

2007
British Columbia Seafood Industry
YEAR IN REVIEW

British Columbia
Canada's Pacific Gateway

British Columbia Seafood

British Columbia's seafood industry continues to thrive as it responds to changes in the demands of the global marketplace. The increasing importance of sustainability, traceability, organics, and healthy, quality food choices has opened the door for B.C. seafood product and species development and diversification. Harvests from our well-managed culture sites and capture fisheries provide our seafood processors with over 90 different species of fish, shellfish and marine plants — each targeted for routing to specific products and markets.

In 2007, the combined harvest from capture fisheries and aquaculture operations was 269,700 tonnes — down 12 per cent from the 307,900 tonnes harvested in 2006. The landed value of the harvest was also lower, generating a total value of $708.9 million, down from the $786.2 million recorded the previous year.

The total wholesale value of finished products showed a slight increase rising from $1,281.1 million to $1,296.6 million. In 2007, British Columbia seafood was shipped to 82 countries. Export volumes remained stable for most species and products, while the total export value showed an eight per cent decrease from $987 million to $904.2 million as the strengthened Canadian dollar brought export prices down.

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.

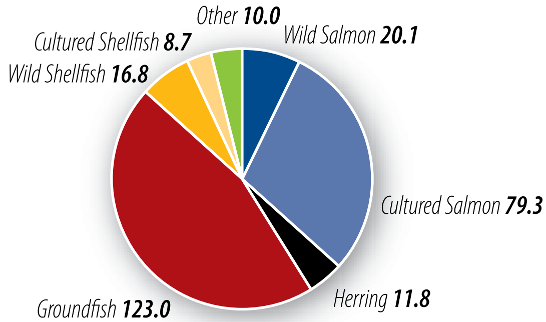
Wholesale Value – The value of the fish after processing. All of the British Columbia harvest is included in the wholesale value as well as any fish imported from outside British Columbia that has undergone processing within the province.

E Estimates – Volume and value estimates are derived from information available to June 2008 that has been adjusted to account for missing data.

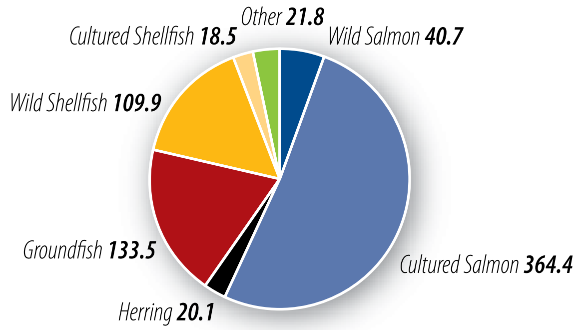
P Preliminary – Volume and values are revised from the previously published estimates but are not yet final.

Relative Importance of Major Species Groups in B.C. Seafood 2007

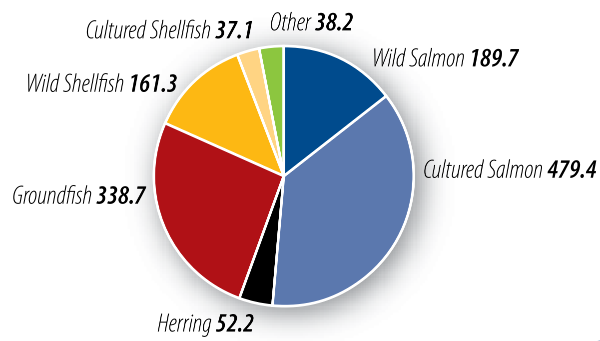
Harvest *('000 tonnes)*



Landed Value *($ millions)*



Wholesale Value *($ millions)*



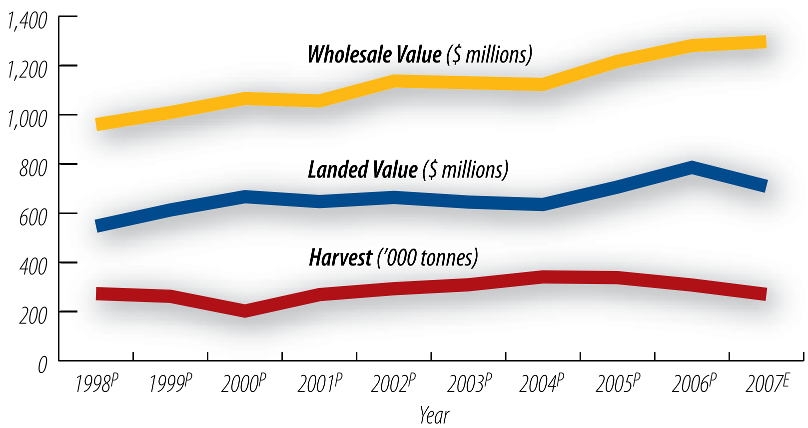
British Columbia Seafood Production 2005–2007

	Harvest '000 tonnes			Landed Value $ millions			Wholesale Value $ millions		
	2005^{P}	2006^{P}	2007^{E}	2005^{P}	2006^{P}	2007^{E}	2005^{P}	2006^{P}	2007^{E}
Salmon									
Wild	27.3	24.3	20.1	34.2	60.9	40.7	218.6	224.7	189.7
Cultured	70.4	78.0	79.3	318.3	407.4	364.4	375.8	456.1	479.4
Subtotal	97.7	102.3	99.4	352.5	468.3	405.1	594.4	680.8	669.1
Herring	30.8	23.5	11.79	32.5	18.4	20.1	89.1	60.1	52.2
Groundfish	170.6	147.9	123.0	156.7	148.2	133.5	292.8	306.6	338.7
Shellfish									
Wild	18.1	15.1	16.8	125.7	111.7	109.9	171.8	156.7	161.3
Cultured	10.1	10.0	8.7	17.9	19.0	18.5	30.2	34.0	37.1
Subtotal	28.2	25.1	25.5	143.6	130.7	128.4	202.0	190.7	198.4
Other									
Tuna	4.8	5.8	6.4	17.1	16.0	16.2	31.1	32.4	25.9
Other Wild[1] and Cultured[2]	6.0	3.3	3.6	4.0	4.6	5.6	7.1	10.5	12.3
Subtotal	10.8	9.1	10.0	21.1	20.6	21.8	38.2	42.9	38.2
Grand Total	**338.1**	**307.9**	**269.7**	**706.4**	**786.2**	**708.9**	**1,216.5**	**1,281.1**	**1,296.6**

1 "Wild Other" includes marine plants, eel, smelt, eulachon, mackerel and other minor finfish species.

2 "Cultured Other" includes marine plants, plankton, freshwater trout and all non-salmonid fish species cultured in fresh and marine waters.

British Columbia Seafood Production 1998–2007



British Columbia Commercial Capture (Wild) and Cultured Seafood Production 2005–2007

	Harvest '000 tonnes			**Landed Value** $ millions			**Wholesale Value** $ millions		
	2005P	2006P	2007E	2005P	2006P	2007E	2005P	2006P	2007E
Commercial Capture	257.2	219.1	180.8	367.6	356.0	321.0	807.4	785.8	774.8
Cultured	80.9	88.9	88.9	338.8	430.2	387.9	409.1	495.3	521.8
Grand Total	338.1	307.9	269.7	706.4	786.2	708.9	1,216.5	1,281.1	1,296.6

Commercial Capture Fisheries

Sixty-seven per cent of all seafood produced in British Columbia is harvested in the commercial capture fisheries. Salmon, herring, groundfish and shellfish all contributed to the total catch of 180,800 tonnes (down 17 per cent from 2006) which generated a total landed value of $321 million (a 10 per cent drop from 2006).

Wild Salmon

Wild salmon has been the mainstay of the British Columbia commercial capture fishery for over a century. In the capture fisheries, five species of Pacific salmon are commercially harvested in British Columbia — sockeye, pink, chum, chinook and coho.

In 2007, wild salmon contributed 11 per cent of the total capture fisheries harvest and 13 per cent of the landed value. The total wild salmon harvest was down 17 per cent to 20,100 tonnes while the landed value fell 33 per cent to $40.7 million from $60.9 million the year before.

Pink salmon made up over half of the total wild salmon harvest in 2007 at 11,200 tonnes. This species generally garners lower prices in the marketplace, however, and the landed value of $5.1 million represented only 13 per cent of the landed value of B.C. wild salmon.

At 4,900 tonnes, chum salmon had the second highest harvest volume of all wild salmon in 2007. This species generated $6.7 million in landed value and contributed a 16 per cent share of the total value of wild salmon.

The sockeye harvest, at 1,800 tonnes, was one-fifth the size of the 2006 harvest as conservation concerns for weak stocks curtailed harvest opportunities. Sockeye contributed 9 per cent of the wild salmon harvest and garnered the highest prices in the marketplace. In 2007 the total landed value of sockeye ($16.1 million) represented a 40 per cent share of the total value of all wild salmon.

Chinook and coho were harvested in small quantities in 2007 with a combined volume of 2,200 tonnes worth $12.8 million. The chinook harvest of 1,400 tonnes generated $10.2 million in landed value (25 per cent), with coho landings of 800 tonnes bringing in $2.6 million (six per cent).

British Columbia Wild Salmon Production 2005–2007

	Harvest '000 tonnes			**Landed Value** $ millions			**Wholesale Value**[1] $ millions		
	2005P	2006P	2007E	2005P	2006P	2007E	2005P	2006P	2007E
Chinook	2.1	2.0	1.4	12.6	14.4	10.2	24.9	29.1	26.2
Chum	10.6	9.9	4.9	10.1	10.3	6.7	54.1	50.7	30.4
Coho	1.1	0.6	0.8	3.5	2.4	2.6	24.0	21.5	23.6
Pink	12.6	1.4	11.2	4.2	0.5	5.1	46.9	8.5	43.2
Sockeye	0.9	10.4	1.8	3.8	33.3	16.1	67.5	113.6	65.6
Total	27.3	24.3	20.1	34.2	60.9	40.7	218.6	224.7	189.7

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

Herring

The combined harvest for the 2007 herring fisheries declined 50 per cent to 11,790 tonnes (almost seven per cent of the total commercial fisheries catch) and the total landed value increased nine per cent to $20.1 million (a six per cent share of the total landed value of British Columbia's commercial capture harvest).

The largest herring fishery is for roe herring and in 2007 the 10,500 tonne harvest (although down 53 per cent from 2006) represented 89 per cent of the total herring harvest. Food and bait (at 1,100 tonnes) contributed nine per cent, followed by spawn-on-kelp at 190 tonnes (a two per cent share).

In terms of landed value, however, roe herring contributed $12.3 million (61 per cent), followed by spawn-on-kelp at $6.9 million (34 per cent) with the remaining $900,000 (five per cent) generated by the food and bait fishery.

Groundfish

British Columbia's groundfish harvest fell 17 per cent in 2007 to 123,000 tonnes while continuing to contribute a 68 per cent share to the provincial commercial capture harvest total. The harvest for most groundfish species showed declines except in the cases of dogfish, pollock and rockfish.

The most notable decline occurred in the hake fishery which experienced a 23 per cent drop in the total harvest. Annual

British Columbia Herring Production 2005–2007

	Harvest '000 tonnes			Landed Value $ millions			Wholesale Value $ millions		
	2005P	2006P	2007E	2005P	2006P	2007E	2005P	2006P	2007E
Herring									
Spawn on Kelp	0.31	0.30	0.19	3.2	4.4	6.9	4.1	5.4	7.5
Roe Herring	29.1	22.3	10.5	28.4	13.5	12.3	82.0	51.2	41.2
Food and Bait	1.4	0.9	1.1	0.9	0.5	0.9	3.0	3.5	3.5
Total	30.81	23.5	11.79	32.5	18.4	20.1	89.1	60.1	52.2

British Columbia Groundfish Production 2005–2007

	Harvest '000 tonnes			Landed Value $ millions			Wholesale Value $ millions		
	2005P	2006P	2007E	2005P	2006P	2007E	2005P	2006P	2007E
Arrowtooth Flounder	16.5	5.9	4.6	3.5	1.5	2.0	6.1	2.2	2.5
Dogfish	5.4	2.4	4.1	2.9	3.5	1.5	9.4	6.6	6.6
Hake	104.2	96.2	74.1	28.4	28.6	22.0	58.4	61.4	54.4
Halibut	7.4	7.2	5.9	50.5	51.8	48.5	97.0	124.9	168.5
Lingcod	2.8	2.5	2.5	5.1	6.0	7.5	9.8	10.0	11.7
Pacific Cod	1.5	1.0	0.5	2.0	1.5	1.0	4.9	3.1	2.4
Pollock	1.9	3.1	3.2	0.9	1.0	1.5	2.2	2.8	4.2
Rockfish	18.2	18.7	19.1	23.8	19.5	21.0	39.1	35.3	37.6
Sablefish	4.6	3.9	3.3	31.6	28.3	23.0	37.1	33.1	27.8
Soles	5.9	5.4	4.4	5.8	5.0	4.0	12.2	11.0	12.4
Other	2.2	1.6	1.3	2.2	1.5	1.5	16.6	16.2	10.6
Total	**170.6**	**147.9**	**123.0**	**156.7**	**148.2**	**133.5**	**292.8**	**306.6**	**338.7**

fluctuations in abundance and stock location affect both the harvest levels and prices for this species in particular. Hake is British Columbia's highest volume harvest and in 2007 the 74,100 tonnes represented 60 per cent of the groundfishery, 41 per cent of the commercial capture fishery and 27 per cent of all B.C.'s total seafood production.

Rockfish species — including red snapper and Pacific Ocean perch — showed a slight increase in landings to 19,100 tonnes in 2007 for a 13 per cent share of the groundfish harvest. Dogfish reported a 71 per cent rise in landings from 2,400 tonnes in 2006, to 4,100 tonnes in 2007 while pollock harvests rose three per cent to 3,200 tonnes.

The landed value of the British Columbia groundfishery dropped 10 per cent from $148.2 million in 2006, to $133.5 million in 2007. All groundfish species combined generated 42 per cent of the capture fishery landed value total. Primary contributors to the groundfish landed value included halibut at $48.5 million (36 per cent), sablefish at $23 million (17 per cent), hake at $22 million (17 per cent) and rockfish at $21 million (16 per cent).

Wild Shellfish

British Columbia's wild shellfisheries realized an 11 per cent increase in harvest levels in 2007, to 16,800 tonnes and contributing a nine per cent share of the commercial capture fishery. Crabs, with a harvest of 6,700 tonnes, contributed 40 per cent of the wild shellfish harvest total with prawns at 16 per cent (2,700 tonnes), red urchins at 13 per cent (2,200 tonnes) and geoducks at 10 per cent (1,600 tonnes).

Crabs generated the most in landed value of any shellfish species in 2007 at $37.8 million — this also represented a 58 per cent increase over 2006 levels as both harvest and prices were higher for crabs in 2007. Geoducks generated $33.5 million (a 30 per cent share of the B.C. wild shellfishery value) and prawns — although experiencing a severe price drop — brought in $27.4 million for a 25 per cent share.

British Columbia Shellfish Production 2005–2007

	Harvest '000 tonnes			**Landed Value** $ millions			**Wholesale Value** $ millions		
	2005P	2006P	2007E	2005P	2006P	2007E	2005P	2006P	2007E
Cultured									
Clams	1.9	1.7	1.4	8.5	8.9	8.5	11.4	11.2	11.2
Oysters	8.0	8.0	6.8	8.4	8.6	8.0	15.4	18.1	20.4
Scallops & Other	0.2	0.3	0.5	1.0	1.5	2.0	3.4	4.7	5.5
Subtotal	10.1	10.0	8.7	17.9	19.0	18.5	30.2	34.0	37.1
Wild									
Clams	1.4	1.1	1.0	3.9	3.3	3.0	5.2	4.1	3.9
Crabs	5.7	4.3	6.7	29.7	23.9	37.8	57.4	42.4	55.2
Geoducks	1.6	1.6	1.6	32.7	33.2	33.5	36.9	38.9	38.6
Scallops	0.02	0.02	0.02	0.1	0.1	0.1	0.2	0.2	0.2
Sea Cucumbers	1.6	1.5	1.5	3.2	2.0	1.9	4.8	3.5	3.4
Sea Urchins: Red	4.1	3.1	2.2	6.5	4.7	3.0	11.4	10.0	7.2
Sea Urchins: Green	0.03	0.03	0.06	0.1	0.1	0.2	0.3	0.3	1.0
Shrimp	1.0	0.9	0.8	3.3	3.0	2.6	6.1	8.0	9.4
Prawns	2.2	2.4	2.7	45.6	41.1	27.4	47.5	45.2	38.1
Other	0.4	0.1	0.2	0.6	0.3	0.4	2.0	4.1	4.3
Subtotal	18.1	15.1	16.8	125.7	111.7	109.9	171.8	156.7	161.3
Total	**28.2**	**25.1**	**25.5**	**143.6**	**130.7**	**128.4**	**202.0**	**190.7**	**198.4**

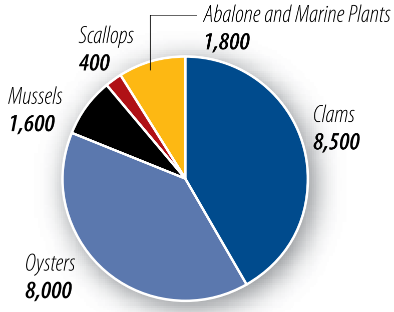
Cultured Seafood

One third of all seafood harvested in British Columbia in 2007 was produced in fresh and saltwater aquaculture facilities. Production levels among species fluctuated, but overall the harvest remained the same as in 2006, at 88,900 tonnes. The farmgate value of cultured seafood reached $387.9 million — down 10 per cent from the $430.2 million recorded in 2006 — and contributed 55 per cent of the total landed value of all British Columbia seafood.

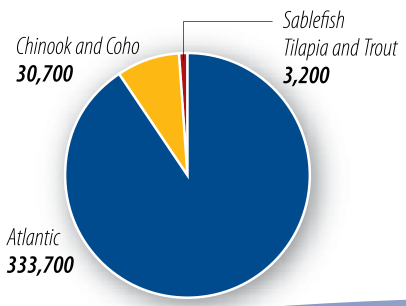
Cultured salmon (Atlantic, chinook and coho) represented 89 per cent of the cultured harvest at 79,300 tonnes and 94 per cent of the value at $364.4 million. Cultured shellfish operations (oysters, clams, mussels and scallops) harvested 8,700 tonnes (10 per cent of all cultured seafood) worth $18.5 million (5 per cent).

Developing species including tilapia, sablefish and micro-algae showed a 13 per cent increase in harvest levels, rising from 800 tonnes in 2006 to 900 tonnes in 2007. The corresponding farmgate value rose an impressive 31 per cent to $5.0 million in 2007.

Cultured Shellfish Farmgate Value 2007 ($'000)



Cultured Finfish Farmgate Value 2007 ($'000)



Seafood Processing

In 2007, British Columbia produced 472 distinct species and product combinations ranging from live rockfish to cold-smoked sockeye salmon and shucked oysters. In addition to the traditional domestic species and products, British Columbia processors import fish for value-added processing. Examples of these exotic products include flying fish roe, dace paste, and lobster paté. In 2007, the total wholesale value of all B.C. seafood products reached $1,296.6 million.

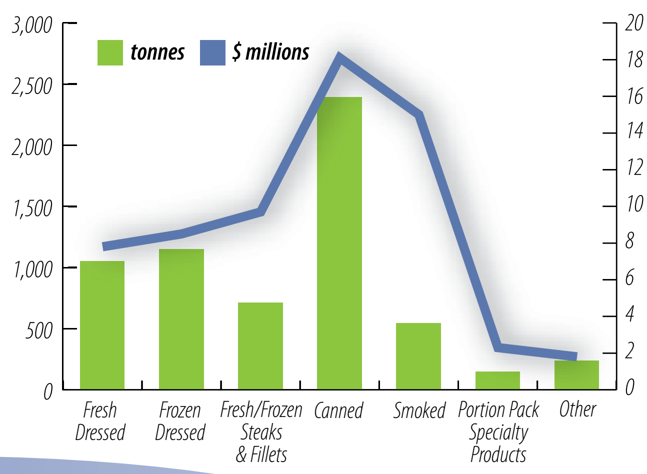
Salmon

In 2007, cultured and wild salmon products combined, (at $669.1 million) represented 52 per cent of the total wholesale value of British Columbia seafood. Wild salmon products, including value-added imported salmon, generated $189.7 million — 15 per cent of the total value of B.C. seafood. At $479.4 million, cultured salmon products made up 37 per cent of the total B.C. seafood wholesale value and 72 per cent of the value of all B.C. salmon products.

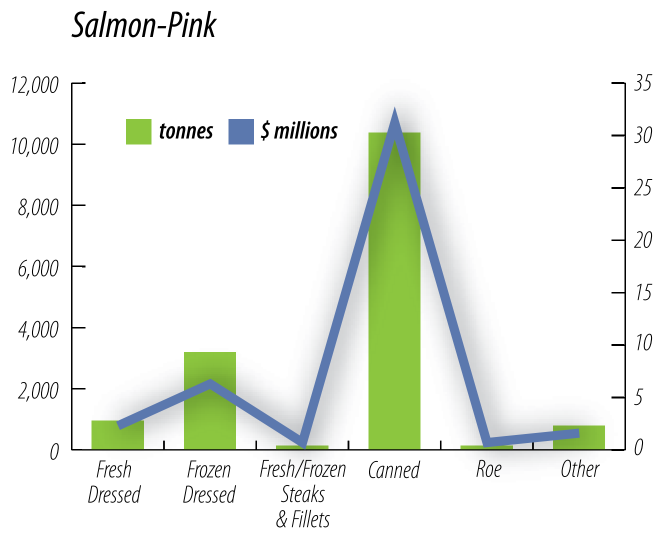
Wild salmon products saw a 16 per cent decline in wholesale value from the $224.7 million recorded in 2006. The largest decline was recorded for sockeye products where the wholesale value of $65.6 million was down from the $113.6 million generated the previous year.

Sockeye continued to be the highest revenue generator of all wild salmon species contributing 35 per cent of the total wild salmon wholesale value.

Salmon-Sockeye

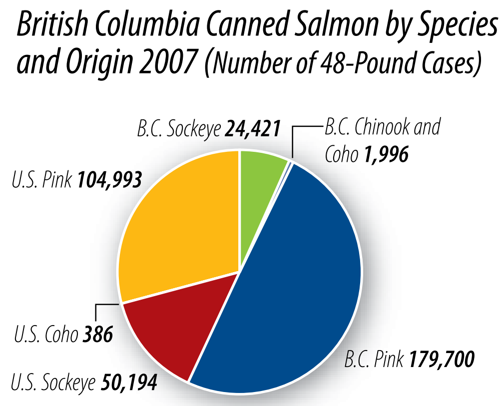


Pink salmon followed at 23 per cent ($43.2 million), chum at 16 per cent ($30.4 million), chinook at 14 per cent ($26.3 million) and coho at 12 per cent ($23.6 million).



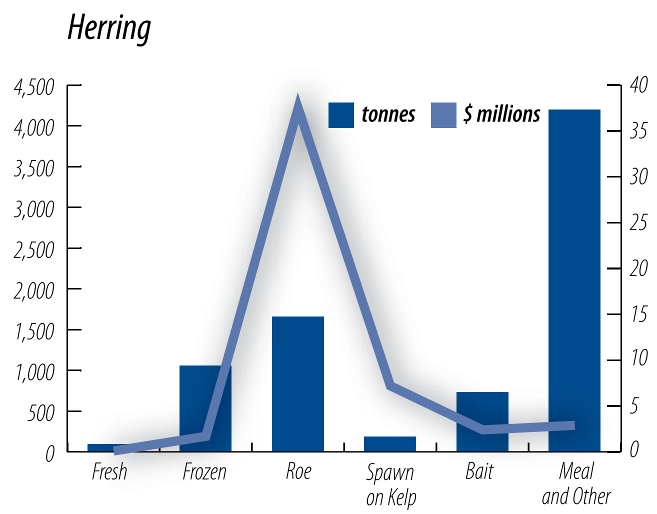
Canned Salmon

The 2007 British Columbia canned salmon pack totalled 361,690 standard 48-pound cases. This was an increase of 70 per cent over the 2006 pack of 211,295 cases. Pink salmon, with 284,693 cases, made up 79 per cent of all canned salmon followed by sockeye at 20 per cent (74,615 cases). Small amounts of chinook and coho were also canned for a total of 2,382 cases and one per cent of the total pack. Domestic supplies produced 206,117 cases and 57 per cent of the total canned salmon pack in 2007, while 155,573 cases of imported salmon were canned in British Columbia and made up 43 per cent of total pack. The pink, sockeye and coho sourced from Alaska in 2007 generated an estimated wholesale value of $21.4 million.



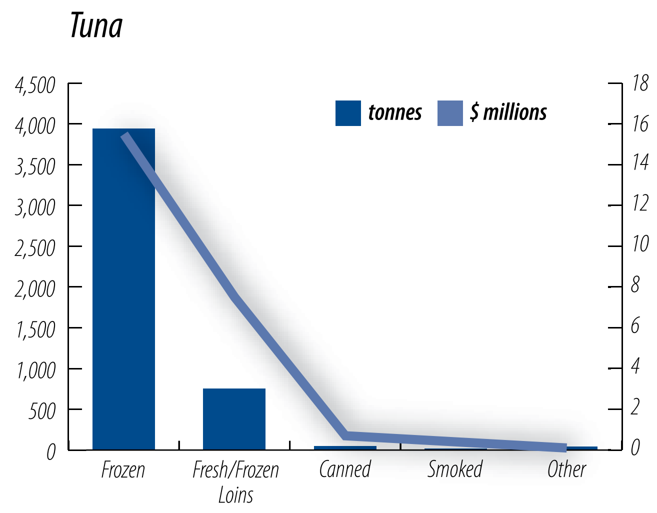
Herring

The total wholesale value of herring products fell 13 per cent from $60.1 million to $52.2 million and comprised four per cent of the total value of British Columbia seafood. Roe herring products (herring roe and spawn-on-kelp) generated $48.7 million in wholesale value in 2007, with food and bait herring products adding $3.5 million to the total.



Tuna

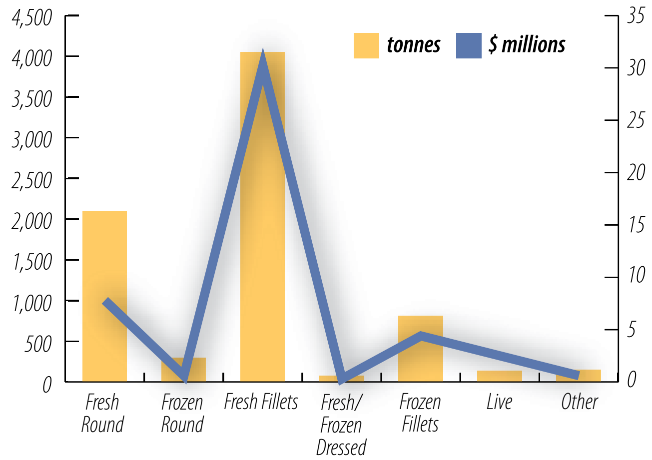
Albacore Tuna products generated $25.9 million in 2007, down 20 per cent from the $32.4 million recorded in 2006.



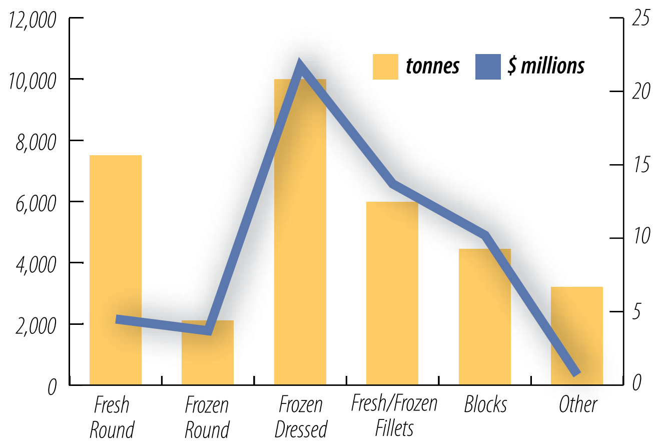
Groundfish

The total wholesale value of British Columbia groundfish increased 10 per cent to $338.7 million in 2007 and a 26 per cent share of the seafood industry total. One half ($168.5 million) of the total wholesale value of groundfish was generated by halibut products derived from domestic and imported sources combined. Hake products, at $54.4 million, represented 16 per cent of the groundfish total followed by rockfish species at 11 per cent ($37.6 million) and sablefish at eight per cent ($27.8 million).

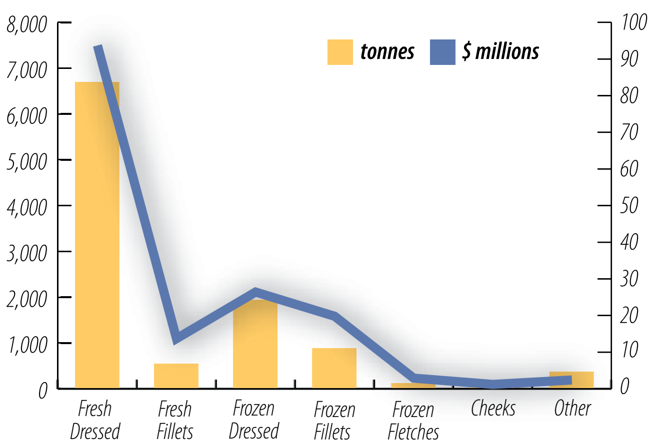
Rockfish and Soles



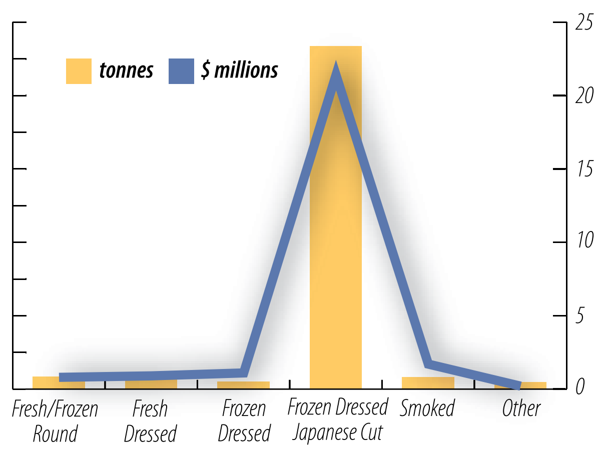
Hake



Halibut

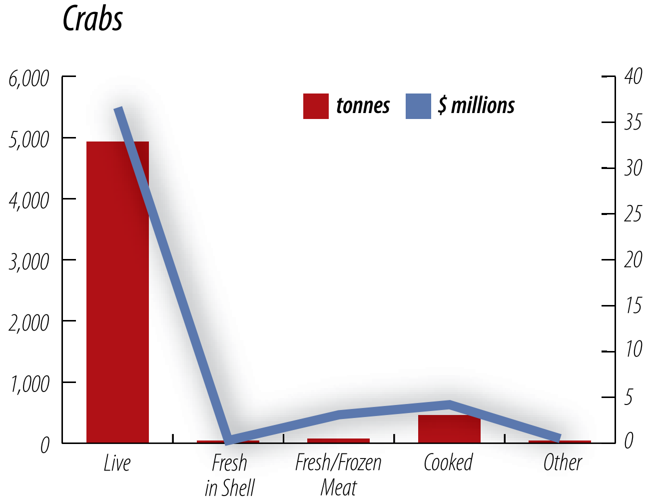


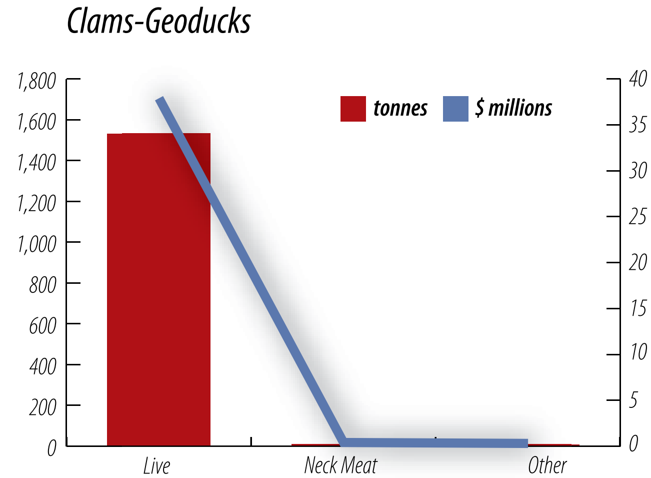
Sablefish

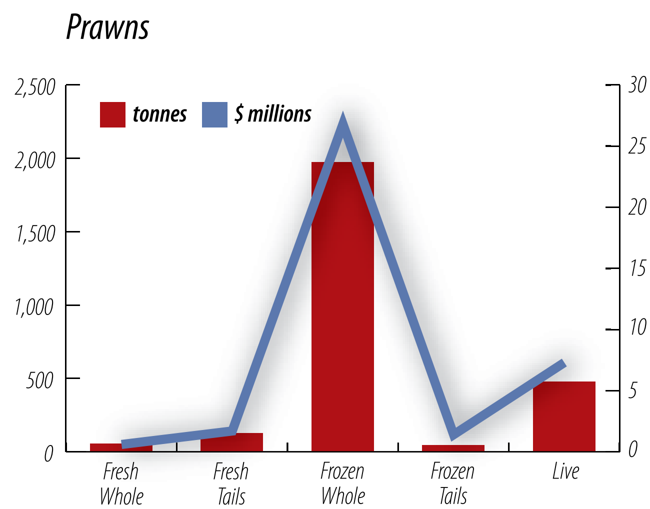


Shellfish

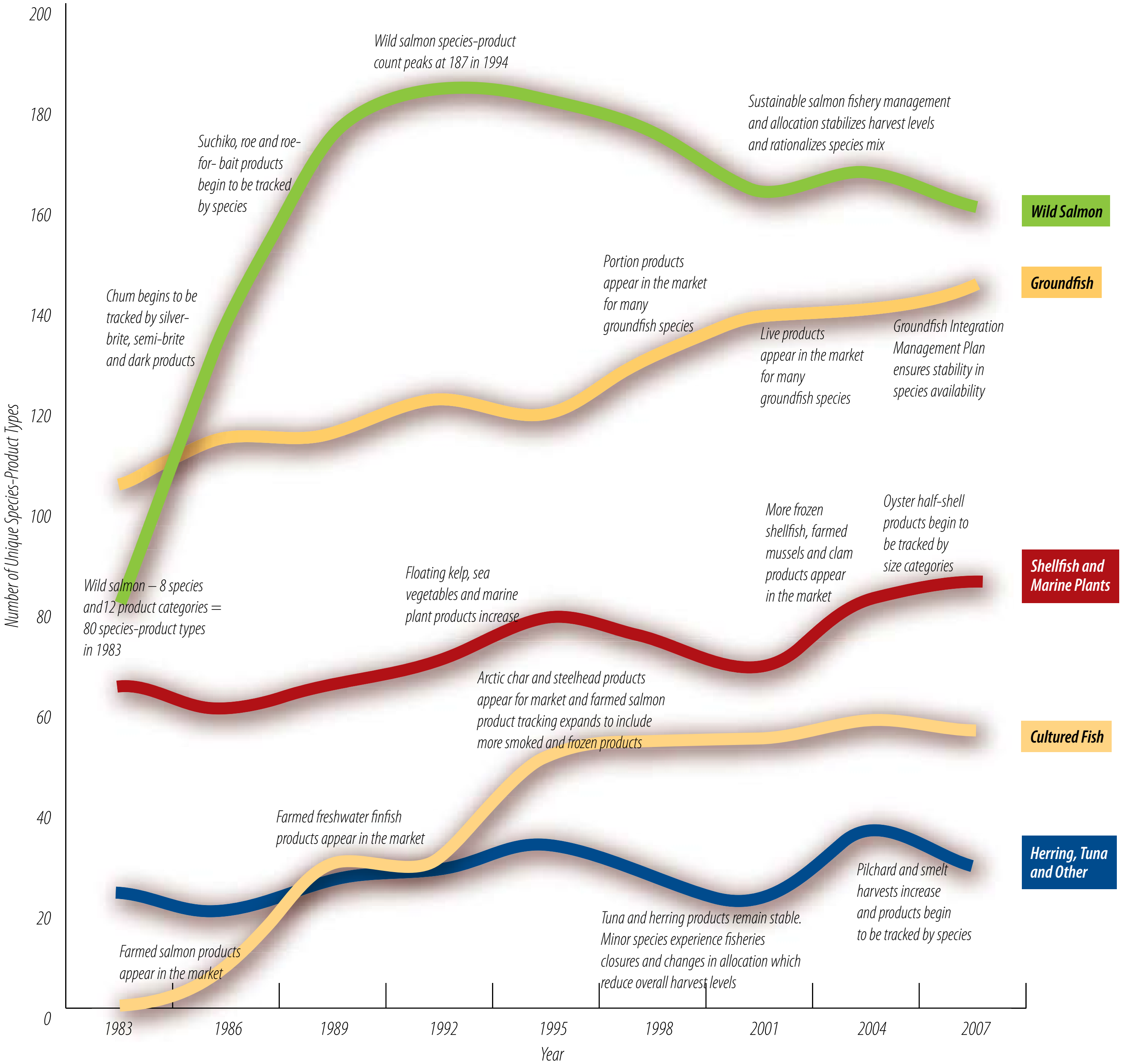
The total wholesale value of cultured and wild shellfish products rose four per cent from $190.7 million to $198.4 million and represented 15 per cent of the value of all B.C. seafood. Crab products generated $55.2 million (for a 28 per cent share of the shellfish total), followed by geoduck clams at $38.6 million (19 per cent) and prawns at $38.1 million (19 per cent). Cultured oysters were the fourth largest commodity in shellfish products with $20.4 million in sales (10 per cent of the total) and cultured clams generated $11.2 million (a six per cent share).







British Columbia Seafood Diversification (Tracking the Development of New Species and Products 1983–2007)



In 1983 British Columbia processors offered 272 different seafood products.

By 2007, the number of species-product types reported by industry reached 472.

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Significant Events in British Columbia's Fisheries, Aquaculture and Seafood Industry 2007–2008

British Columbia's Progress towards Eco-Certification of Seafood

The Marine Stewardship Council (MSC) provides B.C. with an internationally recognized standard for certifying the sustainability of its fisheries. Seafood products that display the coveted blue MSC eco-label offer buyers worldwide a way to make the best environmental choices and support sustainable fisheries.

- British Columbia currently has six fisheries in full assessment under the MSC process (sockeye salmon, pink salmon, chum salmon, Pacific halibut, Pacific hake, and spiny dogfish). There are five other fisheries in the confidential pre-assessment phase, and four fisheries preparing to enter the process.
- A $100,000 commitment from the Ministry of Environment will help provide industry with the technical and administrative capacity to manage the process across multiple fisheries.
- Due to the increased market demand for sustainably produced seafood, the Canadian Council of Fisheries and Aquaculture Ministers made a national commitment to third-party eco-certification and formed the Task Group on Eco-Certification in fall 2007. British Columbia co-chairs this group.

New B.C. Seafood Website – www.bcseafood.ca

The website was introduced at the Boston Seafood Show in February 2008 and was designed for both industry and government to promote B.C. seafood to buyers in the international and domestic markets. A user-friendly, state-of-the-art, searchable database of all B.C. processors enables buyers to readily access information on B.C. seafood by company, species, and/or product types. The site also contains information on species seasonality, upcoming events and recipes.

First Nations Initiatives

The Oceans and Marine Fisheries of the Ministry of Environment provided funding to First Nations interests on the Fraser River to explore the viability of in-river salmon fisheries. The Ministry of Agriculture and Lands has worked with the Siska Band who now operate a processing facility on their reserve, employing band members and selling their own fish. Now, other First Nations bands are joining in and working together on a program for First Nations commercial fisheries on the Fraser River.

Increasing British Columbia's Presence on the Global Stage

British Columbia strives to increase the profile of B.C. seafood in the global marketplace by showcasing its products at the world's premier seafood shows — the Boston Seafood Show, Brussels Seafood Show, and more recently, the China Seafood Show. Our presence provides a home for B.C. seafood companies to make new contacts with buyers and to highlight their unique products on a world stage.

Dalian – China Fisheries and Seafood Expo – October 2007

The China Expo is the only dedicated international exposition for the world's largest and fastest growing seafood market — China.

This first year of British Columbia, Canada's Pacific Gateway, met with positive results. B.C. developed a brochure translated into Chinese for distribution at the show and contributed to the Canada seafood reception by hosting wholesale and food service buyers. Buyers commented they were pleased to see Canada becoming more visible.

Boston – International Boston Seafood Show (IBSS) – February 2008

The IBSS is the only seafood show in North America and provides British Columbia with a venue to exhibit our products to our largest market — U.S. buyers. Highlights of the 2008 show:

- B.C.'s third year of participation and the first time provinces were grouped as an overall Canadian presence
- A well-known chef prepared a range of B.C. seafood dishes onsite to accentuate the flavour and quality of B.C. seafood
- Launched the new bcseafood.ca website
- Expanded B.C.'s global presence as well as its profile within Canada

Brussels – European Seafood Exposition (ESE) – April 2008

This was British Columbia's eighth season participating in the ESE which provided the opportunity to showcase our products at the world's largest seafood show. The British Columbia booth in the Canadian Pavilion was supported fully by returning B.C. seafood industry representatives. B.C. sablefish and hake continue to establish new customers and interest in B.C. wild salmon continues to grow.

Japanese Journalist Mission – September 2007

The mission consisted of five journalists from Kyodo News and the prominent food publications of Ryori Ohkoku (Cuisine Kingdom) and Senmon Ryori (Professional Cooking) along with a trade commissioner from the Canadian Embassy in Tokyo. The main goal was to increase awareness of British Columbia's seafood in Japanese consumers, seafood buyers and processors. The mission included a one-week tour of the British Columbia seafood industry and meetings with industry, provincial, and federal partners. In return, each journalist published attractive articles highlighting British Columbia seafood.

Centre for Shellfish Research – Deep Bay Field Station

VANCOUVER ISLAND UNIVERSITY Enjoy the journey.

The Centre for Shellfish Research at Vancouver Island University (Nanaimo) is building an off-campus research and training field site in Deep Bay on the east coast of Vancouver Island. The Province, through Island Coastal Economic Trust, will provide $1 million towards the development of the field station. It will be the only facility of its kind in Canada that integrates scientific research, industry training, community outreach, tourism and marketing. The field station will include an upland seawater tank farm, laboratory and demonstration shellfish farm and is designed to act as a combination research facility for shellfish aquaculture, marine ecology and water quality. www.mala.ca/csr/facilities/fieldsites.asp

Symposium – Community Engagement and Coastal Governance – April 28, 2008

The Institute for Coastal Research at Vancouver Island University drew speakers from different perspectives to provide information and dialogue on community engagement and governance in coastal social-ecological systems. Participants drew on experience in the mining, forestry, fisheries, and 'academic' (community-university research partnerships) sectors as well as from the First Nation's perspective. The event was followed by a one-day workshop for provincial government staff to explore community engagement and ecosystem-based management in relation to aquaculture.

Commercial Crab Association (CCA)

The CCA was formed in 2007 to represent the interests of 222 commercial and First Nations fishers. The CCA will focus on identifying industry concerns and developing options for the future management of the industry as DFO implements a program of change called Dungeness Crab Reform. www-ops2.pac.dfo-mpo.gc.ca/xnet/content/consultations/shellfishInvertebrates/crab/dungenesscrabreform/default_e.htm

Pacific Salmon Treaty

In spring 2008, the Pacific Salmon Treaty negotiations between Canada and the U.S. were successfully concluded with draft language for each of the Annex arrangements that are set to expire in 2008. Following domestic consultations, both federal governments are expected to ratify the agreement that will guide the sharing of conservation objectives and salmon catches between the countries for the next 10 years. The only remaining item to be re-negotiated is the Fraser River sockeye and pink salmon arrangement that expires at the end of 2010.

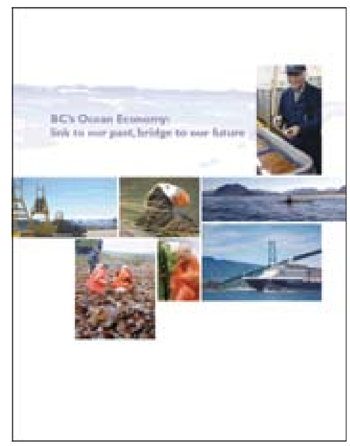
Federal Funding for Aquaculture – February 2008

The federal budget announced funding of $70 million over five years for continued development of Canada's sustainable aquaculture industry. The funds, known as Aquaculture 2012, will focus on four areas: governance and regulatory reform, regulatory science, innovation and certification and market access.

Reports and Publications

Skeena Independent Science Review Panel Report – May 2008
www.psf.ca/programs_iniatives.php?article=skeena_river

B.C.'s Ocean Economy: Link to Our Past, Bridge to Our Future – May 2008
www.env.gov.bc.ca/omfd/reports/BCs-Ocean-Economy.pdf



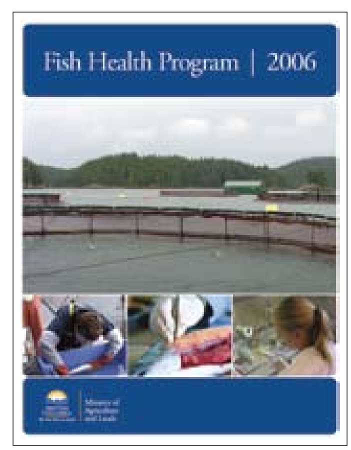
Broughton Archipelago: A State of Knowledge – February 2008
www.pacificsalmonforum.ca/pdfs-all-docs/BroughtonStateofKnowledgeMay08.pdf

Science and Sea Lice: What Do We Know? – February 2008
www.pacificsalmonforum.ca/pdfs-all-docs/ScienceandSeaLiceFinalFeb22-08.pdf

B.C. Pacific Salmon Forum Research Program, Summary of 2007 Interim Research Findings – February 2008
www.pacificsalmonforum.ca/pdfs-all-docs/2007InterimFindingsFeb8-08.pdf

Effects of Geoduck Aquaculture on the Environment: A Synthesis of Current Knowledge – January 2008
www.wsg.washington.edu/research/geoduck/literature_review.html

2006 Fish Health Program Report – January 2008
www.al.gov.bc.ca/ahc/fish_health/fish_health2006.pdf



Final Report of Special Committee on Sustainable Aquaculture – May 2007
www.leg.bc.ca/CMT/38thparl/session-3/aquaculture/index.htm

Economic Contribution of the Oceans Sector in British Columbia – April 2007
www.env.gov.bc.ca/omfd/reports/oceansector-economics.pdf

Literature Review and Framework Analysis of Non-Market Goods and Services Provided by British Columbia's Ocean and Marine Coastal Resources – March 2007
www.env.gov.bc.ca/omfd/reports/ocean-nonmarket-values.pdf

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Data Sources

All aquaculture industry harvests and farmgate values compiled by the provincial Ministry of Environment.

All seafood finished products and wholesale values compiled by the provincial Ministry of Environment.

All capture fisheries landings provided by Fisheries and Oceans Canada, Pacific Region. (Preliminary values for 2005 and 2006 and estimates for 2007 have been adjusted by the provincial Ministry of Environment).

Aquaculture and processing facility licensing data provided by the provincial Ministry of Agriculture and Lands.

Export data provided by Statistics Canada.

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

Oceans & Marine Fisheries
Ministry of Environment
PO Box 9309 Stn Prov Govt
Victoria, B.C. V8W 9N1

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