

INTRODUCTION

Canada is the world's fifth-largest fish exporter by value. In 1994 Canadian production of fish products amounted to more than \$3.2 billion, of which more than 80 per cent (\$2.8 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 Union. These three destinations collectively account for approximately 92 per cent of total exports.

Canada's competitive strength in fish products reflects its access to a resource base that is one of the world's richest and most diversified despite temporary shortages of some species and industry's emphasis on high-quality, safe and nutritious products guaranteed by Canada's inspection system. The diversity of species and products available is related to the distinct features of Canada's Atlantic, Pacific, Arctic freshwater and aquaculture fisheries.

The Atlantic Fishery

In 1994, landings in Atlantic Canada totalled 650 869 tonnes, valued at \$1 billion. The most important species are lobster, red-fish, 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 1994, total landings in the Pacific fishery amounted to over 280 000 tonnes, valued at \$473 million. Salmon is the mainstay of the British Columbia fishing industry. Major export markets for canned salmon include the United Kingdom, continental Europe, Australia and New Zealand. France, Japan, the United States 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 in the Pacific fishery.

The Freshwater Fisheries

Canada's freshwater fisheries are concentrated around the Great Lakes and in Central and Northern Canada. In 1994, freshwater landings totalled some 36 000 tonnes with a total value of over \$75 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.

The Aquaculture Fishery

Canada has a rapidly expanding aquaculture industry with the value of production reaching \$290 million in 1993. 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 25 900 tonnes with a farm gate value of \$245 million in 1994. Rainbow trout remains the dominant species throughout central Canada, although Arctic char has attained commercial status. The effort is under way to successfully raise such species as black cod, halibut, and wolffish.

Quality Standards and Inspection

Canada's stringent fish inspection activities — which cover vessels, plants, unloading, holding and handling sites, and transportation equipment — ensure that only the country's finest products reach international markets.

The Canadian government, through the Inspection Branch of the Department of Fisheries and Oceans, is responsible for administering the Fish Inspection Act and Regulations. It has responsibility for assuring that fish and fish products produced in Canada meet regulatory requirements, are produced under sanitary conditions and are properly packaged and labelled. These responsibilities are currently met through the operation of a Fish Inspection Program carried out by a staff of over 500 inspectors located in all 10 provinces and the Northwest Territories.

There are 105 field inspection centres across the country supported by 23 strategically located laboratories. Laboratory staff regularly check to ensure that products for which grade standards have been established comply with all regulatory requirements thereby enabling the field inspection staff to certify Canadian fish products for the export market.