



British Columbia Fisheries

The BC Seafood Story

Our marketing advantages:

- Pristine and natural environment
- Strong conservation and stock management
- A diversity of high quality products
- Reliability, sustainability, traceability

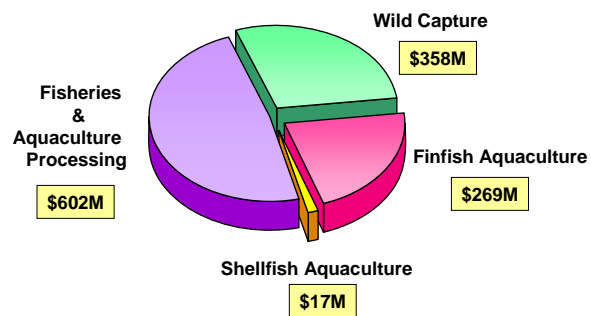
Our marketing reality:

- Global markets are changing and are demanding certification
- Competitors are more advanced in certification processes
- Our product mix is changing
- Need to add value to seafood
- Shift from homogenous commodities to specialized products
- Ensuring traceability and food safety

A Taste of the Pristine

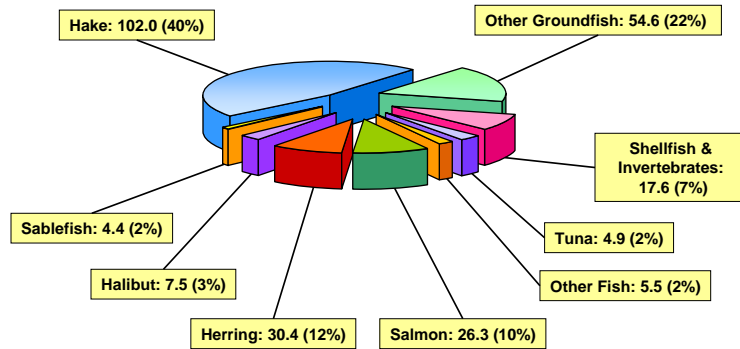


Fisheries Sectors: Revenue

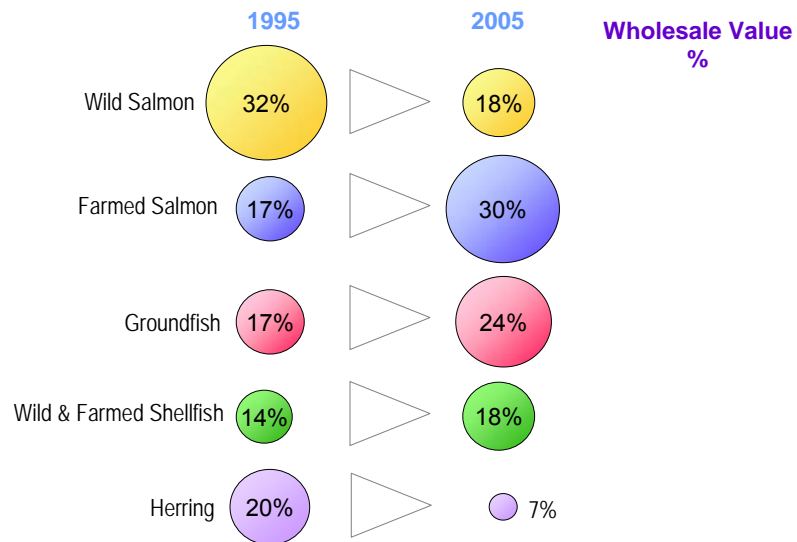


Wild Capture

B.C. Commercial Capture Fisheries Harvest - 2005
(Total 253,200 tonnes)

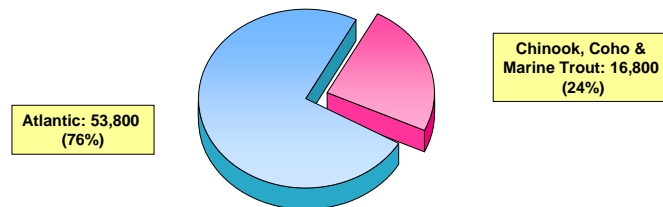


Changing Trends



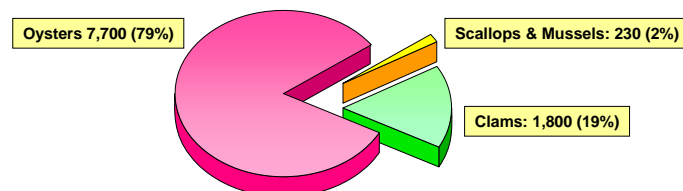
Aquaculture: Finfish

**B.C. Farmed Salmon Harvest
(Round tonnes) 2005**



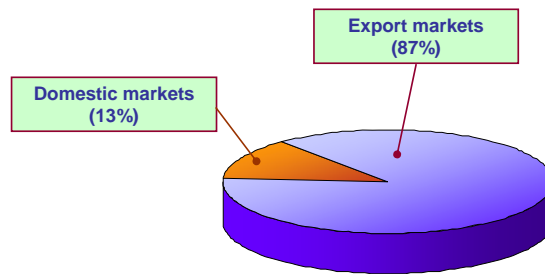
Aquaculture: Shellfish

**B.C. Farmed Shellfish Harvest
(Round tonnes) 2005**



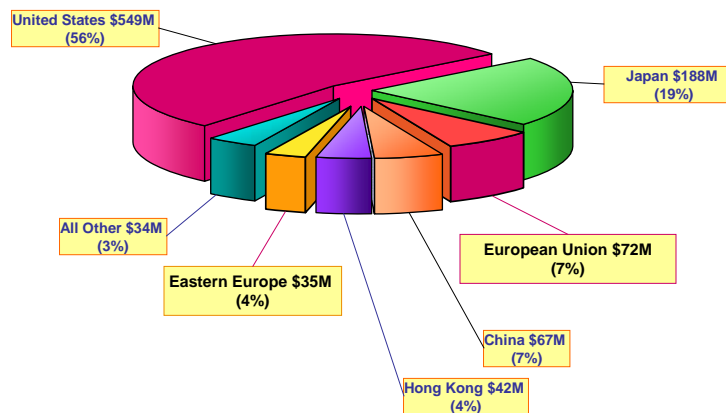
BC's Seafood Exports

\$1.2B (2005 wholesale value)



BC Seafood Exports 2006

Total Export Value: \$987 Million



Our Mandate

“To lead the world in sustainable environmental management, with the best air and water quality, and the best fisheries management, bar none.”

*GREAT GOALS FOR A GOLDEN DECADE
B.C. Throne Speech
February 8, 2005*

Opportunities

- **Increasing domestic and global demand for seafood**
- **Diversification of markets**
- **New species/products**
- **Tell the British Columbia story**
- **Demonstrating sustainability**

Challenges

For Export



- Growing and more stringent regulatory regime



- Transportation costs & carbon footprint



- The fluctuating value of the Canadian dollar



- Growing requirement for MSC certification



Pacific Fisheries and MSC

Fisheries Certification and Integrated Oceans Management

- 3rd party certification provides an excellent means of demonstrating the sustainable use of fisheries resources in the context of integrated oceans management

Status of British Columbia Fisheries in Certification

- Sockeye assessment is nearing completion, pink and chum entering certification.
- Halibut MSC assessment report nearing completion
- Hake has entered full assessment in cooperation with US fisheries
- Dogfish fishery has completed pre-assessment –certification urgent due to EU shark ban and possible CITES listing
- Urchin and prawn fisheries have begun pre-assessment process – urchin certification very urgent due to IUU fishery in NW Pacific
- Tuna and sablefish prime candidates for certification
- Other groundfish should likely wait until another year of integration
- Geoduck certification could also assist industry with expansion
- In total, BC has provided \$560K in direct funding and an additional \$150K in technical staff support for MSC processes

Pacific Fisheries and MSC

US Pacific Fisheries

- Alaska halibut, cod, sablefish and pollock recently certified
- Washington and Oregon fisheries certified or under assessment; halibut, tuna, sablefish, dungeness crab, pink shrimp
- California chinook in assessment

Certification and Our Export Markets

- BC's major export markets are moving heavily towards certification
- Drivers behind move towards MSC are major retailers in EU (i.e., UK, Germany, Switzerland) and in the US (i.e., Wal-Mart, Whole Foods) plus growing interest in Asia (i.e., Japan)
- Jan 2006 - Wal-Mart announced that 100% of its wild-caught fish will be sourced from MSC certified fisheries in future
- July 2006 - Japanese supermarket operator Aeon started offering MSC certified products in over 660 stores
- March 2007 – UK importers indicate clear preference for MSC certified salmon

Lessons Learned

- Certification processes must be transparent and inclusive to ensure credibility
- Pacific Regional policy reforms such as the Wild Salmon Policy, Groundfish Integration, Pacific Fisheries Reform, are essential to successful certification
- Certification should be a collaborative process involving the fishing industry, the management agency, other orders of government, First Nations, communities and marine conservation organizations
- Parties engaged in certification should be clear on shared objectives for the process
- Management agencies, particularly those engaged in fisheries management and science need to play an active and supportive role
- Marine conservation organizations need to be effectively engaged in the process
- Success requires good communications and an ongoing commitment

Pacific Region Sustainable Fisheries and Oceans Initiatives

DFO and BC are collaborating on several regional sustainable fisheries and oceans management initiatives, such as:

- **Integrated Groundfish Management**
 - ▶ World-leading system to account for all bycatch
 - ▶ 100% catch monitoring through either on-board observer or electronic
- **Pacific Salmon Reform**
 - ▶ Moving towards defined shares and a greater focus on the products from the fishery and market demands
- **Wild Salmon Policy**
 - ▶ Shift from aggregate to more weak stock management
- **Marine Protected Area Development and Integrated Planning**
 - ▶ Commitment to comprehensive MPA system development
 - ▶ 164 Rockfish Conservation Areas approx 5,000 sq. km.
 - ▶ Close to 30% of shoreline in protected area status

The B.C. Seafood Story

