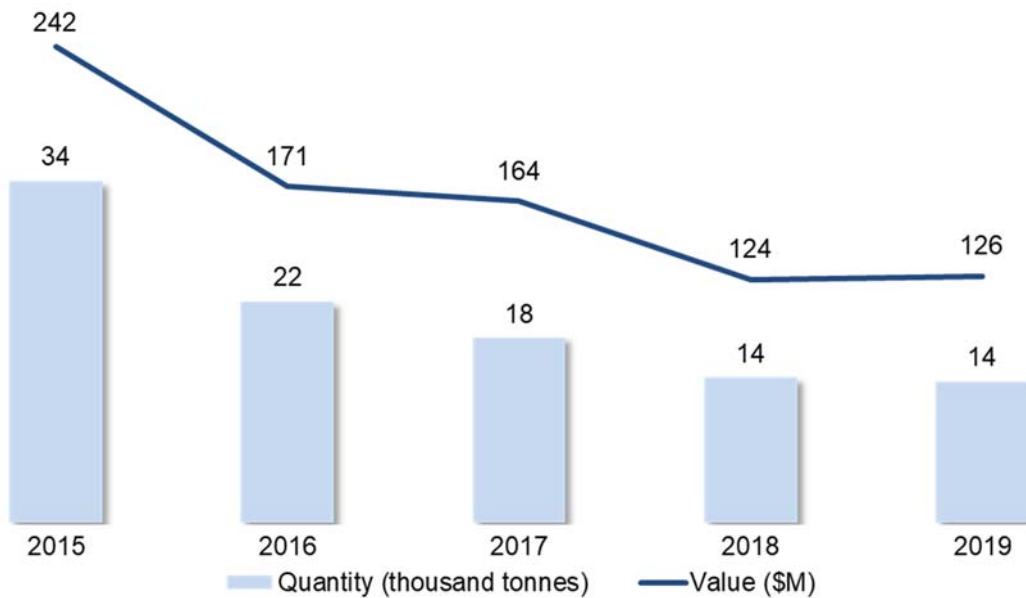
¹¹ The EU's import statistics collected by Eurostat, retrieved March 9, 2020 via the Global Trade Tracker.

CANADA'S FISH AND SEAFOOD TRADE WITH THE EUROPEAN UNION, 2019

After continuously declining since 2015, Canada's value of shrimp exports to the EU remained almost the same as in the previous year with a 1 per cent (+\$2M) increase. This was mostly attributable to an increase in export prices (+4 per cent) as quantity of shrimp exported to the EU experienced a 3 per cent decrease from 2018 to 2019. Quantity of shrimp exported to the EU has been declining from a peak of 34 thousand tonnes in 2015 to 14 thousand tonnes in 2019; this decline coincides with a decrease in Canada's landings.

Overall, the value of shrimp exports to the EU has declined by 15 per cent annually, on average, since 2015. This decline was attributable to an annual decrease of 20 per cent in quantity exported, as shrimp/prawn export prices to the EU have experienced an annual growth rate of 6 per cent during this period.

Figure 7. Canada's Shrimp Exports to the EU, 2015-2019



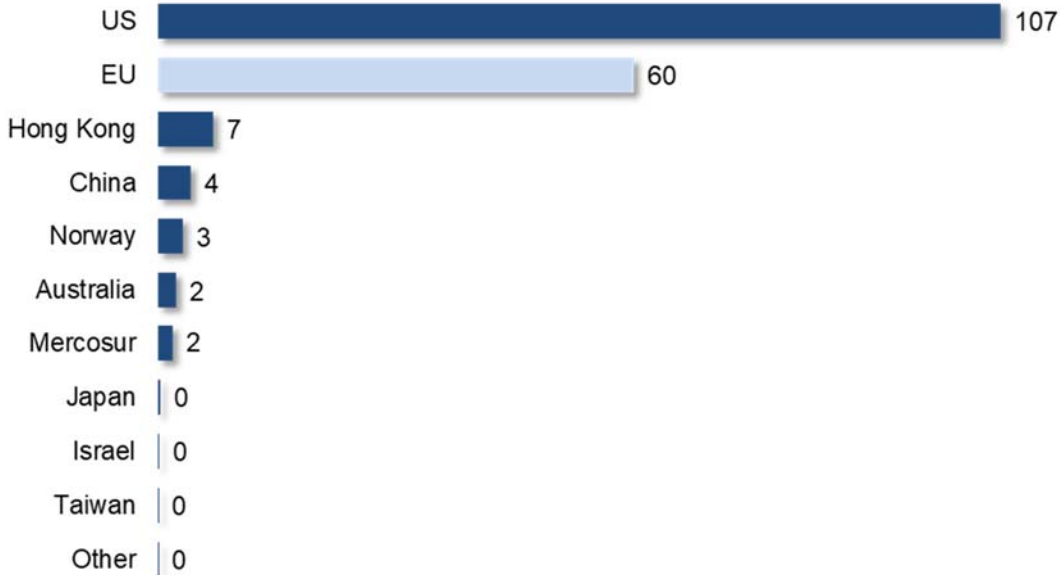
Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.



Scallop (3rd largest export)

In 2019, Canadian scallop exports to the EU were valued at \$60M representing 32 per cent of Canada's total scallop export value. The EU ranked second, behind the US (\$107M) in Canada's reported export value of scallop. Canada's scallop exports to the EU mostly consisted of frozen scallops (70 per cent by value in 2019), but also of scallops in brine or smoked (30 per cent).

Figure 8. Canada's Scallop 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.

Canadian scallop exports to the EU were principally destined for France, accounting for 62 per cent of Canadian scallop export value to the EU in 2019.

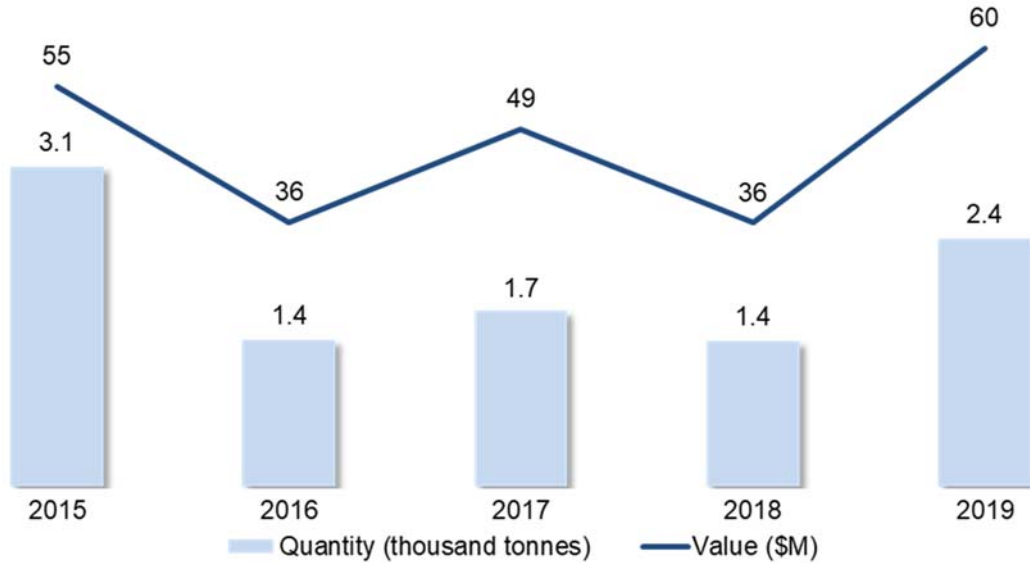
With 78 per cent of the value of scallop exports in 2019, Nova Scotia (\$47M) was the main province exporting scallop to the EU, followed by Newfoundland and Labrador (\$12M).

From 2018 to 2019, Canada's value of scallop exports to the EU notably increased 66 per cent (+\$24M). Quantity exported increased 71 per cent and export prices of scallop to the EU decreased 3 per cent during the same period.

There is no clear trend in Canada's scallop exports to the EU. Annual fluctuations leave growth calculations dependent on the chosen end points, but the net effect between 2015 and 2019 shows an annualized increase of 2 per cent per year by value. Scallop export prices to the EU have for their part increased 9 per cent annually, while quantity

exported has experienced an annual rate of decline of 6 per cent during the same period.

Figure 9. Canada's Scallop Exports to the EU, 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 to the EU of species other than lobster, shrimp and scallop were valued at \$131M, representing 26 per cent of Canada's total fish and seafood export value to the EU. The main other species exported to the EU in 2019 were salmon (\$23M), hake (\$21M) and cod (\$18M).

In 2019, Canadian exports of salmon to the EU represented 2 per cent of Canada's total salmon exports by value, while 19 per cent of the value of Canadian exports of hake and 29 per cent of the value Canadian exports of cod were destined for the EU.

The EU ranked third among Canada's export markets for salmon, after the US (\$957M), and Japan (\$26M). In rank order of value, most Canadian salmon exported to the EU were prepared or preserved sockeye (\$10M) and smoked salmon (\$4M).

The EU ranked third, after China (\$32M) and Ukraine (\$29M) in Canada's reported export value of hake. By value, the majority of Canadian hake exported to the EU was frozen (84 per cent in 2019).

CANADA'S FISH AND SEAFOOD TRADE WITH THE EUROPEAN UNION, 2019

In 2019, the EU remained the second destination in importance, after the US (\$40M), for Canadian exports of cod. By value, 38 per cent (\$7M) of Canada's exports of cod to the EU was destined for the UK.

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

Species	Value of Exports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Exports (%)
Lobster	193	11.5	13.7	-2.0	7.4
Shrimp	126	1.4	-2.8	4.3	28.2
Scallop	60	66.0	71.0	-3.0	32.4
Salmon	23	14.2	-12.5	30.6	2.2
Hake	21	7.2	7.9	-0.7	18.8
Cod	18	-10.0	-8.8	-1.3	29.2
Eel	12	26.2	29.6	-2.7	7.2
Sablefish	7	2.1	4.7	-2.4	29.3
Crab	6	24.8	9.4	14.1	0.4
Whitefish	3	-25.5	-23.3	-2.9	15.0
Other	42	24.2	13.4	9.5	3.2
Total	510	13.0	6.0	6.6	6.9



Canada's Fish and Seafood Exports to the EU by Province and Territory

In 2019, Nova Scotia maintained its position as the top fish and seafood exporting province by value to the EU. The province exported a total of \$234M of fish and seafood to the EU, with lobster (\$119M), scallop (\$47M) and shrimp (\$40M) as the main species exported. Newfoundland and Labrador came second exporting a total of \$114M, with shrimp (\$67M) as the main exported species.

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

Province and Territory	Value (\$M)	Quantity (thousand tonnes)	Main species	
			Species	Share* %
Nova Scotia	234	17	Lobster	51.0
			Scallop	20.0
			Shrimp	17.2
Newfoundland and Labrador	114	15	Shrimp	58.9
			Cod	12.7
			Scallop	11.0
British Columbia	52	12	Salmon	43.4
			Hake	34.2
			Sablefish	12.6
New Brunswick	44	2	Lobster	77.4
			Eel	12.2
			Herring	3.6
Quebec	27	2	Shrimp	66.3
			Lobster	22.4
			Cod	6.7
Prince Edward Island	25	1	Lobster	97.3
			Scallop	2.2
			Mussel	0.4
Other	15	2	Whitefish	20.7
			Pike	14.7
			Lobster	1.6

* Share of province's fish and seafood exports to the EU

Canada's Fish and Seafood Imports from the EU

In 2019, Canada continued to be a net exporter of fish and seafood products to the EU, with imports from the EU worth \$204M. With 5 per cent of Canada's total fish and seafood imports by value, the EU ranked sixth amongst Canada's reported fish and seafood suppliers in 2019.

In 2019, Canadian fish and seafood import value from the EU increased 10 per cent (+\$18M) relative to 2018. Quantity of imports was 33 thousand tonnes with a 9 per cent increase since 2018, while fish and seafood import prices from the EU increased less than 1 per cent during the same period.

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

Year	Value of Imports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)
2015	105	10.7	17.1	-5.5
2016	140	33.5	28.0	4.3
2017	172	22.8	5.7	16.2
2018	186	7.6	3.0	4.4
2019	204	9.9	9.3	0.6
Average	162	CAGR 18.0	CAGR 11.1	CAGR 6.2

In 2019, the top species imported from the EU were salmon (\$41M), tuna (\$27M) and trout (\$12M). Together, these three species accounted for 39 per cent of total Canadian fish and seafood imports by value from the EU.

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

Species	Value of Imports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Imports (%)
Salmon	41	3.2	7.5	-4.0	5.5
Tuna	27	28.7	40.2	-8.2	9.6
Trout	12	34.4	54.9	-13.2	13.6
Sea Bass	10	16.9	14.5	2.2	77.7
Sardine	8	-23.5	-24.1	0.7	41.1
Mackerel	7	21.5	0.8	20.5	30.6
Octopus	6	-19.9	-19.0	-1.1	23.5
Anchovy	3	11.6	10.7	0.7	53.7
Herring	3	-19.1	-18.8	-0.4	43.8
Cod	3	-3.4	2.7	-6.0	2.2
Other	86	13.1	12.2	0.7	2.9
Total	204	9.9	93	0.6	4.8

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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