2010
YEAR IN REVIEW

BRITISH COLUMBIA SEAFOOD INDUSTRY

CANADA STARTS HERE

BRITISH COLUMBIA CANADA

A Message From The Minister of Agriculture

Welcome to the 2010 B.C. Seafood Year in Review, a statistical summary of British Columbia's seafood production and exports.

This report will also introduce you to a diverse industry that is an economic cornerstone for many island and coastal communities.

The following pages represent the hard work of thousands of British Columbians, from tuna fisherman in open waters to shellfish growers in guarded inlets and quiet coves. In fact employees throughout the entire distribution chain, from harbour docks to processing centres to cargo terminals, have all contributed to the $1.4 billion worth of B.C. seafood produced in 2010.

One of my ministry's highest priorities is to help B.C.'s seafood producers reach new and growing markets. Last year B.C. exported about $960 million worth of seafood to 74 countries. Exports to Asia accounted for about a third of that total, and were up 16 per cent from the previous year. As our trading relationship with Asia grows so do the opportunities for B.C. seafood producers and investors. In fact B.C.'s November 2011 seafood trade mission to China is the largest ever, with representatives from thirty B.C. seafood producers joining Premier Christy Clark to increase the sales of B.C. products abroad and as well as create industry jobs right here.

As government we are working hard to ensure international consumers understand that B.C. seafood is safe, nutritious and sustainably managed. By working with industry, B.C. is now recognized by third-party organizations such as the Marine Stewardship Council as a world leader in providing sustainably harvested seafood. We're committed to ensuring more and more consumers around the world will enjoy the great-tasting, trusted seafood for which B.C. is famous.

To learn more about B.C.'s seafood sector, please visit the Ministry of Agriculture's websites at www.bcseafood.ca and www.gov.bc.ca/agri

Don McRae

Minister of Agriculture

2010 *Highlights*

More than 100 species of fish, shellfish and marine plants were produced from British Columbia's oceans and fresh waters in 2010.

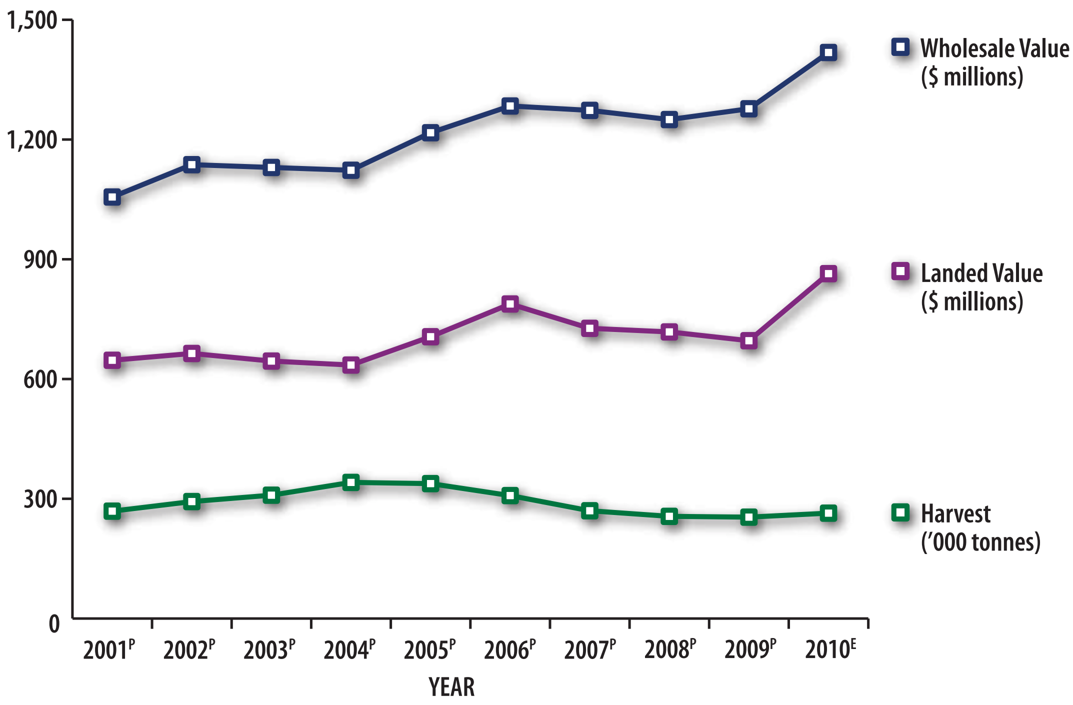
Provincial production totalled 264,400 tonnes with a landed value of $863.8 million. Commercial capture fisheries harvested 173,800 tonnes worth $330 million to the fishers, while aquaculture operations produced 90,600 tonnes with a farmgate value of $533.8 million.

British Columbia offered 472 distinct fish and seafood commodities in 2010 with a combined wholesale value of $1.4 billion. B.C. seafood was served in approximately two billion meals in 74 countries as export shipments totalled 183,000 tonnes valued at $957 million.

British Columbia's world-renowned Fraser River sockeye salmon returned in record numbers in 2010. Fishermen, processors, exporters and consumers revelled in the summer bounty of fresh sockeye from the Pacific Ocean. A profile of this record run is on page six.

Our albacore tuna, sablefish and sockeye salmon fisheries achieved Marine Stewardship Council (MSC) certification in 2010. An in-depth look at all 12 certified fisheries is on starts on page nine.

B.C. SEAFOOD PRODUCTION **2001-2010**



HARVEST
The round (whole) weight of the fish harvested from British Columbia capture fisheries and aquaculture operations. One tonne equals 2,204.6 pounds.

LANDED VALUE
The price paid to the commercial fishers and/or aquaculturists for the whole fish. In aquaculture this can also be referred to as farmgate value.

WHOLESALE VALUE
The value of the fish post processing. All of the British Columbia harvest is included in the wholesale value as well as any fish imported from outside British Columbia that has undergone significant processing within the province.

The 2010 Fraser River sockeye salmon return was the largest since 1913 with an estimated run size of 34 million.

BRITISH COLUMBIA SEAFOOD PRODUCTION **2008 – 2010**

		HARVEST ('000 tonnes)				LANDED VALUE ($ millions)				WHOLESALE VALUE ($ millions)			
		2008P	2009P	2010E	*% change 09/10*	2008P	2009P	2010E	*% change 09/10*	2008P	2009P	2010E	*% change 09/10*
SALMON	Chinook	1.0	0.9	1.1	*22.2*	9.0	7.1	9.0	*26.8*	18.4	16.1	18.0	*11.8*
	Chum	1.7	2.7	0.5	*-81.5*	3.0	4.3	0.9	*-79.1*	18.7	21.3	9.5	*-55.4*
	Coho	0.4	0.8	0.5	*-37.5*	1.9	3.0	2.4	*-20.0*	21.3	23.9	20.1	*-15.9*
	Pink	0.4	13.4	1.2	*-91.0*	0.2	6.7	0.7	*-89.6*	13.3	41.8	16.3	*-61.0*
	Sockeye	1.9	0.7	19.8	*2,728.6*	7.7	2.6	56.3	*2,065.4*	65.6	39.2	172.3	*339.5*
	Wild Salmon[1]	***5.4***	***18.5***	***23.1***	*24.9*	***21.8***	***23.7***	***69.3***	*192.4*	***138.1***	***143.5***	***237.8***	*65.7*
	Atlantic	77.2	72.7	74.5	*2.5*	381.8	370.5	470.3	*26.9*	455.5	461.0	520.2	*12.8*
	Pacific[2]	4.2	3.6	4.2	*16.7*	27.5	23.7	29.3	*23.6*	39.7	32.5	39.7	*22.2*
	Cultured Salmon	***81.4***	***76.3***	***78.7***	*3.1*	***409.3***	***394.2***	***499.6***	*26.7*	***495.2***	***493.5***	***559.9***	*13.5*
	Salmon	**86.8**	**94.8**	**101.8**	*7.4*	**431.1**	**417.9**	**568.9**	*36.1*	**633.3**	**637.0**	**797.7**	*25.2*
HERRING	Spawn on Kelp	0.14	0.13	0.11	*-15.4*	3.6	1.6	0.6	*-62.5*	4.2	2.2	1.1	*-50.0*
	Roe Herring	10.5	11.6	9.3	*-19.8*	11.7	15.5	10.6	*-31.6*	41.1	59.9	31.6	*-47.2*
	Food and Bait	0.8	0.6	0.7	*16.7*	0.7	0.5	0.6	*20.0*	3.0	3.2	3.1	*-3.1*
	Herring	**11.4**	**12.3**	**10.1**	*-17.9*	**16.0**	**17.6**	**11.8**	*-33.0*	**48.3**	**65.3**	**35.8**	*-45.2*
GROUNDFISH	Arrowtooth Flounder	5.0	3.9	3.4	*-12.8*	2.0	1.5	1.5	*0.0*	3.5	3.0	2.5	*-16.7*
	Dogfish	2.2	4.3	1.9	*-55.8*	1.0	2.0	1.0	*-50.0*	4.6	7.7	3.9	*-49.4*
	Hake	73.8	56.2	55.6	*-1.1*	25.8	14.2	16.9	*19.0*	83.1	51.4	52.2	*1.6*
	Halibut	4.8	4.1	4.1	*0.0*	38.5	31.5	37.5	*19.0*	124.4	133.0	121.9	*-8.3*
	Lingcod	2.3	2.1	1.6	*-23.8*	5.0	4.5	3.5	*-22.2*	10.7	8.9	6.8	*-23.6*
	Pacific Cod	0.4	1.0	2.0	*100.0*	1.0	1.5	2.5	*66.7*	2.5	3.2	3.6	*12.5*
	Pollock	1.3	3.4	3.7	*8.8*	1.0	2.0	1.5	*-25.0*	2.4	5.6	3.7	*-33.9*
	Rockfish	17.7	18.1	17.9	*-1.1*	21.0	22.5	20.0	*-11.1*	35.1	37.2	35.0	*-5.9*
	Sablefish	3.1	2.6	2.4	*-7.7*	23.0	24.0	22.5	*-6.3*	31.5	30.0	26.0	*-13.3*
	Soles	4.2	4.2	3.9	*-7.1*	4.0	3.5	3.5	*0.0*	9.3	8.6	8.0	*-7.0*
	Other[3]	1.0	0.9	1.1	*22.2*	1.5	1.5	1.5	*0.0*	14.6	12.7	11.5	*-9.4*
	Groundfish	**115.8**	**100.8**	**97.6**	*-3.2*	**123.8**	**108.7**	**111.9**	*2.9*	**321.7**	**301.3**	**275.1**	*-8.7*
SHELLFISH	Clams	1.3	1.3	1.5	*15.4*	7.2	7.2	8.1	*12.5*	9.9	10.4	11.0	*5.8*
	Oysters	5.6	5.7	7.4	*29.8*	6.5	7.1	8.8	*23.9*	13.2	14.0	14.5	*3.6*
	Scallops and Mussels	0.6	0.7	1.1	*57.1*	2.5	3.0	4.8	*60.0*	5.2	5.9	7.0	*18.6*
	Cultured Shellfish	**7.5**	**7.7**	**10.0**	*29.9*	**16.2**	**17.3**	**21.7**	*25.4*	**28.3**	**30.3**	**32.5**	*7.3*
	Clams	0.8	0.8	0.7	*-12.5*	2.1	2.0	1.8	*-10.0*	3.0	2.9	2.7	*-6.9*
	Crabs	6.9	5.6	4.9	*-12.5*	37.4	32.2	33.7	*4.7*	60.1	56.3	73.1	*29.8*
	Geoducks	1.6	1.6	1.6	*0.0*	25.8	31.8	40.9	*28.6*	33.6	42.7	51.8	*21.3*
	Scallops	0.03	0.03	0.02	*-33.3*	0.2	0.2	0.2	*0.0*	0.3	0.3	0.3	*0.0*
	Sea Cucumbers	1.5	1.5	1.5	*0.0*	2.9	3.0	4.0	*2.6*	4.7	6.3	6.4	*1.6*
	Sea Urchins: Red	1.9	2.1	2.2	*4.8*	2.4	2.6	2.7	*3.8*	7.9	8.5	8.2	*-3.5*
	Sea Urchins: Green	0.07	0.11	0.11	*0.0*	0.2	0.4	0.4	*0.0*	0.8	1.2	0.8	*-33.3*
	Shrimp	0.7	0.7	0.5	*-28.6*	1.9	1.3	1.0	*-23.1*	6.8	4.9	3.9	*-20.4*
	Prawns	2.4	3.4	2.2	*-35.3*	26.3	33.0	23.7	*-28.2*	37.3	50.6	37.8	*-25.3*
	Other[4]	0.2	0.1	0.3	*200.0*	0.3	0.4	0.5	*25.0*	2.5	2.6	3.0	*15.4*
	Wild Shellfish	**16.1**	**15.9**	**14.0**	*-11.9*	**99.5**	**106.9**	**108.9**	*1.9*	**157.0**	**176.3**	**188.0**	*6.6*
	Shellfish	**23.6**	**23.6**	**24.0**	*1.7*	**115.7**	**124.2**	**130.6**	*5.2*	**185.3**	**206.6**	**220.5**	*6.7*
OTHER	Tuna	5.4	5.6	6.5	*16.1*	17.8	15.7	22.9	*45.9*	30.7	27.6	47.1	*70.7*
	Sardines	10.4	15.3	22.2	*45.1*	2.3	2.5	3.7	*48.0*	12.3	16.2	23.8	*46.9*
	Other-Wild[5]	0.4	0.3	0.3	*0.0*	2.5	1.5	1.5	*0.0*	8.2	5.5	4.0	*-27.3*
	Other-Cultured[6]	2.5	1.4	1.9	*35.7*	9.0	7.9	12.5	*58.2*	9.8	8.1	13.8	*70.4*
	Other	**18.7**	**22.6**	**30.9**	*36.7*	**31.6**	**27.6**	**40.6**	*47.1*	**61.0**	**57.4**	**88.7**	*54.5*
	Grand Total B.C.	**256.3**	**254.1**	**264.4**	*4.1*	**718.2**	**696.0**	**863.8**	*24.1*	**1,249.6**	**1,267.6**	**1,417.8**	*11.8*

[1] The total wholesale value of wild salmon includes the value of offal, meal and oil which cannot be identified by species.

[2] Pacific cultured salmon includes chinook, coho, and sockeye.

[3] "Other" includes skate, flounder and the value of groundfish meal and oil which cannot be identified by species.

[4] Includes octopus, squid and other unspecified shellfish.

[5] "Other-Wild" includes marine plants, mackerel and other unspecified finfish"

[6] "Other-Cultured" includes marine plants, freshwater trout, sablefish, sturgeon, tilapia, abalone, crayfish and sea cucumbers.

E ESTIMATES - Volume and value estimates are derived from information available to August 2011 that has been adjusted to account for missing data.
P PRELIMINARY - Volume and values are revised from the previously published estimates but are not yet final.

Industry Performance

BRITISH COLUMBIA COMMERCIAL CAPTURE (WILD) & CULTURED SEAFOOD PRODUCTION **2008 – 2010**

	HARVEST ('000 tonnes)				LANDED VALUE ($ millions)				WHOLESALE VALUE ($ millions)			
	2008[P]	2009[P]	2010[E]	*% change 09/10*	2008[P]	2009[P]	2010[E]	*% change 09/10*	2008[P]	2009[P]	2010[E]	*09/10 % change*
Commercial Capture	164.9	168.7	173.8	*3.0*	283.7	276.6	330.0	*19.3*	716.3	735.7	811.6	*10.3*
Cultured	91.4	85.4	90.6	*6.1*	434.5	419.4	533.8	*27.3*	533.3	531.9	606.2	*14.0*
Grand Total B.C.	**256.3**	**254.1**	**264.4**	*4.1*	**718.2**	**696.0**	**863.8**	*24.1*	**1,249.6**	**1,267.6**	**1,417.8**	*11.8*

HARVESTS

With a 264,400-tonne harvest in 2010, British Columbia produced 10,300 more tonnes of seafood than in 2009. Significant increases in harvests occurred in the cultured shellfish sector with a 30 per cent increase, and in the combined "other species" category which was up 37 per cent. B.C.'s total salmon production increased by 7,000 tonnes, with wild salmon harvests up 4,600 tonnes and 2,400 tonnes more coming from cultured production.

Species groups showing harvest declines in 2010 were herring with a 2,200-tonne drop in production, wild shellfish 1,900 tonnes lower and groundfish down 3,200 tonnes.

LANDED VALUE

British Columbia's capture and culture operations combined to generate $863.8 million in landed value in 2010 - a 24 per cent increase over 2009. Many of the higher-valued species enjoyed significant price increases coupled with higher harvests that translated into increased income for farmers and fishers. Notable increases were recorded in wild salmon - almost tripling in value – cultured salmon (up 27 per cent), cultured shellfish (up 25 per cent) and the combined "other species" category (up 47 per cent). Smaller increases were recorded in groundfish (up three per cent) and wild shellfish (up two per cent). Only the herring fishery showed a drop in landed value in 2010 with a decline of 33 per cent as demand for herring roe products declined.

WHOLESALE VALUE

Larger harvests and stronger selling prices in 2010 generated a 12 per cent increase in the total wholesale value of B.C. seafood to $1.4 billion. Similar to the landed value increases the value of processed products increased for wild and cultured salmon (up 66 and 14 per cent), wild and cultured shellfish (up seven per cent each), and the "other species" category with a 55 per cent increase. Both herring and groundfish product sales were not as strong in 2010 and declines in total wholesale value were reported as 45 and nine per cent respectively.

Fish is a major source of food and essential nutrients.

The Salmon Story

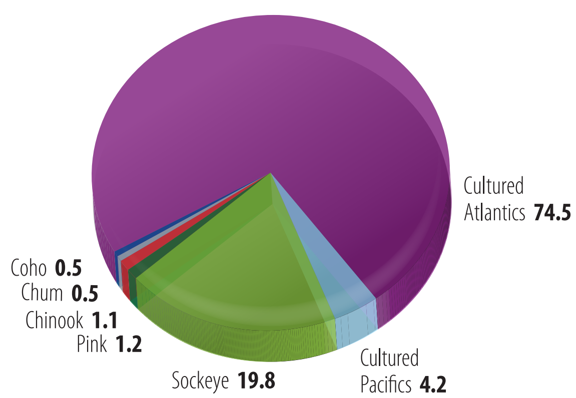
British Columbia's salmon production, at 101,800 tonnes increased seven per cent from 2009 and represented a 39 per cent share of total B.C. seafood production.

Culture operations increased harvests modestly to 78,700 tonnes with Atlantic salmon accounting for 74,500 tonnes. The commercial capture fisheries brought 23,100 tonnes with sockeye landings reaching 19,800 tonnes – the highest in 13 years.

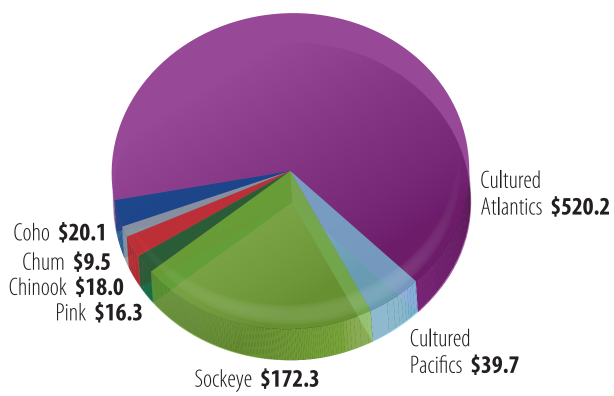
The landed value of all salmon harvests was up 36 per cent in 2010 to $568.9 million. Generally, cultured salmon garners higher landed (farmgate) values than wild salmon due to the value added processing, sales and distribution network integrated into the aquaculture industry. In 2010 cultured salmon generated $499.6 million in sales which represented 88 per cent of the total landed value of all B.C. salmon production. Capture fisheries generated $69.3 million in landed value for a 12 per cent share.

The sale of processed salmon products generated a total wholesale value of $797.7 million – a 25 per cent increase.

HARVEST ('000 TONNES)

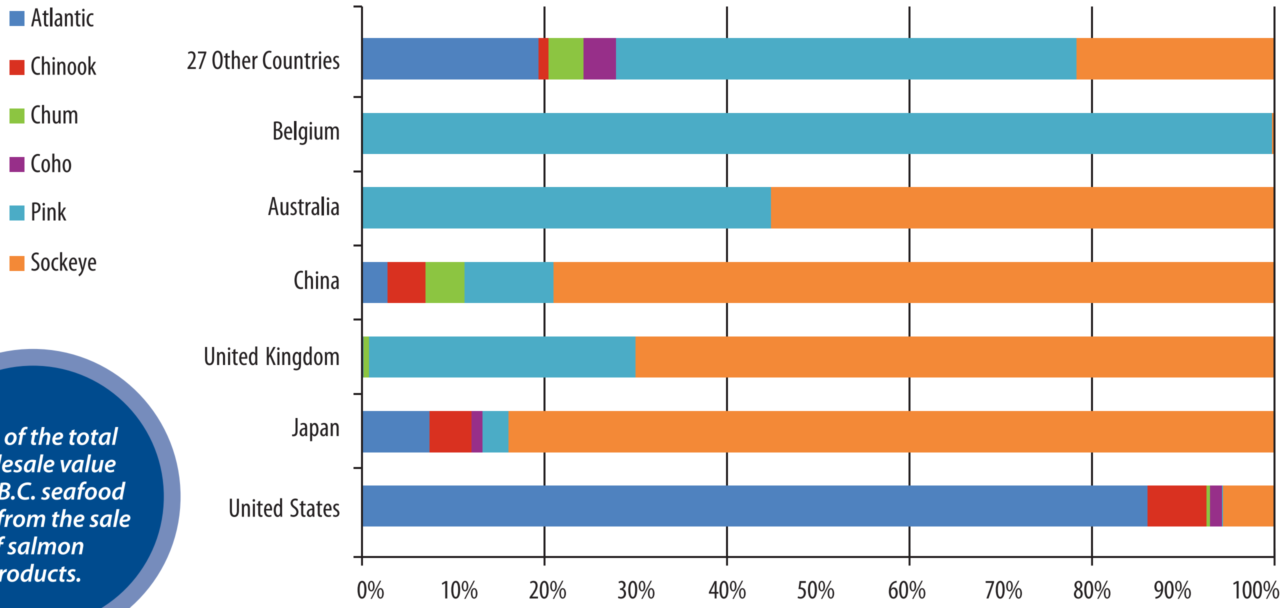


WHOLESALE VALUE ($ MILLIONS)



WHERE DOES OUR SALMON GO?

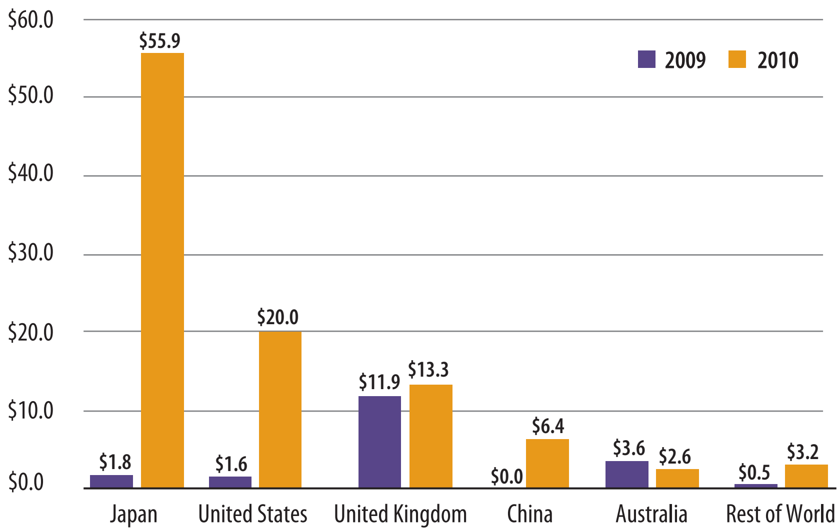
B.C. salmon was exported to 33 countries in 2010. Japan was the largest market for B.C. fresh and frozen sockeye while most of B.C.'s Atlantic salmon was exported to the U.S.A.



56 % of the total wholesale value of all B.C. seafood came from the sale of salmon products.

Spotlight On: *Fraser River Sockeye 2010 Record Returns*

BRITISH COLUMBIA SOCKEYE EXPORTS 2009 V 2010



The Fraser River sockeye that travel the furthest upriver to spawn are the fattest and earliest entries into the river each year.

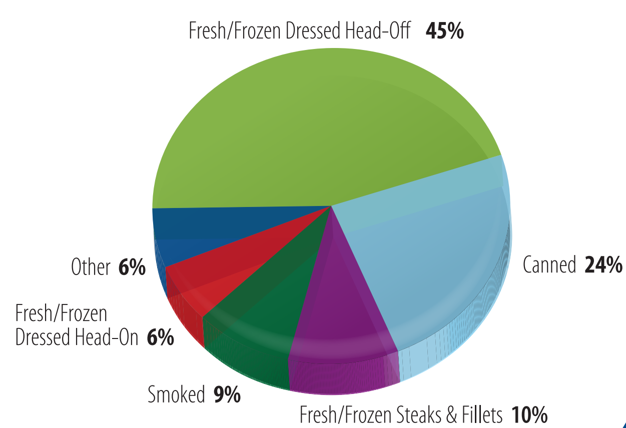
MARKETS

The abundance of sockeye was a boon for everyone on the sockeye value chain as the total wholesale value of sockeye products soared to $172.3 million. Sockeye exports reached $101.4 million, the highest they've been for more than a decade, with more than half of those exports to Japan. B.C. sockeye exports also increased to the U.S., the U.K. and entered the Chinese market for the first time. The $6.4 million worth of fresh dressed and frozen dressed fish made China B.C.'s fourth largest export market for sockeye in 2010. The number of countries receiving B.C. sockeye expanded to 21 with the additions of Bangladesh, Kuwait, Madagascar, Solomon Islands and Vanuatu.

PRODUCTS

Our canneries have orders for B.C. canned sockeye from clients around the world long before the fishing season begins and in 2010 produced 211,719 standard cases with a wholesale value of $40 million. B.C. processors also produced 22 separate cured, fresh and frozen sockeye products.

BRITISH COLUMBIA SOCKEYE SALMON PRODUCTS SHARE OF WHOLESALE VALUE



SHARING THE WEALTH

- Fishers reported that sales of sockeye to the fish plants increased to $56.3 million in 2010.
- The number of companies with sockeye sales in excess of $1 million doubled from 11 in 2009 to 22 in 2010.
- The main commercial sockeye fisheries are the Fraser River in the south the Skeena, Nass, Stikine, Taku and Alsek runs in the north and the Smith and Rivers inlet stocks of B.C.'s central coast.

The Herring Story

The British Columbia herring sector experienced significant declines in harvest and values in 2010. The combined harvest from the three fisheries (food & bait, spawn-on-kelp, and roe herring) fell 18 per cent to 10,100 tonnes.

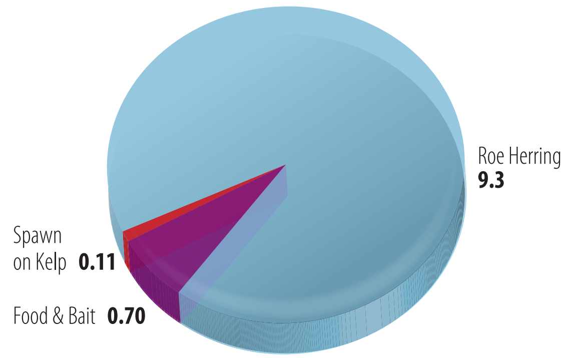
The total landed value, at $11.8 million, was down 33 per cent. Herring products generated a wholesale value of $35.8 million.

In 2010, 92 per cent, (9,300 tonnes) of B.C.'s herring harvest occurred in the roe herring fishery – the majority of which was caught off the east coast of Vancouver Island. The landed value of the fishery ($10.6 million) contributed 90 per cent of the total landed value of herring. In addition to the roe being "popped" from the females, herring from the roe herring fishery are used to produce herring meal for animal feed. Roe herring product sales generated $31.6 million in wholesale value for an 88 per cent share of the herring total. China, Japan, South Korea and the U.S. are primary markets for B.C.'s herring roe products.

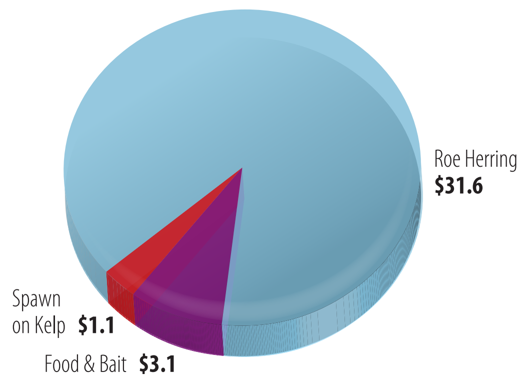
The herring food and bait fishery made up seven per cent of the total herring harvest in 2010 as production rose 17 per cent to 700 tonnes in 2010. Landed values, at $600,000, also increased in 2010. Sales of finished food and bait products represented a nine per cent share of herring wholesale value at $3.1 million. The food products are sold locally and exported to Japan and the U.S. while the fresh and frozen bait is used by local fishermen.

Herring spawn-on-kelp (SOK) harvests were down 15 per cent in 2010 to 110 tonnes. This small harvest generated five per cent ($600,000) of the total herring landed value. Spawn on kelp products generated $1.1 million and were destined for Asian markets.

HARVEST ('000 TONNES)



WHOLESALE VALUE ($ MILLIONS)



Marinated B.C. Spawn on Kelp and Pacific Herring Appetizer

More than 95% of the herring roe produced in B.C. is destined for the high value gift market that takes place to celebrate the Japanese New Year.

The largest single catch of roe herring was close to 1,000 tons and was worth over one million dollars to the vessel crew.

The Groundfish Story

British Columbia's groundfish trawl and hook and line fisheries are managed with individual vessel allocations and comprehensive at-sea and dockside monitoring.

In 2010 the 97,600-tonne harvest was down slightly from 2009 and represented 37 per cent of all seafood production in the province.

At 55,600 tonnes, Pacific hake had the largest harvest of all commercially captured B.C. species and 21 per cent of the provincial seafood total. Most of B.C.'s hake fishery is delivered to processors on the west coast of Vancouver Island where it is processed into frozen dressed products destined for overseas. Primary hake markets include Ukraine, Russian Federation and Lithuania.

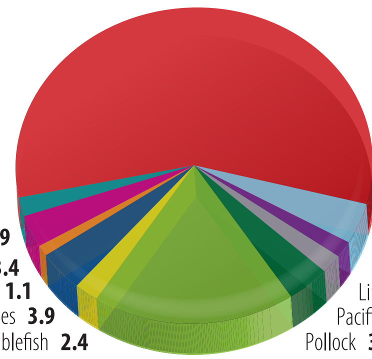
Rockfish species represented 18 per cent of the groundfish harvest and landed value while halibut represented only four per cent of the volume but at $37.5 million brought in 34 per cent of the groundfish landed value.

Most of the major groundfish species experienced declines in harvest volumes in 2010. Species showing significant declines included: dogfish (56 per cent), lingcod (24 per cent and Arrowtooth flounder (13 per cent). Notable increases in harvest were recorded for Pacific cod (100 per cent) and pollock (nine per cent) compared to 2009 landings.

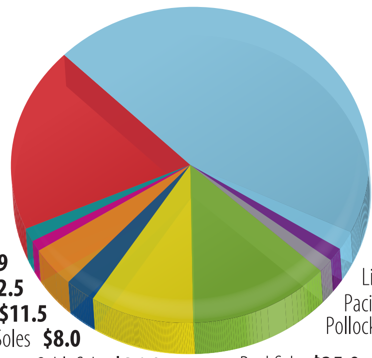
The combined groundfish landed value showed a modest three per cent rise to $111.9 million in 2010 contributing 13 per cent of the total value of B.C. seafood harvest. Pacific cod values rose 67 per cent to $2.5 million while both hake and halibut were up 19 per cent to $16.9 million and $37.5 million respectively.

British Columbia groundfish met strong competition in the global whitefish fillet market in 2010. The wholesale value of groundfish products fell nine per cent to $275.1 million. Only Pacific cod and hake reported positive growth in 2010 up 13 per cent and 2 per cent respectively.

HARVEST ('000 TONNES)



WHOLESALE VALUE ($ MILLIONS)



Seared Pacific Halibut with Kumquat and Cumin Beurre Blanc

Sablefish is the only groundfish species currently being produced by B.C. culture operations. In 2010, harvests reached 579 tonnes with a farmgate value of $6.7 million.

The entire groundfish fishing fleet can prove accountability for every fish they catch with 100% dockside and at-sea monitoring.

Spotlight On: 12 Fisheries Now Certified Green

HALIBUT | HAKE | ALBACORE TUNA | SABLEFISH

WHAT DO WE MEAN BY GREEN?

It's a reference to the Marine Stewardship Council's (MSC) certification of sustainable fisheries. As of summer 2011 British Columbia has seven species in 12 fisheries approved to display the MSC label:

The MSC eco-label program is fully consistent with the United Nations Food and Agriculture Organization guidelines for eco-labeling, and is considered the global standard for fisheries sustainability. Every MSC certified fishery has demonstrated that it maintains sustainable fish stocks, minimizes environmental impacts and is effectively managed.

MSC CERTIFICATION OF B.C. FISHERIES - TIMELINE

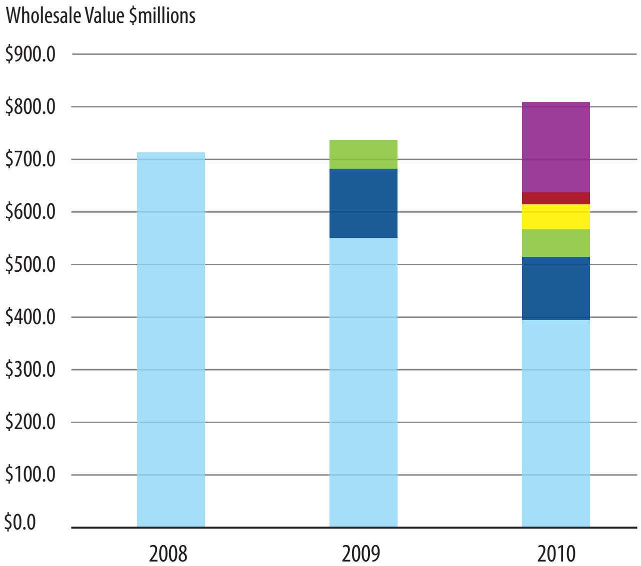
SPECIES	FISHERY	CERTIFICATION DATE
HALIBUT	Pacific Halibut - hook & line	September 2009
HAKE	North Pacific Hake - mid-water trawl	October 2009
TUNA	North Pacific Albacore Tuna - troll & jig	March 2010
SABLEFISH	Pacific Sablefish – trap or hook & line	July 2010
SOCKEYE SALMON	Four fisheries- all gear types • Fraser River watershed • Skeena River watershed • Nass River watershed • Barkley River watershed	July 2010
PINK SALMON	Three fisheries- all gear types • North and Central Coast • Inner South Coast • Fraser River	July 2011
DOGFISH	Spiny Dogfish – North East Pacific Ocean – Outside Migratory Stock - hook & line	September 2011

SOCKEYE SALMON

PINK SALMON

SPINY DOGFISH

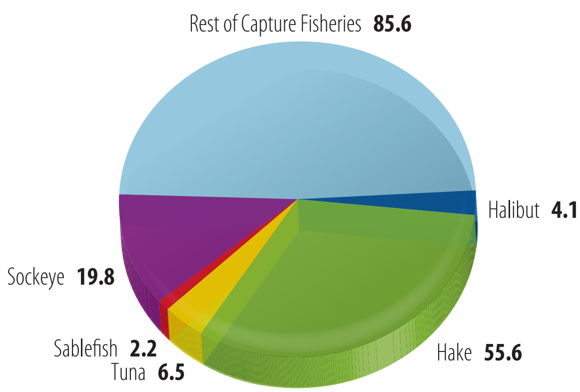
GROWTH IN MSC CERTIFIED FISHERIES IN B.C.



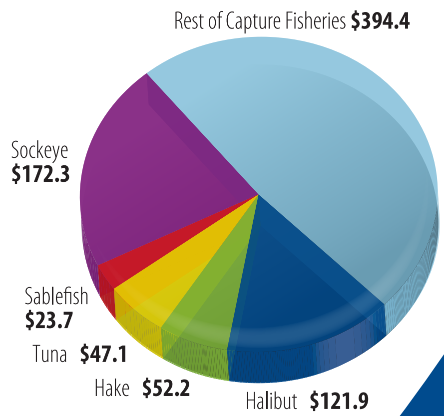
(Excludes Pink Salmon & Dogfish Certified in 2011)

MSC CERTIFIED FISHERIES SHARE OF B.C. CAPTURE FISHERIES

HARVEST ('000 TONNES)



WHOLESALE VALUE ($ MILLIONS)



WHY IS IT IMPORTANT FOR OUR INDUSTRY?

Consumers in both international and domestic markets are becoming more concerned about the environmental impacts of food production. In seafood the interest is focused primarily on whether or not the fisheries are conducted in a sustainable manner.

WHAT'S NEXT?

British Columbia chum salmon (four fisheries) is in the full assessment stage of the MSC certification process.

The Shellfish Story

Shellfish harvests from the capture fisheries and culture operations rose two per cent in 2010 to 24,000 tonnes and contributed nine per cent of the total harvest of B.C. seafood.

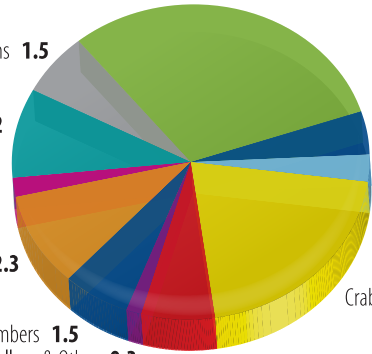
Cultured shellfish production grew 30 per cent to 10,000 tonnes in 2010 and capture shellfisheries harvested 14,000 tonnes.

Highest producing species in 2010 included cultured oysters with a harvest of 7,400 tonnes, followed by crabs at 4,900 tonnes and sea urchins with 2,300 tonnes. Other cultured shellfish production volumes experienced notable increases with scallops and mussels up 57 per cent to 1,100 tonnes and clams (Manila, littleneck and geoduck) up 15 per cent to 1,500 tonnes.

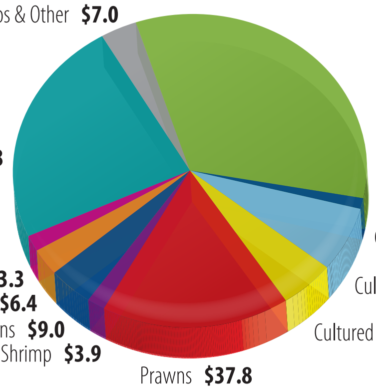
The total landed value for shellfish rose five per cent to $130.6 million as the culture operations generated $21.7 million (up 25 per cent) and wild shellfisheries generated $108.9 million (up two per cent). Shellfish contributed 15 per cent of the total landed value of B.C. seafood in 2010. Wild geoducks, crabs and prawns recorded the highest landed values of all shellfish species by far at $40.9, $33.7 and $23.7 million respectively. These three fisheries contributed 75 per cent of the total value of British Columbia's shellfish harvest in 2010.

Most B.C. shellfish is marketed with minimal processing primarily as fresh or frozen in-shell and live products with notable exceptions occurring with sea cucumbers and red urchins. The wholesale value of B.C. shellfish products rose seven per cent to $220.5 million in 2010. The total wholesale value of cultured shellfish at $32.5 million represented a 15 per cent share of B.C. shellfish sales while capture shellfish products generated $188 million in sales for an 85 per cent share of total shellfish sales. Hong Kong is B.C.'s most diverse shellfish market with imports of 33 different shellfish commodities including crabs, clams, scallops, mussels and sea urchins.

HARVEST ('000 TONNES)



WHOLESALE VALUE ($ MILLIONS)



West Coast Seafood Salad with B.C. Geoduck

The commercial crab fishery started near Vancouver in the late 1800's.

The B.C. cultured shellfish sector shows signs of recovery following the devastating crop and infrastructure losses in winter 2006.

The Other Story

For B.C. seafood the other story focuses on species that are still developing and expanding.

For the commercial fisheries the two most significant species are Albacore tuna and Pacific sardines. Over the last 10 years the B.C. tuna fishery has grown into a viable and vibrant sector, culminating in 2010 with 6,500 tonnes being harvested. In 2010 the B.C. Albacore tuna fishery achieved Marine Stewardship Council Certification as a sustainable fishery. B.C. albacore tuna is also the perfect choice for those concerned about news reports of high levels of mercury in other species of tuna, as test results revealed B.C. albacore tuna is low in mercury and can be consumed freely, without concern.

Sardines were featured in last year's issue as this growing fishery continued to expand. In 2010, 22,200 tonnes of sardines were harvested with a landed value of $3.7 million. Sardines were processed into fresh and frozen products with a wholesale value of $23.8 million. The sardines were then exported to 18 countries in 2010 with the largest shipments to South Korea, Malaysia and Thailand.

In the "Other Cultured" category several new and emerging species are included and most have increased production in the last few years. From the marine farms we are seeing development of sablefish, abalone, marine micro-algae and sea cucumbers while freshwater farms produce sturgeon, tilapia and crayfish. Production in this category is up 36 per cent to 1,900 tonnes with a farmgate value of $12.5 million. With these newer species and products the distribution channels and markets are still developing and therefore prices for products are expected to rise as markets mature. In 2010, the wholesale value of value added products from other cultured species rose 70 per cent to $13.8 million.

Markets

British Columbia fish and seafood exports rose eight per cent in 2010.

One hundred and eighty-four commodities were shipped to 74 countries for a total export value of $957 million. Exports to all regions rose in 2010 with increases ranging from three per cent in North America markets to 37 per cent in the Australia & Oceania region.

COUNTRY AND SPECIES EXPORT HIGHLIGHTS

Top trading countries continued to be United States (56 per cent), Japan (17 per cent), China (eight per cent) and Hong Kong (five per cent). New entrants into our top 10 list in 2010 were Belgium and South Korea and 23 new countries were added to our shipping list last year. Eleven countries more than doubled their B.C. seafood imports in 2010 including the Russian Federation, Belgium and New Zealand. The top performing species in 2010 were: Atlantic salmon at $320.7 million with a 33.5 per cent share, sockeye salmon at $101.4 million (10.6 per cent), crabs worth $65.3 million (6.8 per cent), herring at $48.1 million (five per cent) and hake $46.1 million (4.8 per cent). Species with the most diversified markets in 2010 were: pink salmon (26 countries), sockeye salmon (21 countries) and hake (20 countries).

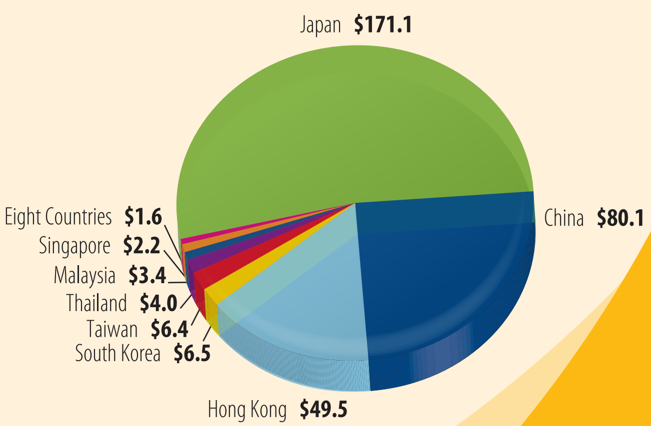
ASIA MARKET EXPORT HIGHLIGHTS

Exports to Asia increased 16 per cent with 168 separate commodities worth $324.8 million. One third of all British Columbia seafood was shipped to 16 countries in the Asia Pacific region. Asian markets are the primary destination for several of B.C. seafood specialties. Top species include: geoduck clams (99.9 per cent share), herring (97 per cent), red and green sea urchins (96.4 per cent), shrimps and prawns (87 per cent), sablefish (81.9 per cent) and tuna (80 per cent).

VANCOUVER-SHANGHAI ROUTE LAUNCHED

In 2011 China Southern Airlines launched a new freight service between Vancouver International and Shanghai Pudong International airports. China Southern's route, which is flown four times a week, marks the first dedicated cargo service from Canada to Mainland China. These direct flights allow B.C.'s seafood industry to directly ship live and fresh products into China.

B.C. SEAFOOD EXPORTS TO ASIAN MARKETS - 2010



Significant Events In British Columbia's Seafood Sector – **2010/11**

COMMISSION OF INQUIRY INTO THE DECLINE OF SOCKEYE SALMON IN THE FRASER RIVER

In 2009, poor returns led to the closure of the Fraser River sockeye fishery for the third consecutive year. The productivity of Fraser sockeye had been in steady decline for the past two decades and concerns were identified about the future of the B.C.'s largest sockeye population. On November 6, 2009 the Federal Government announced the appointment of The Honourable Bruce Cohen, Justice of the Supreme Court of British Columbia, as Commissioner to conduct an inquiry to investigate and report on the reasons for the decline of sockeye salmon in the Fraser River. The Commission completed hearings in September, 2011. Final oral submissions will be heard November 4 - 10, 2011 - when the Commission concludes. The Commission will then prepare its final report which is due June 2012.

More info > http://www.cohencommission.ca

B.C. COMMERCIAL FISHING LABOUR STRATEGY

With $250,000 of funding from the Ministry of Jobs, Tourism and Innovation, this four-phase project runs from March 2011 to November 2012. The primary focus for the project is to develop a sector-wide human resources strategy to ensure the commercial fishing industry has an adequate supply of skilled and qualified individuals now and in the future. Deliverables include:

- A comprehensive study that documents the current profile of the commercial fishing industry;
- A sector-wide human resources strategy and implementation plan that includes looking at accessing training funding and the ability to financially support an on-going, co-ordinated sector-wide approach to labour market issues; and
- A central database for training, recruitment and marketing materials to meet current and future training needs.

More info > http://fishsafebc.com/index.php?id=41

AQUACULTURE INNOVATION AND MARKET ACCESS PROGRAM (AIMAP) HIGHLIGHTS

In 2010, the AIMAP program supported 10 aquaculture projects in B.C. The total value of the projects was over $6.9 million and supported a diverse range of sectors, including:

- Farmed Salmon
- Fish Processing
- Sablefish
- Shellfish Culture Technology (clams, oysters, scallops)
- Shellfish Nursery Development
- Shellfish Processing
- Environmental Assessment

More info > http://www.dfo-mpo.gc.ca/aquaculture/sustainable-durable/projects-2010-11-projets-eng.htm

AQUACULTURE FEDERAL REGULATION

Fisheries and Oceans Canada's (DFO) Pacific Aquaculture Regulation under the federal Fisheries Act came into effect on December 18, 2010. All commercial marine, freshwater and land-based finfish and shellfish aquaculture operations are now licensed under this new regulation. British Columbia remains responsible for administration of Crown land for aquaculture and issuance of Fisheries Act aquaculture business licenses. Canada and B.C. continue to work cooperatively to deliver efficient administration of aquaculture regulation.

More info > http://www.dfo-mpo.gc.ca/media/npress-communique/2010/np-pr11-eng.htm

FROM CANADA'S PACIFIC COAST

A Taste of the Pristine

BRITISH COLUMBIA SEAFOOD... A COMMITMENT TO QUALITY AND SUSTAINABILITY

WILD AND FARMED FINFISH

- Chinook Salmon
- Chum Salmon
- Coho Salmon
- Pink Salmon
- Sockeye Salmon
- Albacore Tuna
- Herring & Sardines
- Farmed Atlantic Salmon
- Farmed Chinook Salmon

WILD AND FARMED SHELLFISH

- Crabs
- Geoduck
- Prawn & Shrimp
- Wild Scallops
- Sea Cucumber
- Sea Urchins
- Farmed Clams
- Farmed Oysters
- Farmed Scallops

GROUNDFISH

- Arrowtooth
- Dogfish
- Hake
- Halibut
- Lingcod
- Pacific Cod
- Pollock
- Rockfish
- Sablefish
- Soles

For more information on the species and products supplied by the British Columbia seafood industry to the global market visit us at www.bcseafood.ca

BCSEAFOOD.CA
BRITISH COLUMBIA

Marine Stewardship Council (MSC) certified fisheries.
For more information on the MSC visit www.msc.org.

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DATA SOURCES

- All aquaculture industry harvests and farmgate values compiled by the Ministry of Agriculture
- All seafood finished products and wholesale values compiled by the Ministry of Agriculture
- All capture fisheries landings provided by Fisheries and Oceans Canada, Pacific Region. (Preliminary values for 2008 and 2009 and estimates for 2010 have been adjusted by the Ministry of Agriculture)
- Export data provided by Statistics Canada

We encourage you to email us your comments and any suggestions for future issues to fishstats@gov.bc.ca or by mail to:

Policy and Industry Competitiveness Branch
Ministry of Agriculture, PO Box 9120 Stn Prov Govt, Victoria BC V8W 9B4

October 2011