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Canada

Pêches et Océans
Canada

CANADA'S FISH AND SEAFOOD TRADE IN 2020: OVERVIEW



Economics, Statistics and Data Governance Directorate
Strategic Policy Sector
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Canada's Fish and Seafood Trade in 2020

™ Highlights ~

- The COVID-19 pandemic disrupted activity in the Canadian seafood sector throughout much of the year.
- Value of Canada's fish and seafood exports was **\$6.43B¹** in 2020, with a 14 per cent decrease (-\$1.01B) from the previous year.
- Quantity of exports was **566 thousand tonnes** with a 7 per cent decrease from the previous year, while average fish and seafood export prices decreased 7 per cent during the same period.
- Top destinations were the **United States** (\$4.12B), **China** (\$1.04B), and the **European Union²** (\$440M), accounting for 87 per cent of Canada's fish and seafood total export value.

Top Destinations for Canada's Fish and Seafood Exports, 2020

Destination	Value of Exports (\$B)	Change ³ of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Exports (%)
US	4.12	-9.5	-5.8	-3.9	64.1
China	1.04	-20.9	-17.1	-4.5	16.1
EU	0.44	-14.1	-9.8	-4.8	6.8
Other	0.83	-21.7	2.3	-23.5	13.0
Total	6.43	-13.6	-7.0	-7.1	100.0

- Top species exported were **lobster⁴** (\$2.09B), **crab⁵** (\$1.33B), and **salmon** (\$970M), accounting for 68 per cent of total Canadian fish and seafood export value.

Canada's Top 3 Fish and Seafood Exports by Species, 2020

Species	Value of Exports (\$B)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Exports (%)
Lobster	2.09	-19.4	-13.7	-6.6	32.5
Crab	1.33	-9.5	-2.4	-7.3	20.6
Salmon	0.97	-7.4	-2.5	-5.1	15.1
Other	2.05	-12.4	-7.1	-5.7	31.8
Total	6.43	-13.6	-7.0	-7.1	100.0

- Top exporting provinces were **Nova Scotia** (\$2.01B), **New Brunswick** (\$1.38B), **British Columbia** (\$1.31B), and **Newfoundland and Labrador** (\$882M), accounting for 87 per cent of Canada's fish and seafood total export value.
- Value of Canada's fish and seafood imports was \$3.97B, with a 7 per cent decrease from the previous year.
- Top suppliers of fish and seafood to Canada were the **United States** (\$1.23B), **China** (\$519M), and **Vietnam** (\$336M), accounting for 52 per cent of Canada's total fish and seafood import value.

¹ Unless otherwise indicated, trade statistics are sourced from Statistics Canada, and were accessed through: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed: September 28, 2021. No endorsement of this product by Statistics Canada is implied.

² The United Kingdom remained a member of the European Union throughout the time period analyzed in this report.

³ The term "change" indicates yearly change from the previous year, unless otherwise specified.

⁴ Lobster refers to the *Homarus* species.

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



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- Top species imported were **salmon** (\$771M), **shrimp** (\$665M), and **lobster** (\$288M), accounting for 43 per cent of Canada's total fish and seafood import value.

Acronyms and Notes

CETA	Canada-European Union Comprehensive Economic and Trade Agreement
DFO	Department of Fisheries and Oceans Canada
MMPA	<i>Marine Mammal Protection Act of the United States</i>
TCA	Canada-United Kingdom Trade Continuity Agreement
UKGT	United Kingdom's Global Tariff
UK	United Kingdom
EU	European Union
US	United States of America

- 1) Unless otherwise indicated, trade statistics are sourced from Statistics Canada and were accessed through: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed: September 28, 2021. 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 country are often not the same as the import statistics reported by its trade partner. Import statistics often include additional shipping costs, and countries 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) Unless otherwise specified, lobster refers to the *Homarus* species.
- 6) Unless otherwise specified, Canadian exports of crab refer to snow crab, Dungeness crab, and unspecified crab species. Based on exporting provinces and Canadian crab species landings data, total Canadian exports of crab consist principally of snow crab.
- 7) The United Kingdom is included within the European Union throughout the time period analyzed in this report, its membership remaining in force until the beginning of 2021.



Canada's Fish and Seafood Trade in 2020

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Canada's Fish and Seafood Trade in 2020: The COVID-19 Pandemic

This report examines Canada's fish and seafood trade in 2020 and highlights the effects of the COVID-19 pandemic on export and import trade. An overview is provided here, and details are provided in subsequent sections of the report.

On March 11, 2020, COVID-19 was declared a pandemic by the World Health Organization.⁶ Much of the world responded with lockdowns and other safety measures to protect public health that substantially curbed economic activity, including trade. The most significant declines in Canada's export value in 2020 were concentrated in late spring and at the end of the year. The spring decline occurred when major Canadian fisheries would typically just be opening, but in 2020, were delayed. The opening of the snow crab fishery in particular was pushed later towards the summer, and significant uncertainty regarding demand led to low prices and some further intentional fishery delays. At the end of the year, annual declines were due primarily to reduced exports of lobster and salmon to the US relative to 2019, and significant reductions in exports of many species to China.

Exports to all of Canada's top five destinations declined in 2020, in terms of value, volume, and average prices, relative to 2019. While lower exports to the US represented the largest losses in absolute value, exports to the US were relatively strong compared to Canada's other trade partners. Given the high share exported to the US and its relatively strong market, the US played a significant role in reducing the average percentage by which Canadian fish and seafood exports declined during the pandemic. By contrast, seafood exports to China fell significantly greater than average.

Exports of Canada's top five species all declined in 2020, both by value and volume, relative to 2019. Compared to the average decline across all species, the value of lobster exports fell more, while that of crab fell less. There was no clear pattern across species regarding the roles of quantities versus prices in determining losses. For lobster, the decline was primarily due to lower export volume, whereas for crab, the decline can be explained mostly by a drop in crab export prices. Focusing on Canada's top five species exported, year-over-year decreases were smallest for salmon in terms of both export value and volume.

The provinces from which exports experienced the greatest impacts were those where lobster and crab dominate: New Brunswick, Nova Scotia, and Quebec. Compared to

⁶ World Health Organization, WHO Director-General's opening remarks at the media briefing on COVID-19 - 11 March 2020. Accessed on October 21, 2021: <https://www.who.int/director-general/speeches/detail/who-director-general-s-opening-remarks-at-the-media-briefing-on-covid-19---11-march-2020>

Canada's Fish and Seafood Trade in 2020

2019 exports, these three provinces bore nearly three-quarters (73 per cent) of the total lost fish and seafood export value in 2020. In dollar terms, British Columbia also experienced a significant decline in 2020.

Canada's fish and seafood imports also declined in 2020, although not as substantially as exports. Despite a nearly one-third (-32 per cent) decline in 2020, lobster imports from the US continued to support Canada's seafood processing sector during the pandemic.

Canada is a net exporter in the global fish and seafood markets. With the value of imports falling less than exports in 2020 compared to 2019, Canada's trade surplus declined by almost one-quarter (-22 per cent).



Canada's Fish and Seafood Trade in 2020

Canada's Fish and Seafood Exports

In 2020, Canada's fish and seafood exports were valued at \$6.43B, a decrease of \$1.01B (-14 per cent) from the previous year. From 2016 to 2019, Canadian fish and seafood export value was trending up. However, steep declines in volume and prices in 2020 were observed due to the effects of the pandemic on trade. Canada exported 566 thousand tonnes of fish and seafood with a 7 per cent decrease from the previous year. Canadian fish and seafood export prices decreased 7 per cent during the same period.

Figure 1. Canada's Fish and Seafood Exports, 2016-2020



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Table 1. Canada's Fish and Seafood Exports, 2016-2020

Year	Value of Exports (\$B)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)
2016	6.55	9.7	3.0	6.5
2017	6.86	4.7	-3.3	8.3
2018	6.92	0.9	-3.2	4.2
2019	7.44	7.5	1.5	5.9
2020	6.43	-13.6	-7.0	-7.1
Average	6.84			

Canada's Fish and Seafood Trade in 2020

Canada's Fish and Seafood Exports by Destination

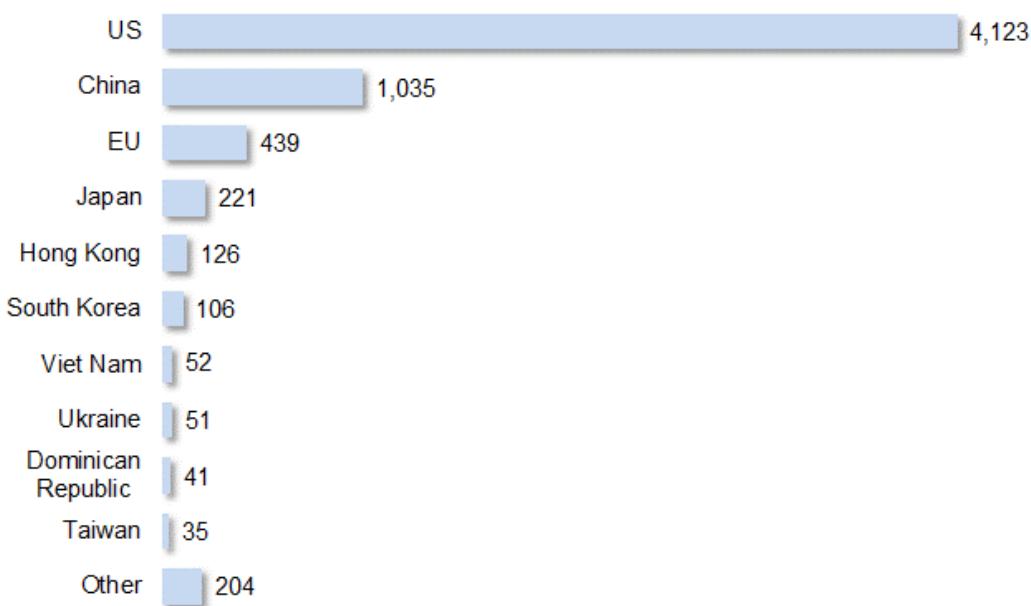
In 2020, the top three destinations for Canadian fish and seafood exports in rank order of value were:

United States (US)	\$4.12B
China	\$1.04B
European Union (EU)	\$439M

Together, these destinations accounted for 87 per cent of Canada's fish and seafood total export value in 2020.

In 2020, Canadian exports to the remaining destinations were valued at \$834M, representing 13 per cent of Canada's total fish and seafood export value. Among these, other significant destinations for Canada's fish and seafood in 2020 were Japan (\$221M), Hong Kong (\$126M), and South Korea (\$106M).

Figure 2. Canada's Fish and Seafood Exports by Destination, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

United States (largest destination)

In 2020, Canada's fish and seafood exports to the US were valued at \$4.12B, accounting for 64 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 decreased 10 per cent (-\$432M) between 2019 and 2020. Quantity exported was 281 thousand tonnes, a 6 per cent



Canada's Fish and Seafood Trade in 2020

decline from 2019. Fish and seafood export prices to the US fell 4 per cent during the same period. Except for an increase in 2019, the value of Canada's exports of fish and seafood to the US had been stable in recent years prior to the pandemic.

Figure 3. Canada's Fish and Seafood Exports to the US, 2016-2020

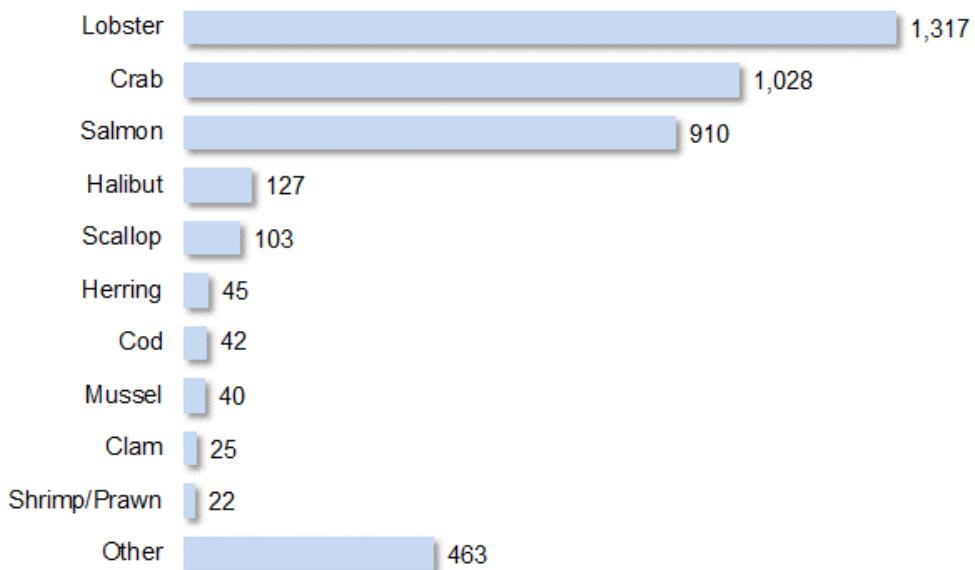


Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

In 2020, Canada's top fish and seafood exports by value to the US were lobster (\$1.32B), crab (\$1.03B), and salmon (\$910M). Together, these three species accounted for 79 per cent of total Canadian fish and seafood exports by value to the US.

Canada's Fish and Seafood Trade in 2020

Figure 4. Canada's Top 10 Fish and Seafood Exports to the US, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Because of its geographical proximity and close trading relationship with Canada, the US remains an important opportunity for Canada's fish and seafood exports. While lower exports to the US represented the largest losses in absolute value, the US market buoyed Canada's seafood exports somewhat through the pandemic. The decline in Canada's exports to the US (-10 per cent) was smaller than the average decline in Canada's exports to all markets (-14 per cent), and much smaller than the decrease in exports to markets other than the US (-20 per cent).

While 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, or to changes in US policies, the pandemic highlighted the benefits of immediate access to this large and thriving economy.

From a market access perspective, it is also worth noting that the United States will require fish and seafood imports to comply with the *Marine Mammal Protection Act* (MMPA) Import Provisions. The provisions were set to be enforced beginning on January 1, 2022. However, the deadline was extended by one year to January 1, 2023, in part due to delays caused by the pandemic.⁷ To maintain US market access under the MMPA, exporting nations, including Canada, will have to meet US standards to mitigate harm to marine mammals. Canada continues working to meet the requirements

⁷ "Modification of Deadlines Under the Fish and Fish Product Import Provisions of the Marine Mammal Protection Act," [85 FR 69515] Federal Register [no. 50 CFR 216] (November 03, 2020), pp. 69515-69517. Accessed on October 22, 2021: <https://www.federalregister.gov/documents/2020/11/03/2020-24210/modification-of-deadlines-under-the-fish-and-fish-product-import-provisions-of-the-marine-mammal>

Canada's Fish and Seafood Trade in 2020

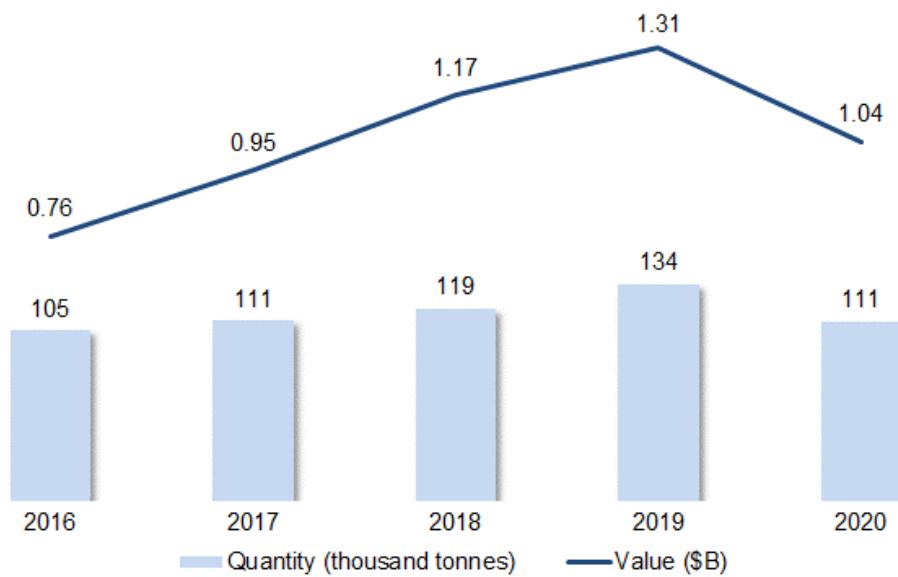
of the US MMPA Import Provisions in close collaboration with Canadian harvesters and other stakeholders.

China (2nd largest destination)

In 2020, China maintained its position as the second most valuable export destination for Canada's fish and seafood, despite strong impacts from the pandemic. Canadian exports to China were valued at \$1.04B, accounting for 16 per cent of Canada's total fish and seafood exports by value. Quantity exported was 111 thousand tonnes.

Prior to 2020, Canada's fish and seafood export value to China was experiencing strong and consistent yearly growth. However, Canadian fish and seafood export value to China declined by 21 per cent (-\$274M) between 2019 and 2020, mainly due to a significant decrease in quantity exported (-17 per cent). Export value declined more substantially with China than with the average for all trade partners (-14 per cent). Prices of Canadian exports of fish and seafood to China also experienced a modest decline of 5 per cent between 2019 and 2020.

Figure 5. Canada's Fish and Seafood Exports to China, 2016-2020



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

In 2020, Canada's top fish and seafood exports by value to China were lobster (\$406M), crab (\$207M), and shrimp (\$160M). Together, these three species accounted for 75 per cent of total Canadian fish and seafood exports by value to China.

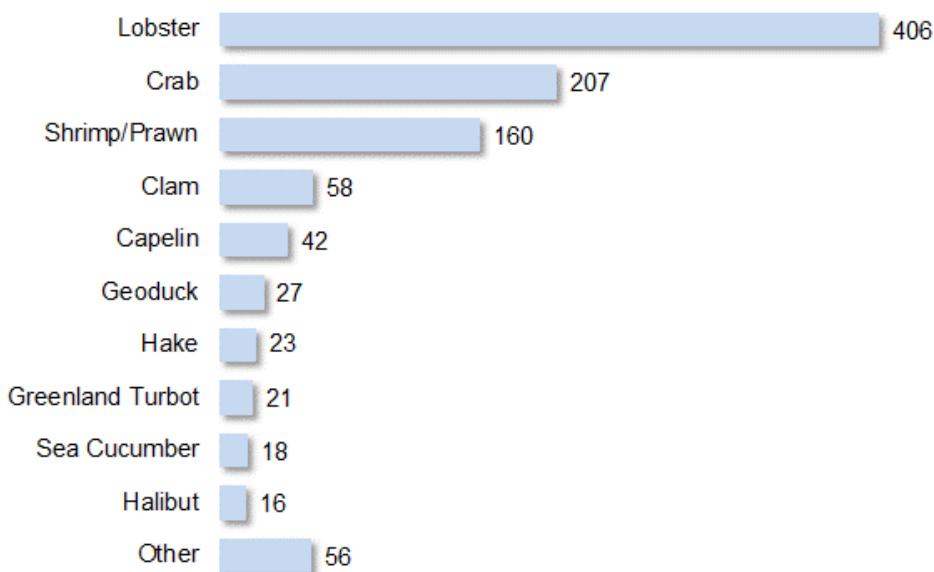
Notably, the value of Canada's lobster exports to China decreased 20 per cent (-\$103M) from the previous year. This decline was wholly attributable to a decrease in the

Canada's Fish and Seafood Trade in 2020

quantity of lobster exported (-22 per cent) largely due to cancellations of New Years' celebrations early in the pandemic, as well as prolonged customs clearance during the latter half of the year that delayed the flow of goods entering China. Prices of lobster exports to China experienced a 2 per cent increase during the same period. The majority of Canada's exports of lobster to China (91 per cent by value in 2020) were live lobsters.

In 2020, Canada was China's largest supplier of live lobster⁸, accounting for 76 per cent of China's import market share.⁹ In previous years, Canada and the US had shared more equally in China's live lobster import market. However, since the US-China trade disputes and tariff escalation between the two countries began in 2018, the value of the US live lobster¹⁰ market share in China plummeted, from 41 percent in 2017 to 27 per cent in 2018, to only 2 per cent in 2019.¹¹ This collapse was primarily due to the retaliatory tariffs that China imposed on its imports of lobster from the US, from July 2018 through all of 2019. In 2020, the US market share for Chinese imports of live lobsters recovered somewhat to 23 per cent.

Figure 6. Canada's Top 10 Fish and Seafood Exports to China, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

⁸ HS Code 030632 (live *homarus* lobsters)

⁹ China's reported import statistics collected by China Customs, retrieved October 18, 2021 via the Global Trade Tracker.

¹⁰ HS Code 030632 (live *homarus* lobsters)

¹¹ China's reported import statistics collected by China Customs, retrieved October 18, 2021 via the Global Trade Tracker.



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European Union (3rd largest destination)

In 2020, Canada's fish and seafood exports to the EU, the third-largest export market for Canadian fish and seafood, were valued at \$439M, accounting for 7 per cent of Canada's total fish and seafood exports by value.

In recent years, the largest export destination for Canada's fish and seafood products within the EU was the United Kingdom (UK). In 2020, however, France was Canada's top destination for exports valued at \$77M, followed by Denmark and the UK (\$65M each). By value, Canadian fish and seafood exports to these three countries accounted for nearly half (47 per cent) of Canada's fish and seafood exports to the EU.

In 2020, export value decreased 14 per cent (-\$72M) relative to 2019. The quantity of fish and seafood exports to the EU was 47 thousand tonnes, a 10 per cent decrease since 2019, and fish and seafood export prices declined 5 per cent during the same period.

Figure 7. Canada's Fish and Seafood Exports to the EU, 2016-2020

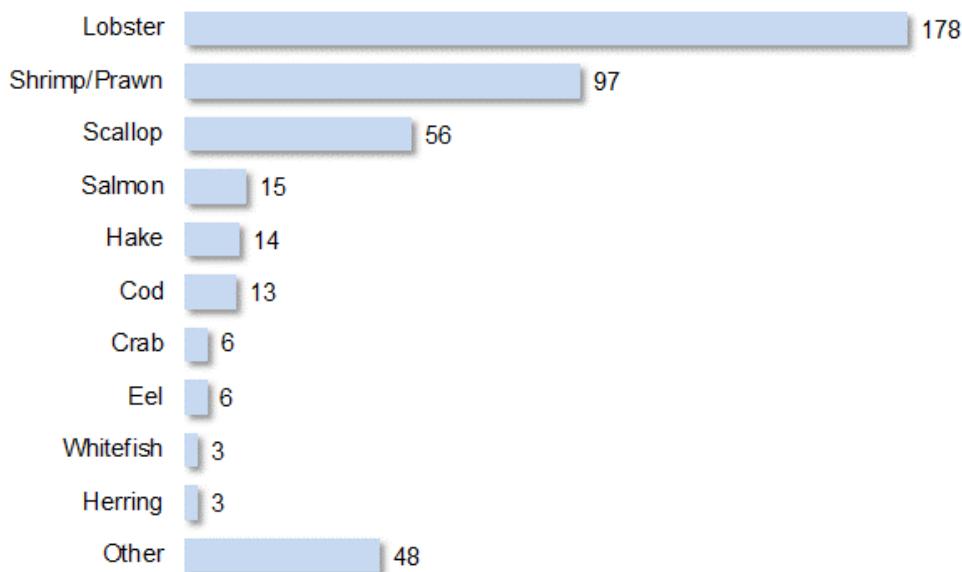


Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Canada's top fish and seafood exports to the EU by value in 2020 were lobster (\$178M), shrimp (\$97M), and scallop (\$56M). Together, these three species accounted for 75 per cent of total Canadian fish and seafood exports by value to the EU.

Canada's Fish and Seafood Trade in 2020

Figure 8. Canada's Top 10 Fish and Seafood Exports to the EU, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

January 2021 marks the departure of the UK from the European Union. As of November 2020, Canada and the UK agreed on a transitional arrangement, the Canada-UK Trade Continuity Agreement (TCA). The TCA avoids the imposition of the United Kingdom's Global Tariff (UKGT) on Canadian exports, including fish and seafood exports, ensuring that the benefits afforded by the Canada-EU Comprehensive Economic and Trade Agreement (CETA) will continue. The Canada-UK TCA is in force as of April 1, 2021, preserving preferential market access for both Canadian and UK businesses.¹²

Other Destinations

In 2020, Canadian exports to the remaining destinations were valued at \$834M, representing 13 per cent of Canada's total fish and seafood export value. Among these, other significant destinations for Canada's fish and seafood in 2020 were Japan (\$221M), Hong Kong (\$126M), and South Korea (\$106M).

Japan remained a valuable destination for Canada's fish and seafood as its fourth-largest export market in 2020, despite a 23 per cent drop in value from 2019. Canada's top fish and seafood exports by value to Japan were crab (\$37M, virtually all snow

¹² Global Affairs Canada, Canada-UK Trade Continuity Agreement (Canada-UK TCA). Accessed on October 21, 2021: https://www.international.gc.ca/trade-commerce/trade-agreements-accords-commerciaux/agr-acc/cuktca-accru/read_agreement-consultez_accord.aspx?lang=eng



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crab), lobster (\$34M), and herring (\$30M). Together, these three species accounted for nearly half (46 per cent) of total Canadian fish and seafood exports by value to Japan.

In 2020, Hong Kong remained the fifth most valuable destination for Canadian fish and seafood exports, although the exported value fell by 46 per cent compared to 2019. By value, the top species exported to Hong Kong were eel (\$47M), geoduck (\$24M), and lobster (\$23M). In 2020, Hong Kong accounted for 81 per cent of the total value of Canada's eel exports, all of which were live glass eels/elvers to be grown in aquaculture.

Table 2. Canada's Top 10 Fish and Seafood Exports by Destination, 2020

Destination	Value of Exports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Exports (%)
US	4,123	-9.5	-5.8	-3.9	64.1
China	1,035	-20.9	-17.1	-4.5	16.1
EU	439	-14.1	-9.8	-4.8	6.8
Japan	221	-22.6	-15.9	-7.9	3.4
Hong Kong	126	-45.7	-17.1	-34.5	2.0
South Korea	106	-12.7	0.9	-13.5	1.7
Viet Nam	52	-27.0	12.8	-35.2	0.8
Ukraine	51	4.1	4.4	-0.3	0.8
Dominican Republic	41	22.3	37.2	-10.9	0.6
Taiwan	35	-8.9	-14.1	6.0	0.5
Other	204	-13.8	10.2	-21.8	3.2
Total	6,431	-13.6	-7.0	-7.1	100.0



Canada's Fish and Seafood Trade in 2020

Canada's Fish and Seafood Exports by Species

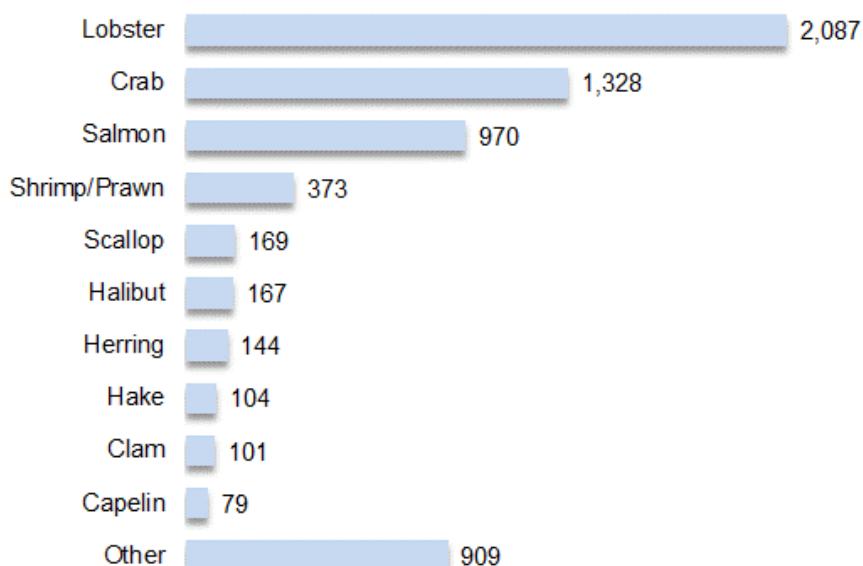
In 2020, Canada's top three fish and seafood exports in rank order of value were:

Lobster	\$2.09B
Crab	\$1.33B
Salmon	\$970M

Together, these three species accounted for 68 per cent of total Canadian fish and seafood exports by value.

Canadian exports of other species were valued at \$2.05B, almost a third of Canada's total fish and seafood export value. The main other species exported in 2020 were shrimp (\$373M), scallop (\$169M), and halibut (\$167M).

Figure 9. Canada's Fish and Seafood Exports by Species, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Lobster (largest export)

In 2020, Canadian exports of lobster were valued at \$2.09B, representing 32 per cent of Canada's total fish and seafood export value. Lobster exports mostly consisted of frozen (52 per cent by value) and live (47 per cent) lobster.

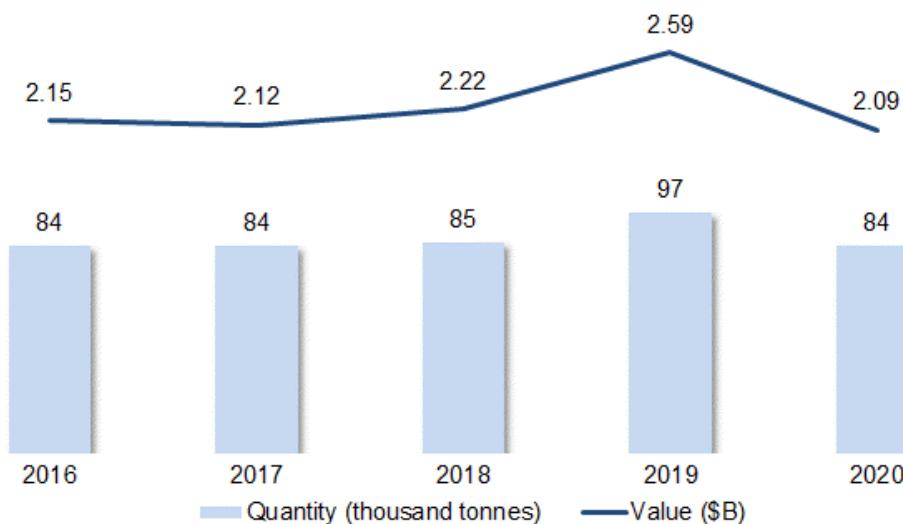
In 2020, Nova Scotia (\$1.01B) and New Brunswick (\$692M) continued to be the main provinces exporting lobster products with 48 and 33 per cent, respectively, of Canada's total lobster export share by value. They were followed by Prince Edward Island (\$230M), Quebec (\$80M), and Newfoundland and Labrador (\$74M), sharing respectively 11, 4, and 4 per cent of Canada's lobster export value in 2020.



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Canadian exports of lobster saw a significant increase in value and volume occurring between 2018 and 2019. However, Canada's lobster export value decreased 19 per cent (-\$503M) from 2019 to 2020. This decline was mainly attributable to a decrease in the quantity of lobster exported (-14 per cent) while Canada's export prices for lobster also declined 7 per cent during the same period.

Figure 10. Canada's Lobster Exports, 2016-2020



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

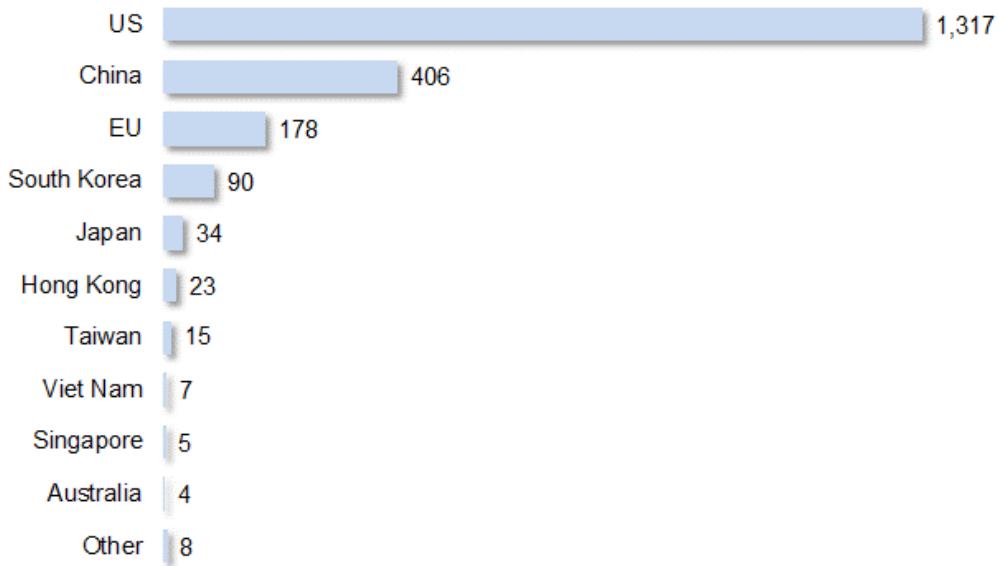
The US (\$1.32B) remained by far the largest destination for Canadian exports of lobster in 2020, representing 63 per cent of Canada's total lobster export value. By value, Canada's lobster exports to the US mostly consisted of frozen (67 per cent in 2020) and live (32 per cent) lobster. It is important to note that Canada, mainly the province of New Brunswick, imports large amounts of live lobster from the US for processing which is then destined for export back to the US market. Lobster trade flow between the US and Canada reflects a strong integration in the two countries' lobster sector and added value opportunities. Canada's lobster exports to the US declined 20 per cent (-\$320M) in value between 2019 and 2020 due to a combination of lower quantities exported (-12 per cent) and lower export prices (-9 per cent).

China remained the second-largest destination for Canada's lobster exports, accounting for 19 per cent of Canada's total lobster export value in 2020. Notably, between 2018 and 2019, the value of Canada's lobster exports to China increased 70 per cent (+\$210M). However, from 2019 to 2020, lobster exports to China fell by 20 per cent (-\$103M) as pandemic restrictions weighed on trade. This contraction was due entirely to a decrease in quantity exported (-22 per cent) as export prices of lobster to China

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experienced a 2 per cent increase during the same period. The majority of Canadian lobster was exported live (91 per cent by value in 2020) to China.

Figure 11. Canada's Lobster Exports by Destination, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Canada's lobster exports to the EU, Canada's third-largest destination for lobster by value, were valued at \$178M in 2020. Nova Scotia was by far the main province exporting lobster to the EU in 2020, representing 72 per cent (\$128M) of Canada's total lobster exports to the EU. Prince Edward Island (\$21M) and New Brunswick (\$19M) followed. Nova Scotia's lobster exports to the EU consisted principally of live lobster, while New Brunswick and Prince Edward Island mostly exported frozen lobster and frozen lobster in brine.

Crab (2nd largest export)

In 2020, Canada's crab exports were valued at \$1.33B, accounting for 21 per cent of Canada's total fish and seafood export value. By value, 71 per cent of exported Canadian crab was identified as frozen snow crab.¹³

By value, the Atlantic provinces and Quebec¹⁴ shared 86 per cent of Canadian crab exports, with exports (of mostly frozen snow crab) valued at \$1.14B in 2020. British Columbia, for its part, exported \$187M (14 per cent share), most of which was live

¹³ In 2020, 12 per cent (\$162M) of Canada's crab exports were labelled as unspecified frozen crab, which, based on exporting provinces and Canadian crab species landings data, would mostly be snow crab.

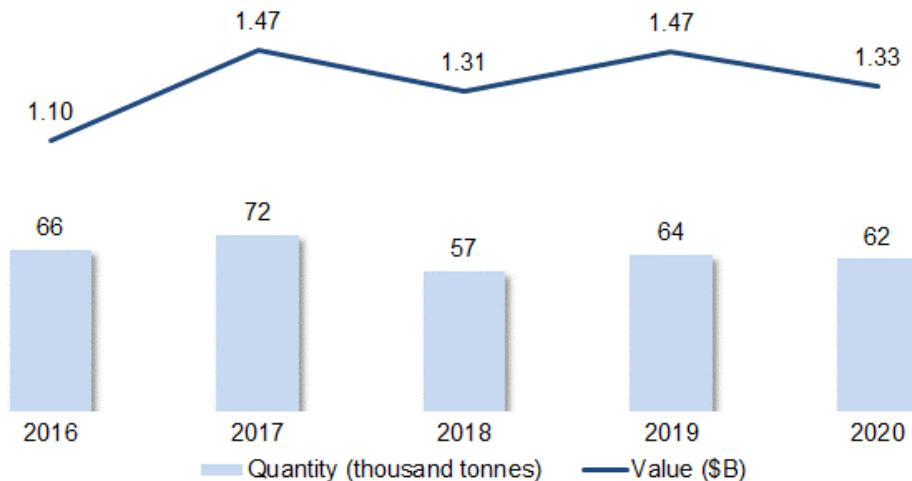
¹⁴ In Eastern Canada, Newfoundland and Labrador (\$426M) exported the most crab, followed by New Brunswick (\$255M), Nova Scotia (\$237M), Quebec (\$195M), and Prince Edward Island (\$26M).



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Dungeness crab, mainly exported to China.

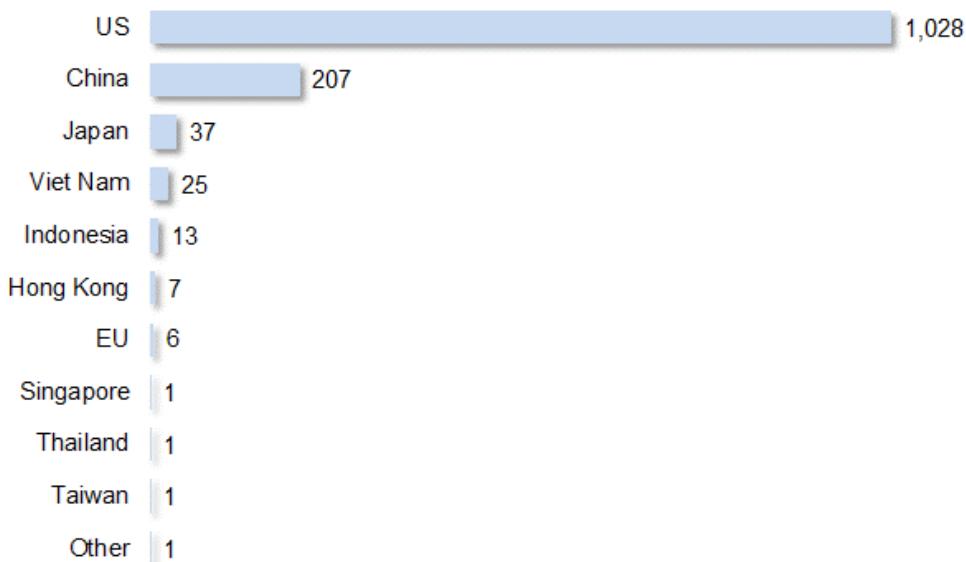
Figure 12. Canada's Crab Exports, 2016-2020



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Prices for crab were particularly strong from 2017 to 2019, and changes in export value during that period largely reflected changes in landed quantities available for export. In 2020, Canada's crab export value decreased 10 per cent (-\$140M) from the previous year. This decrease was due mainly to a 7 per cent decline in crab export prices, while quantity exported dipped slightly by 2 per cent.

Figure 13. Canada's Crab Exports by Destination, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.



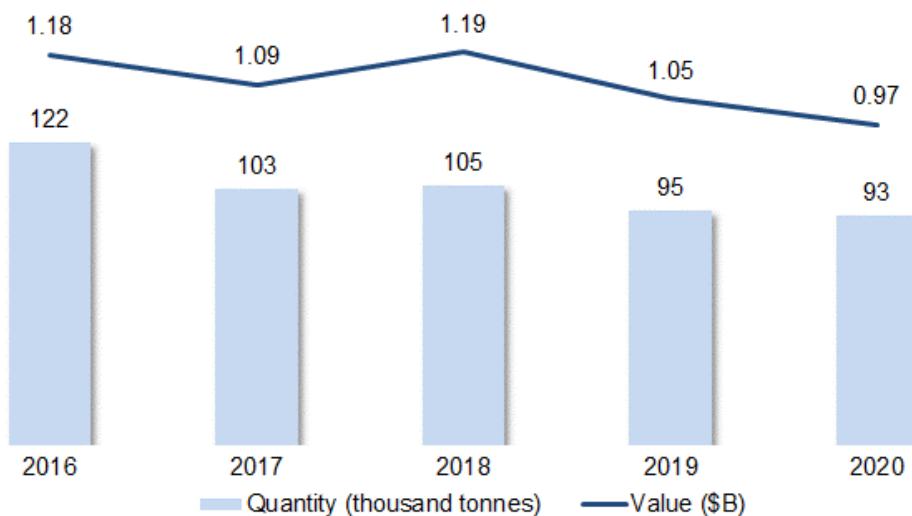
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The US (\$1.03B) remained the largest export destination for Canadian crab in 2020, representing 77 per cent of total crab export value, followed by China (\$207M) and Japan (\$37M), respectively representing 16 per cent and 3 per cent of Canadian crab exports by value.

Salmon (3rd largest export)

In 2020, Canadian salmon exports were valued at \$970M and accounted for 15 per cent of Canada's total value of fish and seafood exports. By value, 83 per cent of Canada's exports of salmon was Atlantic salmon, which is commercially produced only from aquaculture.

Figure 14. Canada's Salmon Exports, 2016-2020



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Continuing a downward trend since 2016, Canada's salmon export value and volume decreased by 7 per cent (-\$78M) and 2.5 per cent (-2,300 tonnes), respectively, from 2019 to 2020. The decline in the value of Canada's salmon exports was primarily attributable to a 5 per cent decrease in prices.

British Columbia (\$704M) and New Brunswick (\$242M) were practically the only exporting provinces of salmon products in 2020, sharing respectively 73 and 25 per cent of Canada's total salmon exports by value.

In 2020, the US continued to be the largest export destination for Canadian salmon, representing 94 per cent (\$910M) of Canada's total salmon export value, followed (distantly) by Japan (\$23M) and the EU (\$15M).

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Figure 15. Canada's Salmon Exports by Destination, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Other Species

In 2020, Canadian exports of species other than lobster, crab, and salmon were valued at \$2.05B, representing 32 per cent of Canada's total fish and seafood export value. The main other species exported in rank order of value were:

Shrimp	\$373M
Scallop	\$169M
Halibut	\$167M
Herring	\$144M
Hake	\$104M
Clam	\$101M
Capelin	\$79M

Canadian export value of shrimp decreased 17 per cent (-\$74M) between 2019 and 2020. This drop was attributable to both a decline in the quantity of shrimp exported (-10 per cent), and prices (-8 per cent). In 2020, Canadian exports of shrimp were mainly destined towards China (\$160M or 43 per cent share of total Canadian shrimp export value) and the EU (\$97M or 26 per cent share). The majority (85 per cent by value) of Canadian shrimp exported in 2020 consisted of frozen cold-water shrimps. Newfoundland and Labrador (\$153M) and Nova Scotia (\$151M) were the primary exporting provinces.



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In 2020, Canada exported \$169M of scallop, mainly destined to the US (\$103M) and the EU (\$56M). Nova Scotia was the main province exporting scallop products, with 86 per cent (or \$145M) of Canada's export value of scallop.

Canadian exports of halibut were valued at \$167M in 2020, with the US (\$127M) accounting for 76 per cent of Canada's total halibut export value. Halibut exports consisted of both fresh (73 per cent of export value) and frozen (27 per cent) halibut.

Among the top 10 exported species, herring and capelin were the only species to experience an increase in export value from 2019 to 2020. The value of herring exports increased 7 per cent (+\$10M) from 2019 to 2020 entirely due to higher export prices (+12 per cent), as export volume fell by 4 per cent. Canadian exports of herring were valued at \$144M in 2020, with the US as the top destination (\$45M). The Dominican Republic was also a key destination for herring exports, primarily for smoked fillets (\$38M). The value of capelin exports increased 19 per cent, despite a decrease in exported volume, due to a 30 per cent increase in price.

Table 3. Canada's Top 10 Fish and Seafood Exports by Species, 2020

Species	Value of Exports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Exports (%)
Lobster	2,087	-19.4	-13.7	-6.6	32.5
Crab	1,328	-9.5	-2.4	-7.3	20.6
Salmon	970	-7.4	-2.5	-5.1	15.1
Shrimp/Prawn	373	-16.6	-9.7	-7.6	5.8
Scallop	169	-9.2	-8.1	-1.2	2.6
Halibut	167	-12.0	-14.6	3.1	2.6
Herring	144	7.1	-4.0	11.6	2.2
Hake	104	-7.7	2.5	-10.0	1.6
Clam	101	-23.2	-23.1	-0.2	1.6
Capelin	79	19.3	-8.0	29.6	1.2
Other	909	-14.8	-8.6	-6.9	14.1
Total	6,431	-13.6	-7.0	-7.1	100.0



Canada's Fish and Seafood Trade in 2020

Canada's Fish and Seafood Exports by Province and Territory

In 2020, the top fish and seafood exporting Canadian provinces were Nova Scotia (\$2.01B), New Brunswick (\$1.38B), British Columbia (\$1.31B), and Newfoundland and Labrador (\$882M), accounting for 87 per cent of Canada's total fish and seafood exports by value.

Table 4. Canada's Fish and Seafood Exports by Province and Territory, 2020

Province and Territory	Value (\$M)	Quantity (thousand tonnes)	Main Species	Share* %
Nova Scotia	2,009	147	Lobster	50.1
			Crab	11.8
			Shrimp	7.5
New Brunswick	1,383	94	Lobster	50.1
			Crab	18.4
			Salmon	17.5
British Columbia	1,310	177	Salmon	53.8
			Crab	14.3
			Hake	7.5
Newfoundland and Labrador	882	92	Crab	48.3
			Shrimp	17.4
			Lobster	8.4
Quebec	347	19	Crab	56.2
			Lobster	23.1
			Shrimp	7.1
Prince Edward Island	312	19	Lobster	73.5
			Mussel	11.0
			Crab	8.3
Other	188	17	Eel	21.5
			Whitefish	8.0
			Pickerel	6.7

* Share of province's fish and seafood exports



Canada's Fish and Seafood Trade in 2020

Canada's Fish and Seafood Imports

Canada's fish and seafood imports were valued at \$3.97B in 2020. The value of imports decreased by \$309M (-7 per cent) from 2019 to 2020, after showing consistent increases in years prior. Quantity of fish and seafood imports was 518 thousand tonnes with a 4 per cent decrease from the previous year. Canada's fish and seafood import prices also decreased 4 per cent relative to 2019.

Figure 16. Canada's Fish and Seafood Imports, 2016-2020



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

Table 5. Canada's Fish and Seafood Imports, 2016-2020

Year	Value of Imports (\$B)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)
2016	3.77	7.3	4.3	2.9
2017	3.87	2.4	0.6	1.8
2018	3.98	3.0	-2.6	5.8
2019	4.28	7.5	3.4	4.0
2020	3.97	-7.2	-3.7	-3.6
Average	3.98			

Canada's Fish and Seafood Trade in 2020

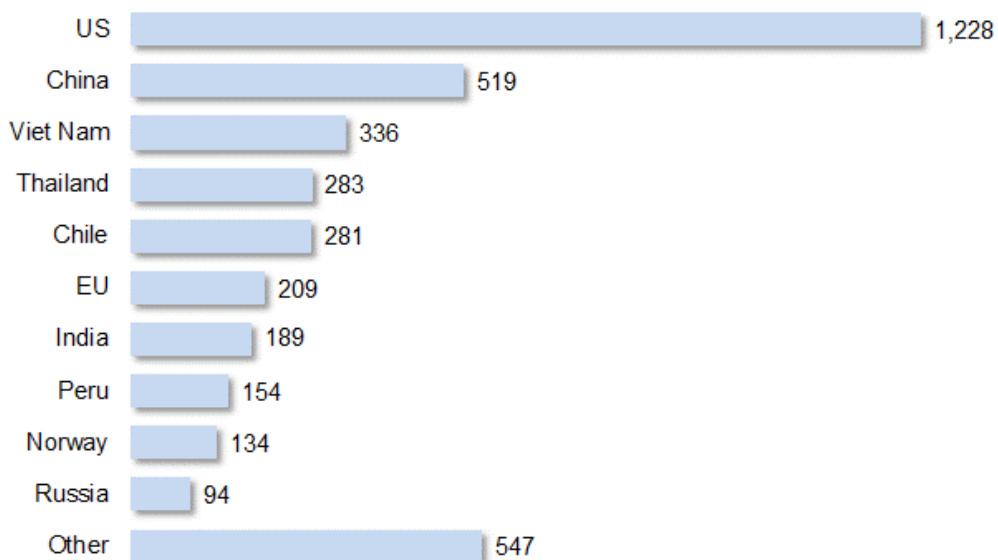
Canada's Fish and Seafood Imports by Origin

In 2020, the top three suppliers of fish and seafood to Canada in rank order of value were:

US	\$1.23B
China	\$519M
Viet Nam	\$336M

Together, these countries accounted for 52 per cent of Canada's total fish and seafood import value in 2020, with the US alone accounting for 31 per cent of total import value.

Figure 17. Canada's Fish and Seafood Imports by Origin, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

In 2020, Canadian fish and seafood imports from suppliers other than the top 3 were valued at \$1.89B, representing 48 per cent of Canada's total fish and seafood import value. Other important suppliers of fish and seafood to Canada in 2020 were Thailand (\$283M), Chile (\$281M), and the EU (\$209M).



Canada's Fish and Seafood Trade in 2020

Table 6. Canada's Top 10 Fish and Seafood Imports by Origin, 2020

Origin	Value of Imports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Imports (%)
US	1,228	-14.4	-11.9	-2.9	30.9
China	519	-17.3	-12.1	-5.9	13.1
Viet Nam	336	7.6	0.7	6.8	8.5
Thailand	283	-12.3	-6.5	-6.2	7.1
Chile	281	24.8	19.0	4.9	7.1
EU	209	2.3	6.2	-3.7	5.3
India	189	5.5	11.2	-5.1	4.7
Peru	154	16.1	-7.6	25.7	3.9
Norway	134	-5.1	27.4	-25.5	3.4
Russia	94	38.7	21.7	14.0	2.4
Other	547	-13.9	-0.5	-13.4	13.8
Total	3,973	-7.2	-3.7	-3.6	100.0



Canada's Fish and Seafood Trade in 2020

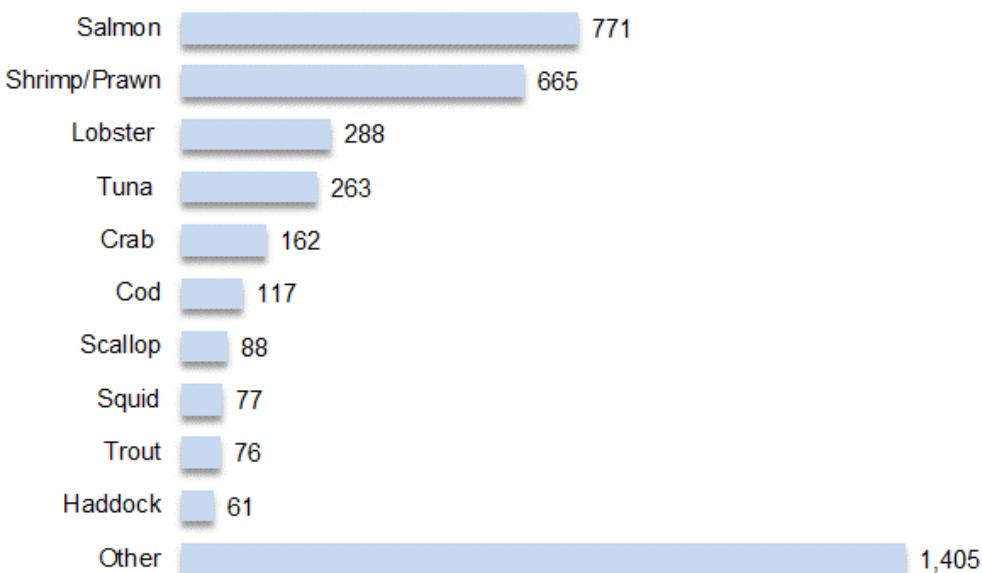
Canada's Fish and Seafood Imports by Species

In 2020, the top three species imported to Canada in rank order of value were:

Salmon	\$771M
Shrimp	\$665M
Lobster	\$228M

Together, these species accounted for 43 per cent of Canada's total fish and seafood import value in 2020.

Figure 18. Canada's Fish and Seafood Imports by Species, 2020 (\$M)



Source: Fisheries and Oceans Canada (2021), EXIM [database], Ottawa. Accessed September 28, 2021.
Adapted from Statistics Canada, *International Trade Data*. This does not constitute an endorsement by Statistics Canada of this product.

The US (54 per cent) and Chile (27 per cent) were Canada's main providers of salmon in 2020, with import values of \$414M and \$211M, respectively. Imports of salmon to Canada consisted primarily of fillets of salmon, either fresh (30 per cent share of total salmon import value) or frozen (18 per cent).

In 2020, the top suppliers by value of shrimp to Canada were Vietnam (36 per cent), India (26 per cent), China (11 per cent), and Thailand (9.5 per cent). By value, most shrimp imported to Canada in 2020 were frozen aquaculture shrimps.

With 99 per cent of total lobster import value to Canada, the US (\$284M in 2020) is considered the sole provider of lobster to Canada. Large quantities of live lobster are imported to Canada from the US for processing into products that are then destined for export back to the US market. Among Canada's top ten imported species, lobster



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imports declined most significantly between 2019 and 2020 both in absolute and percentage terms (-\$133M or -32 per cent).

In 2020, Canadian imports of species other than salmon, shrimp, and lobster were valued at \$2.25B and represented 57 per cent of Canada's total fish and seafood import value. The main other species imported in 2020 were tuna (\$263M), crab (\$162M), and cod (\$117M).

Table 7. Canada's Top 10 Fish and Seafood Imports by Species, 2020

Species	Value of Imports (\$M)	Change of Values (%)	Change of Volumes (%)	Change of Prices (%)	Share of Imports (%)
Salmon	771	3.8	2.9	0.8	19.4
Shrimp/Prawn	665	-0.8	-3.4	2.7	16.7
Lobster	288	-31.6	-24.1	-9.9	7.2
Tuna	263	-6.4	0.7	-7.0	6.6
Crab	162	-2.2	-19.5	21.5	4.1
Cod	117	2.0	10.8	-7.9	2.9
Scallop	88	-1.4	4.2	-5.4	2.2
Squid	77	-24.5	-23.3	-1.5	2.0
Trout	76	-11.7	-7.8	-4.2	1.9
Haddock	61	1.9	7.8	-5.5	1.5
Other	1,405	-9.3	-3.9	-5.6	35.4
Total	3,973	-7.2	-3.7	-3.6	100.0

Canada benefits from being a net exporter in the global fish and seafood markets. With the value of imports (-7 per cent) falling less than exports (-14 per cent) in 2020 compared to 2019, Canada's fish and seafood trade balance shifted, with a decline in net exports of 22 per cent. In 2019, Canada's fish and seafood trade surplus was \$3.16 billion; in 2020 it was \$2.46 billion.



Canada's Fish and Seafood Trade in 2020

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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