

THE CANADIAN FISHERY

INTRODUCTION

Canada is the world's second largest fish exporter. In 1991 Canadian production of fish products amounted to more than \$3 billion, of which more than 80 per cent (\$2.4 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 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, Freshwater and Aquaculture fisheries.

Industry, Science and Technology Canada works to develop a processing industry in Canada that is characterized by a diversity of internationally competitive processing plants that put particular emphasis on applied research and development, adaptation of new technologies and development of the highest product quality and customer service. 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.

External Affairs and International Trade Canada (EAITC) is the leading federal department responsible for Canada's international trade and export development. EAITC'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 1991, landings in Atlantic Canada totalled 1.15 million tonnes, valued at \$1 billion. The most important species are lobster, cod, redfish, scallop, snow crab, shrimp and herring. Additional species landed include haddock, flounder, pollock, capelin and mackerel.

The Atlantic fishery offshore fleet numbers about 150 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 1991, total landings in the Pacific fishery amounted to over 300,000 tonnes, valued at \$400 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 and shellfish, which dominate the east coast, are relatively minor components of the Pacific fishery.

The Freshwater Fishery

Canada's freshwater fisheries are concentrated around the Great Lakes and in Central and Northern Canada. In 1991, freshwater landings totalled some 50,000 tonnes with a total value of over \$84 million. A wide variety of prized freshwater species are processed, including whitefish, pickerel, northern pike 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 \$250 million in 1991. The main species cultured in Canada continue to be 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 29 thousand tonnes. Rainbow trout remains the dominant species