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CANADA'S FISH AND SEAFOOD TRADE WITH THE UNITED STATES OF AMERICA, 2018



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CANADA'S FISH AND SEAFOOD TRADE WITH THE UNITED STATES OF AMERICA, 2018

Highlights

- Value of Canada's fish and seafood exports to the US (Canada's largest export destination by value) was **\$4.27B¹**, accounting for 62 per cent of total Canadian fish and seafood exports by value.
- Canadian fish and seafood export value to the US remained almost the same as in 2017, with less than a 1 per cent decrease (-\$34M).
- Quantity of exports was 298 thousand tonnes with a 9 per cent decline from 2017, while fish and seafood export prices to the US increased 9 per cent during the same period.

CANADA'S TOP 3 FISH AND SEAFOOD EXPORTS TO THE US, 2018

SPECIES	VALUE of Exports (\$B)	CHANGE ² of Values (%)	CHANGE of Volumes (%)	CHANGE of Prices (%)	SHARE of Exports (%)	CAGR ³ of Value (%)
Lobster	1.52	5.2	-2.8	8.2	68.2	6.5
Salmon	1.01	3.2	-2.0	5.2	85.1	16.9
Crab	0.83	-11.5	-21.6	12.9	63.8	10.5
Other	0.91	-3.3	-11.7	9.5	41.1	3.5
Total	4.27	-0.8	-9.0	9.0	61.7	8.6

- Top species exported were **lobster⁴** (\$1.52B), **salmon** (\$1.01B) and **crab⁵** (\$0.83B), accounting for 79 per cent of total Canadian fish and seafood export value to the US.
- Main other species exported were halibut (\$128M), scallop (\$100M) and herring (\$60M).
- Top exporting provinces were **New Brunswick** (\$1.37B), **Nova Scotia** (\$0.98B) and **British Columbia** (\$0.77B).
- Canada continued to be a net exporter of fish and seafood products to the US, with imports from the US worth \$1.36B. With 34 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 (\$387M), salmon (\$356M) and crab (\$91M).

¹ Trade statistics are sourced from Statistics Canada, and were accessed through: Fisheries and Oceans Canada (2019), EXIM [database], Ottawa. Accessed: March 07, 2019.

² The term "change" indicates yearly change from the previous year.

³ Compound annual growth rate from 2014 to 2018.

⁴ Lobster refers to the *Homarus* species.

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



ACRONYMS AND NOTES

CAGR	Compound annual growth rate
CUSMA	Canada-United States-Mexico Agreement
DFO	Department of Fisheries and Oceans Canada
EU	European Union
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 (2019), EXIM [database], Ottawa. Accessed: March 07, 2019.
- 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 US.....	2
Canada's Fish and Seafood Exports to the US by Species	4
Lobster (largest export)	4
Salmon (2 nd largest export).....	6
Crab (3 rd largest export)	7
Other Species	8
Canada's Fish and Seafood Exports to the US by Province and Territory	10
Canada's Fish and Seafood Imports from the US.....	11

LIST OF TABLES

Table 1 Canada's Fish and Seafood Exports to the US, 2014-2018.....	2
Table 2 Canada's Top 10 Fish and Seafood Exports to the US, 2018	9
Table 3 Canada's Fish and Seafood Exports to the US by Province and Territory, 2018 ..	10
Table 4 Canada's Fish and Seafood Imports from the US, 2014-2018.....	11
Table 5 Canada's Top 10 Fish and Seafood Imports from the US, 2018	12

LIST OF FIGURES

Figure 1 Canada's Fish and Seafood Exports by Destination, 2018 (\$M)	1
Figure 2 Canada's Fish and Seafood Exports to the US, 2014-2018.....	2
Figure 3 Canada's Top 10 Fish and Seafood Exports to the US, 2018 (\$M)	4
Figure 4 Canada's Lobster Exports by Destination, 2018 (\$M)	4
Figure 5 Canada's Lobster Exports to the US, 2014-2018	5
Figure 6 Canada's Salmon Exports by Destination, 2018 (\$M)	6
Figure 7 Canada's Salmon Exports to the US, 2014-2018	7
Figure 8 Canada's Crab Exports by Destination, 2018 (\$M)	7
Figure 9 Canada's Crab Exports to the US, 2014-2018.....	8

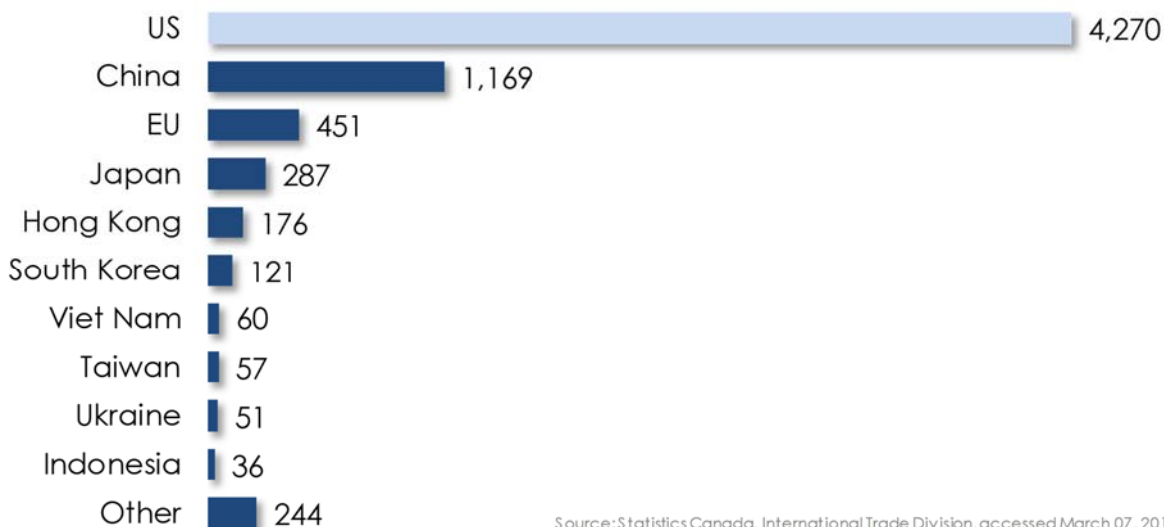
CANADA'S FISH AND SEAFOOD EXPORTS

In 2018, Canada's total fish and seafood exports were valued at \$6.92B with an increase of 1 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)	\$4.27B
China	\$1.17B
European Union (EU)	\$0.45B
Japan	\$0.29B
Hong Kong	\$0.18B

Together, these destinations accounted for 92 per cent of Canada's fish and seafood total export value in 2018.

FIGURE 1 CANADA'S FISH AND SEAFOOD EXPORTS BY DESTINATION, 2018 (\$M)



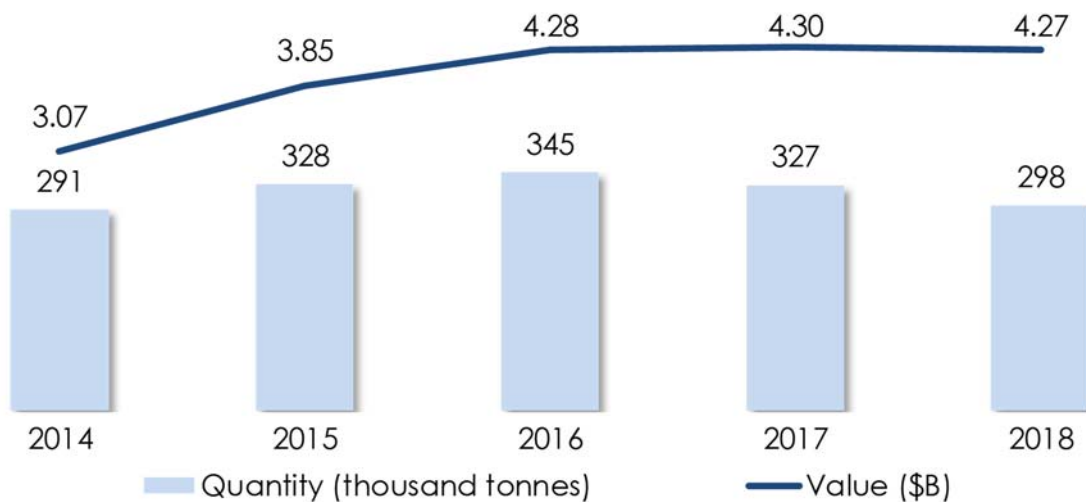
Source: Statistics Canada, International Trade Division, accessed March 07, 2019

CANADA'S FISH AND SEAFOOD EXPORTS TO THE US

In 2018, Canada's fish and seafood exports to the US were valued at \$4.27B, accounting for 62 per cent of total Canadian fish and seafood exports by value.

Canadian fish and seafood export value to the US remained almost the same as in 2017, with less than a 1 per cent decrease (-\$34M). Quantity of exports was 298 thousand tonnes with a 9 per cent decline from the previous year, while fish and seafood export prices to the US increased 9 per cent during the same period.

FIGURE 2 CANADA'S FISH AND SEAFOOD EXPORTS TO THE US, 2014-2018



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

Since 2014, Canada's exports of fish and seafood to the US grew 9 per cent annually in value driven by price increases, as fish and seafood export prices grew by 8 per cent annually and quantity exported by less than 1 per cent. Although, the rate of growth of export value to the US has been slowing down since 2016, the US remained by far Canada's largest fish and seafood export destination.

TABLE 1 CANADA'S FISH AND SEAFOOD EXPORTS TO THE US, 2014-2018

YEAR	VALUE of Exports (\$B)	CHANGE of Values (%)	CHANGE of Volumes (%)	CHANGE of Prices (%)	SHARE of Exports (%)
2014	3.07	11.0	-7.0	19.3	62.6
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
		CAGR	CAGR	CAGR	
Average	3.96	8.6	0.6	8.0	63.4

CANADA'S FISH AND SEAFOOD TRADE WITH THE UNITED STATES OF AMERICA, 2018

March 2019

The US is an important fish and seafood importer and Canada's most valuable trading partner. In 2018, the US (\$30.1B) was the second largest importer of fish and seafood worldwide after the EU (\$40.6B) and followed by Japan (\$20.4B) and China (\$19.3B)⁶. 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 2018. Canada was followed by China (13 per cent), India (10 per cent), Chile (9 per cent) and Indonesia (8 per cent).⁷

Because of its geographical proximity and close trading relationship, the US remains an important opportunity for Canada's fish and seafood exports. However, the overconcentration of Canadian fish and seafood exports to the US market could leave Canada vulnerable to fluctuations in the US economy, changing consumer demands, changes in US fisheries policies or trade agreements. For instance, the recent negotiation of a successor to the North American Free Trade Agreement (NAFTA), the Canada-US-Mexico Agreement (CUSMA), has highlighted the risks that come along with the benefits of having convenient access to a single large trade partner.

⁶ Retrieved March 31, 2019 via the Global Trade Atlas

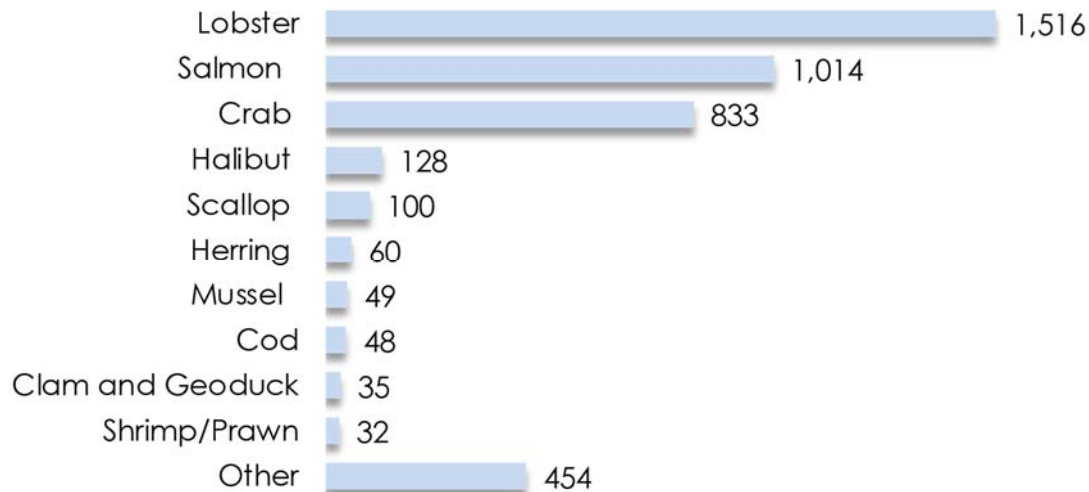
⁷ Retrieved March 31, 2019 via the Global Trade Atlas, seafood trade statistics collected by the US Department of Commerce: Bureau of Census.



CANADA'S FISH AND SEAFOOD EXPORTS TO THE US BY SPECIES

In 2018, Canada's top fish and seafood exports by value to the US were lobster (\$1.52B), salmon (\$1.01B) and crab (\$0.83B). 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, 2018 (\$M)

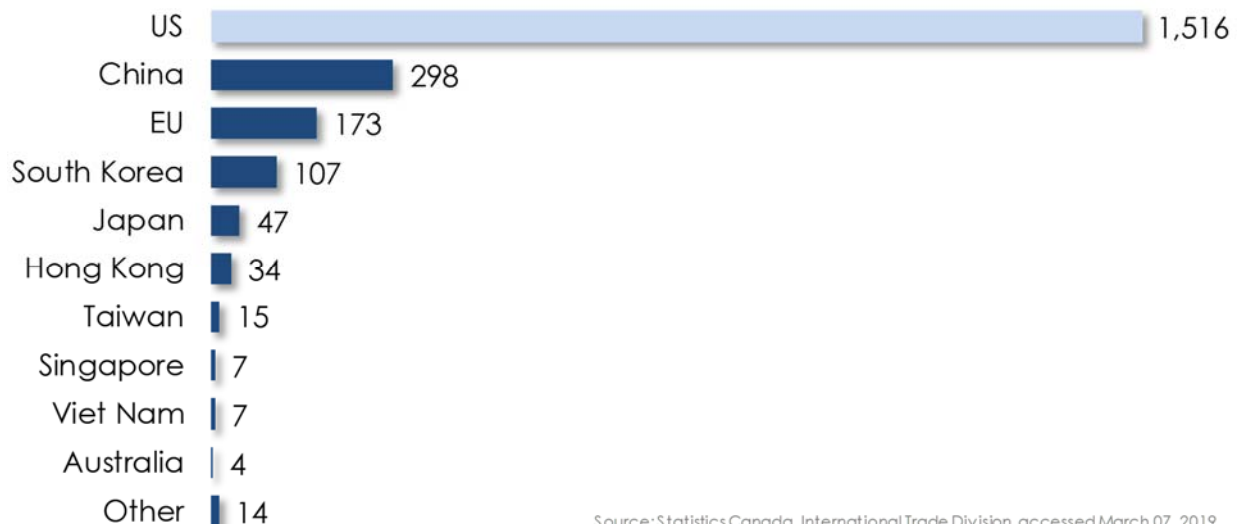


Source: Statistics Canada, International Trade Division, accessed March 07, 2019

Lobster (largest export)

In 2018, Canada's lobster exports to the US were valued at \$1,52B. Although its share of total lobster export value dropped from 78 per cent in 2014 to 68 per cent in 2018, the US remained, by far, Canada's largest export destination for lobster.

FIGURE 4 CANADA'S LOBSTER EXPORTS BY DESTINATION, 2018 (\$M)



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

By value, Canada's lobster exports to the US consisted of a mix of frozen lobster (65 per cent in 2018), live lobster (34 per cent) and other lobster products (less than 1 per cent).

CANADA'S FISH AND SEAFOOD TRADE WITH THE UNITED STATES OF AMERICA, 2018

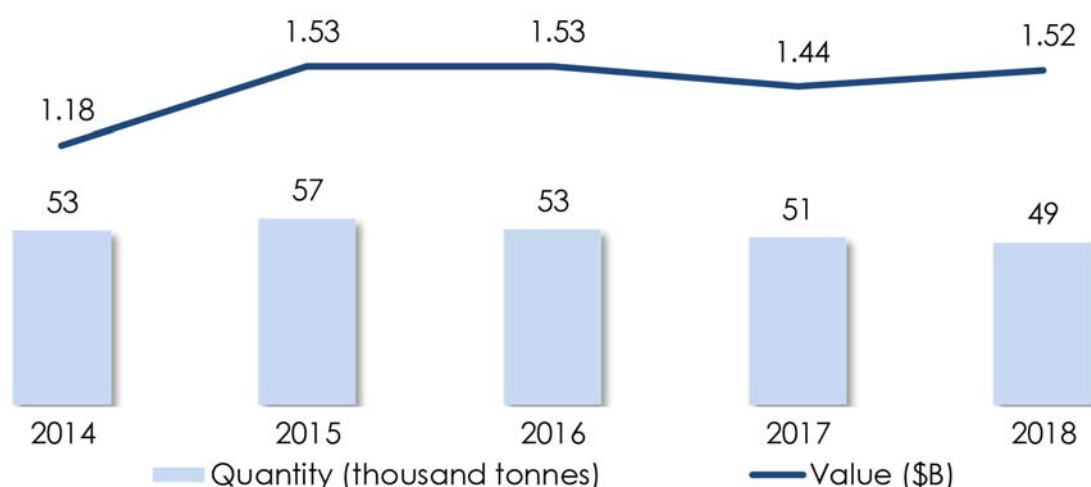
March 2019

In 2018, New Brunswick (\$734M) and Nova Scotia (\$495M) continued to be the main provinces exporting lobster to the US with respectively 48 and 33 per cent of total lobster exports share by value. They were followed by Prince Edward Island (\$131M), Quebec (\$102M) and Newfoundland and Labrador (\$53M), sharing respectively 9, 7 and 4 per cent of Canada's lobster export value to the US in 2018.

Canada's lobster export value to the US increased 5 per cent (+\$74M) between 2017 and 2018, while quantities exported declined by 3 per cent and export prices of lobster to the US increased 8 per cent.

The 2017-2018 change in value of Canada's lobster exports to the US is firmly in line with the trend over recent years, which has been characterized by an annual growth rate of 6 per cent since 2014. During the same period, quantity of lobster exported to the US decreased 2 per cent annually, while exports prices increased 8 per cent per annum.

FIGURE 5 CANADA'S LOBSTER EXPORTS TO THE US, 2014-2018



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

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. In fact, *Homarus* lobster species are principally caught in Canada and the US, these countries essentially producing the global supply of American lobster (*Homarus americanus*). Small amounts of another *Homarus* species, the European lobster (*Homarus gammarus*), are also caught in the EU. Unlike the rock or spiny lobsters⁸, 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

⁸ of the *Palinuridae* family



marketable meat in its tail. Another clawed lobster species, the Norway lobster⁹, also forms an important global catch, but the species is much smaller and is sold separately on markets, mainly within the EU.

Salmon (2nd largest export)

In 2018, Canada's salmon exports to the US were valued at \$1.01B, representing 85 per cent of Canada's total salmon export value. The US was, by far, the main destination for Canada's exports of salmon. By value, 85 per cent of Canada's exports of salmon to the US was Atlantic salmon.

FIGURE 6 CANADA'S SALMON EXPORTS BY DESTINATION, 2018 (\$M)



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

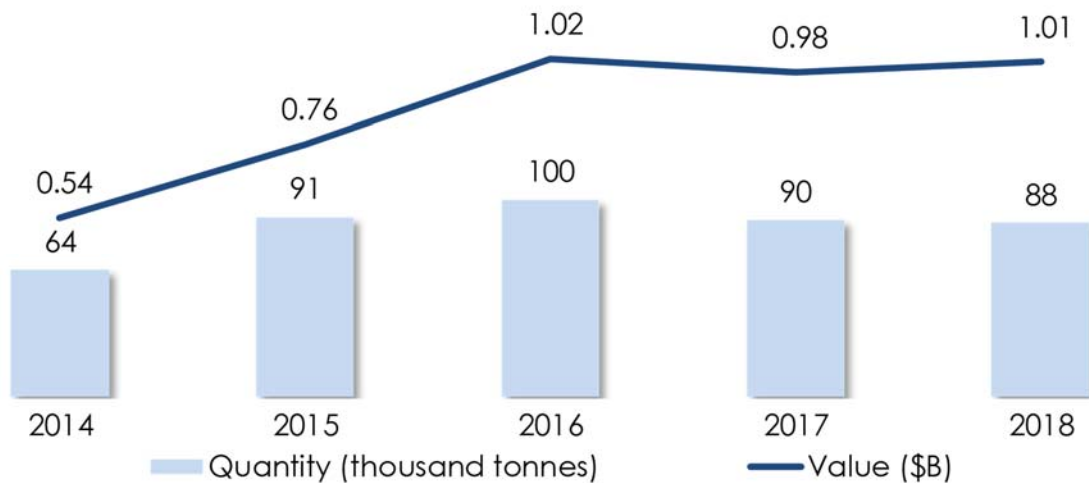
In 2018, British Columbia (\$598M) and New Brunswick (\$377M) were practically the only exporting provinces of salmon products to the US with respectively 59 per cent and 37 per cent of the share of total salmon exports to the US by value.

In 2018, the value of Canada's salmon exports to the US experienced a 3 per cent increase (+\$31M) from the previous year. This growth was mostly attributable to an increase in salmon export prices (+5 per cent) as quantity of Canadian salmon exported to the US decreased by 2 per cent during the same period.

Since 2014, salmon exports to the US grew at an annual rate of 17 per cent in value, with quantities exported and salmon export prices each experiencing compound annual growth of 8 per cent during the same period.

⁹ *Nephrops norvegicus*

FIGURE 7 CANADA'S SALMON EXPORTS TO THE US, 2014-2018

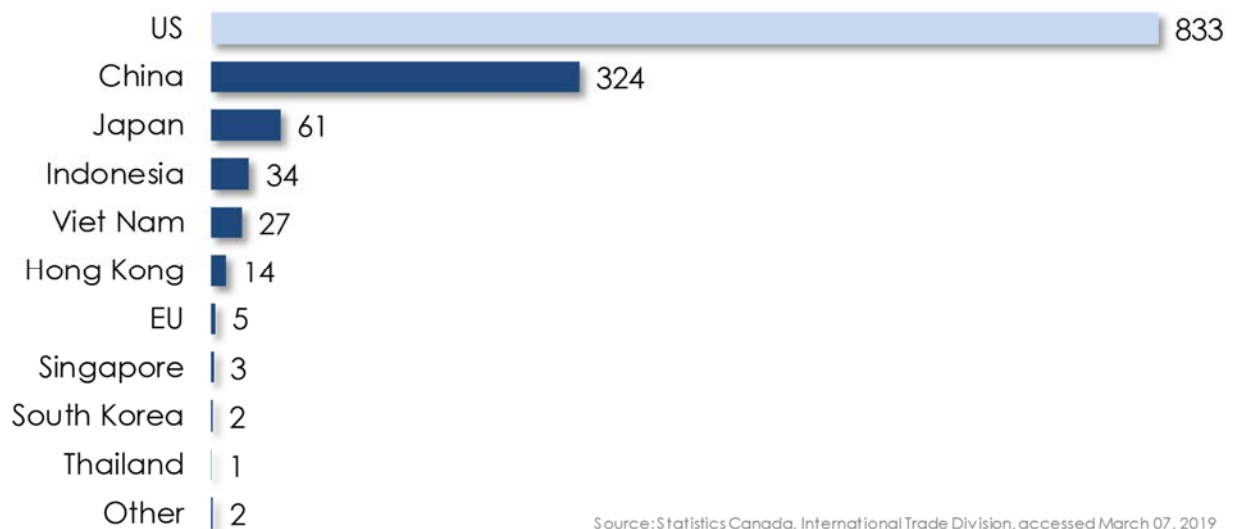


Source: Statistics Canada, International Trade Division, accessed March 07, 2019

Crab (3rd largest export)

In 2018, the US (\$833M) remained the largest export destination for Canadian crab, accounting for 64 per cent of Canada's total crab export value. By value, 84 per cent of Canadian crab exports to the US was frozen snow crab¹⁰.

FIGURE 8 CANADA'S CRAB EXPORTS BY DESTINATION, 2018 (\$M)



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

Newfoundland and Labrador (\$295M), Quebec (\$200M), New Brunswick (\$180M) and Nova Scotia (\$129M) shared essentially all (97 per cent by value) of Canadian crab

¹⁰ In 2018, 11 per cent (\$94M) 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.

CANADA'S FISH AND SEAFOOD TRADE WITH THE UNITED STATES OF AMERICA, 2018

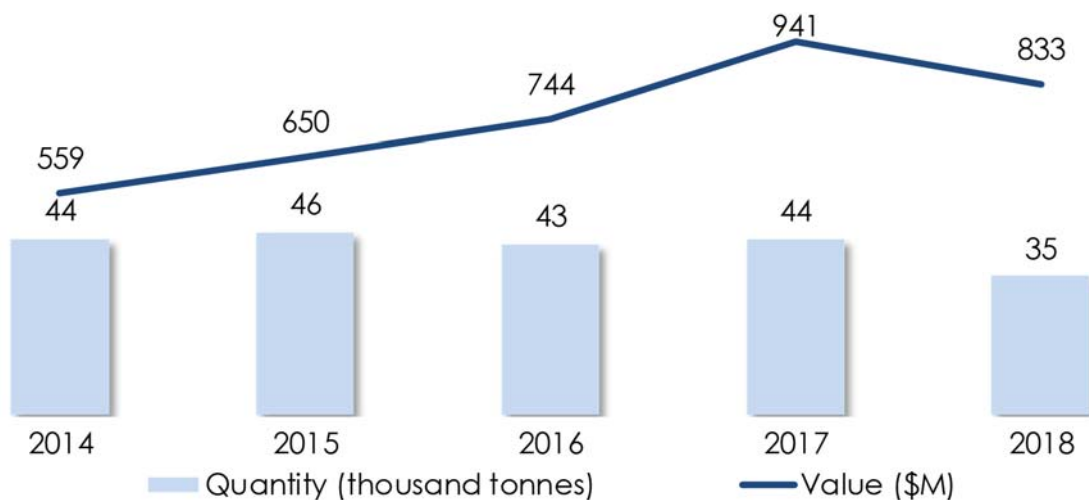
March 2019

exports to the US, with a notable 23 per cent decrease in New Brunswick's crab export value to the US (from \$234M to \$180M) between 2017 and 2018. Quantity of crab exported from New Brunswick to the US decreased 34 per cent during the same period, while prices increased 17 per cent.

In 2018, Canada's value of crab exports to the US decreased 11 per cent (-\$108M) from the previous year. This decline was mostly attributable to a decline in quantity exported (-22 per cent) as export prices of Canadian crab to the US increased 13 per cent during the same period.

Despite the 2018 decrease, the value of Canadian exports of crab to the US has grown at an annual rate of 10 per cent since 2014. Crab exports prices have increased 17 per cent annually, while quantity exported decreased by 6 per cent per annum during the same period.

FIGURE 9 CANADA'S CRAB EXPORTS TO THE US, 2014-2018



Source: Statistics Canada, International Trade Division, accessed March 07, 2019

Other Species

In 2018, Canadian exports of species other than lobster, salmon and crab to the US were valued at \$907M, 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 2018 were halibut (\$128M), scallop (\$100M) and herring (\$60M).

In 2018, Canada's exports of halibut to the US were valued at \$128M, representing 72 per cent of Canada's total halibut export value. By value, 69 per cent of Canada's exports of halibut to the US consisted of fresh or chilled Atlantic halibut, 25 per cent of fresh or chilled Pacific halibut and 7 per cent of frozen unspecified halibut. Nova Scotia



CANADA'S FISH AND SEAFOOD TRADE WITH THE UNITED STATES OF AMERICA, 2018

March 2019

(\$71M), British Columbia (\$33M) and Newfoundland and Labrador (\$17M) were the main provinces exporting halibut products to the US in 2018.

Canada's exports of scallop to the US were valued at \$100M in 2018, representing 62 per cent of Canada's total scallop export value. Mostly Nova Scotia (\$88M), but also New Brunswick (\$11M) were the main exporting provinces of scallop products to the US with respectively 88 per cent and 11 per cent of total share of scallop exports to the US by value.

The US also represented Canada's main market by value for a number of other species. For example, in 2018, more than 90 per cent of the value of Canadian exports of mussel (93 per cent), haddock (96 per cent), pickerel (98 per cent) or perch (94 per cent) was destined to the US. This proportion was also noteworthy for cod (68 per cent), oysters (85 per cent) and tuna (73 per cent).

TABLE 2 CANADA'S TOP 10 FISH AND SEAFOOD EXPORTS TO THE US, 2018

SPECIES	VALUE of Exports (\$M)	CHANGE of Values (%)	CHANGE of Volumes (%)	CHANGE of Prices (%)	SHARE of Exports (%)
Lobster	1,516	5.2	-2.8	8.2	68.2
Salmon	1,014	3.2	-2.0	5.2	85.1
Crab	833	-11.5	-21.6	12.9	63.8
Halibut	128	7.3	7.3	0.0	71.9
Scallop	100	-2.2	5.5	-7.3	61.7
Herring	60	-14.0	-29.2	21.4	39.1
Mussel	49	2.4	1.4	1.0	93.2
Cod	48	-3.5	-10.5	7.9	68.0
Clam and Geoduck	35	5.2	-0.9	6.1	19.9
Shrimp/Prawn	32	0.4	-14.8	17.9	6.8
Other	454	-6.1	-12.5	7.3	48.2
Total	4,270	-0.8	-9.0	9.0	61.7

CANADA'S FISH AND SEAFOOD EXPORTS TO THE US BY PROVINCE AND TERRITORY

In 2018, New Brunswick was the top fish and seafood exporting province to the US by value. The province exported \$1.37B worth of fish and seafood products to the US, with lobster (\$734M), salmon (\$377M) and crab (\$180M) as the main species exported by value. The other top exporting provinces in 2018 were Nova Scotia (\$976M), British Columbia (\$769M) and Newfoundland and Labrador (\$442M).

TABLE 3 CANADA'S FISH AND SEAFOOD EXPORTS TO THE US BY PROVINCE AND TERRITORY, 2018

PROVINCE AND TERRITORY	VALUE (\$M)	QUANTITY (thousand tonnes)	MAIN SPECIES Share* %	
New Brunswick	1,372	77	Lobster	53.5
			Salmon	27.5
			Crab	13.1
Nova Scotia	976	61	Lobster	50.7
			Crab	13.2
			Scallop	9.0
British Columbia	769	78	Salmon	77.9
			Halibut	4.3
			Tuna	2.6
Newfoundland and Labrador	442	31	Crab	66.6
			Lobster	12.0
			Halibut	3.8
Quebec	341	15	Crab	58.9
			Lobster	30.0
			Salmon	2.8
Prince Edward Island	217	19	Lobster	60.3
			Mussel	19.7
			Crab	8.7
Ontario	99	11	Pickarel	16.0
			Perch	12.3
			Whitefish	10.3
Other	54	5	Whitefish	11.7
			Halibut	0.4
			Carp	0.2

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

CANADA'S FISH AND SEAFOOD IMPORTS FROM THE US

In 2018, Canada continued to be a net exporter of fish and seafood products to the US, with imports from the US to Canada worth \$1.36B. With 34 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 (14 per cent), Thailand (8 per cent) and Viet Nam (8 per cent).

In 2018, Canada's fish and seafood import value from the US increased 3 per cent (+\$40M) relative to 2017. Quantity of imports was 180 thousand tonnes with a 1 per cent decline since 2017, while fish and seafood import prices from the US increased 4 per cent during the same period.

TABLE 4 CANADA'S FISH AND SEAFOOD IMPORTS FROM THE US, 2014-2018

YEAR	VALUE of Imports (\$B)	CHANGE of Values (%)	CHANGE of Volumes (%)	CHANGE of Prices (%)
2014	1.14	8.6	0.7	7.8
2015	1.29	12.5	-3.1	16.1
2016	1.46	13.3	2.0	11.1
2017	1.32	-9.4	-2.5	-7.0
2018	1.36	3.1	-0.7	3.7
		CAGR	CAGR	CAGR
Average	1.31	4.5	-1.1	5.6

In 2018, the top species imported from the US to Canada were lobster (\$387M), salmon (\$356M) and crab (\$91M). Together, these three species accounted for 61 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. After decreasing 31 per cent between 2016 and 2017, the value of Canada's lobster imports from the US increased in 2018 by 29 per cent.

In 2018, the US was Canada's top supplier of salmon (53 per cent) followed by Chile (28 per cent), with import values of \$356M and \$188M respectively. By value, 38 per cent of salmon imports from the US were sockeye salmon in 2018.

TABLE 5 CANADA'S TOP 10 FISH AND SEAFOOD IMPORTS FROM THE US, 2018

SPECIES	VALUE of Imports (\$M)	CHANGE of Values (%)	CHANGE of Volumes (%)	CHANGE of Prices (%)	SHARE of Imports (%)
Lobster	387	29.3	17.0	10.5	99.2
Salmon	356	-5.1	-9.2	4.4	53.0
Crab	91	-9.1	6.2	-14.4	55.6
Scallop	52	-2.6	7.8	-9.7	59.0
Halibut	33	8.2	23.0	-12.1	66.1
Pollock	33	-13.0	-15.1	2.4	73.7
Cod	26	-10.9	-8.6	-2.6	24.8
Tuna	26	-16.9	0.6	-17.4	9.0
Shrimp/Prawn	16	-11.6	-12.2	0.7	2.4
Oyster	15	3.8	-5.9	10.3	55.2
Other	326	-1.5	-0.1	-1.5	22.5
Total	1,361	3.1	-0.7	3.7	34.3

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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