



**MARKET ACCESS SECRETARIAT  
Global Analysis Report**

## Sector Trend Analysis

### Fish and Seafood Trends In China

**March 2017**



#### REPORT CONTENT SUMMARY

This report looks to highlight the fish and seafood imports into China, and attempts to identify the best opportunities for Canadian exports.

Specifically, the data analysis that follows focusses on the top Chinese fish and seafood imports, of which Canada may be a supplier. It identifies the gap between China's imports from the world and the proportion provided by Canada, and then outlines top international competitors.

Unless otherwise specified, all figures in this document are based on import data as reported by China Customs, and were sourced from Global Trade Tracker (2016).

#### CHINA MARKET SUMMARY

The volume of fish and seafood retail sales in China grew by 4% to reach 38 million tonnes in 2015, and was expected to continue growing at a compound annual growth rate (CAGR) of 4% from 2015 to 2020, to reach 47 million tonnes by 2020.

Organic fish and seafood is increasing in popularity among Chinese consumers. Most Chinese consumers prefer natural and imported products because of their enhanced quality.

Canadian fish and seafood e-commerce retailers are expected to reach over 400 million Chinese consumers through the e-commerce pavilion established between Chinese online retailing giant Alibaba and Canada in 2016. In addition, Alibaba has partnered with the Canadian Trade Commissioner Service in China (TCS) to better facilitate goods and services between the two countries. The company and TCS agreed to help connect Canadian businesses, especially small and medium-sized enterprises (SMEs), with the Chinese e-commerce market.

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#### RELATED REPORTS

- Market Overview – China
- An Overview of E-Commerce Trends in China
- Foodservice Profile: China
- Competitive Trade Analysis – Fresh, Frozen and Processed Fish in China
- Competitive Trade Analysis – Fresh, Frozen and Processed Crustaceans in China



## CANADA'S PERFORMANCE

### China's Top Ten Suppliers of Fish and Seafood, C\$

Country		2010	2013	2014	2015	CAGR*(%) 2010-2015
<b>Worldwide</b>		<b>6,596,956,221</b>	<b>8,663,469,383</b>	<b>9,907,680,098</b>	<b>11,247,988,370</b>	<b>11.3</b>
1	Russia	1,403,142,921	1,534,999,018	1,561,243,001	1,674,553,310	3.6
2	United States	877,008,116	1,326,639,934	1,519,828,719	1,637,081,484	13.3
3	Peru	1,122,577,490	1,050,321,995	1,153,293,055	1,510,371,006	6.1
4	Canada	225,784,045	419,390,006	514,776,966	715,834,935	26.0
5	Indonesia	161,976,804	378,765,091	463,550,352	529,818,256	26.7
6	New Zealand	134,682,880	360,810,417	436,149,845	510,011,358	30.5
7	Chile	353,462,752	453,070,470	458,080,760	449,052,673	4.9
8	Norway	424,006,075	444,499,215	599,225,000	448,409,897	1.1
9	Thailand	217,170,687	249,818,791	317,128,314	356,995,915	10.5
10	Japan	315,586,630	224,575,822	277,089,352	331,004,041	1.0

\*CAGR: Compound Annual Growth Rate.

### China's Top Ten Suppliers of Fish and Seafood, Market Share (%)

Country		2010	2011	2012	2013	2014	2015
1	Russia	21.3	25.0	21.8	23.3	23.7	25.4
2	United States	13.3	20.5	20.8	20.1	23.0	24.8
3	Peru	17.0	19.0	17.7	15.9	17.5	22.9
4	Canada	3.4	4.7	5.3	6.4	7.8	10.9
5	Indonesia	2.5	2.9	4.0	5.7	7.0	8.0
6	New Zealand	2.0	2.9	4.2	5.5	6.6	7.7
7	Chile	5.4	5.2	4.9	6.9	6.9	6.8
8	Norway	6.4	6.3	6.1	6.7	9.1	6.8
9	Thailand	3.3	2.5	3.0	3.8	4.8	5.4
10	Japan	4.8	2.4	2.6	3.4	4.2	5.0

### Fish and Seafood Supply Gap, C\$

	2010	2013	2014	2015	CAGR*(%) 2010-2015
China's imports from the world	6,596,956,221	8,663,469,383	9,907,680,098	11,247,988,370	11.3
China's imports from Canada	225,784,045	419,390,006	514,776,966	715,834,935	26.0
<b>Supply gap</b>	<b>6,371,172,176</b>	<b>8,244,079,377</b>	<b>9,392,903,132</b>	<b>10,532,153,435</b>	<b>10.6</b>

\*CAGR: Compound Annual Growth Rate.

Source for all tables: Global Trade Tracker, 2016



### Top Fish and Seafood Commodity Imports from the World, C\$

Commodity	Description	Canadian Dollars (\$)		
		2013	2014	2015
<b>Total Fish and Seafood</b>		<b>8,663,469,383</b>	<b>9,907,680,098</b>	<b>11,247,988,370</b>
230120	Flour/meal/pellet of fish, crustaceans, molluscs, etc. unfit for human consumption	1,725,393,603	1,722,614,908	2,312,183,574
030367	Frozen Alaska pollock	907,931,277	929,033,529	935,171,077
030363	Frozen cod	447,294,426	556,383,227	626,769,871
030389	Frozen fish, N.E.S.*	480,395,226	568,297,624	576,721,264
030617	Frozen shrimp and prawns	205,308,933	330,333,639	571,787,113
030749	Frozen/dried cuttle fish and squid	460,978,296	495,857,808	482,930,962
030621	Live rock lobster and other sea crawfish	392,769,945	445,602,651	437,368,482
030312	Frozen Pacific salmon, exclude Sockeye salmon (red salmon)	394,618,109	443,759,580	430,259,961
030624	Live, fresh/chilled, dried, salted, or in brine crab	341,025,114	369,285,917	417,650,874
030214	Fresh Atlantic and Danube salmon	156,295,772	287,929,400	393,558,861

\*N.E.S.: No Elsewhere Specified.

### China's Top Fish and Seafood Commodity Imports from Canada, C\$

Commodity	Description	Canadian Dollars (\$)			Share Over the World's Total Imports (%)		
		2013	2014	2015	2013	2014	2015
<b>Total Fish and Seafood</b>		<b>419,390,007</b>	<b>514,776,964</b>	<b>715,834,935</b>	<b>4.8</b>	<b>5.2</b>	<b>6.4</b>
030616	Frozen cold-water shrimp and prawns	83,735,370	82,378,574	142,051,935	56.1	50.1	56.7
030622	Live/chilled lobster	35,786,022	91,682,594	130,491,379	50.8	51.8	54.6
030614	Frozen crab, including in shell	84,925,157	100,804,677	117,395,001	51.8	57.3	53.2
030624	Live/chilled crab, including in shell	64,543,490	79,428,912	96,627,102	18.9	21.5	23.1
030214	Fresh Atlantic and Danube salmon	1,672,217	3,156,720	36,990,720	1.1	1.1	9.4
030389	Frozen fish, N.E.S.*	15,255,429	12,957,805	25,402,212	3.2	2.3	4.4
030331	Frozen halibut/Greenland turbot	6,307,109	7,031,576	18,687,551	5.8	7.0	12.3
030366	Frozen hake	10,314,918	21,089,620	15,860,033	39.6	52.2	60.0
030612	Frozen lobster, including in shell	4,618,463	9,585,354	15,425,042	1.2	2.2	3.6
030339	Frozen flat fish (excl. halibut, plaice, sole and turbot)	8,783,372	13,281,325	15,220,859	3.7	5.1	6.7

\*N.E.S.: No Elsewhere Specified.

Source for all tables: Global Trade Tracker, 2016.



According to Euromonitor International, the volume of fish and seafood retail sales in China grew by 4% in 2015, reaching 38 million tonnes. The key drivers of this growth could be consumers' increasing awareness of the benefits of fish and seafood, and powerful sales in inland lower-tier cities. Another possible reason might be Chinese economy's optimisation and diverse food selections which have encouraged Chinese consumers to change their diets from meat oriented to fish and seafood. The increasing internet retailing also boosted the growth of the market in 2015. It was expected that fish and seafood in China could continue to grow by a compound annual growth rate (CAGR) of 4% from 2015 to 2020, to reach 47 million tonnes by 2020.

## TRADE OVERVIEW

### 1. Lobster

#### China's Top Lobster Commodity Imports from Canada, C\$

Commodity	Description	2013	2014	2015
<b>Total Lobster</b>		<b>40,404,485</b>	<b>101,267,948</b>	<b>145,916,421</b>
030622	Live Lobster	35,786,022	91,682,594	130,491,379
030612	Frozen Lobster	4,618,463	9,585,354	15,425,042

#### China's Top Lobster Commodity Imports from Canada, KG

Commodity	Description	2013	2014	2015
<b>Total Lobster</b>		<b>2,268,543</b>	<b>5,058,838</b>	<b>6,227,507</b>
030622	Live Lobster	1,919,916	4,360,758	5,056,889
030612	Frozen Lobster	348,627	698,080	1,170,618

### *Live Lobster*

#### China's Top 10 Suppliers of Live Lobster, C\$

Country		2013	2014	2015
1	Canada	35,786,022	91,682,594	130,491,379
2	United States	31,767,300	84,473,272	107,800,827
3	United Kingdom	25,287	659,175	476,970
4	Kenya	0	0	73,158
5	Ireland	483	0	44,375
6	France	28,737	81,163	36,480
7	Japan	428	24,057	28,627
8	Taiwan	683	58,625	25,152
9	New Zealand	379,843	0	12,294
10	Australia	158,104	0	1,292

Source for all tables: Global Trade Tracker, 2016.



### Live Lobster Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	70,496,910	177,080,454	238,990,796	84
China's imports from Canada	35,786,022	91,682,594	130,491,379	91
<b>Supply Gap</b>	<b>34,710,888</b>	<b>85,397,860</b>	<b>108,499,417</b>	<b>77</b>

\*CAGR: Compound Annual Growth Rate.

### Frozen Lobster

#### China's Top 10 Suppliers of Live Lobster, C\$

Country		2013	2014	2015
1	Canada	4,618,463	9,585,354	15,425,042
2	United Kingdom	0	450,248	420,139
3	New Zealand	96,957	110,052	259,381
4	Myanmar	307,887	97,979	134,540
5	France	50,661	0	69,364
6	Mozambique	1,596,500	220,155	23,443
7	Malaysia	0	0	18,525
8	United States	242,699	60,315	7,191
9	Netherlands	0	0	189
10	Australia	9,453	6,016	0

#### Frozen Lobster Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	11,995,486	10,877,689	16,357,814	17
China's imports from Canada	4,618,463	9,585,354	15,425,042	83
<b>Supply Gap</b>	<b>7,377,023</b>	<b>1,292,335</b>	<b>932,772</b>	<b>-64</b>

\*CAGR: Compound Annual Growth Rate.

Source for all tables: Global Trade Tracker, 2016.



## 2. Crab

### China's Top Crab Commodity Imports from Canada, C\$

Commodity	Description	2013	2014	2015
<b>Total Crab</b>		<b>149,497,343</b>	<b>180,233,589</b>	<b>214,022,103</b>
030614	Frozen crab, including in shell	84,925,157	100,804,677	117,395,001
030624	Live/chilled crab, including in shell	64,543,490	79,428,912	96,627,102
160510	Prepared/ preserved cab (excl. smoked)	28,696	0	0

### China's Top Crab Commodity Imports from Canada, KG

Commodity	Description	2013	2014	2015
<b>Total Crab</b>		<b>15,919,745</b>	<b>16,497,640</b>	<b>14,714,103</b>
030614	Frozen crab, including in shell	11,982,033	12,563,124	10,700,272
030624	Live/chilled crab, including in shell	3,920,836	3,934,516	4,013,831
160510	Prepared/preserved crab (excl. smoked)	16,876	0	0

### **Frozen Crab**

### China's Top 10 Suppliers of Frozen Crab, C\$

Country		2013	2014	2015
1	Canada	84,925,157	100,804,677	117,395,001
2	United States	46,962,995	40,663,226	49,327,439
3	Chile	11,459,230	11,189,452	25,203,520
4	Russia	8,727,187	5,801,411	5,683,712
5	United Kingdom	1,963,890	2,649,603	5,243,788
6	Ireland	735,508	1,627,475	2,112,330
7	Argentina	592,733	2,439,155	1,873,427
8	North Korea	683,570	2,072,715	1,739,621
9	Namibia	1,171,404	2,011,979	1,710,022
10	Myanmar	196,640	554,381	1,662,297

Source for all tables: Global Trade Tracker, 2016.



### Frozen Crab Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	163,966,917	175,922,905	220,516,753	16
China's imports from Canada	84,925,157	100,804,677	117,395,001	18
<b>Supply Gap</b>	<b>79,041,760</b>	<b>75,118,228</b>	<b>103,121,752</b>	<b>14</b>

\*CAGR: Compound Annual Growth Rate.

### Fresh Crab

#### China's Top 10 Suppliers of Live Crab, C\$

Country		2013	2014	2015
1	Canada	64,543,490	79,428,912	96,627,102
2	Bangladesh	40,831,794	44,826,642	56,433,045
3	United States	78,426,741	66,697,895	51,703,451
4	North Korea	15,369,520	18,096,040	33,198,376
5	Russia	3,557,065	6,815,174	29,678,677
6	Indonesia	51,320,021	52,656,875	20,833,413
7	Madagascar	8,772,200	19,493,235	18,876,398
8	Philippines	10,761,390	12,376,094	17,606,373
9	Pakistan	11,535,916	9,262,133	15,541,342
10	Malaysia	46,819	13,119	14,845,274

### Fresh Crab Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	341,025,110	369,285,918	417,650,874	7
China's imports from Canada	64,543,490	79,428,912	96,627,102	14
<b>Supply Gap</b>	<b>276,481,620</b>	<b>289,857,006</b>	<b>321,023,772</b>	<b>5</b>

\*CAGR: Compound Annual Growth Rate.

Source for all tables: Global Trade Tracker, 2016.



### 3. Shrimp

#### China's Top Shrimp Commodity Imports from Canada, C\$

Commodity	Description	2013	2014	2015
<b>Total Shrimp</b>		<b>92,187,939</b>	<b>87,815,084</b>	<b>154,308,896</b>
030616	Frozen cold-water shrimp and prawns	83,735,370	82,378,574	142,051,935
030617	Frozen shrimp and prawns	8,446,966	5,418,208	12,111,444
030626	Fresh cold-water shrimp and prawns	0	18,302	108,092
030627	Fresh shrimp and prawns, except cold-water	371	0	37,425
030613	Frozen shrimp and prawns, including in shell	0	0	0
160520	Prepared/ preserved shrimp and prawns	0	0	0
160521	Prepared/ preserved shrimp and prawns, not in airtight containers (excl. smoked)	3,997	0	0
160529	Prepared/ preserved shrimp and prawns, in airtight containers (excl. smoked)	1,235	0	0

#### China's Top Shrimp Commodity Imports from Canada, KG

Commodity	Description	2013	2014	2015
<b>Total Shrimp</b>		<b>20,344,505</b>	<b>17,237,898</b>	<b>22,921,163</b>
030616	Frozen cold-water shrimp and prawns	18,719,685	16,924,797	22,108,697
030617	Frozen shrimp and prawns	1,624,347	312,556	808,879
030626	Fresh cold-water shrimp and prawns	0	545	2,583
030627	Fresh shrimp and prawns, except cold-water	25	0	1,004
030613	Frozen shrimp and prawns, including in shell	0	0	0
160520	Prepared/ preserved shrimp and prawns	0	0	0
160521	Prepared/ preserved shrimp and prawns, not in airtight containers (excl. smoked)	400	0	0
160529	Prepared/ preserved shrimp and prawns, in airtight containers (excl. smoked)	48	0	0

Source for all tables: Global Trade Tracker, 2016.





## Frozen Cold-Water Shrimp and Prawns

### China's Top 10 Suppliers of Frozen Cold-Water Shrimp and Prawns, C\$

Country		2013	2014	2015
1	Canada	83,735,370	82,378,574	142,051,935
2	Greenland	22,543,469	22,905,487	42,796,916
3	Ecuador	1,965,969	8,690,388	18,183,195
4	Russia	4,777,714	9,840,063	12,929,968
5	Argentina	2,824,504	6,382,357	10,040,559
6	Estonia	4,679,953	4,315,751	7,724,001
7	Denmark	15,011,264	13,534,589	7,722,214
8	United States	192,907	876,988	2,442,348
9	India	0	2,078,161	2,285,192
10	Faroe Islands	1,611,847	1,285,414	844,236

### Frozen Cold-Water Shrimp and Prawns Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	149,368,352	164,496,933	250,642,420	30
China's imports from Canada	83,735,370	82,378,574	142,051,935	30
<b>Supply Gap</b>	<b>65,632,982</b>	<b>82,118,359</b>	<b>108,590,485</b>	<b>29</b>

\*CAGR: Compound Annual Growth Rate.

## Frozen Shrimp and Prawns

### China's Top 10 Suppliers of Frozen Shrimp and Prawns, C\$

Country		2013	2014	2015
1	Ecuador	55,390,398	147,388,144	225,393,173
2	Indonesia	3,342,163	18,247,422	83,542,455
3	India	48,064,265	36,159,840	77,253,056
4	Argentina	35,438,543	49,729,408	67,074,469
5	Thailand	15,248,963	22,387,507	49,985,470
6	Canada	8,446,966	5,418,208	12,111,444
7	Myanmar	6,629,769	11,448,769	11,065,599
8	Australia	3,547,439	5,726,218	8,326,804
9	Pakistan	1,898,144	7,565,520	7,711,005
10	Mozambique	5,694,465	4,001,249	7,646,609

Source for all tables: Global Trade Tracker, 2016.



### Frozen Shrimp and Prawns Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	205,308,933	330,333,638	571,787,113	67
China's imports from Canada	8,446,966	5,418,208	12,111,444	20
<b>Supply Gap</b>	<b>196,861,967</b>	<b>324,915,430</b>	<b>559,675,669</b>	<b>69</b>

\*CAGR: Compound Annual Growth Rate.

#### 4. Clams

### China's Top Clam Commodity Imports from Canada, C\$

Commodity	Description	2013	2014	2015
<b>Total Clams</b>		<b>7,632,556</b>	<b>13,455,230</b>	<b>27,417,403</b>
030771	Live, fresh or chilled clams	0	3,327,436	13,452,585
030779	Clams, cockles and ark shells	7,396,039	9,871,530	13,126,557
160556	Prepared/ preserved clams, cockles and ark shells (excl. smoked)	236,517	256,264	838,261

### China's Top Clam Commodity Imports from Canada, KG

Commodity	Description	2013	2014	2015
<b>Total Clams</b>		<b>1,057,199</b>	<b>1,506,536</b>	<b>1,816,864</b>
030771	Live, fresh or chilled clams	0	79,966	337,841
030779	Clams, cockles and ark shells	1,038,299	1,407,670	1,441,223
160556	Prepared/ preserved clams, cockles and ark shells (excl. smoked)	18,900	18,900	37,800

Source for all tables: Global Trade Tracker, 2016.



## Live Clams

### China's Top 10 Suppliers of Live Clam, C\$

Country		2013	2014	2015
1	United States	10,296	8,535,818	23,364,056
2	Canada	0	3,327,436	13,452,585
3	Pakistan	65,212	612,363	2,161,233
4	Ireland	898,209	1,530,117	1,838,305
5	Myanmar	107	223,837	730,390
6	North Korea	166,736	321,258	638,144
7	Thailand	10,859,094	7,849,362	270,936
8	South Korea	901,204	763,913	215,716
9	New Zealand	6,508	41,048	58,997
10	Mexico	5,261	133,865	33,543

### Live Clam Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	13,021,036	23,369,724	42,796,881	81
China's imports from Canada	0	3,327,436	13,452,585	N/C*
<b>Supply Gap</b>	<b>13,021,036</b>	<b>20,042,288</b>	<b>29,344,296</b>	<b>50</b>

\*N/C: Not Calculable. \*CAGR: Compound Annual Growth Rate.

## Clams, Cockles and Ark Shells

### China's Top 5 Suppliers of Clams, Cockles and Ark Shells, C\$

Country		2013	2014	2015
1	Canada	7,396,039	9,871,530	13,126,557
2	Pakistan	0	111,144	865,581
3	Ireland	31,996	192,688	204,864
4	India	122,082	109,096	83,910
5	United States	1,365	3,208	28,682

Note: China has only 8 suppliers of clams, cockles, and ark shells in 2015.

Source for all tables: Global Trade Tracker, 2016.



### Clams, Cockles and Ark Shells Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-2015
China's imports from the world	7,551,482	10,296,016	14,321,046	38
China's imports from Canada	7,396,039	9,871,530	13,126,557	33
<b>Supply Gap</b>	<b>155,443</b>	<b>424,486</b>	<b>1,194,489</b>	<b>177</b>

\*CAGR: Compound Annual Growth Rate.

### 5. Hake

#### China's Top Hake Commodity Imports from Canada, C\$

Commodity	Description	2013	2014	2015
<b>Total Hake</b>		<b>10,314,918</b>	<b>21,089,620</b>	<b>15,860,033</b>
030366	Frozen hake	10,314,918	21,089,620	15,860,033

#### China's Top Hake Commodity Imports from Canada, KG

Commodity	Description	2013	2014	2015
<b>Total Hake</b>		<b>5,467,460</b>	<b>11,690,426</b>	<b>10,254,282</b>
030366	Frozen hake	5,467,460	11,690,426	10,254,282

### **Frozen Hake**

#### China's Top 10 Suppliers of Frozen Hake, C\$

Country		2013	2014	2015
1	Canada	10,314,918	21,089,620	15,860,033
2	United States	6,794,839	9,494,996	2,973,059
3	Argentina	1,933,294	3,367,180	2,560,749
4	New Zealand	5,076,723	2,561,949	2,063,568
5	Uruguay	593,538	2,038,091	777,585
6	Russia	250,778	380,353	410,729
7	Chile	560,166	265,093	385,418
8	South Africa	161,853	265,843	225,655
9	Australia	0	0	212,398
10	South Korea	244,855	619,344	180,047

Source for all tables: Global Trade Tracker, 2016.



### Frozen Hake Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	26,068,964	40,436,664	26,446,354	1
China's imports from Canada	10,314,918	21,089,620	15,860,033	24
<b>Supply Gap</b>	<b>15,754,046</b>	<b>19,347,044</b>	<b>10,586,321</b>	<b>-18</b>

\*CAGR: Compound Annual Growth Rate.

## 6. Salmon

### China's Top Salmon Commodity Imports from Canada, C\$

Commodity	Description	2013	2014	2015
<b>Total Salmon</b>		<b>18,517,546</b>	<b>16,396,336</b>	<b>41,245,049</b>
030214	Fresh Atlantic and Danube salmon	1,672,217	3,156,720	36,990,720
030312	Frozen Pacific salmon (excl. Sockeye salmon)	15,668,690	9,445,057	2,758,812
030311	Frozen Sockeye salmon	0	1,317,209	844,822
030319	Frozen Salmonidae (excl. trout and Pacific, Atlantic and Danube salmon)	129,993	69,912	405,913
030213	Fresh/ chilled Pacific salmon	12,097	68,096	210,249
030541	Smoked Pacific, Atlantic And Danube salmon, incl. fillets (excl. offal)	56,437	21,514	30,510
160411	Prepared/ preserved salmon, whole or pieces	2,778	9,725	3,149
030441	Fresh/ chilled Pacific, Atlantic, Danube salmon fillet	0	61	874
030219	Fresh/ chilled Salmonidae (excl. trout and Pacific, Atlantic and Danube salmon)	28,073	0	0
030313	Frozen Atlantic salmon	947,261	2,123,749	0
030481	Frozen Pacific, Atlantic And Danube salmon fillets	0	184,293	0

Source for all tables: Global Trade Tracker, 2016.



### China's Top Salmon Commodity Imports from Canada, KG

Commodity	Description	2013	2014	2015
<b>Total Salmon</b>		<b>6,550,669</b>	<b>3,977,774</b>	<b>4,808,608</b>
030214	Fresh Atlantic and Danube salmon	193,954	320,471	3,757,015
030312	Frozen Pacific salmon (excl. Sockeye salmon)	5,908,823	2,966,675	781,970
030311	Frozen Sockeye salmon	0	166,937	130,738
030319	Frozen Salmonidae (excl. trout and Pacific, Atlantic and Danube salmon)	123,188	61,949	128,664
030213	Fresh/ chilled Pacific salmon	826	2,970	8,517
030541	Smoked Pacific, Atlantic And Danube salmon, incl. fillets (excl. offal)	1,689	424	1,536
160411	Prepared/ preserved salmon, whole or pieces	150	446	141
030441	Fresh/ chilled Pacific, Atlantic, Danube salmon fillet	0	6	27
030219	Fresh/ chilled Salmonidae (excl. trout and Pacific, Atlantic and Danube salmon)	3,840	0	0
030313	Frozen Atlantic salmon	199,026	399,060	0
030481	Frozen Pacific, Atlantic And Danube salmon fillets	119,173	58,836	0

### **Fresh Atlantic and Danube Salmon**

#### China's Top 5 Suppliers for Fresh Atlantic and Danube Salmon, C\$

Country		2013	2014	2015
1	Faroe Islands	62,470,973	88,322,859	143,914,182
2	Chile	7,075,548	35,498,357	69,862,637
3	United Kingdom	32,387,712	61,414,638	59,666,495
4	Australia	1,144,169	5,143,080	49,471,888
5	Canada	1,672,217	3,156,720	36,990,720

**Note:** China has only 8 suppliers of fresh Atlantic and Danube salmon in 2015.

**Source for all tables:** Global Trade Tracker, 2016.



### Fresh Atlantic and Danube Salmon Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	156,295,774	287,929,401	393,558,862	20
China's imports from Canada	1,672,217	3,156,720	36,990,720	86
<b>Supply Gap</b>	<b>154,623,557</b>	<b>284,772,681</b>	<b>356,568,142</b>	<b>18</b>

\*CAGR: Compound Annual Growth Rate.

### Frozen Pacific Salmon (exclude Sockeye salmon)

#### China's Top 9 Suppliers for Fresh Pacific Salmon, C\$

Country		2013	2014	2015
1	United States	184,966,575	235,266,170	291,293,247
2	Russia	128,318,554	94,493,213	78,066,578
3	Japan	45,684,622	79,477,529	38,413,407
4	Chile	17,170,497	21,946,712	18,616,023
5	Canada	15,668,690	9,445,057	2,758,812
6	Norway	97,265	322,891	508,510
7	South Korea	318,665	1,222,583	257,931
8	New Zealand	0	0	42,351
9	United Kingdom	0	0	429

Note: China has 9 suppliers of fresh Pacific Salmon only in 2015.

### Fresh Atlantic and Danube Salmon Supply Gap, C\$

	2013	2014	2015	CAGR*(%) 2013-15
China's imports from the world	394,618,108	443,759,581	430,259,961	4
China's imports from Canada	15,668,690	9,445,057	2,758,812	-58
<b>Supply Gap</b>	<b>378,949,418</b>	<b>434,314,524</b>	<b>427,501,149</b>	<b>6</b>

\*CAGR: Compound Annual Growth Rate.

Source for all tables: Global Trade Tracker, 2016.



## OPPORTUNITIES AND CHALLENGES

### Potential Canadian Commodity Exports to China's Fish and Seafood Market

Commodity		Description
1	030616	Frozen cold-water shrimp and prawns
2	030622	Live/chilled lobster
3	030779	Clams, cockles and ark shells
4	030624	Live/ chilled crab, including in shell
5	030366	Frozen Hake
6	030771	Live, fresh or chilled clams
7	030612	Frozen lobster, including in shell
8	030214	Fresh Atlantic and Danube salmon
9	030821	Fresh sea urchins
10	030819	Sea cucumbers

Above are the top ten potential Canadian commodity exports to the fish and seafood market in China. The prospective of each commodity is based on China's market size for certain products, Canada's market share on such products, and the growing trends in both world and Canada's export markets to China.

Organic fish and seafood is increasing in popularity among Chinese consumers. Most Chinese consumers prefer natural and imported products because of their enhanced quality.

While Canada's exports of fish and seafood commodities in China grew at a compound annual growth rate of 26% from 2010 to 2015, some fish and seafood sectors are still facing a challenging market environment in China.

## E-COMMERCE

China's top internet e-grocers are JD.com, Alibaba, Amazon, Walmart (YIHAODIAN), GOME, Sundan, LVMH, Hisap, and Auchan. JD.com leads the e-grocers and is the largest for computer, communications, and consumer businesses; while Alibaba is the second-top e-grocer, it is by far the largest e-commerce business in China with 56% of all transactions.

As Chinese e-commerce giant Alibaba and Canada launched Tmall Global's country pavilion in September 2016, Canadian fish and seafood e-commerce retailers are expected to reach over 400 million Chinese consumers through this cross-border e-commerce channel. In addition, Alibaba has partnered with the Canadian Trade Commissioner Service in China (TCS) to better facilitate goods and services between the two countries. The company and TCS agreed to help connect Canadian businesses, especially small and medium-sized enterprises (SMEs) with the Chinese e-commerce market. This partnership between Alibaba Group and Canada has created significant opportunities for Canadian business development in China.

According to Planet Retail, mobile internet retailing is booming in China as consumers increasingly use mobile devices to compare prices and make purchases at any time. As a result, internet retailers are targeting the opportunities offered by m-commerce such as developing an e-commerce mobile app. In addition, Chinese consumers are used to fast service and quick delivery of their online purchases. Holding inventory inside the country can help to expedite transactions and meet consumer expectations.





## FOR MORE INFORMATION

International Trade Commissioners can provide Canadian industry with on-the-ground expertise regarding market potential, current conditions and local business contacts, and are an excellent point of contact for export advice.

- **Overview of Trade Commissioner Services in China**  
[www.tradecommissioner.gc.ca/cn](http://www.tradecommissioner.gc.ca/cn)
- **Find a Trade Commissioner**  
[www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp](http://www.tradecommissioner.gc.ca/eng/find-trade-contacts.jsp)

For additional intelligence on this and other markets, the complete library of Global Analysis reports can be found under *Statistics and Market Information* at the following link, arranged by sector and region of interest:

- [ats-sea.agr.gc.ca](http://ats-sea.agr.gc.ca)

For additional information on China Fish and Seafood Expo (CFSE) and Hospitality China 2015 please contact:

- **Ben Berry, Deputy Director**  
Trade Show Strategy and Delivery  
Agriculture and Agri-Food Canada  
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## SECTOR TREND ANALYSIS, FISH AND SEAFOOD TRENDS in CHINA

*Global Analysis Report*

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