

served. Together, in 1982, the industry produced a landed value of more than \$830 million and a product value of \$1.93 billion. Of this, 83 per cent (nearly \$1.6 billion) was exported, making Canada the world's leading exporter of fishery products for the fourth consecutive year in terms of value. Of this export volume, 55 per cent went to the U.S., 16 per cent to the EEC, 7 per cent to other European countries, 15 per cent to Japan and the balance to a number of smaller or less developed markets in other countries.

There is a sizeable foreign (mainly Japanese) debt capital investment in the Pacific coast fishery but equity ownership and control is Canadian on both coasts. In several instances Canadian companies have established sales offices and even processing subsidiaries abroad.

i) *The Atlantic Fishery*

East Coast Fish Landings in 1982

Species	Thousands of metric tonnes	Landed Value (\$ millions)
Cod	515	192
Other groundfish	301	97
Herring	143	27
Mackerel	16	4
Other fin fish	44	20
Scallops	65	60
Squid	12	2
Lobster	23	112
Other shellfish	69	61

The above quantities, particularly of cod, will increase substantially over the next few years and, in doing so, will overtax the ability of Canada's traditional markets to absorb them. Canada's East Coast fleet consists of about 150 large trawlers (longer than 30 metres) that operate year-round and more than 30,000 smaller vessels that conduct a seasonal inshore or midshore fishery.

The processing industry is characterized by a few large plants which generally operate year-round and about 600 small plants (70 canneries, 270 freezing plants and an equal number of curing plants) distributed along the coastline and generally seasonal in operation. The latter processes the landings by the inshore fisherman of the immediate area. Production is mainly done by 10 large and medium-size companies that account for more than 65 per cent of total Atlantic Coast production. There are more than 48,500 registered fishermen and 47,000 plant workers (full and part time) employed by the Atlantic fishing industry. For many communities the fishing industry is the only employer. Between 10 and 12 per cent of the value added by all the manufacturing and processing industries of the Atlantic Region comes from the fishery.

The processing operations, in general, are not technologically sophisticated and the next major change is going to be an emergence of secondary

processors or manufacturers of fish-based consumer products, first for the domestic market and then for the export markets.

From a study of the Atlantic fisheries industry, some major changes, particularly in the structure of the industry, can be expected to take place.

ii) *The Pacific Fishery*

Salmon is the mainstay of the British Columbia fishery, with herring (for roe extraction) second in importance. Over a three-year (1980-1982) average, annual total landings were about 140,000 tonnes (43 per cent salmon) with a product value in excess of \$245 million.

The Pacific processing industry consists of three large companies, one of them co-operative, and a number of medium and smaller-size companies operating more than 100 plants. Canning is the main processing operation, followed by freezing, smoking and roe-extraction operations. In 1982, there were 8 groundfish plants producing mainly frozen fillets and blocks. More than 40 per cent of the West Coast production is sold domestically. Export markets for salmon are principally France, Britain, United States, Japan, Australia and New Zealand.

iii) *Inland Fishery*

Canada's freshwater fishery is relatively small, slightly in excess of 57,000 tonnes and with a landed value of about \$50 million in 1982. The principal species are whitefish, pickerel and smelt. Exports are mainly to the United States with markets also in Europe and, for smelts, in Japan.

The fishery is centred around the Great Lakes where a number of private companies operate and in Winnipeg where a Crown corporation, the Freshwater Fish Marketing Corporation, handles processing and marketing services for the independent commercial fishermen from North-western Ontario to the Rocky Mountains.

Recent Canadian Marketing Activity

The Commercial Division at the Embassy in Paris has been closely monitoring the market for fish products in France and is actively involved in promoting the sale of Canadian products. It is worth noting that the Program for Export Market Development (PEMD) has been extensively used by Canadian exporters of fish products who have been developing the French market in recent years.

In the ongoing promotion of Canadian fish products, the following activities took place:

- In 1978, 28 Canadian firms took part in a show/seminar in Paris and several other European cities;
- In August 1979, an incoming groundfish buyers' mission was brought over from France;