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Canada

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Canada

CANADA'S FISH AND SEAFOOD TRADE WITH THE UNITED STATES OF AMERICA, 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 United States of America, 2019

Highlights

- Value of Canada's fish and seafood exports to the US (Canada's largest export destination by value) was **\$4.56B**¹ in 2019, accounting for 61 per cent of total Canadian fish and seafood exports by value.
- Canadian fish and seafood export value to the US increased 7 per cent (+\$286M) between 2018 and 2019.
- Quantity of exports 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.

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

| Species | Value of Exports (\$B) | Change ² of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share ³ of Exports (%) | CAGR ⁴ of Value (%) |
|--------------|------------------------------|---|-----------------------------|----------------------------|---|--------------------------------------|
| Lobster | 1.64 | 8.0 | -3.3 | 11.7 | 63.2 | 1.6 |
| Crab | 1.02 | 22.6 | 22.6 | 0.0 | 69.6 | 12.0 |
| Salmon | 0.96 | -5.6 | -1.5 | -4.1 | 91.2 | 5.8 |
| Other | 0.94 | 3.7 | -3.0 | 6.9 | 40.2 | 1.0 |
| Total | 4.56 | 6.7 | 0.4 | 6.3 | 61.2 | 4.3 |

- Top species exported were **lobster**⁵ (\$1.64B), **crab**⁶ (\$1.02B) and **salmon** (\$0.96B), accounting for 79 per cent of total Canadian fish and seafood export value to the US.
- Main other species exported were halibut (\$138M), scallop (\$107M) and mussel (\$51M).
- Top exporting provinces were **New Brunswick** (\$1.45B), **Nova Scotia** (\$1.02B) and **British Columbia** (\$0.85B).
- Canada continued to be a net exporter of fish and seafood products to the US, with imports from the US worth \$1.43B. With 33 per cent of Canada's total fish and seafood imports by value, the US was Canada's largest supplier of fish and seafood products. The main imported species were lobster (\$417M), salmon (\$409M) and crab (\$84M).

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. 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 |
| CUSMA | Canada-United States-Mexico Agreement |
| DFO | Department of Fisheries and Oceans Canada |
| EU | European Union |
| MMPA | <i>Marine Mammal Protection Act</i> |
| NAFTA | North American Free Trade Agreement |
| 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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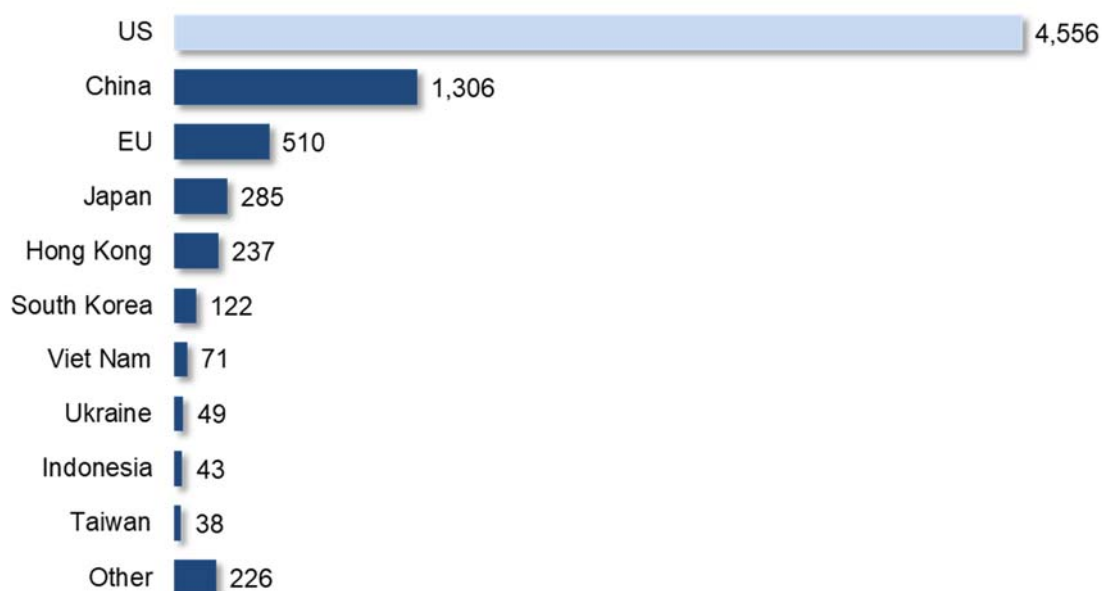
Canada's Fish and Seafood Exports

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 the US

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 of exports 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.

Figure 2. Canada's Fish and Seafood Exports to the US, 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, Canada's exports of fish and seafood to the US grew in value by 4 per cent per year on average driven by price increases, as fish and seafood export prices grew by 7 per cent annually (on average) and quantity exported decreased 2 per cent per year.

Canada's Fish and Seafood Trade with the United States of America, 2019

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

| Year | Value of Exports (\$B) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Exports (%) |
|-------------|------------------------------|----------------------------|-----------------------------|----------------------------|----------------------------|
| 2015 | 3.85 | 25.4 | 12.7 | 11.3 | 64.5 |
| 2016 | 4.28 | 11.1 | 5.1 | 5.7 | 65.3 |
| 2017 | 4.30 | 0.5 | -5.1 | 6.0 | 62.7 |
| 2018 | 4.27 | -0.8 | -9.0 | 9.0 | 61.7 |
| 2019 | 4.56 | 6.7 | 0.4 | 6.3 | 61.2 |
| CAGR | | | | | |
| Average | 4.25 | 4.3 | -2.3 | 6.7 | 63.1 |

The US is an important fish and seafood importer and Canada's most valuable trading partner. In 2019, the US (\$31.2B) was the second largest importer of fish and seafood worldwide after the EU (\$40.5B) and followed by China (\$24.6B) and Japan (\$20.6B)⁷. According to the US Bureau of Census, Canada was the top supplier of fish and seafood to the US by value, representing 15 per cent of the US import market share in 2019. Canada was followed by India (11 per cent), Chile (10 per cent), China (9 per cent) and Indonesia (8 per cent).⁸

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, 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 treatment⁹. On July 1, 2020, the new Canada-United States-Mexico Agreement (CUSMA) entered into force.

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

⁸ Retrieved March 9, 2020 via the Global Trade Tracker, seafood trade statistics collected by the US Department of Commerce: Bureau of Census. Import data reported by one country may differ from the reported exports of its trade partners.

⁹ 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)



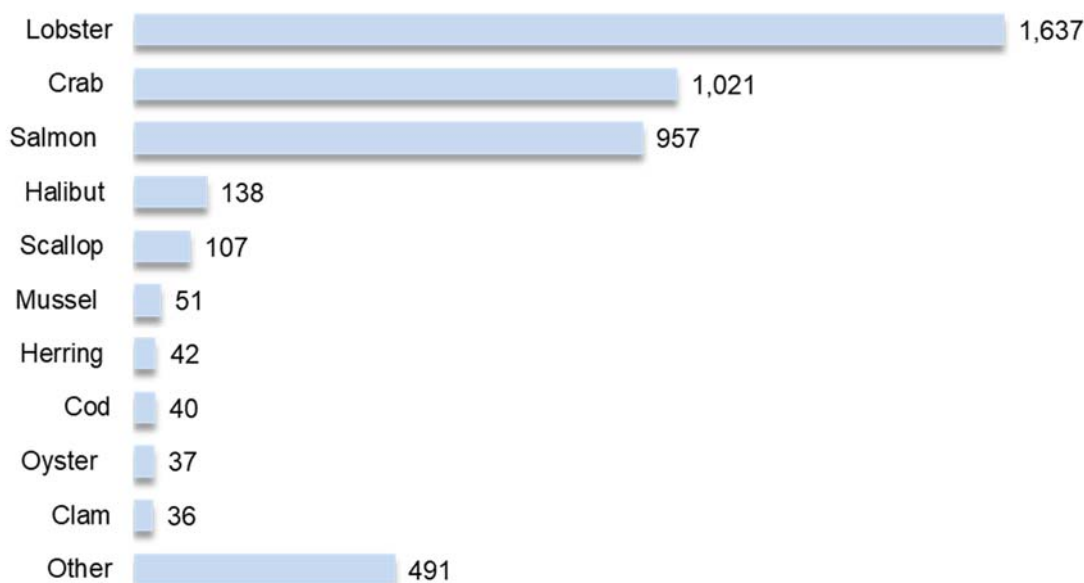
Canada's Fish and Seafood Trade with the United States of America, 2019

From a market access perspective, it is also worth noting that the US 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 requirements of the US MMPA Import Provisions in close collaboration with Canadian harvesters and other stakeholders.

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

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.

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



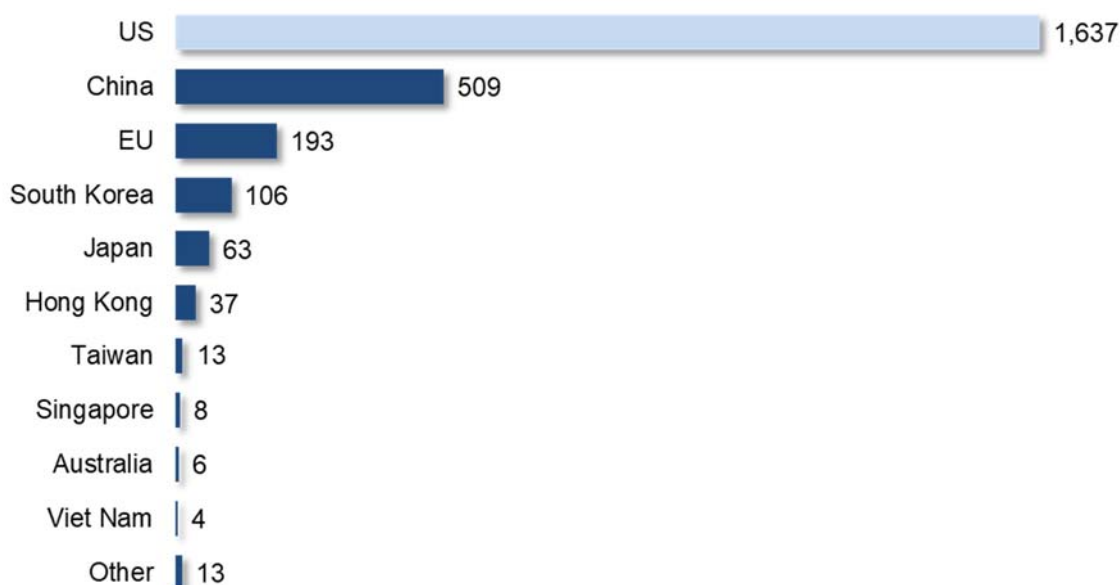
Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.



Lobster (largest export)

In 2019, Canada's lobster exports to the US were valued at \$1.64B. Although its share of total lobster export value dropped from 75 per cent in 2015 to 63 per cent in 2019, the US remained, by far, Canada's largest export destination for 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.

By value, Canada's lobster exports to the US mostly consisted of frozen (67 per cent in 2019) and live (32 per cent) lobster.

In 2019, New Brunswick (\$841M) and Nova Scotia (\$469M) continued to be the main provinces exporting lobster to the US with respectively 51 and 29 per cent of total lobster exports share by value. They were followed by Prince Edward Island (\$171M), Quebec (\$100M) and Newfoundland and Labrador (\$56M), sharing respectively 10, 6 and 3 per cent of Canada's lobster export value to the US in 2019.

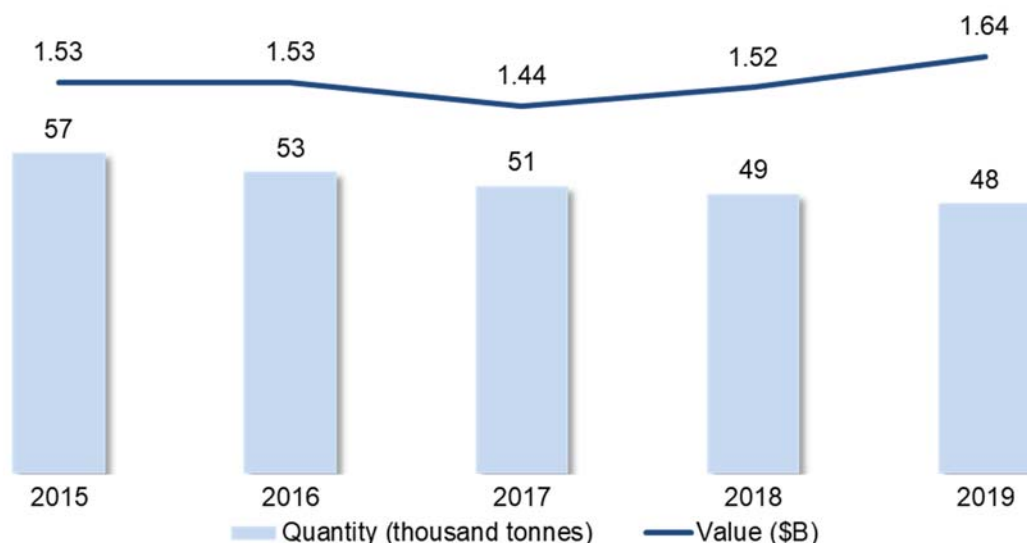
Canada's lobster export value to the US increased 8 per cent (+\$121M) between 2018 and 2019, while quantities exported declined by 3 per cent and export prices increased 12 per cent. Prior to 2019, the value of lobster exports to the US remained relatively flat, even as quantities declined, supported by good prices.

The overall trend in value of Canada's lobster exports to the US over recent years has been characterized by an annualized growth rate of 2 per cent since 2015. During the

Canada's Fish and Seafood Trade with the United States of America, 2019

same period, quantity of lobster exported to the US decreased 4 per cent annually, while export prices increased 6 per cent per annum.

Figure 5. Canada's Lobster Exports to the US, 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.

Note that Canada, mainly the province of New Brunswick, also imports large amounts of live lobster from the US for processing which is then destined for export back to the US market. *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, the European lobster (*Homarus gammarus*), are also caught in the EU. Unlike the rock or spiny lobsters¹⁰, which have no large edible claws, the *Homarus* species of lobster is clawed and the meat in its claws, body, and tail is commercialized. In contrast, the rock or spiny lobster only has marketable meat in its tail. Another clawed lobster species, the Norway lobster¹¹, also forms an important global catch, but the species is much smaller and is sold separately on markets, mainly within the EU.

¹⁰ of the *Palinuridae* family

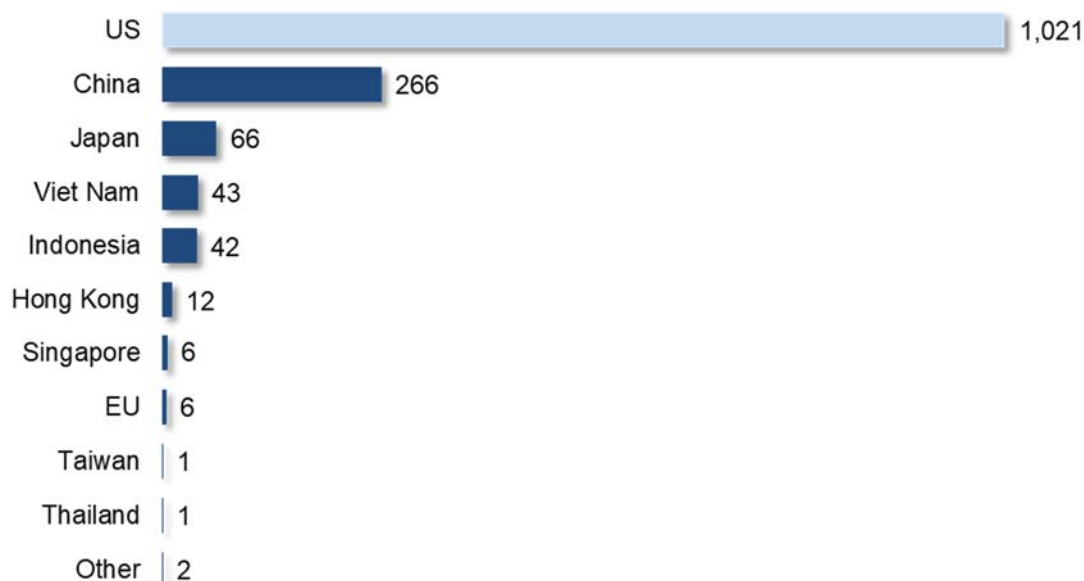
¹¹ *Nephrops norvegicus*



Crab (2nd largest export)

In 2019, the US remained the largest export destination for Canadian crab, accounting for 70 per cent, or \$1.02B, of Canada's total crab export value. By value, 82 per cent of Canadian crab exported to the US was frozen snow crab¹².

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.

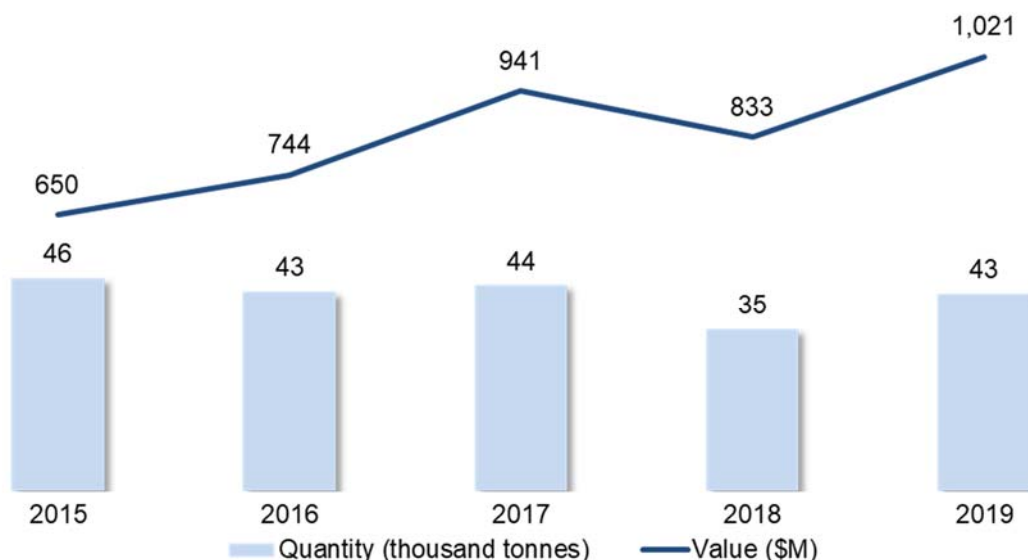
Newfoundland and Labrador (\$320M), New Brunswick (\$238M), Quebec (\$221M), and Nova Scotia (\$186M) shared essentially all (94 per cent by value) of Canadian crab exports to the US.

In 2019, Canada's value of crab exports to the US increased 23 per cent (+\$188M) from the previous year, returning to the longer term trend after a decline in 2018 (-11%) that was coincident with a sharp drop in Canadian landings. Export prices of Canadian crab to the US remained stable from 2018 to 2019, after several years of strong increases.

The value of Canadian exports of crab to the US has grown at an annualized rate of 12 per cent since 2015. Crab export prices have increased 14 per cent annually, while quantity exported decreased by 2 per cent per annum during the same period.

¹² In 2019, 11 per cent (\$117M) of Canada's crab exports to the US was labelled as unspecified frozen crab, which, based on exporting provinces and Canadian crab species landings data, would mostly be snow crab.

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

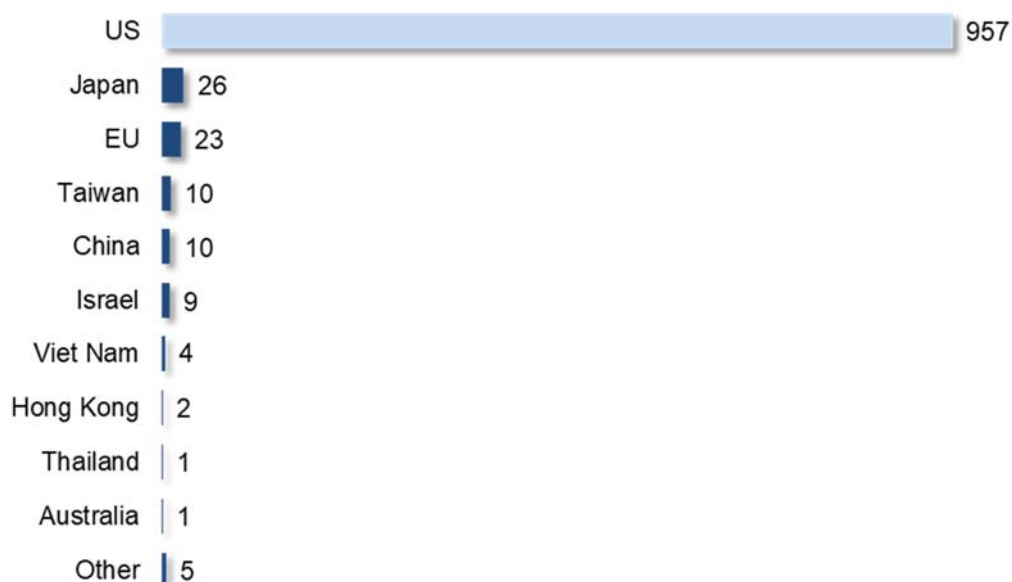


Source: Fisheries and Oceans Canada (2020), EXIM [database], Ottawa. Accessed February 17, 2020.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Salmon (3rd largest export)

In 2019, Canada's salmon exports to the US were valued at \$957M, representing 91 per cent of Canada's total salmon export value. By value, 87 per cent of Canada's exports of salmon to the US was Atlantic salmon.

Figure 8. Canada's Salmon 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.

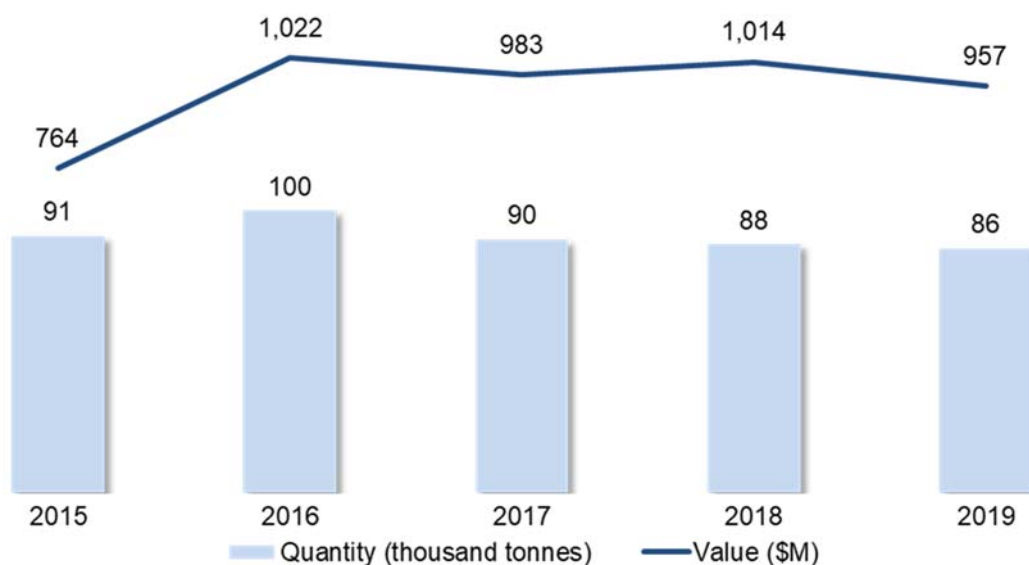
Canada's Fish and Seafood Trade with the United States of America, 2019

In 2019, British Columbia (\$636M) and New Brunswick (\$290M) were practically the only exporting provinces of salmon products to the US with respectively 66 per cent and 30 per cent of the share of total salmon exports to the US by value.

In 2019, the value of Canada's salmon exports to the US experienced a 6 per cent decrease (-\$57M) from the previous year. This decrease was mostly attributable to a decline in salmon export prices (-4 per cent) as quantity of Canadian salmon exported to the US decreased by 1 per cent during the same period.

Salmon exports to the US increased substantially between 2015 and 2016 due to strong growth in Canadian production of farmed Atlantic salmon¹³ combined with high prices globally.¹⁴ Exports have remained relatively flat since 2016. On an annualized basis, salmon exports to the US grew at a rate of 6 per cent per year in value since 2015. Salmon export prices have increased 7 per cent annually, while quantity exported decreased by 1 per cent per annum during the same period.

Figure 9. Canada's Salmon Exports to the US, 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.

¹³ Statistics Canada. [Table 32-10-0107-01 Aquaculture, production and value](#).

¹⁴ FAO. "Severely elevated prices in 2016 has salmon sector searching for solutions." <http://www.fao.org/in-action/globefish/market-reports/resource-detail/en/c/902748/>

Other Species

In 2019, Canadian exports of species other than lobster, salmon and crab to the US were valued at \$941M, representing 21 per cent of Canada's total fish and seafood export value to the US. The main other species exported to the US in 2019 were halibut (\$138M), scallop (\$107M) and mussel (\$51M).

In 2019, Canada's exports of halibut to the US were valued at \$138M, representing 73 per cent of Canada's total halibut export value. By value, 68 per cent of Canada's exports of halibut to the US consisted of fresh Atlantic halibut, 26 per cent of fresh Pacific halibut and 6 per cent of frozen unspecified halibut. Nova Scotia (\$73M), British Columbia (\$35M) and Newfoundland and Labrador (\$19M) were the main provinces exporting halibut products to the US in 2019.

Canada's exports of scallop to the US were valued at \$107M in 2019, representing 57 per cent of Canada's total scallop export value. Mostly Nova Scotia (\$92M), but also New Brunswick (\$13M) were the main exporting provinces of scallop products to the US with respectively 86 and 12 per cent of total share of scallop exports to the US by value.

The US also represented Canada's main market for a number of other species. For example, in 2019, more than 90 per cent of the value of Canadian exports of mussel (91 per cent), haddock (95 per cent), pickerel (100 per cent) or perch (98 per cent) was destined to the US. This proportion was also noteworthy for cod (66 per cent), oysters (86 per cent) and tuna (74 per cent).

Canada's Fish and Seafood Trade with the United States of America, 2019

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

| Species | Value of Exports (\$M) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Exports (%) |
|----------------|---------------------------------------|-------------------------------------|--------------------------------------|-------------------------------------|-------------------------------------|
| Lobster | 1,637 | 8.0 | -3.3 | 11.7 | 63.2 |
| Crab | 1,021 | 22.6 | 22.6 | 0.0 | 69.6 |
| Salmon | 957 | -5.6 | -1.5 | -4.1 | 91.2 |
| Halibut | 138 | 7.1 | 6.6 | 0.5 | 72.7 |
| Scallop | 107 | 6.2 | 4.7 | 1.4 | 57.4 |
| Mussel | 51 | 4.1 | 1.7 | 2.3 | 91.1 |
| Herring | 42 | -1.9 | -2.8 | 1.0 | 30.9 |
| Cod | 40 | -15.9 | -14.8 | -1.3 | 65.5 |
| Oyster | 37 | 23.4 | 7.4 | 14.9 | 85.8 |
| Clam | 36 | 2.8 | 1.5 | 1.3 | 26.9 |
| Other | 491 | 3.6 | -4.8 | 8.8 | 31.9 |
| Total | 4,556 | 6.7 | 0.4 | 6.3 | 61.2 |



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

In 2019, New Brunswick was the top fish and seafood exporting province to the US by value. The province exported \$1.45B worth of fish and seafood products to the US, with lobster (\$841M), salmon (\$290M) and crab (\$238M) as the main species exported by value. The other top exporting provinces in 2019 were Nova Scotia (\$1.02B), British Columbia (\$847M) and Newfoundland and Labrador (\$477M).

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

| Province and Territory | Value (\$M) | Quantity (thousand tonnes) | Main species Share* % |
|---------------------------|----------------|-------------------------------|---|
| New Brunswick | 1,453 | 74 | Lobster 57.9 Salmon 19.9 Crab 16.4 |
| Nova Scotia | 1,020 | 60 | Lobster 46.0 Crab 18.2 Scallop 9.0 |
| British Columbia | 847 | 84 | Salmon 75.0 Crab 4.8 Halibut 4.2 |
| Newfoundland and Labrador | 477 | 33 | Crab 67.0 Lobster 11.7 Halibut 4.0 |
| Quebec | 357 | 14 | Crab 61.9 Lobster 28.0 Shrimp 2.6 |
| Prince Edward Island | 252 | 19 | Lobster 67.6 Mussel 17.0 Crab 5.7 |
| Other | 150 | 14 | Pickarel 10.7 Perch 9.9 Whitefish 9.5 |

* of province's fish and seafood exports to the US



Canada's Fish and Seafood Imports from the US

In 2019, Canada continued to be a net exporter of fish and seafood products to the US, with imports from the US worth \$1.43B. With 33 per cent of Canada's total fish and seafood imports by value, the US was Canada's largest supplier of fish and seafood products, followed by China (15 per cent), Thailand (8 per cent) and Vietnam (7 per cent).

In 2019, Canada's fish and seafood import value from the US increased 5 per cent (+\$67M) relative to 2018. Quantity of imports was 172 thousand tonnes with a 5 per cent decline since 2018, while fish and seafood import prices from the US increased 10 per cent during the same period.

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

| Year | Value of Imports (\$B) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) |
|---------|------------------------------|----------------------------|-----------------------------|----------------------------|
| 2015 | 1.29 | 12.5 | -3.1 | 16.1 |
| 2016 | 1.46 | 13.3 | 2.0 | 11.1 |
| 2017 | 1.32 | -9.3 | -2.3 | -7.2 |
| 2018 | 1.37 | 3.3 | -0.7 | 4.1 |
| 2019 | 1.43 | 4.9 | -5.0 | 10.5 |
| Average | 1.37 | CAGR 2.7 | CAGR -1.5 | CAGR 4.3 |

In 2019, the top species imported from the US were lobster (\$417M), salmon (\$409M) and crab (\$84M). Together, these three species accounted for 64 per cent of total Canadian fish and seafood imports by value from the US.

With 99 per cent of total lobster import value, the US is considered the sole provider of lobster to Canada. Most lobster imports from the US consist of live lobster that is destined for processing to be then exported back to the US market.

In 2019, the US was Canada's top supplier of salmon (55 per cent) followed by Chile (22 per cent), with import values of \$409M and \$163M respectively. By value, 38 per cent of salmon imports from the US were sockeye salmon, either canned (\$64M) or whole frozen (\$64M) or fresh (\$29M).

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

| Species | Value of Imports (\$M) | Change of Values (%) | Change of Volumes (%) | Change of Prices (%) | Share of Imports (%) |
|----------------|---------------------------------------|-------------------------------------|--------------------------------------|-------------------------------------|-------------------------------------|
| Lobster | 417 | 7.9 | -12.6 | 23.4 | 99.1 |
| Salmon | 409 | 15.0 | 15.2 | -0.2 | 55.1 |
| Crab | 84 | -9.8 | -23.9 | 18.6 | 50.8 |
| Scallop | 53 | 1.4 | -0.4 | 1.8 | 58.9 |
| Halibut | 38 | 14.2 | 18.0 | -3.2 | 66.5 |
| Cod | 25 | -4.1 | 1.6 | -5.6 | 21.9 |
| Tuna | 17 | -34.1 | -31.2 | -4.2 | 6.2 |
| Shrimp | 16 | -3.9 | 10.0 | -12.6 | 2.3 |
| Oyster | 14 | -13.2 | -12.4 | -0.9 | 53.4 |
| Trout | 11 | 16.8 | 7.3 | 8.9 | 12.9 |
| Other | 349 | -0.5 | -7.4 | 7.4 | 21.5 |
| Total | 1,433 | 4.9 | -5.0 | 10.5 | 33.5 |

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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