
Introduction

The Canadian fishing industry

The Canadian fishery consists of Atlantic, Pacific and freshwater sectors which are distinct from one another in size and organization as well as in species caught, technology employed, and products sold. Together, in 1985, they accounted for a landed value of over \$1.1 billion and a product value of \$2.44 billion. Of this, 80 per cent (nearly \$1.9 billion) was generated by exports, making Canada, in terms of value, the world's leading exporter of fishery products for the seventh consecutive year. Of this export volume, 61 per cent went to the United States, 12 per cent to the European Economic Community, 17 per cent to Japan and the balance to other countries.

The fishing industry is, largely, owned and controlled by Canadians. In several instances, Canadian companies have established sales offices and even processing subsidiaries abroad.

The Atlantic fishery

In 1985, landings in Atlantic Canada totalled 1.17 million tonnes, with a landed value of \$667.15 million. The most important species in terms of both tonnage and total value was cod. It is particularly significant, therefore, that landings, and particularly those for cod, are expected to increase over the next few years. This will allow Canada to seek out and develop new markets for its output.

The east coast fishery consists of several sectors. The offshore fleet numbers about 150 large trawlers (over 30 metres in length) which operate year-round. More than 30 000 smaller vessels conduct seasonal midwater and inshore fisheries. Currently, one factory freezer trawler is operational.

The processing industry is characterized by a small number of large plants (fewer than 50) which

usually operate on a year-round basis and about 500 smaller plants which may or may not operate throughout the full 12-month cycle. This latter group, which includes 270 freezing plants and a number of canneries and curing operations, tends to process the landings of fishermen from the immediate areas. Weather and ice conditions in certain parts of Atlantic Canada greatly affect the consistency of supply of raw material to some of these plants. Processing operations are technologically sophisticated and there is a growing number of secondary processors or manufacturers of fish-based consumer products developing products for the export market.

More than 45 000 registered fishermen and 15 000 plant workers (full-time and part-time) are employed in the fishery in Atlantic Canada. For many communities, the fishery is the only source of employment.

The Pacific fishery

In 1985, total landings in the west coast fishery were 212 855 tonnes for a landed value of just under \$376 million. Salmon is the mainstay of the British Columbia fishing industry whereas groundfish, which dominates on the east coast, is a relatively minor component. Herring, which provides roe for the lucrative Japanese market, is ranked second in importance in the Pacific fishery.

The processing industry consists of a dozen major companies, and a number of smaller firms operating more than a hundred plants. Canning is much more common as a processing operation than it is on the east coast. Freezing, smoking and roe extraction operations are also widely distributed and, in 1985, there were seven groundfish plants producing mainly frozen fillets and blocks. Export markets for salmon are principally in Europe (France, the United Kingdom, Sweden), Japan, Australia and New Zealand.