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Fishery Products

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Report Highlights: In 1999, U.S. fish and seafood exporters captured 5% more of the value of Canadian fishery product imports, accounting for 44% of the total Canadian fish and seafood import market of C\$1.9 billion. Since 1996, U.S. exports of edible fish and seafood products to Canada advanced at an average annual growth rate of almost 9%. In the first six months of 2000, the United States was the only major supplier to record a strong increase in fish and seafood sales to Canada.

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Includes Trade Matrix: Yes
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Executive Summary	

- * Canada's total commercial fish and seafood catch in 1999 is estimated at 1,092 thousand metric tons, about 5% above Fisheries and Oceans preliminary catch data for 1998. Moderate gains in the overall catch are anticipated for 2000 and 2001 with aquaculture leading in production advances.
- * Fisheries and Oceans reports that the aquaculture industry produced over 92,000 metric tons of product valued at C\$443 million during 1998, which represented 27 per cent of total landed value of Canadian fish and seafood production that year.
- * Industry analysts forecast that the value of aquaculture in Canada will more than double its current output and exceed C\$1.5 billion in sales by the year 2005.
- * According to Industry Canada, fishery product industry productivity per worker in Canada is substantially lower than in the United States.
- * According to Statistics Canada, the per capita consumption of fish and seafood in Canada is nearly half that again of U.S. consumption levels. For 1998, the statistical agency lists Canadian fish and seafood per capita consumption at 9.73 kilograms, 45% above the U.S. level of 6.71 kg that year.
- * In the first six months of 2000, the U.S. was the only major supplier to record a strong increase in fish and seafood sales to Canada. Imports from the U.S. in the January to June period of 2000, were almost 9% above the same period a year ago.
- * Total U.S. exports of fish and seafood to Canada in 1999 climbed to C\$851 million, accounting for 44% of the total Canadian import market for seafood of C\$1.9 billion.
- * Since 1996, U.S. exports of edible fish and seafood products to Canada have advanced at an average annual growth rate of almost 9%. Increased restaurant sales of fish and seafood and growing demand for ready-to-cook fish products are believed to be the catalyst for higher U.S. fish and seafood sales to Canada.
- * Canadian fish and seafood export dependence on the U.S. market increased to nearly 70% during the January to June period of 2000.
- * In policy highlights: Last year's Supreme Court ruling dealing with out-of-season native fishing rights has resulted in an ongoing controversy with serious conservation concerns in Canada's east coast lobster fishery; Fisheries and Oceans announced a C\$75 million program for aquaculture industry sustainability; there is new federal funding for seafishery science programs and; the B.C. government has taken a firmer stand on farmed fish escapes.

Section I. Production

Landings

Canada's total commercial fish and seafood catch in 1999 is estimated at 1,092 thousand metric tons, about 5% above Fisheries and Oceans catch data for 1998. Much of the increase is attributable to farm raised production which continues to demonstrate annual production increases while the seafish catch is variable from year-to-year. According to Fisheries and Oceans Canada, the aquaculture industry produced approximately 92,000 metric tons of product valued at C\$443 million during 1998, which represented 27 per cent of total landed value of Canadian fish and seafood production. Moderate gains in the overall catch are anticipated for 2000 and 2001 with aquaculture leading in production advances.

CANADA: FISH & SHELLFISH COMMERCIAL CATCH					
(includes aquaculture)					
Landings in Metric Tons, Live Weight					
Species	1997	1998	1999	2000	2001
	Revised	Revised	Prelim.	Post estimate	Post forecast
Groundfish	275,807	285,197	290,000	295,000	295,000
Pelag.&oth.finfish	323,842	314,687	330,000	350,000	365,000
Shellfish	350,643	370,258	395,000	410,000	425,000
SUBTOTAL SEA/SHELLFISH	950,292	970,142	1,015,000	1,055,000	1,085,000
Other:					
Marine Plants/Roe	40,784	31,853	35,000	37,000	35,000
SEA FISHERY TOTAL	991,076	1,001,995	1,050,000	1,092,000	1,120,000
Freshwater Commercial	38,798	37,640	37,000	38,000	40,000
Source: Dept. of Fish.& Oceans and post estimates					

Landings, By Species

The following table shows the most recent commercial landings data (1998) as published by Fisheries and Oceans.

1998 ATLANTIC & PACIFIC COASTS COMMERCIAL LANDINGS, BY PROVINCE								
(metric tons, live weight)								
	Nova	New				Total	British	Total
	Scotia	Brunwk.	PEI	Quebec	Nfld.	Atlantic	Columb.	Canada
Groundfish								
Cod	11,873	897	268	2,092	22,611	37,741	1,355	39,095
Haddock	11,438	85	0	0	248	11,771	0	11,771
Redfish spp.	15,348	1	0	180	10,234	25,763	21,541	47,304
Halibut	824	23	1	175	277	1,300	7,199	8,499
Flatfishes	6,437	222	508	557	5,987	13,711	5,079	18,790
Greenland turbot	1,256	13	0	3,227	7,726	12,222	3,738	15,961
Pollock	14,057	398	0	0	637	15,092	894	15,987
Hake	19,438	35	44	25	613	20,154	90,900	111,055
Cusk	1,640	0	0	0	1	1,641	0	1,641
Catfish	318	1	0	2	205	526	0	526
Skate	678	0	0	11	2,355	3,044	800	3,844
Dogfish	924	59	47	47	5	1,081	1,600	2,681
Other	1,224	72	21	12	603	1,932	6,111	8,043
Total	85,455	1,807	888	6,328	51,502	145,981	139,216	285,197
Pelagic & other finfish								
Herring	76,403	69,061	17,293	6,019	22,086	190,861	23,300	214,161
Mackerel	4,562	1,761	6,855	4,066	2,313	19,557	121	19,678
Swordfish	1,020	0	0	0	95	1,115	0	1,115
Tuna	728	0	41	0	37	806	137	943
Alewife	1,548	5,341	52	0	0	6,941	0	6,941
Eel	90	137	40	158	71	496	0	496
Salmon	0	0	0	7	0	7	30,269	30,276
Smelt	28	807	276	140	5	1,255	0	1,255
Capelin	23	776	0	259	37,192	38,249	0	38,249
Other	1,054	20	255	67	177	1,573	0	1,572
Total	85,456	77,902	24,812	10,713	61,977	260,860	53,827	314,687
continued...								
1998 ATLANTIC & PACIFIC COMMERCIAL LANDINGS, BY PROVINCE (cont'd)								
(metric tons, live weight)								

	Nova	New				Total	British	Total
	Scotia	Brunwk.	PEI	Quebec	Nfld.	Atlantic	Columb.	Canada
Shellfish								
Clams	9,571	1,522	1,338	1,208	16,702	30,341	3,068	33,409
Oyster	220	505	2,399	0	0	3,124	5,300	8,424
Scallop	48,795	3,184	1,434	2,714	6,904	63,030	54	63,084
Squid	1,124	0	0	0	820	1,944	22	1,966
Mussel	0	106	10,095	72	0	10,273	0	10,273
Lobster	19,497	7,835	8,636	3,048	2,014	41,030	0	41,030
Shrimp	23,946	4,758	0	15,104	64,100	107,909	5,203	113,112
Crab, Queen	4,910	6,718	612	10,344	52,632	75,216	0	75,216
Crab, Other	2,562	1,687	2,890	1,108	358	8,605	2,972	11,577
Sea urchin	1,021	1,712	38	10	927	3,707	6,047	9,754
Other	221	131	0	845	231	1,429	984	2,413
Total	111,868	28,159	27,442	34,453	144,688	346,608	23,650	370,258
SUBTOTAL Sea/Shellfish	282,779	107,868	53,142	51,494	258,167	753,450	216,693	970,143
Marine plants	15,023	6,810	5,639	0	0	27,472	0	27,472
Lumpfish roe	0	0	0	18	1,560	1,578	0	1,578
Miscellaneous	0	0	0	0	2,415	2,416	387	2,803
Total	15,023	6,810	5,639	19	3,975	31,466	387	31,853
GRAND TOTAL	297,801	114,679	58,781	51,513	262,142	784,916	217,080	1,001,996
Source: Fisheries & Oceans								

Section II. Fish Product Production

The most recent Statistics Canada data for fishery product production (1998) shows that seafish production slipped by about 8% from the year earlier level, whereas shellfish output increased by

nearly 9% over the same time period. According to Industry Canada, total fishery product industry manufacturing shipments per employee rose from C\$95,955 in 1990 to C\$137,399 in 1998, averaging a increase of 4.8% on an annual basis. In comparison, total shipments per employee in the U. S. exhibited C\$358,172 in 1998 compared to the 1990 level of C\$202,731, illustrating a dramatic increase of 7.5% annually. Cost factors for wages and materials, work force skill, and investment in capital equipment may be reasons for the wide difference in labor productivity between the two countries.

CANADA: Fishery Product Production, By Type					
				Post	Post
Units: '000 metric tons				Est.	Fore.
	1996	1997	1998	1999	2000
Seafish					
-Fresh & Frozen	210.67	225.26	207.36	200.00	210.00
-Processed	105.33	112.64	103.68	105.00	110.00
Shellfish	57.41	63.86	69.42	75.00	80.00
Freshwater Fish	5.67	6.26	7.00	6.50	7.00
TOTALS	379.08	408.02	387.46	386.50	407.00
Source: Statistics Canada					
Cat.No. 32-230-XIB					
prodtype.wk4					

Section III. Aquaculture Production

Canadian aquaculture production continues to show the strongest advance of any sector within Canada's fish and seafood industry. The sector currently employs more than 14,000 people with about half in direct employment and the balance comprised of indirect jobs in the related aquaculture supplies and services sectors. One-half of the industry workers are under 30 years old and the majority live in rural or coastal communities. If Canada meets current industry production predictions, the value of aquaculture in Canada will more than double its current output and exceed C\$1.5 billion in sales by the year 2005.

Canada: Aquaculture Production						
Units: metric tons					Post	Post
		Revised	Final	Prelim.	Est.	Fore.
	1996	1997	1998	1999	2000	2001
FINFISH						
Salmon	45,624	60,862	58,341	72,290	85,000	90000
Trout	5,728	5,232	6,370	6,623	7,000	7200
Steelhead	1,097	946	2,354	6,002	5,000	5000
Other	9	78	138	488	500	500
Subtotal*	53,439	68,194	68,318	85,485	97,500	102,700
SHELLFISH						
Manila Clams	979	755	704	900	1,000	1100
Oysters	7,989	6,649	7,937	9,286	10,000	11000
Mussels	9,832	11,463	14,920	17,339	19,000	21000
Scallops	177	50	51	55	60	50
Other	20	18	17	18	20	25
Subtotal*	19,075	19,017	23,714	27,598	30,080	33,175
TOTAL	72,514	87,211	92,032	113,083	127,580	135,875
*Includes data deemed confidential by StatCan						
that would disclose propriety information if categorized						
Source: Statistics Canada					aquasum.wk4	

Section IV. Consumption

According to Statistics Canada, the per capita consumption of fish and seafood in Canada is nearly half that again of U.S. consumption levels. For 1998, the statistical agency lists Canadian fish and seafood per capita consumption at 9.73 kilograms, 45% above the U.S. level of 6.71 kg that year (based on ERS/USDA data). Canada's higher consumption levels and strong demand for a wide variety of fish and seafood help make it an important and growing market for U.S. fish and seafood exporters.

CANADA: Fish & Seafood Per Capita Consumption						
(kilograms, edible weight)						
	1993	1994	1995	1996	1997	1998
Seafish						
Fresh & Frozen	5.55	6.06	4.93	4.45	5.38	4.53
Processed	3.06	2.22	2.33	3.09	3.18	2.75
Shellfish	1.56	1.45	1.53	1.64	2.16	2.26
Freshwater Fish	0.20	0.19	0.19	0.19	0.19	0.19
Total	10.37	9.92	8.98	9.37	10.91	9.73
Source: Statistics Canada						
Cat.No. 32-230-XPB						
percap.wk4						

Section V. Trade

Imports of Fish & Seafood

In recent years, U.S. fish and seafood exports to Canada have consistently captured about 40% of total Canadian fish seafood imports. In the three years ending 1999, total import demand for seafood in Canada grew by more than 12% to reach nearly 340,000 metric tons. In the first six months of 2000, the U.S. was the only major supplier to record a strong increase in fish and seafood sales to Canada. Imports from the U.S. in the January to June period of 2000 were almost 9% above the same period a year ago.

Canadian Fish & Seafood Imports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
HS = 03; 1604; 1605				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	300,512	312,378	339,917	148,443	150,956	1.7%
United States	116,015	119,036	141,004	53,099	57,666	8.6%
Thailand	34,386	37,981	43,563	19,315	18,123	-6.2%
Russia	40,214	35,437	24,261	15,288	8,748	-42.8%
China, P. Rep.	12,558	13,860	17,090	8,885	7,938	-10.7%
Norway	14,898	18,396	15,764	8,225	7,890	-4.1%
Iceland	15,390	15,415	13,406	4,348	7,575	74.2%
Denmark	8,428	10,933	11,511	3,833	2,039	-46.8%
Estonia	1,217	4,081	8,753	2,625	7,908	201.2%
Philippines	5,242	7,625	6,842	4,034	2,810	-30.3%
Taiwan	3,844	4,467	5,848	2,651	6,437	142.8%
Japan	4,876	3,835	3,960	2,505	1,307	-47.8%
India	2,619	2,908	3,589	1,582	1,937	22.5%
Ecuador	3,219	3,464	3,307	1,659	692	-58.3%
Korea, South	1,276	1,984	3,181	2,267	1,233	-45.6%
All Others	36,329	32,953	37,838	18,128	18,651	2.9%
U.S. share of total	39%	38%	41%	36%	38%	
(By volume)						
Source: Statistics Canada; Canadian Trade Analyzer						

Value of Fish & Seafood Imports

In 1999, U.S. fish and seafood exporters captured 5% more of the Canadian import market for fish and seafood. As a result, total U.S. exports of fish and seafood to Canada that year climbed to C\$851 million, accounting for 44% of the total Canadian import market of C\$1.9 billion. The market share increase reflected increased demand for U.S. fish and seafood products in Canada and lower values for Canadian imports of seafood from other major supplies, namely, Thailand, Russia, Denmark, and Norway. Since 1996, U.S. exports of edible fish and seafood products to Canada have advanced at an average annual growth rate of almost 9%. Increased restaurant sales of fish and seafood and growing demand for ready-to-cook fish products are believed to be the catalyst for higher U.S. fish and seafood sales to Canada.

Canada: Import Value of Fish & Seafood Imports						
Period: 1997-1999						
Units: C\$ millions						
	1997	1998	1999		1997	1998
	C\$mil.	C\$mil.	C\$mil.		% share	% share
World	1,477	1,681	1,918		100%	100%
United States	597	659	851		40%	39%
Thailand	239	273	279		16%	16%
Russia	97	123	91		7%	7%
China, P. Rep.	58	66	78		4%	4%
Denmark	46	61	65		3%	4%
Norway	46	71	64		3%	4%
Iceland	63	61	59		4%	4%
Estonia	5	17	47		0%	1%
Ecuador	33	37	28		2%	2%
Lithuania	11	5	27		1%	0%
Philippines	20	31	26		1%	2%
India	14	21	24		1%	1%
Japan	23	18	21		2%	1%
Taiwan	16	16	20		1%	1%
Source: Statistics Canada, Canadian Trade Analyzer						

Fish and Seafood Exports

Total Canadian fish and seafood exports during 1999 increased to 465,928 metric tons, a 2.5% increase over the year earlier level. Most of the increase was attributable to increased exports to the United States which advanced nearly 7% in 1999 to 303,009 metric tons. The increasing dependence on the U.S. market continued into the first half of 2000. Exports of Canadian fish and seafood to the United States in the January to June period of 2000, climbed a further 8% above the level for the same period of 1999 and Canadian fish and seafood export dependence on the United State increased to nearly 70%. Sales to every other major market in the first half of 2000 showed a sharp decline resulting in only a marginal gain in total exports during the period.

Canadian Fish & Seafood Exports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
HS = 03; 1604; 1605						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	426,315	454,550	465,928	208,610	207,263	-0.6%
United States	253,663	283,280	303,009	132,595	143,245	8.0%
Japan	66,574	60,832	50,768	24,935	22,740	-8.8%
Denmark	15,827	13,259	14,131	8,116	7,263	-10.5%
Germany	8,214	12,708	12,365	3,103	2,623	-15.5%
China, P. Rep.	6,852	9,103	11,861	6,228	5,859	-5.9%
United Kingdom	8,091	8,273	10,615	3,710	2,887	-22.2%
Dominican Rep.	11,282	9,845	8,520	4,913	3,913	-20.4%
Taiwan	4,863	5,566	6,291	1,801	1,986	10.3%
France	6,950	6,248	5,667	2,555	1,535	-39.9%
Jamaica	3,017	3,629	3,965	2,256	1,753	-22.3%
All Others	40,985	41,807	38,738	18,397	13,460	-26.8%
% share to the U.S.	60%	62%	65%	64%	69%	
Source: Statistics Canada; Canadian Trade Analyzer						

Section VI. Supply and Distribution

Groundfish

PSD Table						
Country	Canada					
Commodity	Groundfish, Whole/Eviscerated				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	0	0	0	0	0	0
Total Production	70000	70000	66000	72000	0	74000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	35000	31490	40000	25000	0	26000
TOTAL Imports	35000	31490	40000	25000	0	26000
TOTAL SUPPLY	105000	101490	106000	97000	0	100000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	16850	18136	15000	20000	0	21000
TOTAL Exports	16850	18136	15000	20000	0	21000
Domestic Consumption	88150	83354	91000	77000	0	79000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	88150	83354	91000	77000	0	79000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	105000	101490	106000	97000	0	100000

Trade Matrices: Groundfish

Canadian Groundfish Imports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	50,675	42,506	31,490	20,537	13,275	-35.4%
Russia	28,250	23,285	14,963	9,071	4,589	-49.4%
United States	7,167	8,940	8,506	5,372	5,901	9.9%
Norway	6,860	5,130	3,466	3,093	1,643	-46.9%
Japan	694	1,326	1,425	1,248	57	-95.4%
Uruguay	419	879	1,055	491	448	-8.7%
China, P. Rep.	102	160	559	0	284	+100+%
Sweden	2,957	1,335	380	380	80	-78.9%
Denmark	266	28	281	200	49	-75.7%
Korea, South	112	525	240	211	49	-76.6%
Taiwan	0	0	140	140	0	-100.0%
Thailand	140	168	94	47	22	-52.4%
All Others	3,708	730	380	283	152	-46.2%
Descriptions	HS Codes					
Cod, fresh or chilled	030250					
Haddock, fresh or chld	030262					
Coalfish, fresh or chld	030263					
Hake, fresh or frozen	302690010					
Cod, frozen	030360					
Haddock, frozen	030372					
Coalfish, frozen	030373					
Hake, frozen	030378					

Source: Statistics Canada; Canadian Trade Analyzer

Canadian Groundfish Exports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	17,239	19,894	18,136	7,110	9,112	28.1%
United States	14,971	16,305	16,148	6,180	8,510	37.7%
Spain	104	353	738	437	397	-9.0%
Japan	654	297	544	245	45	-81.7%
Korea, South	362	122	170	0	48	100+%
All Others	1,149	2,817	536	248	112	-55.1%
Items	HS Code					
Cod, Atlantic, fresh or chilled	03025010					
Cod, nes., fresh or chilled	03025090					
Haddock, fresh or chilled	03026200					
Coalfish, fresh or chilled	03026300					
Perch, Ocean, fresh or chilled	03026911					
Hake, fresh or chilled	03026921					
Cusk, fresh or chilled	03026923					
Cod, Atlantic, frozen	03036010					
Cod, nes., frozen	03036090					
Haddock, frozen	03037200					
Coalfish, frozen	03037300					
Hake, frozen	03037800					
Cusk & Pollock, frozen	03037912					
Perch, Ocean, frozen	03037915					
Source: Statistics Canada; Canadian Trade Analyzer						

Groundfish Fillets

PSD Table						
Country	Canada					
Commodity	Groundfish, Fillets				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	0	0	0	0	0	0
Total Production	18000	18000	16000	21000	0	22000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	6500	12245	7500	10000	0	10000
TOTAL Imports	6500	12245	7500	10000	0	10000
TOTAL SUPPLY	24500	30245	23500	31000	0	32000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	12800	18136	11500	19000	0	20000
TOTAL Exports	12800	18136	11500	19000	0	20000
Domestic Consumption	11700	12109	12000	12000	0	12000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	11700	12109	12000	12000	0	12000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	24500	30245	23500	31000	0	32000

Trade Matrices: Groundfish Fillets

Canadian Groundfish Fillet Imports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	11,616	11,035	12,245	7,572	5,163	-31.8%
China, P. Rep.	3,258	3,443	3,908	2,010	2,218	10.4%
United States	2,492	2,828	3,742	2,284	1,596	-30.1%
Russia	3,721	1,966	1,324	1,088	121	-88.9%
United Kingdom	806	979	1,142	704	327	-53.5%
New Zealand	183	326	618	294	448	52.4%
Norway	500	759	540	511	93	-81.7%
Denmark	30	206	505	336	138	-59.0%
Iceland	347	98	210	110	51	-54.2%
Sweden	0	0	163	163	0	-100.0%
All Others	278	429	91	72	171	138.4%
Revised HS Code List						
0304100011	Cod fillets, fresh or chilled					
0304100012	Haddock fillets, fresh or chilled					
0304200030	Cod fillets, frozen					
0304200040	Haddock fillets, frozen					
0304200061	Alaska Pollock fillets, frozen					
0304200069	Pollock fillets, frozen, nes					
Source: Statistics Canada; Canadian Trade Analyzer						

Canadian Groundfish Fillet Exports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	18,316	17,423	18,136	6,755	8,255	22.2%
United States	17,719	16,988	17,406	6,499	8,026	23.5%
United Kingdom	0	76	194	47	39	-18.3%
Germany	102	30	165	4	53	1202.7%
Portugal	21	0	131	0	0	
Switzerland	336	151	96	83	27	-67.0%
Japan	38	0	72	72	0	-100.0%
China, P. Rep.	36	0	27	27	0	-100.0%
Denmark	0	32	7	7	52	602.4%
All Others	64	145	38	14	58	303.9%
HS Codes						
03041021	Cod, Atlantic, fillets, fresh or chilled					
03041029	Cod, nes., fillets, fresh or chilled					
03041071	Haddock fillets, fresh or chilled					
03042015	Cod fillets, frozen, in blocks > 4.5 kg					
03042016	Perch, Ocean, fillets, frozen in blocks > 4.5 kg					
03042017	Haddock fillets, frozen, in blocks > 4.5 kg					
03042018	Pollock fillets, frozen, in blocks > 4.5 kg					
03042051	Cod, Atlantic, fillets, frozen, in blocks 4.5 kg and under					
03042059	Cod, nes., fillets, frozen, in blocks 4.5 kg and under					
03042061	Perch, Ocean, fillets, frozen in blocks 4.5 kg and under					
03042072	Cusk & Hake, fillets, frozen, 4.5 kg and under					
03042073	Pollock fillets, frozen, 4.5 kg and under					
Source: Statistics Canada; Canadian Trade Analyzer						

Flatfish

PSD Table						
Country	Canada					
Commodity	Flatfish, Whole/Eviscerated				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	0	0	0	0	0	0
Total Production	16000	16000	17000	17000	0	18000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	5700	9461	6000	8000	0	8500
TOTAL Imports	5700	9461	6000	8000	0	8500
TOTAL SUPPLY	21700	25461	23000	25000	0	26500
Intra-EC Exports	0	0	0	0	0	0
Other Exports	18500	17079	20000	15000	0	16000
TOTAL Exports	18500	17079	20000	15000	0	16000
Domestic Consumption	3200	8382	3000	10000	0	10500
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	3200	8382	3000	10000	0	10500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	21700	25461	23000	25000	0	26500

Trade Matrices: Flatfish

Canadian Flatfish Imports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	5,730	9,800	9,461	3,991	4,500	12.7%
United States	4,193	7,323	8,354	3,557	3,439	-3.3%
Japan	939	625	414	177	269	52.4%
Norway	47	60	194	54	23	-58.2%
Denmark	1	1,210	170	0	0	-
China, P. Rep.	51	39	155	121	39	-68.2%
Russia	50	315	97	62	541	772.7%
All Others	449	228	76	19	189	869.2%
HS Codes						
030221; Halibut fresh or chilled						
030222; Plaice, fresh or chilled						
030223; Sole, fresh or chilled						
030229; Flatfish, nes., fresh or chilled						
030331; Halibut, frozen						
030332; Plaice, frozen						
030333; Sole, frozen						
030339; Flatfish, frozen						
Source: Statistics Canada; Canadian Trade Analyzer						

Canadian Flatfish Exports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	13,696	15,221	17,079	7,909	6,131	-22.48%
United States	10,086	12,416	13,870	6,471	4,630	-28.45%
Taiwan	1,789	1,411	1,543	340	541	58.99%
Japan	573	684	744	653	509	-22.07%
Korea, South	611	119	462	205	266	29.29%
United Kingdom	8	164	267	128	70	-45.72%
Germany	104	100	89	40	20	-50.36%
France	298	178	84	62	48	-22.94%
China, P. Rep.	73	25	10	6	0	-100.00%
Hong Kong	8	4	7	3	21	567.05%
All Others	146	120	3	0	28	+100+%
HS Codes						
03022110; Atlantic Halibut, fresh or chilled						
03022120; Pacific Halibut, fresh or chilled						
03022130; Greenland Halibut, fresh or chilled						
03022200; Plaice, fresh or chilled						
03022300; Sole, fresh or chilled						
03022910; Flounder, fresh or chilled						
03022990; Flatfish, nes, fresh or chilled						
03033110; Atlantic Halibut, frozen						
03033120; Pacific Halibut, frozen						
03033130; Greenland Halibut, frozen						
03033220; Plaice, frozen						
030339; Flatfish nes, frozen						
Source: Statistics Canada; Canadian Trade Analyzer						

Roe, Caviar, Liver

PSD Table						
Country	Canada					
Commodity	Fish,Urchin Roe/Caviar,Livers				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	0	0	0	0	0	0
Total Production	10500	10500	10750	9500	0	9500
Intra-EC Imports	0	0	0	0	0	0
Other Imports	780	633	800	650	0	600
TOTAL Imports	780	633	800	650	0	600
TOTAL SUPPLY	11280	11133	11550	10150	0	10100
Intra-EC Exports	0	0	0	0	0	0
Other Exports	10000	10033	10250	9000	0	9000
TOTAL Exports	10000	10033	10250	9000	0	9000
Domestic Consumption	1280	1100	1300	1150	0	1100
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	1280	1100	1300	1150	0	1100
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	11280	11133	11550	10150	0	10100

Trade Matrices: Roe

Canadian Roe, Caviar, Liver Imports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	1,960	758	633	475	544	14.3%
United States	1,884	668	519	405	513	26.5%
Denmark	10	17	48	40	0	-99.7%
Japan	36	39	36	16	19	22.6%
Thailand	0	0	6	3	0	-97.6%
Germany	4	3	6	5	1	-86.9%
Russia	1	1	5	1	1	-53.5%
Korea, South	3	11	4	2	1	-60.1%
All Others	22	19	9	4	10	141.4%
HS Codes						
030270; Livers and roes, fresh or chilled						
030280; Livers and roes, frozen						
030250; Livers and roes, dried, smoked, salted or in brine						
160430; Caviar and caviar substitutes prepared from fish eggs						
Source: Statistics Canada; Canadian Trade Analyzer						

Canadian Roe, Caviar, Liver Exports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	10,812	10,646	10,033	4,644	4,685	0.9%
Japan	9,083	8,398	7,212	3,398	3,575	5.2%
Sweden	511	382	591	355	18	-95.0%
Germany	304	438	553	122	317	159.2%
China, P. Rep.	215	577	422	412	490	19.1%
Denmark	232	223	311	0	74	+100.0%
United States	181	263	310	47	35	-25.9%
United Kingdom	115	259	235	93	57	-38.4%
Iceland	36	36	209	96	44	-54.5%
Finland	39	29	49	36	23	-36.0%
All Others	96	42	142	85	52	-38.9%
HS Codes						
30270	Livers and roes, fresh or chilled					
3038020	Herring roe, frozen					
3038030	Salmon roe, frozen					
3038090	Fish livers and roes, nes., frozen					
3052020	Herring roe, dried, smoked, salted or in brine					
3052030	Salmon roe, dried, smoked, salted or in brine					
3052090	Fish livers and roes, nes., dried, smoked, salted or in brine					
160430	Caviar and caviar substitutes prepared from fish eggs					
Source: Statistics Canada; Canadian Trade Analyzer						

Salmon, Whole or Eviscerated

PSD Table						
Country	Canada					
Commodity	Salmon, Whole/Eviscerated				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	0	0	0	0	0	0
Total Production	28000	43000	24000	45000	0	48000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	33000	28225	40000	30000	0	32000
TOTAL Imports	33000	28225	40000	30000	0	32000
TOTAL SUPPLY	61000	71225	64000	75000	0	80000
Intra-EC Exports	0	0	0	0	0	0
Other Exports	57200	56347	60000	56000	0	60000
TOTAL Exports	57200	56347	60000	56000	0	60000
Domestic Consumption	3800	14878	4000	19000	0	20000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	3800	14878	4000	19000	0	20000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	61000	71225	64000	75000	0	80000

Trade Matrices: Salmon

Canada: Imports of Salmon, Whole or Eviscerated, fresh or frozen						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	18,291	20,818	28,225	6,611	7,616	15.2%
United States	15,441	18,573	25,619	5,331	6,662	25.0%
Norway	55	309	1,338	824	138	-83.3%
Chile	346	540	318	107	377	251.9%
Russia	0	743	207	21	18	-12.6%
United Kingdom	5	20	162	76	69	-9.2%
Mexico	76	40	101	58	34	-42.7%
Iceland	6	0	75	6	50	672.2%
China, P. Rep.	109	20	34	20	2	-90.3%
Thailand	3	0	31	4	0	-100.0%
New Zealand	13	11	31	26	3	-88.8%
Cuba	26	59	26	17	36	115.3%
Bangladesh	91	49	18	14	9	-37.0%
All Others	2,120	454	266	107	218	104.5%
HS Codes						
302.12	Pacific, Atlantic,& Danube, fresh or chilled					
302.19	Salmonidae, nes., fresh or chilled					
303.10	Pacific, frozen					
303.22	Atlantic, frozen					
303.29	Salmonidae, nes., frozen					

Source: Statistics Canada; Canadian Trade Analyzer

Canada: Exports of Salmon, Whole or Eviscerated, fresh or frozen						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	61,802	58,977	56,347	27,406	26,074	-4.9%
United States	47,253	50,762	49,967	23,693	24,006	1.3%
Japan	11,193	5,044	3,241	1,820	801	-56.0%
Taiwan	677	1,346	1,281	702	725	3.2%
China, P. Rep.	109	113	397	201	66	-67.2%
Italy	496	370	250	195	36	-81.4%
Germany	236	101	192	95	0	-100.0%
Sweden	287	37	174	174	73	-58.1%
Spain	173	167	168	126	0	-100.0%
Belgium	182	47	104	65	195	199.9%
France	545	399	79	57	60	5.2%
All Others	650	589	493	277	113	-59.1%
HS Codes						
302.12	Pacific, Atlantic,& Danube, fresh or chilled					
302.19	Salmonidae, nes., fresh or chilled					
303.10	Pacific, frozen					
303.22	Atlantic, frozen					
303.29	Salmonidae, nes., frozen					

Source: Statistics Canada; Canadian Trade Analyzer

Canned Salmon

PSD Table						
Country	Canada					
Commodity	Salmon, Canned				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	0	0	0	0	0	0
Total Production	22000	20989	20000	17000	0	16500
Intra-EC Imports	0	0	0	0	0	0
Other Imports	14000	14176	15000	19000	0	20000
TOTAL Imports	14000	14176	15000	19000	0	20000
TOTAL SUPPLY	36000	35165	35000	36000	0	36500
Intra-EC Exports	0	0	0	0	0	0
Other Exports	8000	8673	7500	8700	0	8500
TOTAL Exports	8000	8673	7500	8700	0	8500
Domestic Consumption	28000	26492	27500	27300	0	28000
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	28000	26492	27500	27300	0	28000
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	36000	35165	35000	36000	0	36500

Trade Matrices: Canned Salmon

Canada: Imports of Canned Salmon						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
HS 1604.11				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	9,684	12,440	14,176	2,925	4,128	41.1%
United States	9,407	12,254	13,320	2,292	3,498	52.6%
Korea, South	0	76	681	497	403	-19.0%
Thailand	12	6	141	131	208	59.7%
Chile	0	63	15	0	0	-100.0%
United Kingdom	23	23	14	3	0	-86.7%
Norway	12	1	2	1	0	-100.0%
France	1	2	2	1	1	-4.2%
Japan	0	0	1	0	1	236.8%
China, P. Rep.	0	0	0	0	12	+100.0%
All Others	229	15	0	0	4	+100.0%

Source: Statistics Canada; Canadian Trade Analyzer

Canada: Canned Salmon Exports						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
HS 1604.11				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	9,504	8,616	8,673	4,215	4,238	0.5%
United Kingdom	4,539	3,869	4,076	1,355	1,289	-4.9%
Australia	1,270	1,140	1,398	986	559	-43.3%
New Zealand	1,199	976	901	441	658	49.3%
United States	275	295	513	257	798	210.9%
Belgium	831	888	361	294	511	73.9%
Netherlands	250	280	339	193	75	-61.2%
Italy	437	365	328	191	92	-51.7%
Germany	0	603	217	217	0	-100.0%
Ireland	14	18	115	79	71	-11.0%
France	0	29	115	69	74	7.4%
All Others	688	151	310	133	111	-16.8%

Source: Statistics Canada; Canadian Trade Analyzer

Lobster

PSD Table						
Country	Canada					
Commodity	Lobster				(MT)	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Beginning Stocks	0	0	0	0	0	0
Total Production	32000	33000	33000	35000	0	37000
Intra-EC Imports	0	0	0	0	0	0
Other Imports	13000	16142	15000	17000	0	18500
TOTAL Imports	13000	16142	15000	17000	0	18500
TOTAL SUPPLY	45000	49142	48000	52000	0	55500
Intra-EC Exports	0	0	0	0	0	0
Other Exports	32000	35858	35000	38000	0	41000
TOTAL Exports	32000	35858	35000	38000	0	41000
Domestic Consumption	13000	13284	13000	14000	0	14500
Other Use/Loss	0	0	0	0	0	0
TOTAL Utilization	13000	13284	13000	14000	0	14500
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	45000	49142	48000	52000	0	55500

Trade Matrices: Lobster

Canadian Lobster Imports (live,fresh or frozen)						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	13,602	10,574	16,142	758	902	19.0%
United States	12,687	9,833	15,289	463	379	-18.1%
Cuba	564	405	241	116	75	-35.4%
Bahamas	129	117	192	115	150	30.6%
Chile	5	51	113	10	7	-30.2%
India	13	37	91	19	114	511.2%
South Africa	0	0	74	0	52	+100.0%
Haiti	1	11	27	14	4	-73.2%
Honduras	0	0	24	0	2	802.2%
All Others	202	120	91	22	119	452.4%
HS codes						
030611 Rock Lobster, frozen						
030612 Lobster, nes, frozen, in shell						
030621 Rock Lobster, not frozen						
030622 Lobster, nes, not frozen, in shell						
Source: Statistics Canada; Canadian Trade Analyzer						

Canadian Lobster Exports (live,fresh or frozen)						
1997-1999 Calendar Years						
Jan - June 1999 & 2000 Comparisons						
Units: metric tons						
				Jan-June	Jan-June	% change
	1997	1998	1999	1999	2000	'00/'99
World	30,443	29,882	35,858	18,341	20,076	9.46%
United States	18,499	19,265	23,742	13,190	15,337	16.28%
France	2,616	2,746	2,580	920	499	-45.80%
Belgium	1,801	1,903	2,251	1,039	1,433	37.89%
Japan	1,935	1,404	1,700	953	871	-8.64%
Sweden	635	513	1,063	286	109	-61.80%
United Kingdom	700	830	1,035	432	485	12.19%
Germany	609	792	759	213	170	-20.12%
Netherlands	678	650	615	354	228	-35.60%
Hong Kong	992	613	478	229	200	-12.46%
Italy	452	308	437	145	270	85.80%
Spain	59	99	264	235	2	-98.99%
Norway	192	170	261	75	128	69.60%
Denmark	126	180	243	54	46	-14.55%
Korea, South	482	92	188	100	149	49.44%
All Others	669	318	243	114	147	29.29%
HS codes						
030611 Rock Lobster, frozen						
030612 Lobster, nes, frozen, in shell						
030621 Rock Lobster, in shell, frozen						
030622 Lobster, nes						
Source: Statistics Canada; Canadian Trade Analyzer						

Section VII. Policy

Fishing and Native Rights

On September 17, 1999, Canada's Supreme Court, in determining an appeal to a charge against a native fisherman, found that the prohibitions on catching and retaining fish without a licence, on fishing out of season, and on the unlicensed sale of fish, contained in Canada's Maritime Provinces Fishery Regulations and the Fishery (General) Regulations, were inconsistent with the treaty rights of the appellant contained in the Mi'kmaq Treaties of 1760-61 and therefore did not apply to him, by virtue of Canada's Constitution.

The historic and complex decision means, in general, that First Nations (aboriginal peoples) in the Maritimes and some in Quebec have a communal right to fish commercially towards a moderate livelihood which has led to a large controversy in Canada's Maritime lobster industry. This fall, the First Nations people have refused to recognize the tagging and management regulations enforced by Fisheries and Oceans. Canada's lobster season normally runs April through August, but native fisherman continued to set traps well into September this year. Following lengthy negotiations which yielded little result, the federal minister reacted by closing the lobster fishery and his officials have seized more than 3,600 aboriginal lobster traps off the coast of New Brunswick. The issue remains a serious conservation concern for Fisheries and Oceans officials.

C\$75 Million for Sustainable and Environmentally Sound Aquaculture

In August 2000, Herb Dhaliwal, Minister of Fisheries and Oceans, announced an investment of C\$75 million over the next five years to enhance the sustainable development of Canada's aquaculture industry. The Program for Sustainable Aquaculture in Canada will provide the industry and the government with opportunities to conduct leading-edge research and development; strengthen measures to further protect human health through an enhanced shellfish water quality monitoring program; and implement a legislative and regulatory framework for the industry. The program includes:

- *C\$32.5 million for Science, and Research and Development, which includes C\$20 million for the Aquaculture Collaborative Research & Development Program (ACRDP);

- *C\$20 million for a Human Health Program; and

- *C\$22.5 million for an Improved Management and Regulatory Framework.

The ACRDP will provide funds for research and development projects that are proposed and jointly funded by private sector partners and, in some instances, by the provinces.

This federal investment for aquaculture development supports the Federal Aquaculture Development Strategy (Partnership Program) made last October (see CA9133, page 32).

First Projects Funded by Aquaculture Partnership Program

In mid-2000, Fisheries and Oceans announced the first projects awarded funding through the Aquaculture Partnership Program (APP; detailed in CA9133) .

The funded projects are as follows:

- * The BC Salmon Farmers Association will receive C\$134,600 to develop a coordinated fish health management program for fish culture facilities in British Columbia.
- * The Ontario Aquaculture Association will receive C\$101,900 to create an Environmental Codes of Practice for freshwater aquaculture in Canada.
- * The BC Shellfish Growers Association (BCSGA) and the Aquaculture Association of Nova Scotia (AANS) will receive C\$95,700 to jointly develop communications materials that may be used in other regions across Canada. The BCSGA will be awarded an additional C\$51,300 to develop and implement a communications strategy.
- * The Alberta Fish Farmer's Association received C\$18,150 to hold a "National Recirculation Technology Workshop" in July 2000 to examine how this technology can be used in new or existing operations.

The Aquaculture Partnership Program is funded through the Office of the Commissioner for Aquaculture Development. The Program was designed to help the aquaculture industry across Canada to develop partnerships and work together on projects of national and regional significance. APP funds up to C\$600,000 per year will be issued over a period of three years from April 1, 1999 to March 31, 2002.

New Federal Funding for Science Programs

In June 2000, June 12, 2000, Herb Dhaliwal, Minister of Fisheries and Oceans, announced funding totaling C\$39.3 million over the next three years to increase the federal capacity to deliver existing science programs within the Department of Fisheries and Oceans. The investment is targeted at providing F&O permanent funding for a number of new scientists, including some already recruited, as well as hiring of others, for a total of 100 permanent positions across the country. The goal is to improve F&O's capability to assess fish stocks, to increase the monitoring of resources and their environment, and to conduct research on ecosystems, and key species such as snow crab, lobster and marine mammals.

New National Ocean Research Initiative

In September 2000, Herb Dhaliwal, Minister of Fisheries and Oceans and John Manley, Minister of Industry and the minister responsible for the Social Sciences and Humanities Research Council, today announced C\$1.14 million in funding for an Ocean Management National Research Network Initiative. The Network will bring together university researchers, community and aboriginal partners, as well as government and private sector representatives, who will

collaborate on research needed to ensure a sustainable future for Canada's oceans. The Ocean Management National Research Network Initiative will create a national network of interdisciplinary research teams dedicated to promoting new research, integrating knowledge and accelerating the application of best practices for the sustainability of oceans ecosystems. Key areas of study include developing sustainability, integration of knowledge systems, using ocean resources ethically and managing human activities in and around the oceans.

B.C. Takes Stand on Salmon Farm Escapes

On August 23, 2000, in response to recent escapes from B.C. salmon farms, the provincial government announced a policy whereby all salmon farms are required to provide interim escape management plans to the government within 60 days. In addition, random audits of all aquaculture operations in B.C. will be made to review escape prevention procedures. B.C. Fisheries staff were to meet with their counterparts in Washington State to pursue joint action to prevent the loss of farmed fish. The province has also announced its intention to develop legislation, regulation and standards to address fish farm escapes.

Section VIII. Export Promotion

Program for Export Market Development

The Program for Export Market Development (PEMD) is the Canadian government's cornerstone international business development program. Since its inception in 1971, PEMD has assisted over 29,000 Canadian businesses (all sectors) in marketing their products and services abroad. The GOC does not disclose PEMD support by industry sector. Post estimates fish industry PEMD funding at about C\$400,000 to C\$500,000. In addition, post estimates industry contributions to fish and seafood export promotion at about \$C1.1-1.3 million.

Specifically, the PEMD objective is to increase export sales of Canadian goods and services by sharing the costs of activities that companies normally could not or would not undertake alone, thereby reducing risks involved in entering a foreign market.

Through a partnership-like relationship between government and business, the program encourages a long-term focus on target markets with built-in flexibility to respond to changing market conditions.

The PEMD program is comprised of four major elements: Market Development Strategies (MDS), New-to-Exporting Companies, Capital Projects Bidding and Trade Association Activities. A review of the elements was detailed in last year's Seafood Annual, CA9133. Background information is available from the DFIAT's PEMD website at:

<http://www.infoexport.gc.ca/pemd-e.asp>

Seafood Sector Reports

Canada's Trade Commissioners at overseas posts have prepared Seafood Market reports by sector for the world's major geographic regions. They are made available to Canadian fish exporters at: <http://www.infoexport.gc.ca/menu-e.asp>

Section IX. Marketing

Opportunities for U.S. Fish and Seafood Exporters

In 1998, Canada was the second most important market for U.S. fish and seafood product exports, after Japan. While only about one-third as important as Japan on a value basis, U.S. fish and seafood exports to Canada at \$427 million (1997) were nearly three and one-half times more than the third largest market, the Republic of Korea. End use markets for U.S. fish and seafood products in Canada include fish processors, restaurants and retail outlets. In Canada, fish and seafood are distributed by wholesale and distribution firms. Some of these businesses specialize only in seafood while others are considered full-line.

Major Canadian Importers by Selected Product

The following tables show the major Canadian importers of fish and seafood, 1998, by type, according to Industry Canada. The importer is not necessarily the end-user. Interested U.S. exporters can request individual telephone numbers for the private companies (listed alphabetically) from the long distance operator for the city listed.

Major Canadian Salmon Importers in 1998		
HS code 030212; Salmon (Pacific, Atlantic, Danube) fresh or chilled		
Market Concentration: Top 11 Importers accounted for 78% of import value		
Total Value of Imports in 1998: C\$64.8 million		
Company Name	City	Province
British Columbia Packers Ltd	Vancouver	British Columbia
Calkins & Burke Ltd	Vancouver	British Columbia
Connors Bros., Ltd	Blacks Harbour	New Brunswick
J S McMillan Fisheries Ltd	Vancouver	British Columbia
Sea Merchants Inc	Etobicoke	Ontario
Seacore Seafoods Inc	Woodbridge	Ontario
Stolt Sea Farm Inc	Campbell River	British Columbia
Tataris Canada Ltd	Montreal	Quebec
True North Salmon Co Ltd	St. George	New Brunswick
Source: Industry Canada		

Major Canadian Fish Fillet Importers in 1998		
HS code 030410; Fish Fillets and Other Fish Meat, fresh or chilled		
Market Concentration: Top 10 Importers accounted for 63% of import value		
Total Value of Imports in 1998: C\$14.1 million		
Company Name	City	Province
AllSeas Fisheries Inc	Etobicoke	Ontario
Connors Bros., Ltd	Blacks Harbour	New Brunswick
Fortune Seas Canada Ltd	Tantallon	Nova Scotia
Hi-To Fisheries Ltd	Vancouver	British Columbia
Janor Fisheries Ltd	Vancouver	British Columbia
Lef McLean Bros International Inc	Wheatley	Ontario
Mediterranean Fish	York	Ontario
National Sea Products	Lunenburg	Nova Scotia
Sea Merchants Inc	Etobicoke	Ontario
Seacore Seafoods inc	Woodbridge	Ontario
South Point Foods Inc	Leamington	Ontario
Tataris Canada Ltd	Montreal	Quebec
The Digby Fish Company	Digby	Nova Scotia
VIA/MER	Saint-Hyacinthe	Quebec
Source: Industry Canada		

Major Canadian Frozen Trout Importers in 1998		
HS code 030321; Trout, Frozen		
Market Concentration: Top 3 Importers accounted for 75% of import value		
Total Value of Imports in 1998: C\$2.0 million		
Company Name	City	Province
FPI Inc	Riverport	Nova Scotia
Hosho Canada Inc	Richmond	British Columbia
Oceanfood Sales Ltd	Vancouver	British Columbia
Source: Industry Canada		

Major Canadian Fresh Crab Importers in 1998		
HS code 030624; Crab, not frozen		
Market Concentration: Top 6 Importers accounted for 62% of import value		
Total Value of Imports in 1998: C\$14.6 million		
Company Name	City	Province
A-P Seafoods Ltd	Vancouver	British Columbia
All Seasons Fishery	Scarborough	Ontario
Beaver Fishery	Scarborough	Ontario
Cape Bald Packers Ltd	Cap-Pelé	New Brunswick
Four Star Seafoods Ltd	Vancouver	British Columbia
Hing Lee Seafood Market	Richmond	British Columbia
In Look Aqua Design Ltd	Vancouver	British Columbia
Seaworld Fisheries Ltd	Vancouver	British Columbia
Tri-Star Seafood Supply Ltd	Richmond	British Columbia
Source: Industry Canada		

Major Canadian Importers of Prepared or Preserved Fish in 1998

HS code 160419; Fish, nes, Prepared or Preserved, whole or in Pieces, not Minced		
Market Concentration: Top 6 Importers accounted for 62% of import value		
Total Value of Imports in 1998: C\$6.8 million		
Company Name	City	Province
China Economy Inc	Scarborough	Ontario
FPI	Riverport	Nova Scotia
Hardy Sales Ltd	Surrey	British Columbia
Kofman-Barenholtz Foods Ltd	Concord	Ontario
Lef McLean Bros International Inc	Wheatley	Ontario
National Sea Products	Lunenburg	Nova Scotia
Oceanfood Sales Ltd	Vancouver	British Columbia
Source: Industry Canada		

Major Canadian Importers of Shrimps and Prawns, Frozen in 1998		
HS code 030613; Shrimps & Prawns, frozen		
Market Concentration: Top 15 Importers accounted for 80% of import value		
Total Value of Imports in 1998: C\$371.0 million		
Company Name	City	Province
Accuway Lyd	Thornhill	Ontario
Export Packers Ltd	Brampton	Ontario
Midland Seafoods Inc	Toronto	Ontario
Ocean Seafood Company	North York	Ontario
Tai Foong International Ltd	Scarborough	Ontario
Wah Loong Ltd	Richmond	British Columbia
Westfair Foods Ltd	Calagary	Alberta
Source: Industry Canada		

Summary of Regulatory Requirements for U.S. Fish Products in Canada

The following information outlines basic information pertaining to safety, quality, composition, labeling requirements and inspection procedures of imported fish into Canada as administered by the Canadian Food Inspection Agency (CFIA), Fish Inspection Directorate.

The authority for the control and inspection of fish is provided under: The Fish Inspection Act and the Fish Inspection Regulations. The CFIA's Fish Inspection Directorate also takes into consideration requirements of other Canadian federal agencies concerned with the inspection of food such as Health Canada.

The Canadian importer of U.S. fish and seafood products must be in possession of a Fish Import Licence. There are three categories of licence: a Fish Importers Licence, a Shared Quality Management Program for Importers Licence (QMPI) and an Enhanced QMPI. A Fish Import Licence costs C\$500 per year. The import licence fee for Shared or Enhanced QMPI is C\$5,000 per year. Shared and Enhanced QMPI importers are required to implement a high level of quality assurance activities.

Importers are required to notify the CFIA, prior to importation of a product or within 48 hours following importation, of the product type and quantity, the name of the producer, the country of origin and the storage location of each product contained in a shipment. Product is not to be moved pending inspection or notification by an inspector concerning the inspection requirements of the products.

For canned products, the import notification must be accompanied by a code list which indicates the processing establishment and the number of containers for each production code. Failure to provide proper written notification for each imported shipment may result in enforcement action by CFIA.

Fees will be charged for imported products based on the declared weight (i.e. the quantity of fish identified in the written notification provided to CFIA) at the time of importation (see table).

When an imported product fails to comply with the Fish Inspection Regulations, the product will be listed on the Fish Inspection Directorate Import Alert List, and all subsequent importations of this product from the same producer will be subject to mandatory inspection until such time as four (4) consecutive importations comply with the Fish Inspection Regulations. The Canadian importer is required to pay the inspection fees, the amount to depend on the test(s) performed, for the inspection of any product by the Fish Inspection Directorate. Importers are invoiced for all inspection fees, on a monthly basis.

CFIA Import Licence Fees			
Type of Product	Fish Importers Licence C\$/kg	Shared QMPI C\$/kg	Enhanced QMPI C\$/kg
Ready-to-Eat	0.15	0.05	0.002
Canned	0.02	0.005	0.002
Fresh	0.01	0.005	0.002
Raw molluscan shellfish	0.01	0.005	0.002
All other types of fish	0.01	0.005	0.002
All fish destined for further processing	C\$30 per shipment	C\$30 per shipment	C\$30 per shipment
Source: CFIA			

Failure of the Canadian importer to provide proper written notification for each imported shipment may result in enforcement action by the Fish Inspection Directorate. Products new to the Canadian market are sampled on entry until the Fish Inspection Directorate is satisfied that safety, quality, composition, packaging and labeling are satisfactory. Shipments subjected to sampling and examination procedures are detained pending the results of inspection, and may only be released for sale in Canada if they are found to comply with the requirements of the Fish Inspection Regulations and other Canadian federal agency requirements.

Shipments of fish which do not conform to the requirements are not permitted entry into Canada. In such cases, the importer is notified of the refusal of entry and, subject to the appeal process provided by the Fish Inspection Regulations, the shipment must be destroyed or removed from Canada within 45 days of the date of notification. In cases where labeling infractions are the cause for rejection, permission for re-labeling may be granted.

For additional information on the regulatory requirements to enter the Canadian fish and seafood market see the CFIA fish and seafood website at:

<http://www.cfia-acia.agr.ca/english/anima/fispoi/fispoie.shtml>

Websites:

DFAIT's PEMD Program: <http://www.infoexport.gc.ca/pemd-e.asp>

CFIA Seafood Inspection: <http://www.cfia-acia.agr.ca/english/anima/fispo/fispoie.shtml>

Fisheries & Oceans Canada: http://www.dfo-mpo.gc.ca/home-accueil_e.htm

Exchange Rates

Prices and values in this report are expressed in Canadian dollars. Exchange rates are 1997, C\$=US\$.7223; 1998, C\$=.6743; 1999, C\$=US\$.6730; early October 2000, approximately US\$.6665.

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