

# FISHERIES AND AQUACULTURE

NEWS

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The 2014 fishing season saw a remarkable increase in the value of fish and seafood landings. With total catches worth at least \$200 million, it was a record year! This excellent news should have positive repercussions on the processing sector as well as on the entire marine product industry in Québec.

It's a fine performance and it encourages us to renew our support for the upcoming fishing season so as to facilitate the success of fishing enterprises and contribute to the economic vitality of our maritime regions. In this regard, we invite all members of the industry to step up communication and build closer ties.

Over the course of the coming months, the introduction of the maritime strategy (*Stratégie maritime*) should also be seen by all sector stakeholders as an opportunity for networking and cooperation. This strategy, one of the pillars of Québec's economic recovery, will notably focus on innovation. The latter is essential if we are to improve the prospects and competitiveness of our fisheries and aquaculture industry.

We are, therefore, well-prepared to embark on this new year confidently. By placing an emphasis on communication, networking and innovation, the fisheries and aquaculture industry will be able to reach the targets it has set for itself and thus, contribute notably to Québec's economy.



**Pierre Paradis**  
Minister of Agriculture,  
Fisheries and Food



**Germain Chevarie,**  
Parliamentary assistant  
to the Minister of Agriculture,  
Fisheries and Food (fisheries  
and aquaculture component)



## ANNUAL AQIP MEETING: BUSINESS MEETINGS WITH FOREIGN BUYERS

By **Françoise Nicol,**  
Fisheries and Aquaculture Analyses  
and Policies Directorate

For the fifth consecutive year, members of Québec's fisheries industry association (Association québécoise de l'industrie de la pêche – AQIP) welcomed foreign buyers at their annual meeting in Québec City in late January. This year, twelve foreign buyers from South Korea (2), the European Union (7) and the United States (3) accepted AQIP's invitation. The participating Québec marine product processing firms notably wished to establish new business ties with countries that have entered into trade agreements with Canada or are about to do so, as is the case for South Korea and the European Union.

The program proposed for the event kicked off with a presentation of Québec's fisheries industry, prepared by the Fisheries and Aquaculture Analyses and Policies Directorate (Direction des analyses et des politiques des pêches et de l'aquaculture –

DAPPA). The presentation cast the spotlight on the main species harvested in Québec and the context in which fishing and production activities take place. The AQIP guests then toured the Fumoir Grizzly inc. facility, in Saint-Augustin-de-Desmaures, as well as the grocery store, Provigo Le Marché Charlesbourg, in Québec City. The second day of the program was dedicated to business meetings with Québec's processing enterprises, with 85 meetings taking place at a steady pace.

These activities were organised with financial and technical support from the Ministry of Agriculture, Fisheries and Food, via its Market Access Directorate and DAPPA, and with the assistance of Québec's foreign delegations and the Agri-Food Export Group Québec-Canada.

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www.mapaq.gouv.qc.ca

Coordination team: Donald Arseneau, Micheline Côté,  
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# ANNUAL GATHERING OF THE MAGDALEN ISLANDS FISHERIES AND MARICULTURE INDUSTRY

6<sup>th</sup>  
edition

By Karine Villemaire,

Magdalen Islands Regional Directorate

The sixth edition of the annual gathering of the Magdalen Islands fisheries and mariculture industry, inspired by the theme Insight and efficiency: *Solutions within our reach!*, took place last December 11 in L'Étang-du-Nord. Bringing together nearly a hundred fish harvesters, assistant fishers, mariculturists, food processors, association representatives, specialists and industry partners, the event's presentations and workshops provided an opportunity to discuss the various issues facing the sector.

using local data. Over the years, these reports have become key features of the event, highlighting outstanding facts of the past year. The 2014 reports revealed some diversification in mariculture activity (for instance, lagoon-based oyster farming); in terms of fishing, lobster landings increased by 22 percent compared to 2013 while the value of all landings rose by 28 percent (preliminary data).

## ECONOMIC CONTEXT AND COMMERCIAL POLICIES

An economist at Université de Moncton, Pierre-Marcel Desjardins described the national and international repercussions of the current economic context on the industry. He pointed out that the lower value of the Canadian dollar and the drop in oil prices will certainly impact the industry positively, particularly in terms of exports.

Furthermore, Raymond Dupuis, project leader at the Centre for Interuniversity Research and Analysis of Organisations (Centre interuniversitaire de recherche en analyse des organisations – CIRANO) and a strategic advisor for the Agri-Food Export Group Québec-Canada, presented the various multilateral trade policies that will be implemented in the near future. The economic and trade agreements entered into with the European Union, South Korea and Japan will lead to the reduction and even abolition of most tariffs for Canadian products, which will have the – anticipated and expected – effect of increasing export volumes considerably. According to Dupuis, these agreements will make it easier for Canadian fish and seafood to enter new markets.

## DISCUSSION WORKSHOP

To introduce the discussion workshop, Claude Rioux, an economist at Université du Québec à Rimouski, gave a presentation entitled, *The value chain approach: From fork to sea*. Participants were then invited to form groups and discuss the following question: "Can we enhance the value of what we produce and by exten-



Photo: Municipalité des Îles-de-la-Madeleine

Participants at the sixth edition of the Magdalen Islands fisheries and mariculture industry gathering.

sion, increase local benefits; and if so, how would we go about it?" The workshop generated the most interesting exchange of opinions and ideas; in particular, participants noted the importance of focussing on the quality of products and processing, on the creation of strategic alliances and on the potential for developing new international markets. The challenge inherent to reducing insularity-related transportation costs, both in terms of in-puts and finished products, was also discussed.

## FUEL EFFICIENCY AND NEW TRENDS

François Lévesque, proprietor of OpDAQ Systèmes, presented a range of technological options to enhance the fuel efficiency of fishing vessels. Since fuel is one of the main expenses of a fishing enterprise, practical solutions were shared with an eye to reducing costs. Based in Rimouski, OpDAQ Systèmes specialises in on-board instrumentation systems for vessels, and in the evaluation of their performances.

With respect to food processing, Alain Samuel Merinov, gave a presentation on plant modernisation and new trends. Whether through the acquisition of new equipment, the adoption of new technology or the mechanisation or automation

of operations, modernisation is an investment, one that not only improves an enterprise's productivity and efficiency but also ensures its future.

## ADDRESSES BY INDUSTRY LEADERS

Finally, to close the day, representatives of the fishing and mariculture industry took the floor to speak in particular to the fifteen professional fishing students – the fish harvesters of tomorrow – who attended the gathering. The message they delivered pointed first and foremost to the importance of conserving marine resources for future generations. They also highlighted how involvement in research and in the implementation of solutions is crucial if the sector is to succeed in meeting the challenges it faces.

It is important to point out that the Magdalen Islands mariculture table (Table pêche et mariculture des Îles-de-la-Madeleine) an entity created by the municipality, was responsible for initiating this sixth edition of the industry gathering. The Ministry of Agriculture, Fisheries and Food contributed by helping to organise the event which, once again, was a resounding success!



Photo: Municipalité des Îles-de-la-Madeleine

Raymond Dupuis, project leader at the Centre for Interuniversity Research and Analysis of Organisations and strategic advisor for the Agri-Food Export Group Québec-Canada

## REPORTS

To kick off the day, Gabrielle Landry, a member of the Municipalité des Îles-de-la-Madeleine's community development team, summed up the past year's press review. She was followed by Josée Richard, of Fisheries and Oceans Canada (DFO), and François Bourque, of the Ministry of Agriculture, Fisheries and Food (MAPAQ), who in turn reported on the fishing and mariculture seasons,

# DESTINATION UNITED STATES: WHO BUYS OUR PRODUCTS?

By Françoise Nicol  
and Samir Benchabane  
Fisheries and Aquaculture Analyses and Policies Directorate

## CANADIAN EXPORTS TO THE UNITED STATES

The United States continues to be the main market for Canada's fish and seafood. In fact, in 2013, it took the giant's share, absorbing 62.6 percent of Canadian exports. On the whole, the values of exports to the United States reached \$2.8 billion in 2013, an 8.7 percent increase from 2012.

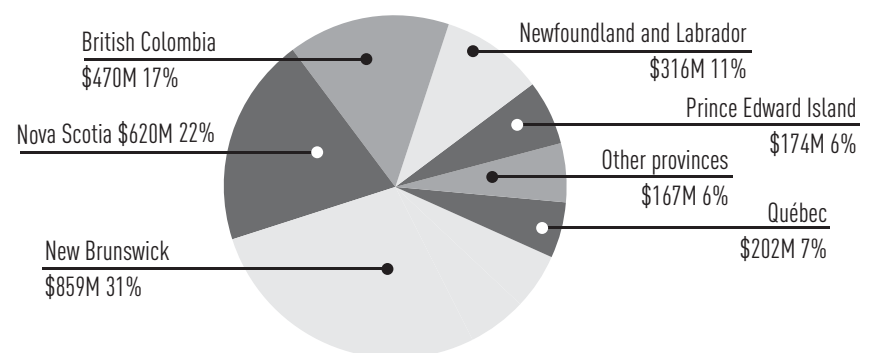
New Brunswick took the largest share of the pie with exports of 74,273 tonnes of fish and seafood, valued at \$859 million, to the American market. It was followed by Nova Scotia, which exported 55,733 tonnes of product worth \$620 million. British Columbia ranked third, having

shipped 83,493 tonnes of fish and seafood worth \$470 million to our southern neighbour. Next was Newfoundland and Labrador with its exports totalling 41,829 tonnes, worth \$316 million, an increase of 27 percent for this province compared to 2012.

It is important to point out that all provinces in Eastern Canada export essentially the same species, such as snow crab and lobster. However, New Brunswick also exports farmed Atlantic salmon and Prince Edward Island, live mussels.

## FISH AND SEAFOOD PRODUCT EXPORTS FROM THE CANADIAN PROVINCES TO THE UNITED STATES IN 2013

Source: Global Trade Atlas data base  
(data extracted on January 15, 2015).



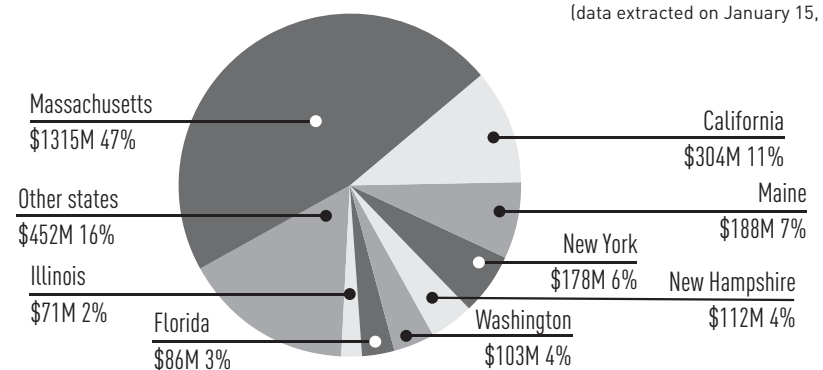
## MAIN DESTINATIONS OF CANADIAN FISH AND SEAFOOD

With 61 percent of all exports heading there – a total value of more than \$1.7 billion, the New England states (Connecticut, Maine, New Hampshire, Vermont, Massachusetts and Rhode Island) are the main destinations for fish and seafood from Eastern Canada. However, California receives most of the products from British Columbia.

In 2013, Massachusetts imported Canadian fish and seafood worth \$1.32 billion, 47 percent of the total value of the country's exports while \$403 million in exports went to California. Maine followed with \$188 million in fish and seafood, and then New-York State, with \$178 million.

## VALUE OF CANADIAN FISH AND SEAFOOD EXPORTS BY MAIN DESTINATION IN THE UNITED STATES IN 2013

Source: Global Trade Atlas data base  
(data extracted on January 15, 2015).



## EXPORTS FROM QUÉBEC TO THE UNITED STATES

International exports of fish and seafood from Québec fell by 9.5 percent from 2012 to 2013. Exports to the United States dropped by 5.4 percent while their value stood at \$202 million. The New England states are still the main destinations for fish and seafood from Québec, accounting for nearly 79 percent (\$160 million) of the total value of Québec products headed to the United States.

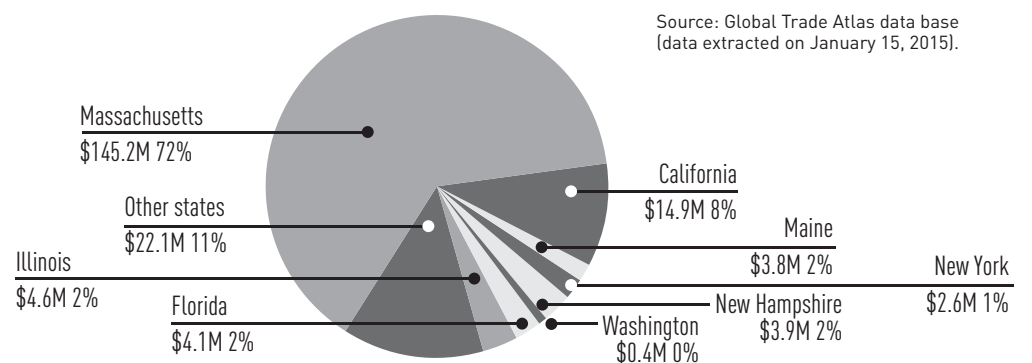
Massachusetts tops the list by far, accounting for 72 percent (\$145 million) of shipments from Québec. It is important to point out that two species, snow crab and lobster, generate sales of \$122 million, 85 percent of the total value of products exported to this state in 2013. However, the total value of fish and seafood exports from Québec to Massachusetts contracted by 5 percent from 2012 to

2013, falling from \$153 million to \$145 million. Lobster fell farthest, by 33 percent, moving from a total value of \$67 million in 2012 to \$45 million in 2013. As for snow crab exports to this New England state, they rebounded by nearly 23 percent (\$63 million in 2012 compared to \$77 million in 2013).

California is now Québec's second largest trading partner: It accounted for 7 percent (\$15 million) of the total value of fish and seafood exports from Québec to the United States. Three species, snow crab, shrimp and lobster, were responsible for 84 percent of the total value of fish and seafood exports to this state, worth \$14 million. Compared to 2012, (\$11 million), the value of shipments to California increased by 31 percent in 2013 (\$15 million), spurred notably by snow crab whose sales rose from

## VALUE OF FISH AND SEAFOOD EXPORTS FROM QUÉBEC TO THE UNITED STATES IN 2013

Source: Global Trade Atlas data base  
(data extracted on January 15, 2015).



\$0.4 million to \$4.8 million over the course of a single year. It is important to point out that exports to all other states fell.

The changes in fish and seafood exports from Québec to the American market are no doubt due to several factors: falling

Greenland halibut landings and exports; a drop in the supply of processed lobster; increased sales on the domestic market, etc. In 2015, however, the higher value of the American dollar should help improve Québec's exports to the United States.

# 2015 TRADE MEETING AGENDA

March 3 to 6

**Foodex**Chiba, Japan  
[www3.jma.or.jp/foodex](http://www3.jma.or.jp/foodex)

March 15 to 17

**Seafood Expo North America**Boston, United States  
[www.seafoodexpo.com/north-america/](http://www.seafoodexpo.com/north-america/)

April 21 to 23

**European Seafood Exposition**Brussels, Belgium  
[www.europeanseafood.com](http://www.europeanseafood.com)

April 28 to 30

**SIAL Canada 2015**Toronto, Canada  
<http://www.sialcanada.com>

November 4 to 6

**China Fisheries & Seafood Expo**Qingdao, China  
[www.chinaseafoodexpo.com](http://www.chinaseafoodexpo.com)

## QUÉBEC'S AQUATIC RESOURCES: EXCEPTIONAL RESEARCH CAPACITY

By Julie Boyer,

Gaspé Peninsula Regional Directorate

The Québec research fund for nature and technology (*Fonds de recherche du Québec – Nature et technologies* – FRQ-NT) fosters the creation of poles of excellence in university research in sectors of strategic importance for the development of Québec. As a consequence, an exceptional research capacity has been built in Québec in recent years, with some thirty strategic groups being established with the support of universities, organisations and enterprises.

### QUÉBEC AQUATIC RESOURCE GROUP (RAQ)

The freshwater and marine fisheries and aquaculture sector has been identified as a sector of strategic importance by FRQ-NT. It is central to the mission of one of these strategic groups, the Québec aquatic resource group (Ressources aquatiques Québec – RAQ). RAQ researchers, some forty in all, are attached to nine Québec universities and related research centres, one college, three ministries and four organisations, including Merinov.

### ANNUAL RAQ MEETING

RAQ held its annual meeting in Québec City on November 13 and 14, 2014. The research results presented included a good number of studies dealing with harvested populations, genomics as a fisheries management tool, the toxicity of nanoparticles, the development of byssus-based biomaterials, fish health, the diet of farmed species and certain ethical considerations.

A presentation on “environmental DNA” by Anaïs Lacoursière-Roussel, a post-doctoral fellow at the Université Laval laboratory headed by Louis Bernatchez, drew attention. Management of natural environments and aquatic populations is often limited by the lack of data on these populations. An analysis of the DNA present in the environment could prove a revolutionary tool for gathering data in remote regions or in cases where financial resources are limited. The method reveals the DNA present in water samples, thus making it possible to identify the species inhabiting it. The researcher showed how this method was used to determine the species profile of aquatic environments such as Lac Saint-Pierre. She is continuing her work to find out if it would be feasible to estimate the stocks of different species using this method.



Photo: Jacques Brisson

Research work underway by Yves Comeau's team on the use of artificial marshes to treat fish farm waste

It is important to point out that a representative of the Ministry of Agriculture, Fisheries and Food sits on the RAQ steering committee, together with scientists and delegates representing the industry and the Department of Fisheries and Oceans Canada. This committee determines research orientations, targeted objectives and action priorities.

For more information about RAQ, please visit the website at <http://raq.uqar.ca> or contact Renée Gagné, Coordinator, by phone at 418-723-1986, ext. 1425, or by e-mail at [raq-coordination@uqar.ca](mailto:raq-coordination@uqar.ca)