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Fishery Products

Annual

2005

Approved by:

Lisa Anderson
U.S. Embassy

Prepared by:

George Myles

Report Highlights:

This report highlights developments in the harvest of wild and farmed fish and seafood in Canada and of fish product production, consumption, and trade. The marketing section identifies the market in Canada for U.S. fish and seafood exports and measures their performance.

Includes PSD Changes: No
Includes Trade Matrix: Yes
Annual Report
Ottawa [CA1]
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Executive Summary

- Canada's total commercial catch of fish and seafood during 2004, excluding marine plants and roe, was 1,102,109 metric tons live weight, up 3.2% from the 2003 level of 1,068,345 metric tons. All of the increase was reflected in the groundfish catch while the pelagic and other finfish catch declined 4 percent. Canadian shellfish production was virtually unchanged from the year earlier level.
- After ten consecutive years of production increases, total Canadian aquaculture production in 2003 (most recent data) fell to 155,634 metric tons, down almost 10% from 171,796 metric tons a year earlier.
- Among single country markets, U.S. exports of fish and seafood to Canada in 2004 at \$647 million ranked second to Japan (\$1.0 billion) and accounted for 18% of the total value of U.S. worldwide fish and seafood exports of \$3.5 billion.
- The U.S. share of the Canadian import market for fish and seafood remained steady at 43% during 2004 but during the first seven months of 2005, the Canadian import market for fish and seafood has shown weakness with reduced imports from most countries including the United States. Of major supplying countries, only China increased exports to Canada during the January to July period of 2005.
- Canadian processors are significant importers of U.S. fish and seafood. Many Canadian processors source raw product in the United States for further processing into value-added products for both the domestic and export market.
- According to a 2002 report by L.B.C. Consulting Services of Montreal, the foodservice sector accounts for almost two-thirds of total Canadian retail sales of fish and seafood.
- Fresh lobster was the leading U.S. seafood export to Canada during 2004, valued at \$143.7 million, accounting for more than 22% of total U.S. fish and seafood exports to Canada. The other leading U.S. fish and seafood items in the Canadian market are identified in the Marketing Section of the report.

Section I. Production

Preliminary information by Fisheries and Oceans Canada for 2004 shows that Canada's total commercial catch for all fish and shellfish species at 1,102,109 metric tons live weight, up 3.2% from the 2003 level of 1,068,345 metric tons. All of the increase was reflected in the groundfish catch, particularly for hake in the Pacific coast fishery. The Pelagic and other finfish catch declined 4% from 2003 predominantly due to reduced harvests for herring and salmon. Canadian shellfish production, farmed and wild, was virtually unchanged from the year earlier level at 462,283 metric tons. For 2005, post forecasts the total fish and seafood catch at about 1.1 million metric tons, similar to the 2004 level albeit with a small increase in shellfish output and a modest decline in the groundfish catch.

Canada: Fish & Shellfish Commercial Catch
(includes aquaculture)

Landings in Metric Tons Live Weight

SPECIES	2003 Revised	2004 Prelim.	2005 Post Fore.
Groundfish	256,319	305,366	300,000
Pelagic & Other Finfish	349,337	334,460	335,000
Shellfish	462,689	462,283	465,000
SUBTOTAL	1,068,345	1,102,109	1,100,000
Other:			
Marine Plants, Roe, etc.	60,942	16,801	25,000
FISHERY TOTAL	1,129,287	1,118,910	1,125,000

Source: DFO & Post

Landings By Species

2004 ATLANTIC & PACIFIC COASTS COMMERCIAL LANDINGS, BY PROVINCE

(metric tons, live weight)

Source: Fisheries & Oceans

	Nova Scotia	New Brunswick	PEI	Quebec	Nfld.	Total Atlantic	B.C. (5)	Total Canada
Groundfish								
Cod	7,563	633	286	1,574	14,517	24,572	1,322	25,894
Haddock	16,286	38	0	0	153	16,476	0	16,476
Redfish spp.	6,591	13	0	291	6,047	12,942	19,529	32,471
Halibut	1,080	57	22	182	493	1,834	7,373	9,207
Flatfishes	2,541	37	229	753	16,025	19,585	11,572	31,157
Greenland turbot	63	55	0	3,164	9,826	13,109	0	13,109
Pollock	8,307	75	0	0	386	8,768	2,932	11,700
Hake	15,682	61	3	9	1,531	17,286	124,872	142,158
Cusk	675	0	0	0	4	679	0	679
Catfish	128	0	0	0	46	174	0	174
Skate	503	0	0	26	1,402	1,930	1,728	3,658
Dogfish	2,057	270	0	9	0	2,336	5,481	7,817
Other	3,143	4	4	11	1,253	4,414	6,450	10,864
Total	64,618	1,244	543	6,019	51,683	124,107	181,259	305,366
Pelagic/other finfish								
Herring	75,025	64,749	15,162	6,847	21,035	182,817	23,833	206,650
Mackerel	5,004	1,318	4,527	1,979	40,372	53,201	13	53,213
Swordfish	1,180	0	0	0	23	1,203	0	1,203
Tuna	805	0	179	0	26	1,010	5,461	6,471
Alewife	430	954	20	1	0	1,405	0	1,405
Eel	3	70	36	0	19	127	0	127
Salmon	0	0	0	0	0	0	25,566	25,566
Smelt	5	198	82	0	3	288	0	288
Capelin	0	0	0	187	36,234	36,420	0	36,420
Other	335	9	247	2	11	604	2,512	3,116
Total	82,788	67,298	20,252	9,016	97,723	277,076	57,384	334,460
Shellfish								
Clams/quahaugs	10,002	757	816	2,369	18,556	32,499	2,255	34,754
Oyster (1)	47	105	2,421	0	0	2,573	0	2,573
Scallop (2)	73,313	2,650	234	1,159	4,349	81,705	32	81,737
Squid	43	0	0	0	2,409	2,451	0	2,451
Mussel (3)	0	47	0	55	0	102	0	102
Lobster	21,591	6,433	8,501	3,838	1,994	42,358	0	42,358
Shrimp	9,085	6,998	0	22,347	120,461	158,891	2,676	161,567
Crab, Queen	18,059	11,795	2,551	15,289	55,650	103,344	0	103,344
Crab, Other	1,749	2,588	2,874	1,850	1,218	10,278	9,390	19,668
Sea urchin	209	1,124	0	166	688	2,187	2,912	5,099
Other	2,798	1,271	17	1,676	1,529	7,291	1,337	8,628
Total	136,895	33,768	17,414	48,749	206,854	443,680	18,602	462,283
Seafish/Shellfish	284,301	102,309	38,209	63,784	356,260	844,864	257,246	1,102,109
Marine plants	0	8,383	4,308	0	0	12,691	0	12,691
Lumpfish roe	0	0	0	81	1,765	1,846	0	1,846
Miscellaneous	5	0	0	0	2,219	2,224	40	2,264
Total	5	8,383	4,308	81	3,984	16,761	40	16,801
GRAND TOTAL (4)	284,306	110,692	42,517	63,865	360,244	861,624	257,286	1,118,910

(1) Oyster: BC data now reported under Aquaculture. Atlantic includes wild and farmed data.

(2) Scallop includes meat with roe.

(3) PEI mussels are now classified under "aquaculture" because they are a farmed product.

(4) Totals may not add up due to rounding.

(5) Includes 4,734 tonnes of tuna caught in international waters by Canadian fishermen and landed in Canada.

Section II. Fish Product Production

While Canada's total fish and seafood catch is reported on a live weight basis, Statistics Canada reports fish product production on an edible weight basis. The table below shows Statistics Canada estimates for the 2001-2003 period and the post forecast for 2004.

Canada: Fish Product Production, By Type

Units: metric tons

	2001	2002 revised	2003 prelim.	2004 post fore.
Seafish				
-Fresh & Frozen	191,940	201,400	200,250	204,000
-Processed	82,260	86,320	85,820	90,000
Shellfish	84,440	87,660	85,440	86,000
Freshwater Fish	19,070	20,580	18,690	20,000
TOTALS	377,710	395,960	390,200	400,000

Source: Statistics Canada & Post Estimates; October 2005

Section III. Aquaculture

After ten consecutive years of production increases, total Canadian aquaculture production in 2003 (most recent data) fell to 155,634 metric tons, down almost 10% from 171,796 metric tons a year earlier. Reduced farmed-raised salmon output accounted for nearly all of the decline reflecting, in part, much lower exports to the United States. The decline in exports to the United States was partly due to continuing attacks against the farmed salmon industry and the resulting impact on sales. In addition, Canadian salmon exporters faced increased competition in the U.S. market from product from the United Kingdom, Denmark and Norway.

According to Statistics Canada, total revenues from Canada's aquaculture industry in 2003 declined as a result of lower production and tumbling exports of farmed salmon. The aquaculture industry reported operating revenues of C\$731.5 million in 2003, down 3.0% from the C\$754.4 million peak in 2002. Sales of finfish fell 3.3% to C\$643.6 million, driven by the declining revenue from salmon, which dominates the industry. In addition to low prices for farmed salmon, the strengthening Canadian dollar and outbreaks of disease had a negative impact on total revenue.

Industry observers claim the outlook for Canadian farm raised salmon for 2005 is improved. Canadian exports to the United States in the first seven months of 2005 are sharply above the poor performance levels of 2003 and 2004 partly reflecting reduced supplies of third country exports to the U.S. market during the period.

Table 1. Aquaculture: Production and Value, by Province and Canada, 2003

	N.L.	P.E.I.	N.S.	N.B.	Que.	Ont.	Man.	Sask.	Alta.	B.C.	Canada
Production	tonnes										
Salmon	1,450	x	x	33,300	0	0	0	0	0	70,500	105,950 ¹
Trout	0	x	0	500	351	4,650	0	x	x	100	6,351 ²
Steelhead	1,150	0	x	0	0	0	0	0	0	0	1,150 ³
Other ⁴	x	x	x	x	x	x	x	x	x	x	7,943 ¹
Total Finfish⁵	2,600	24	5,210	33,800	351	4,650	10	x	x	70,600	115,204
Oysters	0	0	0	0	0	0	0	0	0	1,500	1,500
Cysters	0	3,000	300	2,200	0	0	0	0	0	7,000	12,700
Mussels	1,300	16,320	1,400	400	400	0	0	0	0	0	20,800
Sealoes	0	0	15	0	0	0	0	0	0	120	135
Other ⁶	0	0	400	0	100	0	0	0	0	0	500
Total Shellfish	1,300	19,320	2,300	2,600	500	0	0	0	0	8,620	35,524
Total	3,900	19,344	7,510	36,400	851	4,650	10	x	x	79,220	154,728
Re-stocking⁷	300	900
Total (incl. re-stocking)	3,900	19,344	7,510	36,400	1,151	4,650	10	x	x	79,220	155,634

Section IV. Consumption

In the spring of 2003, public health officials in Toronto, Canada's most populated city, struggled to control a deadly virus named SARS (Severe Acute Respiratory Syndrome). After several deaths, the World Health Organization imposed a travel ban on Toronto in April 2003. Although the outbreak was eventually contained, the reduction in business and pleasure travel to the city and a decline in the number of Torontonians visiting restaurants during the lengthy outbreak combined to reduce overall demand for fish and seafood products at foodservice establishments. As a result, per capita fish and seafood consumption slipped to 9.53 kg, down almost 4.5% from the year earlier level according to the latest data (June 2005) from Statistics Canada. Most observers believe that the per capita consumption level of fish and seafood in Canada has recovered to an annual level above 10.0 kg since the SARS event.

Canada: Fish & Seafood Per Capita Consumption

Units: kilograms, edible weight

	1999	2000	2001	2002	2003
Seafish					
-Fresh & Frozen	4.82	4.51	4.39	4.34	4.41
-Processed	2.50	2.19	2.67	3.00	2.76
Shellfish	2.29	2.35	2.12	2.13	1.89
Freshwater Fish	0.42	0.46	0.47	0.52	0.47
TOTALS	10.03	9.51	9.65	9.99	9.53

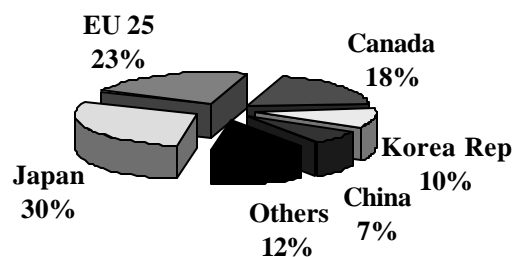
Source: Statistics Canada

Section V. Trade

Among single country markets, U.S. exports of fish and seafood to Canada in 2004 at \$647 million ranked second to Japan (\$1.0 billion) and accounted for 18% of the total value of all U.S. fish and seafood exports of \$3.5 billion. For more detail about the utilization of U.S. fish and seafood products in the Canadian market and about the leading U.S. fish and seafood product categories, see the Marketing Section beginning on page 14.

Canada: An Important Market for U.S. Fish & Seafood Exports

**Total U.S. Fish & Seafood Exports in Calendar Year 2004,
\$3.5 billion**



Total Imports of Fish & Seafood

Total Canadian imports of fish and seafood during the first seven months of 2005 at 170,945 metric tons fell 8% below the 185,329 metric tons imported during the same period last year. Most of the decline reflected lower imports in HS categories 0302 and 0303, Fish, fresh or frozen. Of major supplying countries, only China increased exports to Canada during the January to July period of 2005. In fact, Canadian imports of fish and seafood from China have doubled since 2001. Despite this, for U.S. fish and seafood exporters, the share of the Canadian import market during the five-year period ending 2004 has held steady at about 43%. However, on a quantity basis, imports of fish and seafood from the United States during the first seven months of 2005 were down 13% from the same period of 2004, but the value was down only fractionally (-0.6%).

Canada: Total Fish & Seafood Imports from Major Supplying Countries

2002-2004 Calendar Years & Year-to-Date Comparisons

Units: Metric tons

	2002	2003	2004	Jan-July 2004	Jan-July 2005	% change
-- The World --	363,576	335,787	343,255	185,329	170,945	-8%
United States	152,658	144,028	148,387	77,613	67,612	-13%
China	27,258	38,440	51,124	24,677	28,411	15%
Thailand	49,250	48,291	46,734	26,586	26,129	-2%
Philippines	8,392	6,276	9,224	6,152	3,496	-43%
Chile	5,876	8,300	9,208	4,998	5,414	8%
Russia	3,585	5,073	8,930	4,972	1,245	-75%
Vietnam	20,611	15,912	8,912	3,971	5,687	43%
Norway	18,801	12,010	7,504	5,043	3,528	-30%
Taiwan	7,128	7,491	6,786	3,390	3,127	-8%
India	5,002	5,600	6,444	3,401	3,421	1%
Iceland	7,208	2,915	3,882	2,125	1,665	-22%
New Zealand	2,962	3,096	2,846	1,750	1,721	-2%
Japan	3,053	2,578	2,822	1,261	741	-41%
All Others	2,600	2,200	2,106	19,390	18,748	-3%
U.S. Share	42%	43%	43%	42%	40%	

HS Codes:	302 Live Trout	304 Fish Fillets
	302 Live Eels	305 Fish, dried, salted, etc
	302 Live Carp	306 Crustaceans
	302 Live Fish, nes	307 Molluscs, etc
	302 Fish, Fresh or chilled	1603 Fish, extracts, etc
	303 Fish, Frozen	1604 Fish, prep'd or pres'vd
		1605 Crust/Molluscs, pre'd

Note: excludes ornamental fish

Source: Derived from World Trade Atlas

Canadian Fish and Seafood Exports

Canadian exports of fish and seafood showed a strong advance during 2004 with total exports up 8.4% from the year earlier level to 596,081 metric tons. More than half (52%) of Canada's fish and seafood exports in 2004 were to the United States. In recent years, Canadian exporters have been reducing their dependence on the U.S. market and selling more to China, Japan, Denmark, Russia, and others (see table). Exports to China during 2004, at 62,679 metric tons accounted for more than 10% of total, doubling in less than five years. For 2005, the pace of increase in Canadian fish and seafood exports eased during first seven months to a 2% year-over-year level, but important export sales increases were noted to Japan and Russia in particular.

Canada: Total Fish & Seafood Exports

2002-2004 Calendar Years & Year-to-Date Comparisons

Units: Metric tons

	2002	2003	2004	Jan-July 2004	Jan-July 2005	% change
-- The World --	544,690	549,667	596,081	325,107	332,484	2
United States	334,642	317,675	308,688	177,511	181,291	2
Japan	54,240	54,812	57,485	29,895	34,505	15
China	34,921	46,685	62,679	32,318	33,503	4
Denmark	14,370	17,525	22,657	12,787	15,689	23
Russia	1,603	1,271	14,731	4,656	8,396	80
Dominican Republic	11,170	7,785	7,168	4,232	5,458	29
Taiwan	6,952	7,404	6,677	3,219	3,827	19
Spain	2,680	5,818	10,785	6,353	3,760	-41
United Kingdom	7,823	8,426	8,989	4,803	3,627	-24
Korea, South	11,768	11,076	12,258	5,998	3,165	-47
Germany	7,419	8,895	6,156	3,866	3,018	-22
Hong Kong	4,328	6,204	5,174	2,681	2,972	11
France	6,840	7,268	5,949	2,702	2,865	6
Iceland	6,173	2,945	9,057	5,930	2,692	-55
Norway	2,543	2,888	6,891	5,155	1,048	-80
All Others	37,220	42,989	50,738	23,003	26,667	16
% Share to the U.S.	61%	58%	52%	55%	55%	

HS Codes: 03, 1604, 1605

Source: Derived from World Trade Atlas

Section VI. Policy

Canada Imposes Retaliatory Duties To Protest Byrd Amendment

On March 31, 2005, Canada announced that effective May 1 2005, it would apply a 15 percent surtax on imports of U.S. live swine, cigarettes, oysters, ornamental fish, and certain frozen fish in retaliation for the U.S. Continued Dumping and Subsidy Offset Act of 2000, commonly known as the Byrd Amendment. Last August, a WTO Arbitrator ruled that Brazil, Canada, Chile, the European Union, India, Japan, Mexico and South Korea could retaliate against the U.S. for the Byrd Amendment that allows U.S. companies to receive the duties collected as a result of the anti-dumping and/or countervailing duty orders. The affected U.S. fish and seafood items are:

- 0301.10.00 Live ornamental fish
- 0303.79.00 Fish, frozen, excluding fish fillets and other fish meat of heading 0304 and excluding goods of tariff items 0303.11.00 to 0303.78.00 inclusive
- 0307.10.10 Oysters in shell
- 0307.10.20 Oysters, shelled

U.S. Bioterrorism Act

For more than a year, Canadian fish and seafood companies that export product to the United States have had to comply with the provision of the U.S. bioterrorism Act of 2002. The Canadian Food Inspection Agency (CFIA) helped advise the Canadian fishery industry that exports to the United States fell under the new regulations, which came into force on August 13, 2004. Canadian fish and fish product exporters are required to register with U.S. FDA and provide prior notification of export shipments.

U.S. Mandatory Country of Origin Labeling

Canadian fish and seafood exporters are now subject to U.S. mandatory country of origin labeling rules. On September 30, 2004, the U.S. Department of Agriculture issued an interim final rule for mandatory country of origin labeling (COL) for fish and shellfish as required by the 2002 Farm Bill (P.L. 107-171). Fish and shellfish covered under the interim final rule, ("covered commodities") must be labeled at retail to indicate their country of origin with either "Product of U.S." or the name of the foreign country of origin, and method of production (wild and/or farm-raised), effective April 4, 2005. However, covered commodities are excluded from COL if they are an ingredient in a processed food item.

Canadian Country of Origin Labeling Requirements

The name of the country of origin must be clearly identified on the label of any fish or fish product imported into Canada. The requirement does not carry through to all retail fresh fish and seafood sales. In addition to the *Food and Drugs Act / Food and Drug Regulations (FDA/FDR)*, the *Consumer Packaging and Labeling Act and Regulations (CPLA/CPLR)*, labeling of domestic (processed in federally registered establishments) and imported fish and fish products is regulated by the *Fish Inspection Act (FIA)* and the *Fish Inspection Regulations (FIR)*. Canadian fish labeling policies can be found in the following reference documents:

[Quality Management Program Inspection Policies, Chapter 3, Facilities Inspection Manual](http://www.inspection.gc.ca/english/anima/fispoi/manman/fimmii/toctdme.shtml), at <http://www.inspection.gc.ca/english/anima/fispoi/manman/fimmii/toctdme.shtml>
[Imported Fish and Fish Products Inspection Policies, Chapter 3, Fish Products Inspection Manual](http://www.inspection.gc.ca/english/anima/fispoi/manman/fpimip/toctdme.shtml), at <http://www.inspection.gc.ca/english/anima/fispoi/manman/fpimip/toctdme.shtml>
[Fish Products Standards and Methods Manual](http://www.inspection.gc.ca/english/anima/fispoi/manman/samnem/toctdme.shtml), at <http://www.inspection.gc.ca/english/anima/fispoi/manman/samnem/toctdme.shtml>
[Fish Products Inspection Manual](http://www.inspection.gc.ca/english/anima/fispoi/manman/fimmii/toctdme.shtml), at <http://www.inspection.gc.ca/english/anima/fispoi/manman/fimmii/toctdme.shtml>
[Canadian Shellfish Sanitation Program](http://www.inspection.gc.ca/english/anima/fispoi/manman/cssppccsm/toctdme.shtml), at <http://www.inspection.gc.ca/english/anima/fispoi/manman/cssppccsm/toctdme.shtml>
[Guide to Permitted Additives in Fish and Fish Products](http://www.inspection.gc.ca/english/anima/fispoi/product/additi/guidee.shtml), at <http://www.inspection.gc.ca/english/anima/fispoi/product/additi/guidee.shtml>
[The Canadian Fish List](http://www.inspection.gc.ca/english/anima/fispoi/fishlist/canadahomee.shtml), at <http://www.inspection.gc.ca/english/anima/fispoi/fishlist/canadahomee.shtml>

Export Promotion of Canadian Fishery Products

The Canadian Agriculture and Food International (CAFI) Program

In March 2003, Canadian fish and seafood exporters became eligible for the Canadian Agriculture and Food International (CAFI) Program which is designed to provide federal assistance for trade promotion activities (see CA3013). The (CAFI) is a cost-shared contribution program designed to support Canadian agri-food industry activities in areas of branding and market development, trade advocacy and technical marketing. The C\$26 million program provides industry groups with matching funding for export marketing efforts. The fish and seafood share of the promotional funding is estimated at about C\$1.0 million.

Trade Commissioner Service

Canada's Trade Commissioner Service (TCS) provides Canadian companies free access to its sectoral market studies and country-specific reports prepared by its Market Research Centre and by its offices abroad in Canadian Embassies and High Commissions. The reports are intended to assist Canadian companies identify foreign business opportunities and learn more about target markets. The seafood sector reports are disseminated to Canadian companies only. For more information on the TCS, go to: <http://ats.agr.gc.ca/seafood/reports-e.htm>

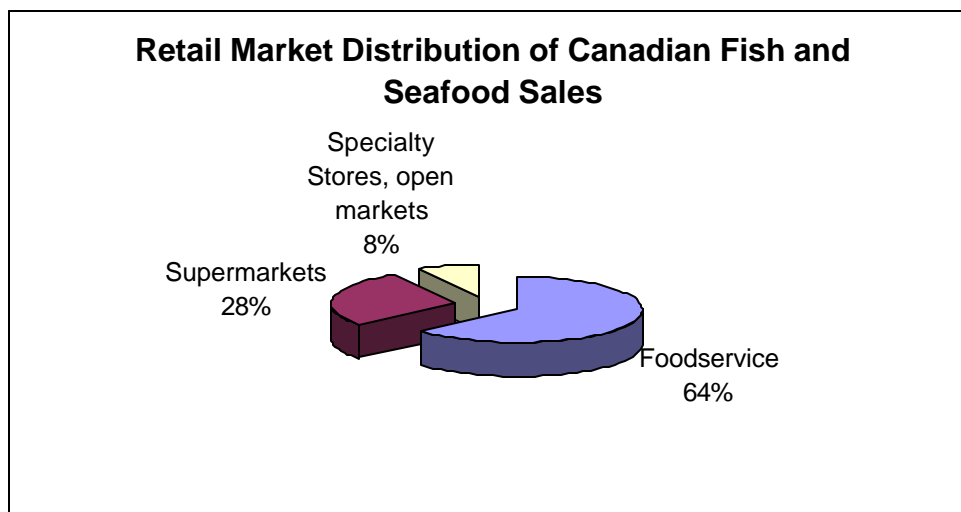
Supplier Database

Agriculture and Agri-Food Canada offer foreign buyers an on-line supplier database of Canadian fish and seafood suppliers. The webpage is: <http://www2.agr.gc.ca/seafood/search-e.asp>

Section VII. Marketing

Distribution of Retail Fish and Seafood Sales

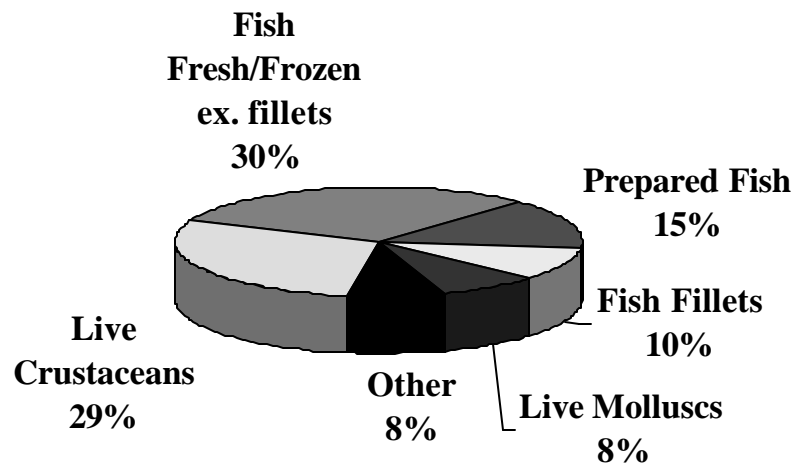
According to a 2002 report by L.B.C. Consulting Services of Montreal (contracted by the Office of Agricultural Affairs, see CA2078), the foodservice sector accounts for almost two-thirds of total Canadian retail sales of fish and seafood.



Imports of U.S. Fish & Seafood by Type

Canadian Imports of U.S. Fish & Seafood by Category

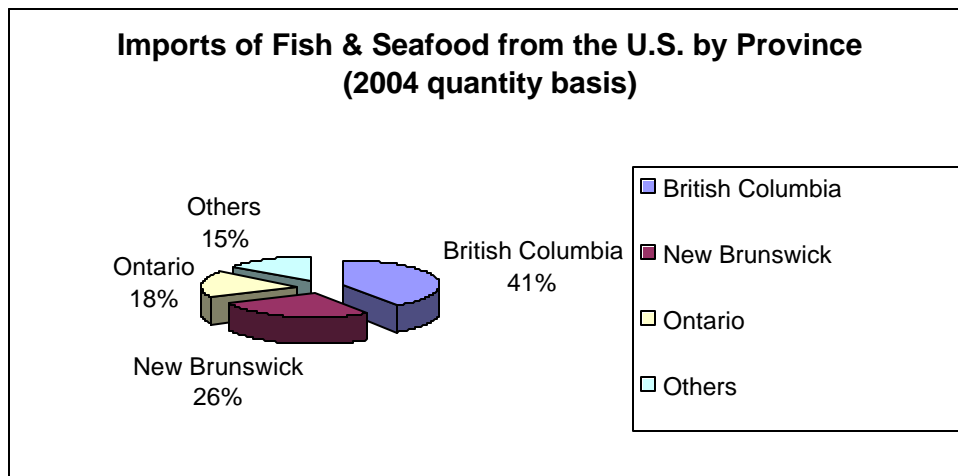
In 2004 Canada Imported \$647 million of U.S. Fish & Seafood



Utilization of U.S. Imports

According to L.B.C. Consulting Services, only about 20% of the fresh or frozen whole fish that Canada imports from the United States is re-sold "as is" to retail or foodservice channels. The balance is imported by Canada's fish processing establishments as "raw material". L.B.C. believes that after processing, a significant share of imports are exported as Canadian product.

The following chart developed by the Office of Agricultural Affairs supports L.B.C. Consultant Services' finding that Canadian processors are significant importers of U.S. fish and seafood. Whereas the province of New Brunswick has only 2.3% of the Canadian population, it accounted for 26% of total Canadian imports of fish and seafood from the United States during 2004. Processors in British Columbia were active importers as well. B.C. accounts for 13.2% of Canada's population, but during 2004 accounted for 41% of total Canadian fish and seafood imports from the United States.



Top U.S. Items in Canadian Fish & Seafood Market

U.S. fish and seafood exports to Canada showed modest growth in the five-year period ending 2004 recording an annual average growth rate of 1.8%. In absolute terms, fresh lobster was the leading U.S. seafood export to Canada during 2004, valued at \$143.7 million, accounting for more than 22% of total. In growth terms, frozen sockeye salmon and fish livers and roe posted the highest annual average growth rates of 58.7% and 32.0% respectively during the 2000-2004 period.

LEADING U.S. FISH AND SEAFOOD EXPORTS TO CANADA

Showing average annual growth rates since 2000

HS Code	Description	2004 US\$MIL.	2000-2004 Aver. Ann. Growth Rate	Highest Growth Rates*
	United States (all 03, 1604, 1605)	647.1	1.8%	
	0306 CRUSTCNS LIVE FRESH ETC.	184.4	-0.3%	
030622	LOBSTER, NOT FROZEN	143.7	2.7%	*
030624	CRABS, NOT FROZEN	15.5	0.8%	
030613	SHRIMP,PRAWN FROZEN	14.7	-10.6%	
030614	CRABS+SHELL,FROZEN	8.5	-8.1%	
	ALL OTHER IN HS 0306	2	-22.4%	
	0302 FISH, FRESH OR CHILLED (EXCL. FILLETS)	132.4	0.3%	
030212	SALMON ATL,PAC,DANU	49.1	-4.1%	
030221	HALIBUT/GREENLAND	37.2	12.0%	*
030269	OTHER 0302	30.9	-2.0%	
030240	HERRINGS, NOT LIVR/ROE	2.8	-8.1%	
030239	OTHER TUNAS	2.6	3.4%	*
	ALL OTHER IN HS 0302	9.8	3.9%	
	1604 PREP OR PRES FISH; CAVIAR	96.9	4.6%	*
160411	SALMON, WHOLE,PIECE	62.2	3.5%	*
160420	FISH, OTHER	29.2	8.0%	*
160419	FISH,OTHR WHOLE,PCS	4	4.6%	*
	ALL OTHER IN HS 1604	1.5	-4.6%	
	0303 FISH, FROZEN (EXCL. FILLETS)	66.9	-0.9%	
030360	COD	23.3	3.3%	*
030331	HALIBT/GRNLD TURBOT	15.3	-2.3%	
030319	PACIFIC SALMON, NES, EXCL FILET, LIVER,ROE, FROZ	8.7	8.6%	
030311	SOCKEYE SALMON, EXCL FILLET, LIVERS & ROES, FROZEN	5.2	58.7%	*
030350	HERRINGS	3.2	12.2%	*
030380	FISH LIVERS, ROES	2.8	32.0%	*
030341	LONGFINNED TUNAS	2.3	6.2%	*
030379	ALL OTHER IN 0303	6.1	-26.5%	

Continued.....

HS Code	Description	2000-2004	Highest
		2004 US\$MIL.	Aver. Ann. Growth Rate
	0304 FISH FILLETS & OTH FISH MEAT,	62.4	4.9% *
030420	FROZEN FILLETS	28.7	9.4% *
	ALL OTHER IN 0304	33.7	1.8%
	0307 MOLLUSCS & AQUA INVERT NES	53.1	6.1% *
030791	OTH 0307 LIVE,FR/CH	23	7.3% *
030721	SCALLOP LIVE,FR/CHL	10.9	4.9% *
030729	SCALLOP NOT LIV/FRSH	6.5	15.2% *
030710	OYSTERS	4.8	9.9% *
	ALL OTHER IN 0307	7.9	-1.5%
	1605 CRUSTACEANS, MOLLUSCS ETC. PRES'RVD	25.9	3.3% *
160520	SHRIMPS AND PRAWNS	13.4	-0.1%
160590	MOLLUSCS, ETC	8.1	4.2% *
160510	CRAB	3.8	40.3% *
	ALL OTHER IN 1605	0.6	-12.9%
	OTHER (Other live, 0301, 1603 extracts)	25.1	

Source: Derived from World Trade Atlas

New Nutrition Labeling Rules

Canada's labeling regulations for fish and seafood are detailed in a labeling guide available online at the following CFIA webpage:

<http://www.inspection.gc.ca/english/fssa/labeti/guide/tab15e.shtml>

On December 12, 2005 Amendments to the Canadian Food Inspection Agency and Drug Regulations will make nutrition labeling mandatory for most prepackaged products on that date. Small companies with revenues from the sale of food of less than C\$1 million in Canada for the 12 months prior to December 12, 2002 have a five-year transition period. Note that prepackaged raw, single ingredient marine or fresh water animal products are exempted from showing a Nutrition Facts table on the label under section B.01.401(2)(iv) of the regulations. However, the exemption may be lost under certain conditions, including when a nutrient content claim is made on the product. A complete, downloadable guide to Canada's new nutrition labeling regulations can be located at:

<http://www.inspection.gc.ca/english/fssa/labeti/guide/tab5e.shtml>

It is important to note that there are differences in the nutrition labeling systems of the U.S. and Canada. As a result, the U.S. nutrition panel used on domestic pre-packaged fish products is not permitted in Canada.

Basic Labeling Rules

A General guide detailing Canada's basic labeling regulations for packaged fish and seafood is available at:

<http://www.inspection.gc.ca/english/fssa/labeti/guide/tab15e.shtml>

Summary of Regulatory Requirements for U.S. Fish and Seafood Exports to Canada

Fish and fish products are subject to the Fish Inspection Act and Regulations, which contain requirements for wholesomeness, labeling, packaging, grading, and health and safety.

There is no requirement under those regulations for imported fish products to be accompanied by a health certificate. However, the person that imports fish into Canada must hold a fish import license, must provide written notification to the CFIA for each imported shipment of fish and must make the fish available for inspection. Product inspections are conducted at frequencies that depend on the product's risk and the exporter's history of compliance. The normal inspection frequency for fresh fish such as wild caught salmon from an exporter with a good history of compliance would be 2%. More information regarding the requirements to import fish into Canada can be found on the CFIA web site in the document titled Guide to Canadian Regulatory Requirements and Examination Procedures for Imported Fish

<http://www.inspection.gc.ca/english/anima/fispoi/import/guidee.shtml>

Section VIII. Trade Matrices

Groundfish

GROUND FISH

Country	January - December			% Change - 04/03 -
	2002	2003	2004	
-- The World --	29,603	33,662	23,419	-30%
United States	14,212	13,317	10,443	-22%
Russia	10,297	14,070	8,141	-42%
Norway	3,520	4,015	2,353	-41%
China	702	1,630	1,739	7%
Iceland	44	10	143	1262%
Korea, South	1	139	129	-7%
Hong Kong	0	0	102	-
All Others	828	480	370	-23%

Country	January - December			% Change - 04/03 -
	2002	2003	2004	
-- The World --	23,745	31,673	45,724	44%
United States	17,935	21,168	18,224	-14%
Spain	1,181	3,291	7,768	136%
Russia	24	154	7,005	4437%
Ukraine	-	249	2,833	1039%
Lithuania	-	290	2,198	658%
Korea, South	2,574	1,104	1,803	63%
China	888	1,384	1,587	15%
United Kingdom	111	1,378	1,163	-16%
Bulgaria	-	-	561	-
Romania	-	26	470	1679%
Norway	-	624	406	-35%
All Others	1,033	2,005	1,706	-15%

Source: World Trade Atlas

Leading U.S. Groundfish Exports to Canada

HS	Description	2002	2003	2004	% Chg
	Imports of Groundfish from the U.S.	MT	MT	MT	- 04/03 -
Group 30	Groundfish	14,212	13,317	10,443	-22%
030360	COD EXCEPT FILLETS, LIVERS AND ROES, FROZEN	11,042	10,683	8,591	-20%
030250	COD EXCEPT FILLETS, LIVERS & ROES, FRESH, CHILLED	1,945	849	507	-40%
030373	ATLANTIC POLLOCK EXCEPT FILLET, LIVER & ROE FROZEN	615	803	764	-5%
030372	HADDOCK EXCEPT FILLETS, LIVERS AND ROES, FROZEN	59	35	181	411%
0302690010	Hake, fresh or chilled, excluding heading 03.04, I	443	794	289	-64%
030263	ATLANTIC POLLOCK EXCEPT FILLET, LIVER, ROE, FR, CH	77	128	55	-57%
030262	HADDOCK EXCEPT FILLETS, LIVER, ROE, FRESH, CHILLED	19	7	50	604%
030378	WHITING & HAKE, EXCEPT FILLETS, LIVER, ROE, FROZEN	11	17	6	-64%

Source of data: Statistics Canada

Groundfish Fillets

GROUNDFISH FILLETS

IMPORTS		January - December			% Change
metric tons					
Country	2002	2003	2004	- 04/03 -	
-- The World --	12,103	13,376	18,030	35%	
China	7,284	9,846	10,773	9%	
United States	2,684	1,709	5,678	232%	
United Kingdom	852	430	823	91%	
Norway	234	385	340	-12%	
New Zealand	312	203	150	-26%	
Russia	123	121	78	-36%	
Faroe Islands	121	116	71	-39%	
Iceland	91	59	29	-51%	
All Others	402	505	89	-82%	

EXPORTS		January - December			% Change
metric tons					
Country	2002	2003	2004	- 04/03 -	
-- The World --	15,521	12,344	10,955	-11%	
United States	12,499	11,435	9,827	-14%	
Russia	-	-	327	-	
Korea, South	381	175	308	76%	
Switzerland	285	192	218	14%	
China	1,036	361	70	-81%	
Ukraine	-	-	40	-	
Portugal	101	24	36	47%	
Thailand	-	-	28	-	
Georgia	-	-	27	-	
Italy	-	-	18	-	
Hong Kong	20	0	17	-	
Barbados	60	50	14	-73%	
All Others	1,141	106	27	-75%	

Source: World Trade Atlas

Leading U.S. Groundfish Fillet Exports to Canada

					% Change
Description		2002	2003	2004	- 04/03 -
Groundfish Fillet Imports from the U.S.		MT	MT	MT	
HS	Groundfish Fillet Imports	2,684	1,709	5,678	232%
0304200069	Pollock fillets, nes, frozen	1,482	663	2,830	327%
0304200061	Alaska pollock fillets	612	398	1,801	352%
0304200030	Cod fillets, frozen	426	341	606	78%
0304200040	Haddock fillets, frozen	18	69	249	261%
0304100011	Cod fillets, fresh or chilled	138	225	181	-20%
0304100012	Haddock fillets, fresh or chilled	8	14	12	-14%

Source of data: Statistics Canada

Flatfish

FLATFISH, WHOLE OR EVISCERATED

IMPORTS		January - December			% Change - 04/03 -
metric tons		2002	2003	2004	
Country					
-- The World --		13,805	11,946	10,228	-14%
United States		11,250	10,504	9,553	-9%
China		232	297	175	-41%
Taiwan		66	222	142	-36%
Singapore		-	3	83	2365%
Chile		0	65	50	-23%
India		29	59	33	-45%
Netherlands		12	13	32	150%
France		21	31	28	-11%
Philippines		1	5	22	376%
Vietnam		5	14	21	53%
All Others		2,190	732	90	-88%

EXPORTS		January - December			% Change - 04/03 -
metric tons		2002	2003	2004	
Country					
-- The World --		22,571	19,913	15,484	-22%
United States		17,914	13,564	9,793	-28%
China		1,718	1,930	2,603	35%
Japan		1,040	2,305	1,660	-28%
Taiwan		1,323	1,080	788	-27%
United Kingdom		162	276	230	-17%
Hong Kong		225	432	97	-78%
Denmark		-	-	53	-
Germany		102	62	50	-20%
Russia		-	-	48	-
Korea, South		-	172	38	-78%
Sweden		-	-	32	-
All Others		86	92	91	-1%

Source: World Trade Atlas

Leading U.S. Flatfish Exports to Canada

HS	Description	2002	2003	2004	% Chng
	Flatfish Imports from the U.S.	MT	MT	MT	- 04/03 -
	Flatfish	11,250	10,504	9,553	-9%
030221	HALIBUT/GREENLAND TURBOT EX FILLET, LVR, ROE FR/CH	7,962	7,682	7,049	-8%
030331	HALIBUT/GREENLAND TURBOT EX FILLET/LIVER/ROE FROZN	2,723	2,440	2,173	-11%
030229	FLATFISH NESOI EXCEPT FILLET, LIVER ROE FRESH/CHLD	179	166	166	0%
030339	FLAT FISH NESOI EXCEPT FILLETS, LIVERS, ROES, FRZ	275	117	104	-11%
030333	SOLE, EXCEPT FILLETS, LIVERS AND ROES, FROZEN	34	63	29	-54%
030223	SOLE EXCEPT FILLETS, LIVERS & ROES, FRESH, CHILLED	29	13	14	12%
030222	PLAICE EXCEPT FILLETS, LIVERS, ROES, FRESH/CHILLED	25	22	18	-20%
030332	PLAICE EXCEPT FILLETS, LIVERS AND ROES, FROZEN	23	1	-	-

Source of data: Statistics Canada

Fish Urchin, Roe/Caviar, Liver

Fish, Urchin Roe/Caviar, Liver

IMPORTS		January - December			
metric tons					% Change
Country	2002	2003	2004	- 04/03 -	
-- The World --	2,302	1,013	640	-37%	
United States	2,136	933	571	-39%	
Norway	33	11	19	74%	
New Zealand	46	17	11	-32%	
India	-	-	10	-	
Japan	29	19	6	-72%	
China	29	0	4	1869%	
Iceland	0	2	3	64%	
United Kingdom	-	4	3	-30%	
Taiwan	0	1	2	154%	
All Others	28	27	11	-59%	

EXPORTS		January - December			
metric tons					% Change
Country	2002	2003	2004	- 04/03 -	
-- The World --	9,421	12,123	11,459	-5%	
Japan	8,005	9,456	8,007	-15%	
China	419	728	1,174	61%	
Sweden	123	325	699	115%	
United Kingdom	322	199	438	120%	
United States	322	726	419	-42%	
Denmark	-	34	199	480%	
Germany	25	111	165	49%	
Thailand	35	198	90	-55%	
Iceland	-	-	68	-	
Finland	26	50	57	14%	
Korea, South	4	1	41	2906%	
All Others	139	292	102	-65%	

Source: World Trade Atlas

Leading U.S. Roe and Fish Liver Exports to Canada

HS	Description				% Chng
		2002 MT	2003 MT	2004 MT	- 04/03 -
	Roe, Caviar, Liver Imports from the U.S.				
	Roe, Caviar, Liver Imports	2,136	933	571	-39%
030250	COD EXCEPT FILLETS, LIVERS & ROES, FRESH, CHILLED	1,945	849	507	-40%
030270	FISH LIVERS AND ROES, FRESH OR CHILLED	179	68	53	-22%
160430	CAVIAR AND CAVIAR SUBSTITUTES	12	15	11	-29%

Source of data: Statistics Canada

Lobster

LOBSTER

IMPORTS		January - December			% Change
metric tons					
Country	2002	2003	2004	- 04/03 -	
-- The World --	22,291	18,026	15,908	-12%	
United States	21,268	17,222	15,120	-12%	
Bahamas	180	162	201	24%	
Cuba	499	221	180	-18%	
Haiti	102	128	125	-2%	
Brazil	4	26	43	66%	
India	44	6	20	243%	
Iceland	9	35	19	-45%	
China	25	17	14	-18%	
Nicaragua	14	0	11	-	
Turks & Caicos Islands	23	-	11	-	
All Others	124	209	163	-22%	

EXPORTS		January - December			% Change
metric tons					
Country	2002	2003	2004	- 04/03 -	
-- The World --	42,542	42,463	38,743	-9%	
United States	32,269	30,690	29,449	-4%	
Japan	1,690	1,607	1,607	0%	
Belgium	2,147	1,728	1,394	-19%	
France	1,710	2,233	1,146	-49%	
United Kingdom	908	829	874	5%	
Korea, South	950	1,007	855	-15%	
Germany	586	785	705	-10%	
Sweden	292	609	427	-30%	
Netherlands	260	464	416	-10%	
Italy	453	685	387	-43%	
Hong Kong	390	339	361	7%	
Spain	198	392	317	-19%	
All Others	689	1,095	806	-26%	

Source: World Trade Atlas

Leading U.S. Lobster Exports to Canada, By Type

HS	Description	2002 MT	2003 MT	2004 MT	% Chng - 04/03 -
	Lobster Imports from the U.S.				
	Lobster	21,268	17,222	15,120	-12%
030622	LOBSTERS, LIVE, FRESH,CH, DRIED, SALTD OR IN BRINE	21,165	17,187	15,084	-12%
030612	LOBSTERS, INCLUDING IN SHELL, FROZEN	83	23	26	14%
030611	ROCK LOBSTER AND OTHER SEA CRAWFISH, FROZEN	13	10	6	-34%
030621	ROCK LOBSTER, OTHER SEA CRAWFISH LV/CH/DRD/SALTED	7	2	3	100%

Source of data: Statistics Canada

Salmon, Whole/Eviscerated

SALMON, WHOLE OR EVISCERATED

IMPORTS		January - December			
metric tons					% Chng
Country	2002	2003	2004	- 04/03 -	
-- The World --	14,215	18,750	21,807	16%	
United States	12,656	16,155	19,291	19%	
Chile	678	870	1,264	45%	
United Kingdom	5	821	344	-58%	
Japan	0	0	202	-	
Philippines	226	272	140	-48%	
Ireland	6	60	134	123%	
India	18	21	122	489%	
Norway	0	160	60	-62%	
Estonia	14	41	35	-17%	
China	11	8	29	273%	
Russia	0	1	13	-	
All Others	599	342	173	-49%	

EXPORTS		January - December			
metric tons					% Chng
Country	2002	2003	2004	- 04/03 -	
-- The World --	67,692	50,546	54,104	7%	
United States	63,984	47,185	49,116	4%	
Japan	2,098	1,323	1,853	40%	
Taiwan	514	977	1,627	67%	
China	243	78	416	432%	
Italy	-	154	313	103%	
Hong Kong	79	120	214	78%	
Singapore	-	-	187	-	
France	18	52	175	234%	
Korea, South	1	3	77	2200%	
Spain	-	-	44	-	
Russia	47	-	23	-	
United Kingdom	-	1	23	-	
All Others	3,708	3,362	5,010	49%	

Source: World Trade Atlas

Leading U.S. Salmon (Whole/Eviscerated) Exports to Canada, By Type

HS	Description	2002 MT	2003 MT	2004 MT	% Change - 04/03 -
	Salmon, Whole or Evisc. From the U.S.				
	Salmon, Whole or Evisc.	12,656	16,155	19,291	19.4
030212	SALMON, PAC, ATL & DANUBE, WITH BONES, FR OR CHILL	9,205	12,219	13,979	14
030319	PACIFIC SALMON, NESOI, EXCL FILET, LIVER,ROE, FROZ	2,555	2,477	3,721	50.2
030311	SOCKEYE SALMON, EXCL FILLET, LIVERS & ROES, FROZEN	356	1,150	1,285	11.7
030219	SALMONIDAE, NESOI, FRESH OR CHILLED	447	271	185	-31.4
030322	ATLANTIC AND DANUBE SALMON, WITH BONES, FROZEN	21	22	86	287.4
030329	SALMONIDAE NESOI, WITH BONES, FROZEN	72	16	35	115.7
030310	PACIFIC SALMON, WITH BONES, FROZEN	-	-	-	

Source of data: Statistics Canada

Canned Salmon

SALMON, CANNED

IMPORTS		January - December			
metric tons					% Chng
Country	2002	2003	2004	- 04/03 -	
-- The World --	12,753	14,519	18,030	24%	
United States	11,464	13,954	17,702	27%	
Thailand	518	162	151	-7%	
China	227	58	87	49%	
Chile	204	91	45	-50%	
Denmark	55	83	21	-74%	
Norway	8	29	12	-61%	
Sweden	-	0	5	-	
United Kingdom	7	5	2	-58%	
Japan	1	2	1	-29%	
All Others	269	135	4	-97%	

EXPORTS		January - December			
metric tons					% Chng
Country	2002	2003	2004	- 04/03 -	
-- The World --	7,992	8,309	8,283	0%	
United Kingdom	3,195	3,479	3,225	-7%	
Australia	1,573	1,164	1,462	26%	
New Zealand	994	1,083	1,394	29%	
Belgium	849	1,148	857	-25%	
United States	299	392	284	-28%	
Netherlands	271	225	250	11%	
Ireland	272	298	233	-22%	
Italy	151	114	210	84%	
Japan	48	123	112	-9%	
France	160	86	98	14%	
Finland	19	37	38	1%	
Philippines	24	38	34	-11%	
All Others	137	122	88	-28%	

Source: World Trade Atlas

Leading U.S. Canned Salmon Exports to Canada, By Type

HS	Description	2002	2003	2004	% Chng
	Imports from the United States	MT	MT	MT	- 04/03 -
160411	SALMON, PREPARED OR PRESERVE	11,464	13,954	17,702	27%
1604110024	Sockeye salmon,not in oil, in cans or glass jars,w	5,935	7,231	9,307	29%
1604110023	Pink salmon,not in oil, in cans or glass jars, whole	3,879	5,730	7,077	24%
1604110021	Chum salmon, not in oil, in cans or glass jars, wh	391	237	754	219%
1604110090	Salmon,o/t in cans/glass jars, prepr/presvd,whole	163	471	390	-17%
1604110029	Salmon nes, not in oil, in cans or glass jars,	959	266	124	-53%
1604110010	Salmon, in oil, in cans or glass jars, whole or in pcs	7	15	44	191%
1604110022	Coho salmon,not in oil, in cans or glass jars, whole	131	4	7	70%

Source of data: Statistics Canada

Exchange Rates

Where prices and values in this report are expressed in Canadian dollars, the exchange rates are: 2000, C\$=US\$.6733; 2001, C\$=US\$.6458; 2002, C\$=US\$.6368; 2003, C\$=US\$.7135; 2004, C\$= US\$.7683; October 2005, C\$= US\$.8425 approximately.

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