



Market Report: British Columbia Agrifood and Seafood Exports to ASEAN



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Purpose

This report provides an overview of British Columbia's domestic agrifood and seafood exports to the Association of Southeast Asian Nations (ASEAN). This research and analysis will assist the province's Trade and Investment Representatives operating in ASEAN countries with their market intelligence, inform British Columbians on the key agrifood and seafood products being exported from B.C. to ASEAN nations, and will contribute to policy and operational decision making in agrifood and seafood trade matters between the province and the association.

Background

ASEAN was formed in 1967 with 10 member countries: Thailand, Singapore, Indonesia, Malaysia, Laos, the Philippines, Myanmar, Brunei, Cambodia, and Vietnam. It is a coveted market for international business, with ASEAN's nations exporting over USD \$1.1 trillion and importing over USD \$1 trillion in 2015. In a slow-growth world where global GDP grew by 3.2 per cent in 2015, ASEAN's economy grew by 4.7 per cent in both 2014 and 2015. ASEAN's nations as a whole are also home to one of the world's largest populations, growing every year since 2012 and reaching almost 629 million people in 2015.¹

Canada has significant trade and investment ties to nations in ASEAN. It has Foreign Investment Protection Agreements with both the Philippines and with Thailand, and has held exploratory bilateral free trade agreement discussions with both countries as well.²

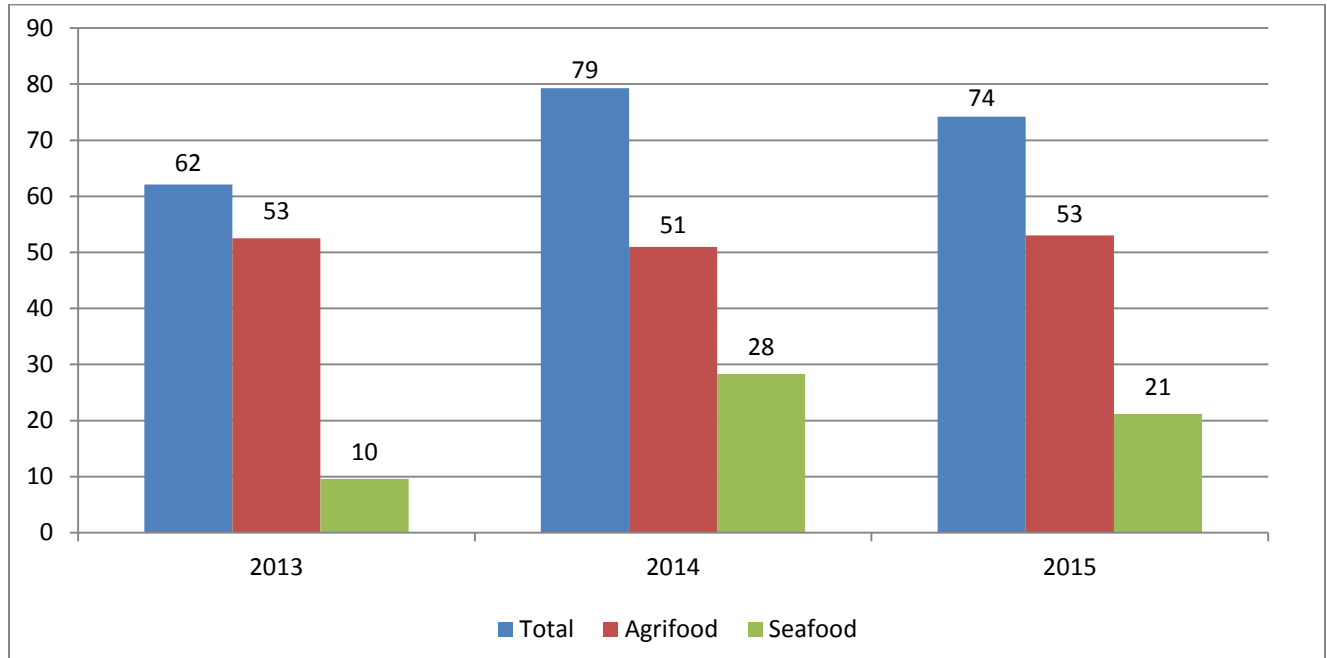
British Columbia's agrifood and seafood businesses currently export to every country in ASEAN and the provincial government has expressed interest in expanding further into these markets. The Government of British Columbia currently has Trade and Investment Representatives offices in Jakarta, Indonesia, and in Manila, the Philippines, with a third planned for Johor Bahru, Malaysia in 2017. The Jakarta office also manages B.C.'s trade and investment with Singapore.

Overview

B.C. exported CAD \$3.5 billion worth of agrifood and seafood products to 159 markets in 2015. Of this, \$74.2 million was exported to ASEAN countries, comprising 2.1 per cent of all exports. B.C.'s agrifood and seafood exports to ASEAN declined by 6.4 per cent in 2015 as increases in agrifood exports (4.0%) were offset by declines in seafood exports (-25.2%). The top market in the association was Vietnam (\$29.4 million), followed by the Philippines (\$14.1 million), and Singapore (\$13.7 million). The top product exported to any ASEAN nation was geoduck clams exported to Vietnam, valued at \$10.7 million—an increase of 109 per cent from 2014.

ASEAN and Top Market Profiles

Agrifood and Seafood Exports to ASEAN, 2013-15 (\$ Millions)



Agrifood and Seafood Exports by Value

Product Type	2013	2014	2015	14-15 Growth
Agrifood	\$52,455,280	\$50,980,113	\$53,041,166	4.0%
Seafood	\$9,619,873	\$28,297,948	\$21,172,412	-25.2%
Total	\$62,075,153	\$79,278,061	\$74,213,578	-6.4%

Source: Statistics Canada, CATSNET Analytics (December 2016)

British Columbia Agrifood and Seafood Exports to ASEAN (\$ Millions)

Rank	Country	Agrifood Exports 2015	Seafood Exports 2015	Total Agrifood & Seafood Exports 2015	2014-15 Growth
1	Vietnam	\$12,487,021	\$16,874,637	\$29,361,658	7.3%
2	Philippines	\$13,943,036	\$148,324	\$14,091,360	-7.9%
3	Singapore	\$11,479,881	\$2,227,287	\$13,707,168	30.0%
4	Thailand	\$5,687,577	\$1,013,824	\$6,701,401	-32.0%
5	Indonesia	\$5,388,221	\$568,893	\$5,957,114	0.6%
6	Malaysia	\$3,310,275	\$274,543	\$3,584,818	-63.0%
7	Myanmar	\$520,196	\$0	\$520,196	9.9%
8	Brunei	\$176,612	\$0	\$176,612	49.8%
9	Laos	\$0	\$64,904	\$64,904	100.0%
10	Cambodia	\$48,347	\$0	\$48,347	6.8%
Total		\$53,041,166	\$21,172,412	\$74,213,578	-6.4%

Source: Statistics Canada, CATSNET Analytics (December 2016)

Vietnam



Agrifood and Seafood Exports by Value

Product Type	2013	2014	2015	14-15 Growth	2015 Share of ASEAN Total
Agrifood	\$9,977,346	\$8,835,375	\$12,487,021	41.3%	23.5%
Seafood	\$5,091,440	\$18,518,364	\$16,874,637	-8.9%	79.7%
Total	\$15,068,786	\$27,353,739	\$29,361,658	7.3%	39.6%

Top Products in 2015 by Value

Product	2013	2014	2015	14-15 Growth
Geoduck Clams	\$2,861,189	\$5,098,527	\$10,653,685	109.0%
Tobacco	\$2,992,790	\$1,629,860	\$3,394,050	108.2%
Shrimp & Prawns	\$145,128	\$7,182,884	\$2,391,806	-66.7%
Apples	\$405,027	\$1,034,754	\$2,222,608	114.8%
Cherries	\$532,822	\$1,290,486	\$1,842,730	42.8%
Clams	\$134,959	\$1,867,459	\$654,967	-64.9%

Philippines



Agrifood and Seafood Exports by Value

Product Type	2013	2014	2015	14-15 Growth	2015 Share of ASEAN Total
Agrifood	\$21,430,449	\$15,196,674	\$13,943,036	-8.3%	26.3%
Seafood	\$43,927	\$100,308	\$148,324	47.9%	0.7%
Total	\$21,474,376	\$15,296,982	\$14,091,360	-7.9%	19.0%

Top Products in 2015 by Value

Product	2013	2014	2015	14-15 Growth
Poultry	\$13,909,769	\$9,736,180	\$5,371,298	-44.8%
Food Preparations for Manufacturing & Natural Health Products	\$860,631	\$1,707,076	\$2,473,056	44.9%
Pork	\$4,084,456	\$2,060,624	\$2,358,867	14.5%
Herring	\$0	\$11,117	\$8,775	-21.1%

Source: Statistics Canada, CATSNET Analytics (December 2016)



Singapore

Agrifood and Seafood Exports by Value

Product Type	2013	2014	2015	14-15 Growth	2015 Share of ASEAN Total
Agrifood	\$6,733,406	\$7,813,974	\$11,479,881	46.9%	21.6%
Seafood	\$2,408,460	\$2,726,933	\$2,227,287	-18.3%	10.5%
Total	\$9,141,866	\$10,540,907	\$13,707,168	30.0%	18.5%

Top Products in 2015 by Value

Product	2013	2014	2015	14-15 Growth
Food Preparations for Manufacturing & Natural Health Products	\$2,785,912	\$3,299,281	\$3,194,306	-3.2%
Cherries	\$958,435	\$1,410,840	\$2,098,010	48.7%
Animal Feed Preparations	\$24,208	\$31,255	\$1,418,400	4438.2%
Oysters	\$1,452,309	\$1,412,481	\$1,247,436	-11.7%
Crabs	\$425,689	\$875,081	\$849,991	-2.9%
Sea Urchins	\$2,350	\$1,321	\$31,759	2304.2%



Thailand

Agrifood and Seafood Exports by Value

Product Type	2013	2014	2015	14-15 Growth	2015 Share of ASEAN Total
Agrifood	\$2,013,486	\$3,753,896	\$5,687,577	51.5%	10.7%
Seafood	\$1,386,347	\$6,100,482	\$1,013,824	-83.4%	4.8%
Total	\$3,399,833	\$9,854,378	\$6,701,401	-32.0%	9.0%

Top Products in 2015 by Value

Product	2013	2014	2015	14-15 Growth
Cherries	\$995,465	\$1,384,807	\$2,898,586	109.3%
Food Preparations for Manufacturing & Natural Health Products	\$197,667	\$777,080	\$753,157	-3.1%
Apples	\$0	\$60,457	\$610,118	909.2%
Pink Salmon	\$937,823	\$1,657,482	\$329,983	-80.1%
Herring	\$0	\$476,148	\$308,944	-35.1%
Sockeye Salmon	\$52,577	\$3,934,780	\$241,687	-93.9%

Source: Statistics Canada, CATSNET Analytics (December 2016)

Indonesia



Agrifood and Seafood Exports by Value

Product Type	2013	2014	2015	14-15 Growth	2015 Share of ASEAN Total
Agrifood	\$6,822,547	\$5,235,782	\$5,388,221	2.9%	10.2%
Seafood	\$245,243	\$683,683	\$568,893	-16.8%	2.7%
Total	\$7,067,790	\$5,919,465	\$5,957,114	0.6%	8.0%

Top Products in 2015 by Value

Product	2013	2014	2015	14-15 Growth
Food Preparations for Manufacturing & Natural Health Products	\$2,455,098	\$1,074,812	\$3,112,165	189.6%
Wheat & Meslin	\$1,911,692	\$1,826,138	\$1,887,109	3.3%
Crabs	\$600	\$0	\$216,797	100.0%
Scallops	\$0	\$327,050	\$154,275	-52.8%
Cherries	\$48,617	\$49,332	\$130,502	164.5%
Oysters	\$152,048	\$97,777	\$117,019	19.7%

Malaysia



Agrifood and Seafood Exports by Value

Product Type	2013	2014	2015	14-15 Growth	2015 Share of ASEAN Total
Agrifood	\$5,276,412	\$9,513,073	\$3,310,275	-65.2%	6.2%
Seafood	\$444,456	\$163,186	\$274,543	68.2%	1.3%
Total	\$5,720,868	\$9,676,259	\$3,584,818	-63.0%	4.8%

Top Products in 2015 by Value

Product	2013	2014	2015	14-15 Growth
Food Preparations for Manufacturing & Natural Health Products	\$1,825,099	\$1,672,432	\$1,499,325	-10.4%
Cherries	\$398,805	\$637,422	\$769,937	20.8%
Edible Mixtures & Preparations of Oils/Fats	\$397,060	\$317,241	\$316,430	-0.3%
Oysters	\$33,593	\$147,100	\$216,587	47.2%

Source: Statistics Canada, CATSNET Analytics (December 2016)

Definitions and Notes

- “Domestic exports” includes all goods grown, produced, extracted or manufactured in British Columbia and leaving the province (through customs) for a foreign destination. Exports of imported merchandise that have been substantially enhanced in value are also included.
- “Agrifood” includes agrifood products produced by farmers, growers and ranchers in British Columbia, as well as products manufactured by B.C.’s food, beverage and tobacco processors. Agrifood does not include any seafood, fish, shellfish or marine plant products.
- “Seafood” includes fish, shellfish and marine plants and their products harvested or cultured in British Columbia marine and freshwater as well as seafood products manufactured by B.C.’s food processors.
- “Food Preparations for Manufacturing and Natural Health Products” includes pastes, powders and flavourings used by food manufacturers, as well as natural health products.

Note on the Export Data:

Export data provided in the “Agrifood” analysis has been revised from raw data released by Statistics Canada to account for apparent discrepancies regarding exports of soya beans, rapeseed/canola oil and oilcakes that are believed to come from other Canadian provinces. Therefore, the total export values for B.C. “Agrifood” provided in this analysis have been reduced by \$28.0 million in 2013, \$47.8 million in 2014 and \$59.5 million in 2015. The Ministry of Agriculture is working with Statistics Canada to investigate these discrepancies.

ENDNOTES

¹ “Selected basic ASEAN indicators”, ASEAN, http://asean.org/storage/2015/09/Summary-table_as-of-Aug-2016-rev.pdf, accessed December, 2016.

² “Canada-ASEAN Trade and Investment,” Global Affairs Canada, http://www.international.gc.ca/asean/trade_investment-commerce_investissement.aspx?lang=eng, accessed December, 2016.

CONTACT INFORMATION

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