BC SHELLFISH GROWERS ASSOCIATION

BCSGA AGM 12 November 2026



PROJECT UPDATE AND DISCUSSION

PACIFICAN REGIONAL TARIFF RESPONSE INITIATIVE (RTRI)

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$363,800 IN PACIFICAN FUNDING | RUNS UNTIL MARCH 2028

Purpose: to strengthen the resilience, competitiveness and market access of BC's shellfish industry in response to trade uncertainty.?

Three overarching objectives:

- Better understand our industry and market opportunities.
- Protect and expand domestic and international markets.
- Better understand risks affecting harvest and market access.

1

INDUSTRY INTELLIGENCE & MARKET OPPORTUNITIES

Production and capacity, market research and barrier identification, industry needs and growth opportunities

2

MARKET DEVELOPMENT & DIVERSIFICATION

Domestic and international buyer engagement activities, buyer missions, trade shows, BC Shellfish brand development and supporting export ready members in reaching buyers.

3

HARVEST-AREA RISKS & MARKET ACCESS

Scientific investigation, environmental data and understanding risks affecting harvest areas (Ie. Pollution source ID, Noro clearance rates, etc.)

4

HATCHERY, NURSERY & SUPPLY CAPACITY

Identify capacity gaps, technology needs and opportunities to strengthen long-term supply.

PROJECT APPROACH

CURRENT PHASE

PHASE 1

ENGAGEMENT & INFO GATHERING

Industry consultation, buyer conversations, government and research engagement, identifying needs and opportunities

PHASE 2

ANALYSIS & PRIORITIZATION

Assess findings, identify gaps, validate opportunities and determine where project resources can have the greatest impact.

PHASE 3

IMPLEMENTATION

Deliver targeted market development, industry analysis, buyer engagement and other priority activities.

EARLY INDUSTRY FEEDBACK

MARKET VISIBILITY & PROMOTION

- Greater recognition of BC shellfish
- Buyer-facing industry directory
- More buyer engagement and trade show support

SUPPLY & PROCESSING

- Processing capacity and infrastructure gaps
- Inconsistent supply and harvest closures

MARKET DIVERSIFICATION

- Interest in the EU, China and Singapore
- Better market data before entering new markets
- Identify and address barriers to entering markets
- Clearer understanding of buyer demand and volumes

MARKET ACCESS & ADMINISTRATION

- Export process and documentation challenges (Engage with the CFIA)
- Financial and administrative support to attend trade shows

EXPLORING OPPORTUNITIES IN SPAIN

SEPTEMBER 24, 2026 | SPANISH TRADE COMMISSIONER AND SEAFOOD BUYERS/IMPORTERS

Key opportunities identified

- Strong interest in increasing BC Manila clam supply.
- Potential for frozen and value-added clam products.
- Reduced reliance on live shipping and air freight.
- Opportunity to develop a distinct BC shellfish brand.
- Potential investment in BC processing and freezing capacity.

Next steps

- Continue engagement with provincial trade contacts and the Spanish delegation.
- Confirm buyer specifications, volumes, pricing and product requirements.
- Map BC processing capacity and potential infrastructure gaps.

SIAL PARIS 2026

ONE OF THE WORLD'S LARGEST FOOD AND BEVERAGE TRADE SHOWS



Objectives:

- Start to tackle the question: IS there a market in the EU?
- Understand international buyer expectations and market opportunities.
- Assess competing products, pricing, packaging and positioning.
- Build relationships with trade commissioners and market contacts.



WHAT WE HEARD FROM INTERNATIONAL MARKETS

ENGAGEMENT WITH TRADE COMMISSIONERS FROM:

GERMANY | NETHERLANDS | BELGIUM | FRANCE | UKRAINE | MOROCCO

Key takeaways

- Canadian seafood is in demand: Brokers reported difficulty securing Canadian seafood supplies for buyers.
- Product format matters: Import barriers for live/raw products are driving interest in cooked and frozen alternatives.
- Potential market opportunities: Interest identified in Manila clams for Spain and mussels for Belgium.
- Cadmium remains a barrier: Trade commissioners indicated they may be willing to explore advocacy for an exemption if evidence demonstrates levels are not linked to pollution. No guarantee of an exemption.

Next steps

- Trade commissioners offered to help identify buyers and conduct market research ahead of Seafood Expo Global, Barcelona 2027.

VALUE-ADDED PRODUCTS

Products and formats observed

- Pasteurized, frozen and vacuum-sealed shellfish.
- Mussels, clams, limpets, lobster and mixed seafood.
- Shell-on, half-shell and meat-only formats.

Different buyers, different formats

- Hotels and restaurants: bulk shellfish meat.
- Supermarkets: frozen shell-on and half-shell products.?

Key market insight

- Strong regional branding can support premium positioning.
- BC needs to compete on more than price: origin, quality, sustainability and product differentiation.



VALUE-ADDED PRODUCTS





UNDERSTANDING THE FRESH SEAFOOD MARKET

What was observed

- Dedicated seafood shops were common, often located in municipal indoor markets.
- Oyster bars were frequently integrated with seafood retailers.
- Smaller general grocery stores had limited fresh seafood offerings.
- Frozen and ready-to-cook products were more common in general retail.



UNDERSTANDING THE FRESH SEAFOOD MARKET

Oyster market considerations

- Strong regional and origin-based positioning.
- Clear seasonal consumption patterns.
- No obvious supply shortage in the French market during our visit.

Implication: BC needs to identify specific market gaps and buyer needs rather than assume demand exists.

Species	Price Range	
	EUR	CAD
Oysters (per doz)		
Crassostrea gigas (Pacific)	12 to 34	20 to 54
Mussels (Per kg)		
Mytilus edulis (Blue)	6 to 10	10 to 16
Mytilus galloprovincialis (Mediterranean)	8 to 10	13 to 16
Clams (Per kg)		
Crastoderma edule (Cockle)	15 to 20	24 to 32
Glycymeris glycymeris (Bittersweet)	10	16
Venerupis decussata (Cross-cut)	33 to 39	52 to 62
Venus Verrucosa (Warty venus)	30	48

HOW DO WE POSITION BC SHELLFISH?

Key observations and opportunities

- Leverage Canada's strong international seafood reputation.
- Build recognition of what makes BC shellfish distinctive.
- Explore premium, region-based branding.
- Make BC processors and products easier for buyers to find.
- Learn from successful collective marketing models.

Potential tools

- BC shellfish buyer-facing directory.
- Coordinated print and digital promotional materials.
- Shared trade show presence and industry storytelling.

DISCUSSION

BARRIERS

IF YOU COULD REMOVE ONE MAJOR BARRIER TO GROWING OR SELLING MORE SHELLFISH, WHAT WOULD IT BE?

MARKET RESEARCH & IDENTIFICATION

ARE THERE MARKETS OR BUYERS YOU THINK WE SHOULD BE PURSUING?

MARKET DEVELOPMENT

DO YOU SEE A NEED FOR INDUSTRY LEVEL MARKETING AND BRANDING MATERIALS? A DIRECTORY?

THANK YOU

PLEASE CONNECT WITH US FOR
PROJECT FEEDBACK OR INPUT

CONTACT

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