

2005

British Columbia Seafood Industry

YEAR IN REVIEW

BRITISH COLUMBIA

The Best Place on Earth

BRITISH COLUMBIA SEAFOOD

B.C. fishing boat heading to the grounds.

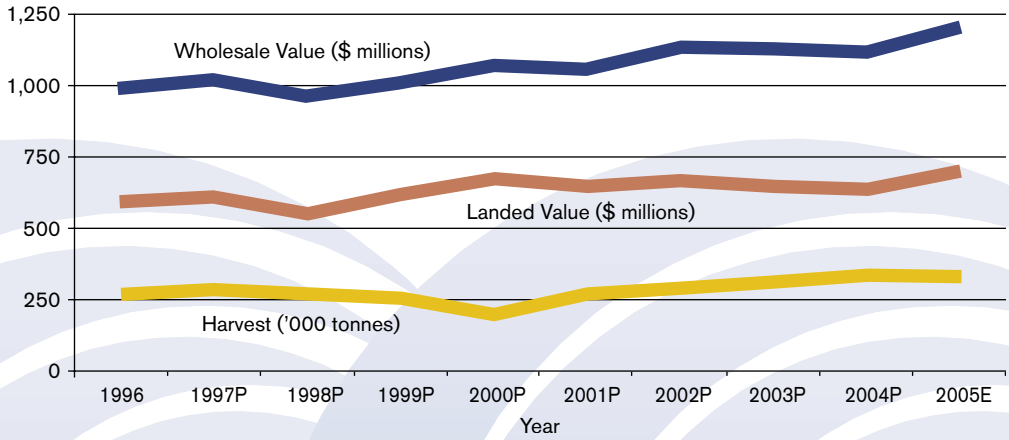
British Columbia is rich in seafood production, with over 90 different species of wild and farmed fish, shellfish and marine plants living in provincial waters. Located on Canada's Pacific Coast, British Columbia is home to integrated, well-managed, closely monitored, and efficient fishing, aquaculture and seafood processing sectors. Food safety, traceability, and sustainability practices are the cornerstones of all three sectors and have earned British Columbia an international reputation for safe, reliable, top-quality seafood products.

There are several factors that may influence the production and value of British Columbia seafood, such as natural fluctuations in wild fish populations, competition in the marketplace, the degree to which raw material is value-added, and economic changes in our traditional markets.

In 2005, British Columbia's seafood harvest from commercial capture fisheries and aquaculture facilities was down two per cent to 333,700 tonnes. The landed value rose 10 per cent to $700 million, while the wholesale value of finished seafood products increased seven per cent to more than $1.2 billion. British Columbia seafood products were shipped to 72 countries in 2005 and generated a total export value of $995 million — up from $984 million in 2004.

Over the last decade, British Columbia's seafood harvest has remained relatively stable, while the landed and wholesale values have shown a steady increase.

B.C. Seafood Production 1996–2005



British Columbia Seafood Production 2003–2005

		Harvest '000 Tonnes			Landed Value $ Millions			Wholesale Value $ Millions		
		2003P	2004P	2005E	2003P	2004P	2005E	2003P	2004P	2005E
Salmon	Chinook	2.2	2.5	2.1	8.2	14.8	12.3	17.3	26.7	25.0
	Sockeye	6.4	4.4	0.9	24.6	22.4	3.8	75.2	99.1	65.0
	Coho	0.8	1.1	1.1	2.5	3.7	3.5	14.2	19.2	24.0
	Pink	15.5	3.6	12.6	4.4	1.1	4.1	33.3	23.1	42.0
	Chum	13.7	14.1	9.6	9.1	11.0	9.2	45.6	47.3	53.0
	Subtotal[1]	**38.6**	**25.7**	**26.3**	**48.8**	**53.0**	**32.9**	**188.4**	**218.9**	**212.0**
Cultured Salmon	Atlantic	55.5	46.1	53.8	212.9	174.5	252.2	241.0	206.7	293.8
	Pacific[2]	17.2	15.7	16.8	42.9	50.7	66.5	61.0	80.7	77.3
	Subtotal	**72.7**	**61.8**	**70.6**	**255.8**	**225.2**	**318.7**	**302.0**	**287.4**	**371.1**
Herring	Spawn on Kelp	0.4	0.4	0.3	9.3	5.6	2.7	11.5	7.6	4.0
	Roe Herring	28.8	23.7	28.7	35.3	27.9	27.8	94.6	80.7	78.7
	Food and Bait	1.3	1.3	1.4	0.5	0.5	0.6	3.4	3.0	3.1
	Subtotal	**30.5**	**25.4**	**30.4**	**45.1**	**34.0**	**31.1**	**109.5**	**91.3**	**85.8**
Groundfish	Hake	69.1	124.9	102.0	13.7	26.6	29.7	40.1	44.5	58.4
	Halibut	7.1	7.4	7.5	49.2	51.4	52.0	106.4	88.3	97.0
	Sablefish	2.3	2.9	4.4	21.3	21.5	25.0	23.7	25.0	29.0
	Other Groundfish[3]	49.5	46.0	54.6	53.0	49.1	50.0	109.6	101.9	101.0
	Subtotal	**128.0**	**181.2**	**168.5**	**137.2**	**148.6**	**156.7**	**279.8**	**259.7**	**285.4**
Shellfish	Cultured	10.2	9.7	9.7	17.9	15.5	17.4	30.7	27.1	32.3
	Wild	20.6	21.7	17.6	123.9	128.4	122.1	192.7	193.3	178.1
	Subtotal	**30.8**	**31.4**	**27.3**	**141.8**	**143.9**	**139.5**	**223.4**	**220.4**	**210.4**
Other	Tuna	6.7	7.9	4.9	14.3	27.7	17.3	23.1	36.6	30.0
	Sardines	1.1	4.3	3.3	0.3	1.3	0.8	1.0	3.8	3.3
	Other	0.6	2.6	2.2	0.3	0.9	0.7	0.3	0.9	0.7
	Cultured Other[4]	0.2	0.2	0.2	1.0	1.6	2.3	2.6	2.5	3.0
	Subtotal	**8.6**	**15.0**	**10.6**	**15.9**	**31.5**	**21.1**	**27.0**	**43.8**	**37.0**
	Grand Total	**309.2**	**340.5**	**333.7**	**644.6**	**636.2**	**700.0**	**1,130.1**	**1,121.5**	**1,201.7**

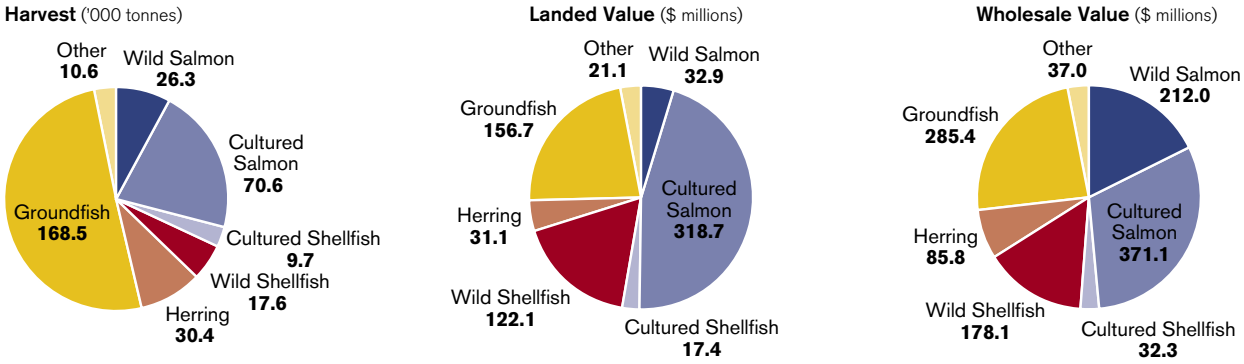
E Estimates – Volume and value estimates are derived from information available to June 2006 that has been adjusted to account for missing data.
P Preliminary – Volume and values are revised from the previously published estimates but are not yet final.
1 The total wholesale value of wild salmon includes the value of salmon products such as offal, meal and oil which cannot be identified by species.
2 Pacific cultured salmon includes chinook, coho, sockeye and marine trout.
3 The total wholesale value for "Other Groundfish" includes the value of fish meal and oil which cannot be identified by species.
4 "Cultured Other" includes marine plants, plankton, freshwater trout and all non-salmonid fish species cultured in fresh and marine waters.

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

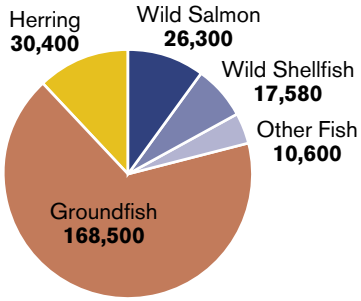
Landed Value – the price paid to the commercial fishers and/or aquaculturists for the whole fish. In aquaculture, this can also be referred to as "farmgate" value.

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.

Relative Importance of Major Species Groups in B.C. Seafood 2005



B.C. Seafood Capture Harvest
Major Species Groups 2005
(Round weight in tonnes)



In 2005, 76 per cent of British Columbia's seafood harvest came from wild capture fisheries.

CAPTURE FISHERIES

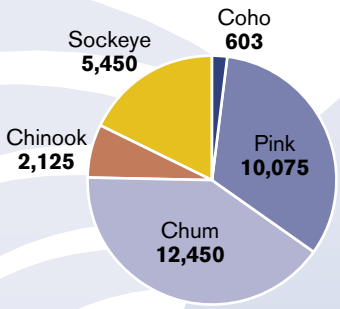
The commercial capture fishery harvests from the open waters of the northern Pacific Ocean and throughout the more sheltered straits and sounds of the coast. More than 8,000 registered fishers using trap, net, hook and line, trawl, dive and hand picking harvest methods brought in 253,200 tonnes of seafood — down six per cent from the 268,800 tonnes harvested in 2004. The landed value fell eight per cent from $393.9 million in 2004, to $361.6 million in 2005, and represented 52 per cent of the total landed value of British Columbia's seafood.

WILD SALMON

The total 2005 wild salmon harvest (26,300 tonnes) was similar to 2004's 25,700-tonne harvest. However, as British Columbia's five commercial salmon species garner highly different prices in the marketplace, the landed and wholesale values reflect the relative shares of the high-value sockeye and oft-abundant pinks.

In 2005, conservation concerns for weak sockeye stocks curtailed harvest opportunities. This resulted in a decline to 900 tonnes (an 80 per cent drop from the previous year); the landed value fell 83 per cent to $3.8 million.

B.C. Wild Salmon Harvest
Four Year Average
(Round weight in tonnes)



The four year average (2002-2005) harvest of wild salmon was 30,703 tonnes.

The 2005 pink harvest was 3.5 times larger than in 2004 and represented 48 per cent of all wild salmon landings. However, the landed value of $4.1 million represented only 12 per cent of the total wild salmon landed value.

Chinook provided the highest share of landed value to British Columbia salmon fishermen in 2005, generating $12.3 million (37 per cent of the wild salmon total).

Overall, the landed value of British Columbia's wild salmon harvest fell 38 per cent, from $53 million in 2004, to $32.9 million in 2005.

GROUNDFISH

In 2005, groundfish comprised 67 per cent of the total capture fisheries harvest for British Columbia. That year hake stocks were low and the harvest fell 18 per cent, which contributed to an overall groundfish harvest decline to 168,500 tonnes (seven per cent).

The overall landed value for groundfish increased five per cent to $156.7 million as prices paid to fishermen increased for most species. The total landed value of hake was up 12 per cent — from $26.6 million in 2004 to $29.7 million in 2005. Halibut generated one-third of the landed value, followed by hake (19 per cent) and sablefish and rockfish species (16 per cent respectively). Newly-developed markets for arrowtooth flounder have provided incentive for trawlers to target the species which in 2005 showed significant increases in harvest and values.

Hake, lingcod, Pacific Ocean perch, arrowtooth flounder and sole.

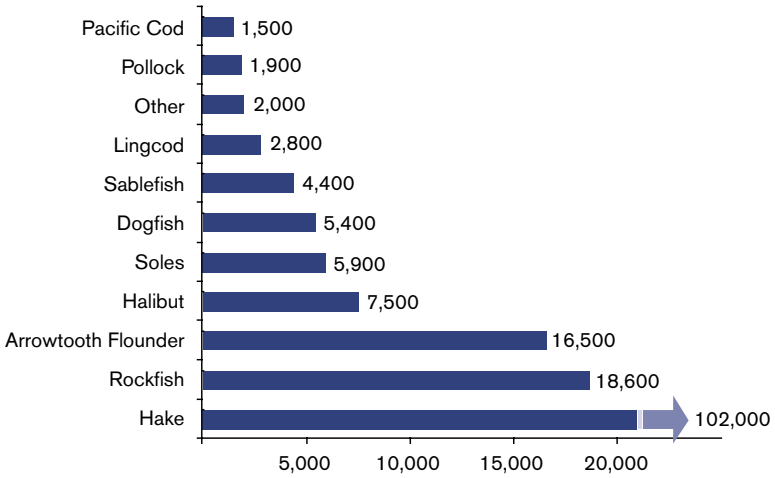
British Columbia Groundfish Production 2003–2005

	Harvest '000 Tonnes			Landed Value $ Millions			Wholesale Value $ Millions		
	2003P	2004P	2005E	2003P	2004P	2005E	2003P	2004P	2005E
Arrowtooth Flounder	4.3	5.5	16.5	1.3	1.8	4.7	1.6	1.8	5.3
Dogfish	5.8	5.5	5.4	5.1	3.6	4.0	11.5	9.8	11.4
Hake	69.1	124.9	102.0	13.7	26.6	29.7	40.1	44.5	58.4
Halibut	7.1	7.4	7.5	49.2	51.4	52.0	106.4	88.3	97.0
Lingcod	2.8	2.8	2.8	5.4	5.5	5.5	8.3	10.2	10.2
Pacific Cod	0.8	1.3	1.5	1.1	1.8	2.1	3.8	5.0	4.9
Pollock	5.4	2.9	1.9	2.6	1.4	0.9	3.3	3.3	2.0
Rockfish	21.7	20.0	18.6	28.9	26.5	24.5	48.7	44.8	40.0
Sablefish	2.3	2.9	4.4	21.3	21.5	25.0	23.7	25.0	29.0
Soles	6.1	6.1	5.9	7.1	7.0	6.8	13.0	12.2	12.2
Other	2.6	1.9	2.0	1.5	1.5	1.5	19.4	14.8	15.0
Total	**128.0**	**181.2**	**168.5**	**137.2**	**148.6**	**156.7**	**279.8**	**259.7**	**285.4**

E Estimates P Preliminary

Hake dominated the groundfish fishery in harvest volume, contributing more than 60 per cent of the total catch.

B.C. Groundfish Harvest by Major Species Groups 2005



Prawn and shrimp.

WILD SHELLFISH

The harvest of wild shellfish fell 19 per cent in 2005 (to 17,600 tonnes), primarily due to a significant decline in crab landings. Compared to the previous year, harvest of other shellfish species showed minor fluctuations in 2005. Prawns contributed 35 per cent of the total landed value of wild shellfish followed by geoducks at 27 per cent and crabs at 24 per cent. While crabs generated almost $18 million less in landed value in 2005, strong geoduck and prawn landed prices buoyed the wild shellfish sector overall and total landed value fell only 5 per cent to $122.1million.

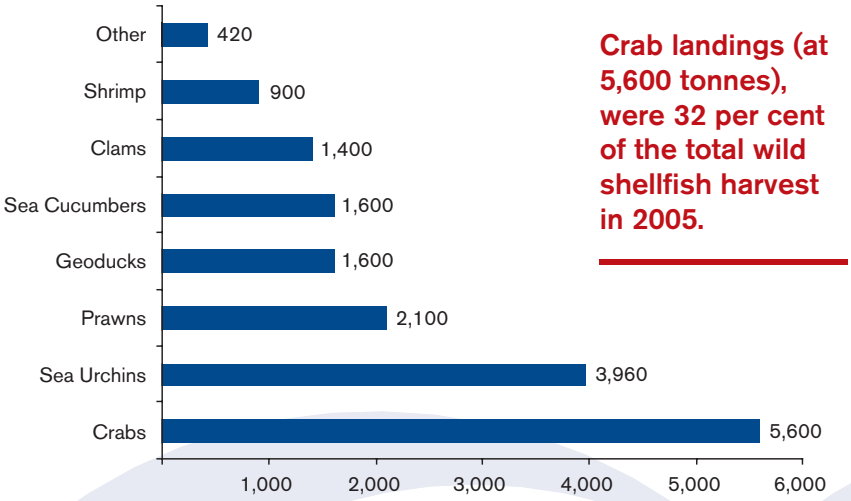
Red sea urchin harvesting.

British Columbia Shellfish Production 2003–2005

		Harvest '000 Tonnes			Landed Value $ Millions			Wholesale Value $ Millions		
		2003P	2004P	2005E	2003P	2004P	2005E	2003P	2004P	2005E
Cultured	Clams	1.7	1.6	1.8	8.2	7.2	8.4	11.9	11.0	12.7
	Oysters	8.3	7.9	7.7	8.9	7.4	8.0	17.0	14.0	16.5
	Scallops and Other	0.15	0.16	0.23	0.8	0.9	1.0	1.8	2.1	3.1
	Subtotal	**10.2**	**9.7**	**9.7**	**17.9**	**15.5**	**17.4**	**30.7**	**27.1**	**32.3**
Wild	Clams	1.6	1.4	1.4	5.4	4.3	3.9	7.9	6.6	6.0
	Crabs	7.2	9.4	5.6	39.1	46.7	28.8	61.0	67.9	52.0
	Geoducks	1.7	1.8	1.6	31.9	33.6	32.7	49.0	51.0	37.0
	Scallops	0.06	0.04	0.02	0.3	0.2	0.1	0.7	0.5	0.5
	Sea Cucumbers	1.4	1.4	1.6	2.1	2.7	3.2	6.5	5.9	7.0
	Sea Urchins: Red	4.3	4.4	3.9	7.2	7.4	6.5	14.8	15.7	13.8
	Sea Urchins: Green	0.2	0.13	0.06	0.9	0.5	0.2	1.9	1.0	0.3
	Shrimp	1.3	0.9	0.9	3.5	2.6	2.9	6.4	6.7	6.5
	Prawns	2.4	2.0	2.1	32.8	30.0	43.2	42.5	36.0	53.0
	Other	0.4	0.2	0.4	0.7	0.4	0.6	2.0	2.0	2.0
	Subtotal	**20.6**	**21.7**	**17.6**	**123.9**	**128.4**	**122.1**	**192.7**	**193.3**	**178.1**
	Total	**30.8**	**31.4**	**27.3**	**141.8**	**143.9**	**139.5**	**223.4**	**220.4**	**210.4**

E Estimates P Preliminary

B.C. Wild Shellfish Harvest by Major Species Groups 2005



Crab landings (at 5,600 tonnes), were 32 per cent of the total wild shellfish harvest in 2005.

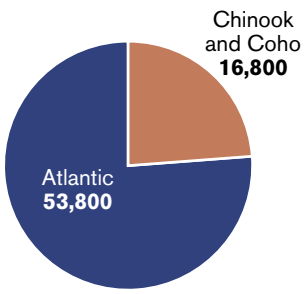
Dungeness Crab.

CULTURED SEAFOOD

More than 30 different species of finfish, shellfish, and marine plants are cultured in commercial quantities throughout British Columbia. From small backyard trout fishing ponds to remote, partially-automated salmon and shellfish farms, British Columbia aquaculture provides economic benefits throughout the province. In 2005, a total of 739 sites were licensed for operation (489 shellfish, 132 marine finfish, 112 freshwater finfish, and six marine plants) to 444 companies (315 shellfish, 24 marine finfish, 99 freshwater finfish, and six marine plants). The total provincial harvest from aquaculture facilities increased to 80,500 tonnes in 2005 (12 per cent), while the farmgate value rose a remarkable 40 per cent to $338.4 million.

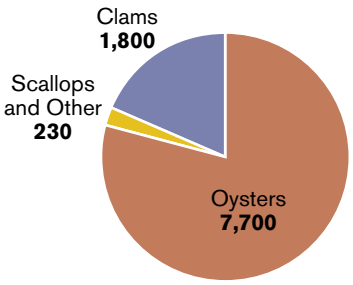
Cultured salmon production increased to 70,600 tonnes (14 per cent) while shellfish and minor species production remained steady at 9,900 tonnes. The farmgate values for all species were higher in 2005, with cultured salmon increasing to $318.7 million (42 per cent), cultured shellfish to $17.4 million (a 12 per cent increase), and marine plants and other finfish to $2.3 million (up 43 per cent).

B.C. Cultured Salmon Harvest 2005



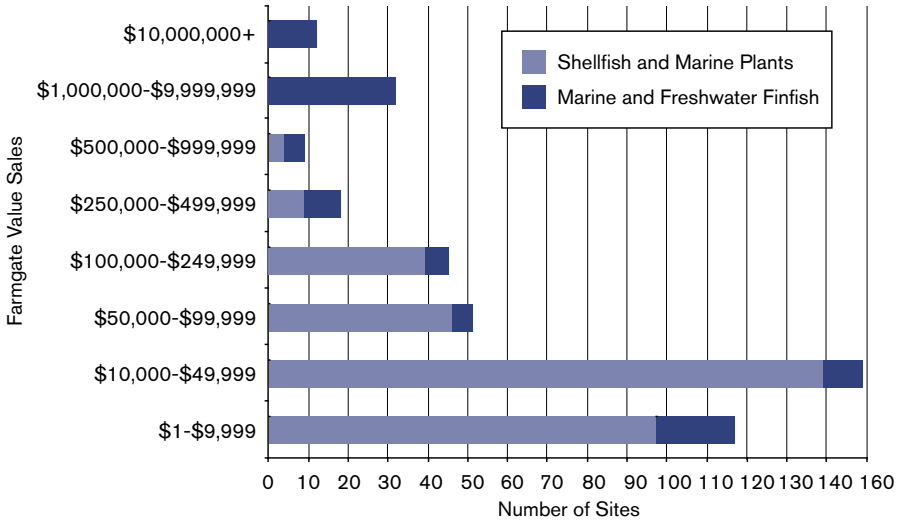
In 2005, 73 per cent of B.C. salmon was produced on aquaculture sites.

B.C. Cultured Shellfish Harvest 2005



Thirty-six per cent of B.C. shellfish was produced on aquaculture sites in 2005.

Aquaculture Site Counts by Farmgate Sales Level 2005



SEAFOOD PROCESSING

British Columbia produces some of the world's most popular specialty seafood products in more than 230 provincially licensed facilities.

SALMON

Six species of salmon are produced in commercial quantities from capture fisheries and culture operations in British Columbia. In 2005 the total supply increased 11 per cent to 96,900 tonnes. Atlantic salmon made up just over 55 per cent of the total supply followed by Pacific chinook, coho, pink, chum and sockeye. Salmon is available year-round in a variety of forms (cold and hot smoked, and fresh/frozen dressed, fillets, steaks and portions) and packaging such as flexible vacuum pouches and traditional cans.

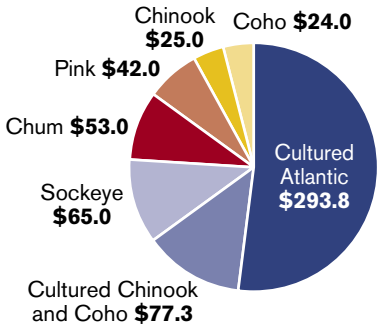
In 2005, B.C.'s canned salmon production increased 25 per cent to 489,359 standard 48-pound cases. Only two per cent of this was comprised of coho and chum salmon (one per cent each), while 77 per cent was comprised of pink salmon and 21 per cent of sockeye. British Columbia canneries accessed salmon from Alaska to supplement domestic supplies, and in 2005, 234,024 cases (48 per cent of the total) were derived from imported salmon.

In 2005, the total wholesale value of salmon products was $583.1 million contributing 49 per cent of the total value of British Columbia seafood. B.C. wild salmon is primarily exported to the United States, Japan, United Kingdom, China, and Australia; most cultured salmon is shipped to the United States, Japan, and Taiwan.

HERRING

British Columbia roe herring products (herring roe and spawn-on-kelp) generated $82.7 million in wholesale value in 2005, with food & bait herring products adding $3.1 million to the total. All herring products combined comprised seven per cent of the total value of British Columbia seafood.

B.C. Salmon Products
Wholesale Value 2005



Sixty-four per cent of the total wholesale value of B.C. salmon was cultured product.

Herring roe processing.

British Columbia herring products are primarily exported to Japan, China, and the United States.

GROUNDFISH

British Columbia groundfish includes primarily white-flesh fish, such as hake, soles, halibut, lingcod, pollock, Pacific cod, and arrowtooth flounder. All species are available in fresh and frozen dressed form, as well as fillets and blocks. The total wholesale value of British Columbia groundfish was $285.4 million in 2005, (a 24 per cent share of the seafood industry total). Primary export destinations for British Columbia groundfish are the United States, Japan, Russian Federation, Ukraine, and China.

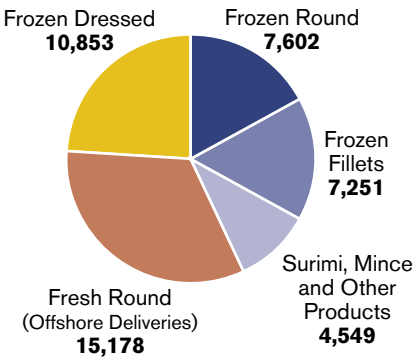
SHELLFISH

Popular shellfish products include sea urchin roe, shrimp and prawn (whole or tails) and crab (whole or in portions). Bi-valve shellfish including geoduck and Manila clams, scallops, oysters, and mussels are sold primarily in-shell fresh. The total wholesale value of shellfish products was $210.4 million in 2005, (18 per cent of the total value of B.C. seafood). Many of our unique species are exported to niche markets in United States, Japan, Hong Kong, and China.

OTHER SPECIES

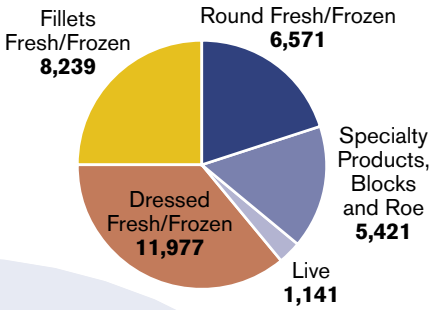
Tuna, sardines, and mackerel are some of the minor species rising in importance in British Columbia's wild capture fisheries sector. Aquaculture has been expanding into tilapia, sablefish, abalone, geoducks, marine plants and sturgeon. Farmgate, landed, and wholesale values fluctuate as these species move from experimental toward full-fledged commercial production harvest levels.

B.C. Hake Products 2005
(Processed weights)



The total weight of B.C. hake products was 45,433 tonnes in 2005.

B.C. Whitefish Products
(excluding Hake) 2005
(Processed weights)



B.C. produced 33,349 tonnes of whitefish products in 2005.

SIGNIFICANT EVENTS IN BRITISH COLUMBIA'S SEAFOOD INDUSTRY 2005/06

OCEANS AND MARINE FISHERIES DIVISION (OMFD) OF MINISTRY OF ENVIRONMENT (MOE)

The OMFD was created in 2005 with the goal to achieve sustainable management and development of British Columbia's ocean resources and marine fisheries in a manner that protects the health of the environment, and supports a thriving economy and healthy communities, as well as promoting growth and diversification of a seafood sector that offers strong competition in global markets. **http://www.env.gov.bc.ca/omfd**

SUSTAINABILITY AND RESOURCE MANAGEMENT INITIATIVES

MARINE FISHERIES AND OCEANS DEVELOPMENT

- In its commitment to sustainable and collaborative management and use of marine and ocean resources, MOE invested in a variety of initiatives to:
  - help reform the management of Pacific salmon fisheries;
  - support the implementation of a new integrated Groundfish Quota Management System;
  - build new approaches to recreational fisheries development and marketing; and
  - support ocean science and technology development projects.
- In conjunction with the government of Canada, MOE established a new Oceans Coordinating Committee to collaboratively deliver programs and initiatives for Canada's Ocean Strategy.

B.C. SEAFOOD ALLIANCE SUMMIT IV

The one-day summit, "British Columbia: Leading the World in the Best Managed Fisheries – Bar None?" was held November 1, 2005 in Vancouver, bringing together key industry participants and government leaders to ask what "best managed fisheries" means and how it could be achieved. **http://www.bcseafoodalliance.com**

NATIONAL AQUATIC ANIMAL HEALTH PROGRAM (NAAHP)

The Canadian Food Inspection Agency (CFIA) and Fisheries and Oceans Canada (DFO) are co-delivering the NAAHP. The NAAHP is a science-based regulatory program designed to meet international aquatic animal health management standards to protect Canadian aquatic resources (wild and cultured) from serious infectious diseases and to maintain competitive international market access. Canadians will benefit by having:

Key to international access

- healthy aquatic animal resources to provide a reliable supply of wholesome marine food products;
- secure and expanding seafood export markets;
- more stable regional economies; and
- growing recognition of Canada as a global leader in the export of sustainable, high-quality fish and seafood products.

http://www.inspection.gc.ca/english/direct/naahp

CANADA – U.S. PACIFIC SALMON TREATY (PST)

In February 2005, two new PST annex arrangements were agreed upon by both Canadian and U.S. parties. The agreements will improve the management of trans-boundary river stocks and Fraser River sockeye and pink salmon.

BC PACIFIC SALMON FORUM

PACIFIC SALMON FORUM

Chaired by the Honourable John Fraser, the forum is a three-year $5 million commitment to assist in securing the future of salmon in British Columbia. Currently in its second year of operation, the forum has a mandate to analyze scientific and socio-economic issues, and is encouraged to consider traditional ecological knowledge in its work. It will generate balanced and impartial advice for managing the salmon resource based on answers to key research questions. **http://www.pacificsalmonforum.ca//index.php**

SALMON MANAGEMENT

In April 2005, DFO implemented its Wild Salmon Policy and contributed $1.1 million to related salmon science. The policy makes conservation of wild salmon and their habitat the highest priority in the resource management decision process, in order to restore and maintain healthy and diverse salmon populations.

http://www-comm.pac.dfo-mpo.gc.ca/publications/wsp/default_e.htm

World leading project in groundfish management.

GROUNDFISH INTEGRATED MANAGEMENT PLAN

A three-year pilot plan for the integration of commercial groundfish fisheries is to be implemented for the 2006 fishing season. Developed by the Commercial Groundfish Industry Advisory Committee and the Commercial Industry Caucus, and with the support of the Province, the new plan will strengthen conservation in the commercial groundfish fisheries by virtually eliminating by-catch and discards. British Columbia groundfish fisheries will now be amongst the best managed in the world.

http://www.pac.dfo-mpo.gc.ca/ops/fm/Groundfish/default_e.htm

PACIFIC HAKE FISHERY

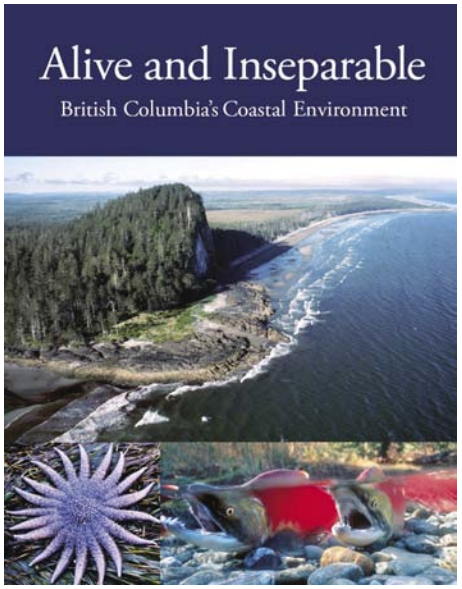
In recent years the government-industry in-season Hake Advisory Committee has given priority to allocation of hake to British Columbia on-shore plants to maximize economic benefits to both the processing and fishing sectors. In 2005, the hake abundance exceeded shoreside processing capacity (69,000 tonnes) and British Columbian fishers were allocated an additional 33,000-tonne-harvest for deliveries to foreign at-sea factory vessels under contract with the British Columbia Hake Consortium.

MINIMIZING EULACHON BY-CATCH

The province supported the Pacific Coast Shrimpers Cooperative Association in their work on a new eulachon by-catch reduction device for shrimp trawl nets. The device is expected to decrease eulachon by-catch to less than one per cent (a five per cent reduction from the devices that are currently mandatory in the fishery).

BRITISH COLUMBIA COASTAL AND MARINE ENVIRONMENT REPORT

In June 2006 MOE, in collaboration with DFO, Environment Canada, the University of British Columbia and the University of Victoria, published a series of six reports on the state of British Columbia's coastal and marine environment. The reports use a series of indicators to develop a scientific baseline for decision makers working on the coast, as well as a tool for public education. Indicators are organized into six topics areas: Population and Economic Activity, Climate Change, Industrial Contaminants, Biodiversity, Ecosystem Protection, and Fisheries. **http://www.env.gov.bc.ca/soe/bcce/**



SPECIES-AT-RISK-ACT (SARA) LISTINGS

Following federal government recommendations for listings under SARA, a decision was made not to list Interior Fraser River coho salmon. Interior Fraser River coho remain a conservation concern, but DFO is confident that it has the tools to rebuild the species. Currently, extensive protection measures are in place and they will be have long-term support under the federal *Fisheries Act*. The Province supports federal efforts to ensure important coho habitats are protected and restored.

MARINE HABITAT CONSERVATION

A combined effort from British Columbia Parks, the Integrated Land Management Bureau (ILMB) and OMFD produced updated resource data on British Columbia's Marine Protected Areas. The update will help identify the conservation contributions of provincial protected areas to a future collaborative federal/provincial Marine Protected Areas system.

ROCKFISH CONSERVATION AREAS (RCAS)

With the support of the Province, DFO proposed the addition of over 70 new RCAs to the current 89 on the British Columbia coast. RCAs are part of the Rockfish/Lingcod Conservation Strategy and prohibit fishing that harms rockfish. Implementation of the new RCAs will occur in February of 2007. **http://www.pac.dfo-mpo.gc.ca/ops/fm/Groundfish/default_e.htm**

AQUACULTURE INITIATIVES

SPECIAL COMMITTEE ON SUSTAINABLE AQUACULTURE

On February 20, 2006, the Legislative Assembly agreed that a Special Committee on Sustainable Aquaculture be appointed to examine, inquire into, and make recommendations regarding sustainable aquaculture in British Columbia. A "Survey and Assessment of the Economic Impacts and Prospects of the Salmon Farming and Wild Salmon Industry in British Columbia" is underway. The committee will present its findings and recommendations to the Legislature by May 31, 2007. **http://www.leg.bc.ca/cmt/38thparl/session-2/aquaculture/index.htm**

FINFISH AQUACULTURE DEVELOPMENT – FRAMEWORK FOR DIALOGUE

On January 12, 2006 the Coastal Alliance for Aquaculture Reform and Marine Harvest Canada, a prominent salmon farming company in British Columbia, announced an agreement on a provincially facilitated "Framework for Dialogue". The Framework supports collaboration on research and on identifying solutions for conflicts surrounding net-pen salmon farming, with a main focus on examining relationships between net-pen farms, wild salmon, and sea lice. **http://www.marineharvest.com/news-2006-3.html**

SHELLFISH AQUACULTURE DEVELOPMENT

- The Ministry of Agriculture and Lands, in conjunction with DFO and ILMB, led the development of a comprehensive geoduck aquaculture policy framework that resulted in clarified operation guidelines for geoduck aquaculturists. The pilot is expected to lead to new tenures by fall 2006. **http://www.agf.gov.bc.ca/fisheries/Shellfish/geoduck/main.htm**
- The British Columbia Shellfish Growers Association, with support from MAL, developed the Industry Strategic Plan that assesses current conditions in the industry and identifies vision, goals, and directions for the future. It presents options for action on key issues and provides a timeline for a three-year implementation strategy. **http://www.bcsga.ca/bcsga_info/24.php**
- The Centre for Shellfish Research (CSR) acquired seven acres of waterfront property in Deep Bay on the east coast of Vancouver Island to build the Shellfish Aquaculture Research and Training Farm. The site will be used for testing CSR research results, training, technology development, and public education. Two foreshore tenures will host operating shellfish farms for training and demonstration purposes. Construction of the facility is currently underway. **http://www.csr.mala.bc.ca/home.asp**

FISHERIES/AQUACULTURE COMPLIANCE AND ENFORCEMENT

In 2005, MAL inspected 147 aquaculture sites, and performed 232 commercial inspections and investigations. MAL inspectors continue to work closely with other law enforcement agencies including DFO. This working relationship has lead to several joint inspections and DFO participation in all

investigations. The recently released report on MAL inspection activities can be viewed at
http://www.agf.gov.bc.ca/fisheries/aqua_report/2004-5/index_2004-5.htm

AGRICULTURE AND LANDS FISH HEALTH PROGRAM

The MAL Fish Health Program provides regulators with a comprehensive understanding of the health status of fish stocks on salmon farms. The program allows for the regulation of fish disease and addresses health concerns related to cultured fish in British Columbia. The Ministry is preparing to release a thorough review of the program; included in the report will be an overview of the results of the 2003 to 2005 audit of marine salmon farms on the British Columbia coast.
http://www.agf.gov.bc.ca/ahc/fish_health/index.htm

FIRST NATIONS DELEGATION TO AQUANOR 2005

The British Columbia Ministry of Agriculture and Lands (MAL) and the federal government sponsored a British Columbia First Nations delegation to travel to Norway for AquaNor 2005, the largest aquaculture trade and technology show in the world. The delegation visited production and research facilities, and made many contacts to familiarize themselves with aquaculture as practiced in Norway.

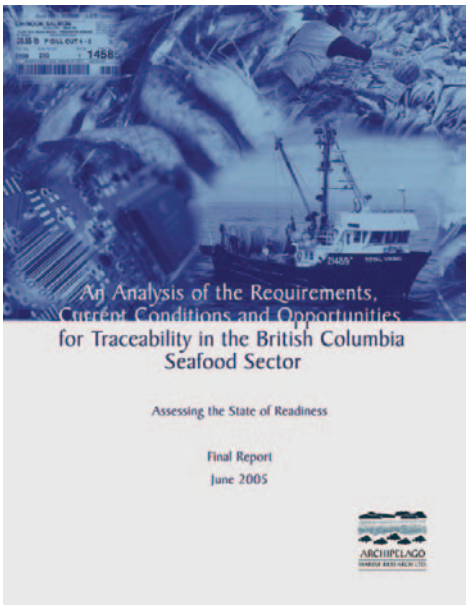
FIRST NATIONS SHELLFISH AQUACULTURE TRAINING PROGRAM (FNSATP)

In April 2006, the Province provided the Centre for Shellfish Research with funding for the FNSATP. The comprehensive training program offers 16 courses ranging from beach management to business management and will support the transition of shellfish aqua-business development from "consultant-based" to "First Nation-based".
http://www.mala.ca/shellfishresearch/index.asp

SEAFOOD MARKETING INITIATIVES

TRACEABILITY

The "Analysis of the Requirements, Current Conditions and Opportunities for Traceability in the British Columbia Seafood Sector" was completed by Archipelago Marine Research Ltd. for the British Columbia Seafood Alliance, with support from MOE. The report outlines data requirements for seafood traceability, compares traceability programs currently in place within the province, and identifies gaps.
http://www.bcseafoodalliance.com/documents/Traceability.pdf



MARINE STEWARDSHIP COUNCIL (MSC) CERTIFICATION

MSC Certification recognizes sustainable fisheries and is a strong marketing tool for British Columbia seafood products in the global marketplace. British Columbia salmon and halibut are in the process of achieving MSC certification, with sockeye salmon nearing completion. **http://www.msc.org**

ALBACORE TUNA

2005 was the debut season for 25 vessels in the albacore tuna fishery licensed as members of the Platinum Quality Assurance Program (PQAP) of the Canadian Highly Migratory Species Foundation (CHMSF). PQAP requires fishers to follow strict procedures to maximize fish quality, and is one of the many marketing tools that CHMSF has implemented for the fishery. CHMSF also funded sampling for mercury levels in Canadian albacore tuna, which consistently tested amongst the lowest in the world.
http://www.canadianalbacoretuna.com/index.html

CULTURED SHELLFISH

The Vancouver Island Economic Developers Association launched a marketing campaign with the slogan "Let Our World Be Your Oyster." The campaign and website is aimed at international investors interested in British Columbia aquaculture opportunities. **http://www.shellfishwest.com/**

SEAFOOD SHOW PARTICIPATION

International seafood shows provide an opportunity for companies to promote their products in key export markets. The Province raised the profile of British Columbia's seafood industry through participation in:

- the 2005 International West Coast Seafood Show in Los Angeles. **http://www.westcoastseafood.com**
- the 2005 and 2006 European Seafood Shows in Brussels, Belgium. **http://www.euroseafood.com**; and
- the 2006 International Boston Seafood Show. **http://www.bostonseafood.com**

SEAFOOD FACT SHEETS

The "British Columbia Seafood" fact sheet series was developed for use by industry and government as a marketing tool at trade shows and other events. Each fact sheet provides information on species and product availability, nutritional analysis, and a recipe by an acclaimed British Columbia chef.

British Columbia Seafood — A Taste of the Pristine from Canada's Pacific Coast

DATA SOURCES

- All aquaculture industry harvests and farmgate values are compiled by the provincial Ministry of Environment.
- All seafood finished products and wholesale values are compiled by the provincial Ministry of Environment.
- All capture fisheries landings are provided by Fisheries and Oceans Canada, Pacific Region. (Preliminary values for 2003 and 2004 and estimates for 2005 have been adjusted by the provincial Ministry of Environment).
- Aquaculture licensing data provided by the provincial Ministry of Agriculture and Lands.

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

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