

INTRODUCTION

Canada is the world's fifth largest fish exporter by value. In 1995 Canadian production of fish products amounted to more than \$3.7 billion, of which more than 88 per cent (\$3.25 billion) was exported. Canada exports fish products to some 100 countries around the world. The United States is Canada's largest export market, followed by Japan and the European Community. These three destinations collectively account for approximately 90 per cent of total exports.

Canada's competitive strength in fish products reflects its access to one of the world's richest and most diversified resource bases despite temporary shortages of some species. The diversity of some species and products available is related to the distinct features of Canada's Atlantic, Pacific, Arctic, Freshwater and Aquaculture fisheries. Industry's emphasis on the production of high quality, safe and nutritious products and Canada's inspection program add to the competitiveness of Canadian exports.

The larger processing operations are technologically sophisticated, producing a wide range of products, including ready-to-serve consumer products developed for the export market. The smaller plants tend to process the landings of fishermen from the immediate area, and include freezing plants, canneries, roe processing and curing operations. The Department of Fisheries and Oceans undertakes programs in support of Canada's economic, ecological and scientific interests in the oceans and inland waters and provides for the conservation, development and sustained economic utilization of Canada's fisheries resources.

Foreign Affairs and International Trade Canada (DFAIT) is the leading federal department responsible for Canada's international trade and export development. DFAIT's trade responsibilities involve enhancing Canada's access to foreign markets through bilateral and multilateral trade negotiations and providing programs and services to support industry's export marketing activities as well as helping industry to obtain foreign investment and technology to improve its international competitiveness.

The provinces are also actively involved in assisting the fisheries industry.

THE ATLANTIC FISHERY

In 1995 landings in Atlantic Canada totalled 628,805 tonnes, valued at \$1.32 billion. The most important species are lobster, redfish, clams, scallops, snow crab, shrimp and herring. Additional species landed include cod, haddock, flounder, pollock, greenland halibut, capelin, skate and mackerel.

The Atlantic fishery offshore fleet numbers about 50 technologically advanced trawlers operating year round. Since these vessels fish for long periods, the high quality of landed fish is achieved by state of the art handling on board, including freezing at sea, immediate bleeding, gutting, icing and boxing. In addition, there are about 30,000 smaller vessels that conduct seasonal midwater and inshore fishing. The high quality of catch in this sector is ensured by daily landings. In addition, 'quality superior' techniques such as longline and jigging are used extensively.

THE PACIFIC FISHERY

In 1995 total landings in the Pacific fishery amounted to 198,753 tonnes, valued at \$398 million. Salmon is the mainstay of the British Columbia fishing industry. Major export markets for canned salmon include the U.K., continental Europe, Australia and New Zealand. France, Japan, the U.S.A. and Sweden are major markets for frozen salmon products. Herring roe exports to Japan rank second in importance after salmon. Groundfish such as redfishes, hake and flatfishes and shellfish such as oysters and crab are of growing importance of the Pacific fishery.

THE FRESHWATER FISHERY

Canada's freshwater fisheries are concentrated around the Great Lakes and in Central and Northern Canada. In 1995, freshwater landings totalled 37,788 tonnes with a total value of \$48.4 million. A wide variety of prized freshwater species are processed, including whitefish, pickerel, northern pike, trout and sauger. The United States is the major market for Canada's freshwater species, followed by Europe and Japan.

AQUACULTURE

Canada has a rapidly expanding aquaculture industry and the value of production reached \$343 million in 1995. The main species cultured in Canada continue to be Atlantic salmon, rainbow trout, oysters and mussels. In the salmon sector, which comprises the largest component of the industry, Atlantic salmon are overtaking Pacific salmon as the principal species on both coasts. Production of farmed salmon currently amounts to over 43.1 thousand tonnes with a farm gate value of \$288 million in 1995. Rainbow trout remains the dominant species throughout central Canada, although Arctic charr has attained commercial status. The search is under way to successfully raise such species as black cod, halibut, and wolffish.