

**British Columbia
Seafood Sector and Tidal Water
Recreational Fishing:
A Strengths, Weaknesses, Opportunities,
and Threats Assessment**

Final Report

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Preface

This report was prepared under contract for the BC Ministry of Agriculture, Food and Fisheries to assess the competitiveness of the BC seafood sector, its harvesting, aquaculture, and processing components, and the BC tidal recreational fishing sector.

The consultants have benefited from discussions with industry, government, and others. Notwithstanding this assistance, the authors have final responsibility for the analyses and conclusions of this study.

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Acronyms

Acronym	Full
AABC	Aboriginal Aquaculture Association of BC
AASR	Annual Aquaculture Statistical Report
ADFG	Alaska Department of Fish and Game
ACOA	Atlantic Canada Opportunities Agency
AFPS	Annual Fisheries Production Schedule
AFS	Aboriginal Fisheries Strategy
ASMI	Alaska Seafood Marketing Institute
BCARDC	BC Aquaculture Research and Development Committee
BCSFA	BC Salmon Farmers Association
BCSGA	BC Shellfish Growers Association
BCSMC	BC Salmon Marketing Council
BCWF	BC Wildlife Federation
BSE	Bovine Spongiform Encephalopathy
CAIA	Canadian Aquaculture Industry Alliance
CCFAM	Canadian Council of Fisheries and Aquaculture Ministers
CAFI	Canadian Agriculture and Food International program
CCG	Canadian Coast Guard
CEAA	Canadian Environmental Assessment Act
CFIA	Canadian Food Inspection Agency
COOL	Country of Origin Labelling
COSEWIC	Committee on the Status of Endangered Wildlife in Canada
CPP	Canada Pension Plan
CSA	Canadian Sablefish Association
CSSP	Canadian Shellfish Sanitation Program
CU	Conservation Unit
DFO	Canada Department of Fisheries and Oceans
DMP	Dockside Monitoring Program
EBITDA	Earnings Before Interest, Taxes, Depreciation, and Amortization
EFTA	European Free Trade Agreement
EI	Employment Insurance
EM	Electronic Monitoring
ESSR	Excess to Salmon Spawning Requirements
EU	European Union
FAO	Food and Agriculture Organization
FAS	Frozen at Sea
FCBC	Fisheries Council of BC
FCC	Farm Credit Corporation

Acronym	Full
FFAW	Food, Fish and Allied Workers
FHMP	Fish Health Management Plan
FLUPSY	Floating Upweller System
FPI	Fishery Products International
FRC	Fisher Registration Card
FTA	Canada-US Free Trade Agreement
FTAA	Free Trade Agreement of the Americas
FTE	Full-Time Equivalent
GATT	General Agreement on Tariffs and Trade
GDP	Gross Domestic Product
HAB	Halibut Advisory Board
HACCP	Hazard Analysis and Critical Control Point
HRCS	Herring Resource Conservation Society
HRDC	Human Resources Development Canada
HS	Harmonised System
IHN	Infectious Hematopoietic Necrosis
IPHC	International Pacific Halibut Commission
IQ	Individual Quota
IQF	Individually Quick Frozen
ISER	Institute for Social and Economic Research
ITQ	Individual Transferable Quota
IVQ	Individual Vessel Quota
LWBC	Land and Water BC
MAFF	BC Ministry of Agriculture, Food and Fisheries
MAP	Modified Atmosphere Packaging
MED	Marine Emergency Duties
MFN	Most Favoured Nation
MOU	Memorandum of Understanding
MSC	Marine Stewardship Council
MV	Market Value
NAFTA	North American Free Trade Agreement
NBBC	Native Brotherhood of BC
NBV	Net Book Value
NGO	Non-Governmental Organization
NMFS	National Marine Fisheries Service
NNFC	Northern Native Fishing Corporation
NRFTG	National Recreational Fisheries Task Group
NWPA	Navigable Waters Protection Act
OAL	Overall Allowable Length
OCAD	Office of the Commissioner for Aquaculture Development
OECD	Organisation for Economic Co-operation and Development
OFFS	On-Farm Food Safety

Acronym	Full
PBS	Pacific Biological Station
PCB	Polychlorinated Biphenyls
PDO	Pacific Decadal Oscillation
PFAR	Pacific Fisheries Adjustment and Restructuring Program
PFRCC	Pacific Fisheries Resource Conservation Council
PHMA	Pacific Halibut Management Authority,
POP	Persistent Organic Pollutant
PSA	Pilot Sales Agreement
PSHA	Pacific Salmon Harvesters Association
PSP	Paralytic Shellfish Poison
PY	Person-Year
QCI	Queen Charlotte Islands
QMP	Quality Management Program
RBC	Royal Bank of Canada
RSW	Refrigerated Sea Water
SAR	Salmon Aquaculture Review
SARA	Species at Risk Act
SARS	Severe Acute Respiratory Syndrome
SCH	Small Craft Harbour
SE	Sockeye Equivalent
SFAB	Sport Fishing Advisory Board
SFI	Sport Fishing Institute
SMP	Shellfish Management Plan
SOTA	Salmon for the Americas
SPAA	Society for the Positive Awareness of Aquaculture
SQA	Supplier Quality Assurance
SWOT	Strengths-Weaknesses-Opportunities-Threat
TAC	Total Allowable Catch
UFAWU	United Fishermen and Allied Workers' Union
UHA	Underwater Harvesters Association
USCBP	US Customs and Border Patrol
USDA	US Department of Agriculture
USDOC	US Department of Commerce
USEPA	US Environmental Protection Agency
USFDA	US Food and Drug Administration
USITC	US International Trade Commission
WCB	BC Workers' Compensation Board
WCO	World Customs Organisation
WCVI	West Coast of Vancouver Island
WED	Western Economic Diversification
WSP	Wild Salmon Policy
WTO	World Trade Organization

Map of BC Coastline

