

# Small Scale, Big Value:

Creating a Value Chain to Support Atlantic Canada's Sustainable Fisheries

Ecology Action Centre

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*Photo: Courtesy of Fallon Conway*



Ecology Action Centre

[www.ecologyaction.ca](http://www.ecologyaction.ca)

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Information contained in this report has been collected on a "best efforts" basis and reflect the comments presented by workshop participants.

## About the Ecology Action Centre

Since 1971, the Ecology Action Centre (EAC) has been working to build a healthier, more sustainable Nova Scotia. The EAC works closely with social and natural scientists and makes strong use of science in communicating its message to the public.

The Centre's earliest projects included recycling, composting, and energy conservation, and these are now widely recognized environmental issues. Our current areas of focus include Built Environment, Marine Issues, Coastal Issues, Wilderness, Food, Transportation and Energy Issues.

The Marine Issues Committee works locally, nationally and internationally towards conserving and protecting marine ecosystems and maintaining sustainable fisheries and vibrant coastal communities.

Founded in 1995, following the collapse of the east coast cod fishery, the Marine Issues Committee uses a variety of tools to achieve our marine conservation objectives. We advocate, conduct research, engage in public education, and use market based approaches and legal tools to achieve our campaign goals. Collaborative efforts with Canadian and international NGOs, scientists, fishing organizations and government agencies are integral to our approach.



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## Table of Contents

<b>Acknowledgements</b> .....	<b>2</b>
<b>About the Ecology Action Centre</b> .....	<b>2</b>
<b>Major findings</b> .....	<b>4</b>
<b>Recommendations</b> .....	<b>6</b>
<b>Next Steps</b> .....	<b>7</b>
<b>IDENTIFYING AND UNDERSTANDING MARKET SEGMENTS FOR ATLANTIC CANADA'S SUSTAINABLE SEAFOOD</b> ....	<b>8</b>
Gourmet Restaurants – Chris Aerni, Rossmount Inn, St. Andrews-By-The-Sea, NB .....	<b>9</b>
Sustainable Seafood Restaurant Programs- Robin Poirier, Ocean Wise, Vancouver Aquarium .....	<b>9</b>
High Quality Retail/Restaurant Wholesale– Dan Donovan, Hooked Inc., Toronto .....	<b>9</b>
Direct to Consumer - Keltie Butler – Farmers' Markets of Nova Scotia .....	<b>10</b>
Institutional Demand - Brett Tolley, Northwest Atlantic Marine Alliance .....	<b>10</b>
Facilitated Plenary Discussion on Market Demand .....	<b>11</b>
<b>MEETING MARKET DEMANDS</b> .....	<b>12</b>
Tracing Fish Back to the Harvester - Newfoundland Atlantic Halibut: David Decker, Fish, Food and Allied Workers of Newfoundland, Tasha Sutcliffe, ThisFish, ECOTrust .....	<b>13</b>
Transparent Pricing and Producer /Processor Collaboration: Stewart Lamont, Tangier Lobster, Nova Scotia, and Keith Sullivan, Fish, Food and Allied Workers of Newfoundland (FFAW) .....	<b>14</b>
Seafood Distribution: Michael Dimin, Sea2Table .....	<b>15</b>
Small Group Break-out Session: What are sustainable seafood demand and supply challenges that need to be resolved? .....	<b>15</b>
Achieving Market Access .....	<b>15</b>
Distribution .....	<b>16</b>
Quality .....	<b>16</b>
Organizational Improvement and Relationships .....	<b>17</b>
General Comments and Ideas .....	<b>17</b>
Short, Medium, and Long Term Opportunities .....	<b>19</b>
<b>EXPLORING OPPORTUNITIES AND IDEAS FOR ATLANTIC CANADA'S SMALL SCALE FISHERIES</b> .....	<b>21</b>
Is there a need and opportunity for a new sustainable fisheries certification system for small-scale fisheries? Marc Allain, Fisheries Policy Consultant .....	<b>21</b>
SWOT Analysis: Sustainable Fisheries Certification .....	<b>23</b>
Strategies: Sustainable Fisheries Certification .....	<b>25</b>
Exploring the idea of a Seafood Hub in Atlantic Canada. Dave Adler, Ecology Action Centre .....	<b>26</b>
SWOT Analysis: Seafood Hub .....	<b>28</b>
Strategies: Seafood Hub .....	<b>30</b>
Exploring Distribution Options (facilitated discussion) .....	<b>31</b>
<b>What is the most productive role for the Ecology Action Centre?</b> .....	<b>33</b>
<b>APPENDICES</b> .....	<b>35</b>
Appendix 1 Workshop Invitation & Agenda .....	<b>35</b>
Appendix 2 Workshop Participants & Speaker Biographies .....	<b>38</b>
Appendix 3 Post Workshop Survey Results .....	<b>41</b>
Appendix 4 Workshop Slow Fish menus .....	<b>44</b>



## EXECUTIVE SUMMARY

While demand for sustainable seafood has increased over the past decade, much of the emphasis has been on seafood buyers and retailers to rethink their seafood supply chain and has generally focused on third party certification schemes or sustainability ranking programs. There has been less emphasis on bringing existing supply to the market and fishermen have tended to be left out of the picture, despite their role as primary resource harvesters.

This report summarizes the findings and record of discussion from a workshop entitled *“Creating a Sustainable Value Chain For Atlantic Canada’s Small-scale Fisheries”* held in Halifax, Nova Scotia on October 16th and 17th, 2013. The workshop brought together 43 fishermen, representatives from fishing associations and unions, buyers, distributors and processors of sustainable seafood under the common goal of creating a seafood value chain that ultimately benefits all players in the seafood system, from the ocean, to fishermen to end consumers. The motivation for the workshop was to explore ways that small-scale fisheries and fishermen who are actively engaged in conservation, specifically the Atlantic Canadian owner-operator fleet, could better access markets that value high quality, social and economic sustainability and genuine connections with food producers, with the end goal of achieving improved livelihoods for fishermen and fishing communities, as well as access to sustainably harvested seafood for local and regional consumers.

### Workshop Objectives

1. Bring together small-scale fishermen, retailers, chefs and distributors to quantify the demand from different market segments for Atlantic Canada’s ecologically and socially sustainable seafood.
2. Explore different mechanisms for small-scale fishermen to meet these market demands.



3. Identify barriers and opportunities for marketing Atlantic Canada’s small-scale fisheries including branding opportunities.
4. Identify priority action items to move forward in the promotion of ecologically and socially sustainable seafood products from Atlantic Canada.

## Major findings

Through panel discussions, facilitated sessions and breakout groups, several conclusions emerged from the collective input of workshop participants:

### *New partnerships and relationships in seafood harvesting, distribution, and management are needed*

- Fisheries in Atlantic Canada increasingly are characterized by high volume, low value harvesting techniques carried out by large vessels and vertically integrated firms which control critical market aspects such as price and access to quota. This trend has made it increasingly difficult for smaller scale, owner-operator fishermen to compete.
- The post-harvest supply chain in Atlantic Canada’s fisheries is aligned predominantly with the international export market. This trend has made it difficult for small-scale fishermen to access regional and domestic markets that are willing to pay a fair price for their high quality product, while consumers, chefs, and wholesale buyers have great difficulty accessing the supply.
- In order to address these two trends, new partnerships and relationships in seafood harvesting, distribution, and management must be developed.

<sup>1</sup>The need for more effective traceability to counter mislabelling concerns in the seafood market is raising the demand for sustainable seafood products clearly sourced and labeled. The Conference Board of Canada (2013) Strengthening Canada’s Commercial Fisheries and Aquaculture: From Fin to Fork Chapter 2, Page 27 [http://aquaculture.ca/files/documents/14-185\\_fromfintofork\\_cfic\\_rpt.pdf](http://aquaculture.ca/files/documents/14-185_fromfintofork_cfic_rpt.pdf).

- It was agreed at the workshop that representatives from all aspects of the value chain must be involved at the outset- including fishermen, buyers, processors, distributors, marketers, wholesalers, restaurants, chefs, market managers, and policy makers; some of these relationship need to be built and strengthened.

### **Successes and the story of small-scale fishermen in Atlantic Canada should be communicated**

- There is a need to communicate examples of success in building seafood value chains for small-scale fisheries. Because fishermen are often occupied with the business of fishing, and fishing associations are busy with various tasks from science meetings, management meetings, dock-side monitoring programs, policy consultations, negotiations with processors etc., there is often little time to share success stories and communicate innovative projects to the public and to other fishing communities.
- Participants also agreed that the story of small-scale fishermen needs to be communicated to the public. Consumers now have a connection to their food by understanding the role that their farmers play in communities and in supplying their produce. However, these stories about fishermen are harder to find, and people feel less connected to their seafood.
- The Ecology Action Centre has done this with the SmallScales.ca blog, which provides weekly posts sharing stories and issues from Atlantic Canada's small-scale fisheries.

### **New market segments exist on which fishermen may capitalize**

- General consensus exists that new initiatives need to be undertaken to both preserve small-scale fishermen in Atlantic Canada and improve their economic viability. One of the best ways to achieve these goals will be through a focus on consistently high quality products that are distributed efficiently to regional, national and international target

markets that, in turn, recognize the value of high quality, responsibly harvested products and are prepared to pay a premium for them.

- Several market segments were identified:
  - a.** Consumers who care about how their fish was caught and who want to buy from the harvester as directly as possible. In the case of Atlantic Canada's 'direct to consumer' marketplace, most of the primary target market is located in towns and cities that already support a Farmers' Market and existing community supported agriculture and fisheries initiatives.
  - b.** Chef-operated restaurants who want to purchase more high quality seafood products to meet their professional expectations and customer demands. The secondary target market, in terms of geography, is located in Ontario and Quebec where there are a growing number of neighbourhood seafood specialty retailers and restaurants catering to a similar high quality product and sustainability-conscious consumers. It is necessary to identify chef-operated restaurants, located throughout the Atlantic region, Quebec and Ontario, who want to buy from the harvester as directly as possible and are also interested in opportunities to purchase normally undervalued high quality by-catch from sustainable harvesting methods.
  - c.** Institutional buyers such as universities and health care providers have proven to be an important market for marginalized fisheries (and fish) in the Northeastern United States. This market should be explored in Canada.

## **A Seafood Hub is viable solution to distribution and infrastructure challenges**

- The required infrastructure for efficient marketing and distribution of higher value products based on higher quality does not currently exist. A new business entity focused on developing and managing this infrastructure would be beneficial. This entity could use or leverage a combination of high-speed digital communications to market and manage products and third party transportation services to consolidate and distribute seafood products. There was consensus to further explore the model of a seafood hub for the Atlantic Provinces, a portal through which consumers could be connected to producers and processors in an effective, transparent way.

## **Values based brand or certification is a possible way to delineate Atlantic Canada owner-operator seafood**

- There was considerable debate and some scepticism about the need and benefit of creating a new values-based certification or brand for Atlantic Canadian sustainable seafood products. A core element of this discussion was differentiating this brand from existing certification programs. An enforcement or compliance aspect for participants was considered. It was agreed that this concept needs further review, discussion and development before both feasibility and desirability are determined.

## **Recommendations**

- Advance the concept of an Atlantic Canadian Sustainable Seafood Hub.
- An Atlantic Canadian Sustainable Seafood Hub would involve a "virtual" marketplace providing real-time information on products and landings as well as the use of existing and new processing, cold-storage, transportation and distribution infrastructure to aggregate and distribute seafood products. Further research into the corporate structure of the business

entity, its governance model, financial resources required, and market quantification must be undertaken. A leadership team to develop and implement the hub will also need to be identified and recruited. Steps required to move forward are:

- Identifying, educating and qualifying small-scale fishermen with the interest and/or potential to provide consistently high quality products.
- Identifying and communicating with potential third-party distribution partners.
- Evaluating efficient, high-speed, digital communications tools and processes for the entire value chain.
- Identifying and qualifying potential high quality seafood specialty retailers and restaurant chefs who can provide a demand platform on which to build the "Hub".
- Find and engage potential processing partners to facilitate the processing and packaging of high quality, high value products in small quantities.
- Extend the notion of sustainability beyond its ecological definition by integrating values of socioeconomic responsibility of individual fishermen and the often small communities in which they live.
- The EAC should continue its facilitator role as "honest broker" in gathering the key industry participants together in the search for common ground to promote economic, social and ecological sustainability for small-scale fishermen.
- The EAC should continue feasibility discussions amongst stakeholders until a consensus is reached regarding a new, values-based, certification and branding mechanism for Atlantic Canadian sustainable seafood products harvested by small-scale operators. A core element in this certification process that would differentiate it from other such existing

programs would be an enforcement or compliance aspect for participants.

- The EAC should continue to tell the 'story' of small-scale fishermen and their successes.
- Support value-added initiatives underway in the harvesting, marketing and distribution of premium quality lobster that show promise, if they continue to demonstrate positive results over the next several years.
- Develop traceability initiatives in all fisheries involved in partnership with ThisFish.



Photo: Courtesy of Fish, Food & Allied Workers

## Next Steps

What	Who	When
Distribute report widely, particularly to Department of Fisheries and Oceans and provincial Fisheries & Aquaculture Departments in Atlantic Canada with the goal of informing government staff and gaining support for further discussions and collaboration.	Ecology Action Centre (EAC)	February - Spring 2014
Develop a regional fishery strategy around a seafood hub comprising all the Atlantic Provinces, and beyond, as fish stocks are shared by Atlantic Canadian and US fisheries.	EAC along with fishing organizations	February - June, Spring-Summer 2014
Profile and broadcast the success stories to "storify" small-scale fishermen and make it tangible for consumers and market.	EAC SlowFish SmallScales.ca	February & March 2014 ongoing
Map existing processing and transportation infrastructure to support seafood hub.	EAC New Business Partners	February & March Spring-Summer 2014
Explore the development of a regional small-scale fishery brand incorporating the provincial branding that already exists, such as Taste of Nova Scotia, Select Nova Scotia, Flavours Prince Edward Island, etc.	EAC Provincial Government Restaurants	February - June Summer 2014
Maintain communications with interested parties and stakeholders while fostering new relationships where required.	EAC Workshop participants	On going

## INTRODUCTION

The Ecology Action Centre's Marine Program has been working on sustainable seafood marketing for over a decade. Part of a sustainable fishery is ensuring that fishermen and fishing practices that have a low impact on the environment are recognized and rewarded with market access and where possible, increased prices.

Atlantic Canada's fishing industry is built on small-scale, community based owner-operator fisheries. The products of the small-scale sector, however, are not marketed as such. This workshop explored whether it is possible to increase the value and employment in the owner-operator fisheries sector by tapping into markets that value high quality, social and economic sustainability and genuine connections with food producers. The momentum of local food movements, along with growing demand for sustainable seafood, has helped open the doors for small-scale fishermen to direct marketing opportunities. Consumers are increasingly willing to pay more for local, high quality seafood caught with low-impact gears, especially if the premium is invested back into the traditional fishery, local communities and the marine environment. The success of direct marketing initiatives such as Off the Hook Community Supported Fishery indicates strong local demand for local seafood. Additionally, there is demand for Atlantic Canada's small-scale fisheries at the national and international retail level that is not being met.

However, regional distribution remains one of the key deficiencies in Atlantic Canada's seafood sector. The post-harvest supply chain of seafood is aligned with the international commodity market, resulting in some of the region's finest seafood products being shipped overseas at low prices. Chefs and consumers have only sporadic access to fresh seafood. Further, developing markets for sustainable

fish can be challenging. A potential solution is to define a small-scale fishery value chain, starting with what consumers want - fresh, fair fish - and then establishing relationships that enable this value chain to be created and maintained.

This two-day workshop included panel discussions and facilitated discussions. The first day focused on identifying and meeting market demands, while the second day focused on mechanisms to differentiate Atlantic Canada's sustainable seafood products and bring these products to market. The following is a summary of the key findings of each session.

## IDENTIFYING AND UNDERSTANDING MARKET SEGMENTS FOR ATLANTIC CANADA'S SUSTAINABLE SEAFOOD

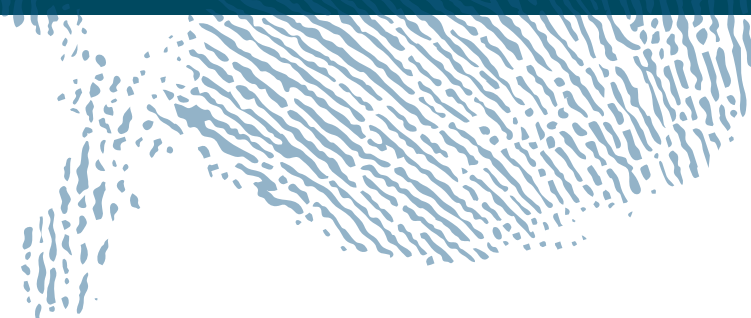
To better understand the market place and identify opportunities for Atlantic Canadian seafood, the workshop brought together the perspective of people working in different market segments, such as high quality retail, fine-dining chefs/restaurants, institutions and 'direct to consumer' marketing initiatives including farmers' markets and community supported fisheries.

Speakers were asked to present their perspective on the sustainable seafood marketplace, and identify challenges and opportunities where possible. The speakers included:

- Chris Aerni, Rossmount Inn, **St. Andrews-By-The-Sea, NB**
- Robin Poirier, Oceanwise, **Vancouver Aquarium**
- Dan Donovan, Hooked Inc., **Toronto, Ontario**
- Keltie Butler, **Farmers Markets of Nova Scotia**
- Brett Tolley, **Northwest Atlantic Marine Alliance**

<sup>2</sup> Beaton, Sadie (2010). "Local Seafood Direct Marketing: Emerging Trends For Small scale Fishers in Nova Scotia". Anchor Consulting.





The following is a summary of each market segment as presented by the panel:

## Gourmet Restaurants

### Chris Aerni –

#### Rossmount Inn, St. Andrews-By-The-Sea, NB

Originally from Switzerland, Chef Chris Aerni came to St. Andrews-By-The-Sea via Toronto. Since 2001, he has owned and operated the Rossmount Inn which features his well-regarded kitchen and dining room. When it comes to his food procurement, he defines local as Maritime Canada and Maine, USA. His customers are mostly tourists looking for fresh, high quality seafood. His success relies on understanding seasonality as a key element to identify high quality seafood and creatively using by-catch. Several other chefs were in attendance and contributed to the discussion.

The following **challenges** were identified:

- Sourcing local products can be a time-consuming challenge for chefs and restaurant operators.
- Seafood suppliers currently sell everything to export markets for very low prices, making it hard for chefs to obtain the seafood.
- The word “sustainable” is becoming a generic or undifferentiated term that is losing credibility and relevance.
- Many chefs find seasonality and species variability to be a barrier. However, like-minded chefs and restaurants can find that these features can add value.

## Sustainable Seafood Restaurant Programs

### Robin Poirier –

#### Ocean Wise, Vancouver Aquarium

Robin Poirier works for Ocean Wise, a Vancouver Aquarium conservation program created to educate and empower consumers about sustainable seafood issues. This national program uses a logo which is displayed by participating partners including restaurants, retail markets, and food-

service locations including universities and hospitals. Ocean Wise’s recommended species are based on four criteria; these are important aspects to create markets for high quality, sustainable seafood:

- Species is abundant and resilient to fishing pressures.
- Species is well managed with a comprehensive management plan based on current research.
- Species is harvested using a method that ensures limited by-catch on non-target and endangered species.
- Species is harvested in ways that limit damage to marine or aquatic habitats and negative interactions with other species.

## High Quality Retail/Restaurant Wholesale

### Dan Donovan –

#### Hooked Inc., Toronto, ON

Dan Donovan is the co-owner of Hooked Inc., a specialty seafood store, retailing to consumers and wholesaling to restaurants focused on high quality. All customer service personnel are trained by the chefs. Hooked Inc. currently provides seafood to 120 restaurant clients who represent the highest volume and fastest growing segment of the business. Donovan has worked quickly and collaboratively with chefs to help with menu planning and when necessary product substitution based on product availability.

#### Challenges include:

- Lack of understanding of fish distribution by consumers or chefs.
- Lack of existing infrastructure for distribution of locally caught sustainable seafood.

#### Opportunities /Solutions:

- Potential to promote lifestyle, culture and identity of seafood products and fishermen.
- Due to the lack of existing infrastructure, he created his

own product distribution system building a reputation on delivering high quality, fresh, local and sustainable products. He does not price-check competitors; instead he has focussed his business on attaining target margins, which include allowances for transportation and product yield.

- His success is also based on the development of under-utilized and non-commodity species.

## **Direct to Consumer Keltie Butler – Farmers' Markets of Nova Scotia**

Keltie Butler is the president of the Farmers' Markets of Nova Scotia. There are 45 farmers' markets in Nova Scotia - the highest number of farmers' markets on a per capita basis in Canada. While most are seasonal, a few operate year-round in indoor facilities. These markets have experienced rapid growth in recent years due to the significantly increased "buy local" interest of consumers. The core consumer group for farmers markets' are "foodies" with significant disposable income, who believe direct connections between harvesters and consumers are important. Most markets are looking for fresh seafood vendors.

### **Opportunities for sustainable seafood in Farmer's Markets:**

- Consumers are more interested in product quality than price, while also looking for information on cooking preparation.
- Markets are considered a good venue for consumer education about the value of local producers/harvesters to local economies.
- Consumers are interested in local, organic and sustainable products.
- There is an opportunity by selling at farmer's markets for small-scale fishermen and producers to develop and promote consistent messaging and policies regarding product quality and industry sector sustainability.
- EAC has an opportunity to help establish and maintain the

credibility of the small-scale harvester sector within farmers markets, given the organization's role with Community Supportive Fisheries.

## **Institutional Demand - Brett Tolley, Northwest Atlantic Marine Alliance**

Brett Tolley is a community organizer with the Northwest Atlantic Marine Alliance (NAMA), a fishermen-led organization that promotes small-scale, community-based fisheries. NAMA has recently focussed on institutions, connecting hospitals and schools with information about the community value of supporting local small-scale fisheries. In 2011, they also surveyed 100 schools to determine needs and opportunities to promote local sustainable seafood. NAMA also hosts public and institutional education events called "Seafood Throw-downs" to help develop awareness and markets for lower-priced by-catch species, including dogfish.

NAMA has played a key role in transforming policy to support local, sustainable fisheries based on seven key principles for choosing seafood:

- Buy from local fishermen whenever possible.
- Choose seafood that has travelled the least distance.
- Choose wild seafood whenever possible.
- Avoid farmed finfish and shrimp.
- Avoid fake or imitation seafood products.
- Get involved in a community supported fishery (CSF).
- Ask how, where, and when your seafood was caught.

**Challenges** in current sustainable seafood dialogue:

- NAMA does not see important “values” reflected in current certification programs such as Marine Stewardship Council.
- Missing values include wild ecosystems, local economies, labour and price paid to fishermen, scale of fisheries, healthy food and communities, and food justice based on access.

## Facilitated Plenary Discussion on Market Demand

**Question: What are the administrative barriers and what would be the economic value of the decision to move towards marketing small-scale sustainable community-based fisheries?**

While the current policy framework does not necessarily encourage small-scale fishing operations and the current export market is focused on a few buyers concentrating volumes of catch, the fact that Atlantic Canada has an owner-operator policy for its fisheries means that there is still considerable opportunity to differentiate fisheries on a place-based and fishery-based system that can distinguish itself in a local, regional and global market place.



Photo: Courtesy of Shan Daph Oysters

Opportunities	Barriers
<ul style="list-style-type: none"> <li>• Fish marketed 'direct to consumer' from small operators can yield a higher price</li> </ul>	Logistics for 'direct to consumer' or 'direct to retailer' are complicated and can mean extra workload for the fishermen
<ul style="list-style-type: none"> <li>• Certification is not necessary as traceability is inherent in 'direct to consumer'</li> </ul>	Logistics for shipping beyond an immediately local market need to be addressed
<ul style="list-style-type: none"> <li>• 37 First Nations fisheries have been granted access to commercial fisheries</li> </ul>	Fishermen rely on buyers for bait and ice as well as unemployment benefits
<ul style="list-style-type: none"> <li>• First Nations fisheries have potential to address regulated, seasonal products due to ability to fish year-round</li> </ul>	Many fishermen have established relationships with buyers and while some fishermen may want to explore other markets, it is hard to know where to begin
<ul style="list-style-type: none"> <li>• Establishing relationships: find a fishing port, processor and farmers market all close together</li> </ul>	
<ul style="list-style-type: none"> <li>• Explore local market and find who and where is willing to pay more for a good product</li> </ul>	
<ul style="list-style-type: none"> <li>• Telling the story! That's where a lot of value is added, especially for 'direct to consumer' opportunities with Farmers Markets, etc.</li> </ul>	
<ul style="list-style-type: none"> <li>• Potential for aggregating product at regional airports</li> </ul>	



## Addressing Product Quality

**Question: How do you develop best practices for seafood handling and incentivise harvesters to abide by them? How do you educate fishermen about handling fish properly?**

Wharf prices for many of Atlantic Canada's seafood products are currently determined based on auction prices in foreign markets such as Boston or Tokyo. In the current post-harvest supply chain, product quality and sustainability has little impact on the price paid to fishermen. These commodity prices are putting smaller, owner-operator vessels out of business as they cannot compete with industrial harvesters. They also lead to environmental damage, since fishermen are pressured to provide high volumes, using less sustainable gear.

- Many fishermen focus on best practices only when there is a direct connection to the end consumer, or when there is a direct financial compensation for higher quality products.
- Dialogue needs to go beyond "health concerns" to include ecological and socio-economic sustainability issues.
- Ask fishermen: What do you need to get paid to handle the fish the way I want it handled?
- Price first can cause fishermen to cut corners, so quality needs to be the primary concern. The quality needs to match the premium.
- Canadian Food Inspection Agency (CFIA) regulations relate primarily to processed rather than fresh or frozen whole products.
- Consumers are demanding high quality mackerel in Toronto's restaurant market. However, because mackerel is often considered a bait fish in Atlantic Canada, quality seafood handling practices are an issue.
- Sustainability is a triangle between the consumer, processor and harvester- but fishermen are often left out. Fishermen often don't understand the need for product quality as they have no connection to the consumer.

**Question: How do you handle the logistics, namely transportation, around rural fisheries and markets located in urban areas and make the numbers work?**

- At Off The Hook CSF, fishermen set the price. Afterwards, processors set their fees and, it travels down the chain. In this case, fillets end up at \$13.75/lb.
- Urban consumers will pay \$13.75 for quality fillets, but that's often too expensive for people in rural fishing communities.
- In the interest of local food security and making sure that fishing communities still have access to fish, Off The Hook CSF offers a discount for consumers in the local fishing community.
- Transportation costs can be removed from local community sales.

## MEETING MARKET DEMANDS

Once market demand has been established and quantified, the focus must turn to how to meet these demands. A panel of experts from various aspects of the seafood industry from Canada and the US was assembled to provide a framework for this discussion. Key points included:

- importance of involving the fishermen in telling their stories
- providing tools for traceability
- transparency and trust in the value chain
- engagement of all stakeholders in the value chain

### The panel included:

- David Decker, Fish, *Food and Allied Workers of Newfoundland*
- Tasha Sutcliffe, ThisFish, *ECOTrust Canada*
- Stewart Lamont, Tangier Lobster, *Nova Scotia*
- Keith Sullivan, Fish, *Food and Allied Workers of Newfoundland*
- Michael Dimin, *Sea2Table*



## Tracing Fish Back to the Harvester - Newfoundland Atlantic Halibut: David Decker, Fish, Food and Allied Workers of Newfoundland, Tasha Sutcliffe, ThisFish, ECOTrust

David Decker is Secretary-Treasurer of the Fish, Food and Allied Workers of Newfoundland and Tasha Sutcliffe is Vice President at Ecotrust Canada. David Decker explained that some resent fishermen-led changes in the derby halibut fishery in the 4R fishery region of Newfoundland and Labrador. Derby fisheries result in large quantities of product harvested in a short period of time as fishermen try to catch the maximum portion of the total quota for a fishery. The duration of the halibut fishery decreased in the early 2000s from all year to weeks to only 24 hours in 2011/2012. After 2012, it was agreed that a new approach was needed that would eliminate glut and help optimize value, provide benefit for active harvesters, decrease safety risks associated with extremely short competitive derby-style fishery and improve conservation by keeping landings within set quota. The new approach provided three options that would benefit active harvesters, meaning those active in 2012 with minimum of \$5,000.00 landed value in enterprise. These options include:

1. Twelve hours with 2,000 hooks and 2,500 pounds round per individual - no buddy-up allowed.
2. 5 days (Monday to Friday) with 1,000 hooks and 850 pounds round per individual.
3. 5 days (Monday to Friday) with 1,000 hooks and 1,250 pounds round per buddy-up (2 enterprises).

Further the plan required a maximum catch limit of Atlantic halibut for the entire season and that all Atlantic Halibut must be tagged. Traceability of individual fish is an important development in efforts to add value to the product and provide opportunities to increase price paid to harvesters.

Tasha Sutcliffe explained that ThisFish is a traceability and tagging program to identify who caught the fish, how it was caught, when it was caught and where it was caught. End-users/consumers can trace this data online by entering the code on the fish tag at the ThisFish website.

*“Off the Hook Community Supported Fishery is a for-profit cooperative which was created in 2010 by bottom hook and line fishermen from the Digby region of Nova Scotia. We provide weekly deliveries of fresh groundfish (such as cod, haddock and hake) to over 300 households in 12 communities in Nova Scotia and one in New Brunswick. Our subscribers benefit by gaining access to local, sustainable seafood, while our harvesters benefit by establishing a connection with the end consumer (a rare opportunity in fisheries), and by being able to fetch a fair price for their catch. As Off the Hook has grown, we have begun to wholesale our products to retailers and restaurants in Nova Scotia, Quebec, Ontario, and British Columbia.*

*While selling fish directly to consumers is an effective way to create a streamlined value chain and provides inherent traceability, when we wholesale our products we lose the direct connection to our consumers. We rely on ThisFish to provide that critical link. Our fish is more expensive than other fish of the same species on the commercial market that is caught by industrial fishing techniques, as it costs more to fish using environmentally benign (and less efficient) methods. The stories behind our fish (and the people who catch it) are an essential component of our value proposition. Using ThisFish we are able to distribute our fish to distant markets while not losing the connection we rely on between our harvesters and our end consumers. The chefs and retailers that we work with have learned to use ThisFish to add value to our products in order to justify the higher cost. Again, consumers benefit by knowing who caught their fish, when it was caught, how it was caught, and where it was*

*caught. Our harvesters benefit by the fair price that traceability supports, and by once again establishing a connection to the consumers. One of our favourite features is the two-way communication made possible by ThisFish. Not only can our harvesters communicate to consumers by telling their story, but consumers can send notes directly to the harvester through the ThisFish interface. This humanizes the post-harvest value chain for our fishermen in what is typically a difficult, dangerous, and thankless job. By establishing a link to the end consumer, ThisFish allows fishermen to be proud of their work and of their incredibly high quality product. Not only does ThisFish provide an economic benefit to our harvesters and value chain partners who support sustainable fishing, but it creates tangible social benefit as well."*

*-Dave Adler, Manager*

*Off the Hook Community Supported Fishery*

The FFAW feels that traceability of product is a key factor regarding improved product quality and revenue potential so they joined ThisFish program. Fourteen members of the FFAW have become the core of the program. Decker underlined the importance of having consistent education and marketing about higher value product. Developing a strong, collaborative relationship amongst value chain participants allows transparent discussion about pricing at all stages of the value chain. Sutcliffe also emphasised that storytelling and publicity about harvesters and seafood products are key parts of fishermen-led sustainability solutions.

#### **ThisFish features:**

- Not an auditor. Participation is voluntary, using the honour system.
- Designed to connect seafood harvesters and end-users.
- Provides higher prices for fishermen and encourages better handling practices.
- Efficient product distribution continues to be a significant challenge.
- The ability of harvesters to find out where their fish has travelled allows for two-way communication and creates accountability across the value chain.

## **Transparent Pricing and Producer / Processor Collaboration: Stewart Lamont, Tangier Lobster, Nova Scotia, and Keith Sullivan, Fish, Food and Allied Workers of Newfoundland (FFAW)**

Stewart Lamont is a seafood dealer/buyer based in Nova Scotia who is focused primarily on the growing Asian markets. He mentioned that it will take several years to establish consistent, larger volume relationships in marketplace and it is necessary to build trust. He highlighted that better product quality equals better price. He also stressed the opportunity to target export markets primarily in Asia where high quality seafood is demanded and premium pricing is possible.

According to Keith Sullivan, the FFAW is committed to maximizing harvester revenue. He contacted Stewart Lamont at Tangier Lobster who agreed to represent their product in marketplace. Lamont struggled with low commodity pricing in 2013 but he has been able to achieve a modest price premium for consistently high quality product. Both Lamont and Sullivan hope that by focusing on high quality lobster, fishermen will gain an even higher premium in the next year.

## Seafood Distribution: Michael Dimin, Sea2Table

Michael Dimin runs a family business based in Brooklyn, New York, that operates an online distribution system facilitating direct seafood shipments between harvesters and end-users. The company also uses third-party logistics (Fedex) for product shipments. A key transportation issue is maintaining the cold-chain for both fresh and frozen products while staying inside Hazard Analysis Critical Control Point (HACCP) guidelines. Sea2Table has a database of over 6,000 chefs across the USA who use the service. The business has also been developing relationships with institutional buyers such as universities and large food service companies.

Sea2Table participates as a member of The Future of Fish organization, which tries to evolve seafood supply chain to provide better prices for fishermen. It has established dock-side packaging and processing with existing players who understand their value added concept based on higher quality product. Key quality elements include flash freezing and slow refreshing, along with transparency and traceability of product origin.

### Small Group Break-out Session: What are sustainable seafood demand and supply challenges that need to be resolved?

There is a noticeable gap between the demand for sustainable seafood and the existing supply of catch from small-scale fishermen.

The example of lobster was used repeatedly to outline the challenges in achieving a balance between supply and demand that can also give fishermen a fair price. With lobster the problem is not demand related. Local consumers want

the product but don't have access to the supply. Thus, there is a disconnect between the supply of lobster and the local demand from consumers.

By-catch also poses a supply and demand challenge. Chefs like using by-catch, while fishers would prefer to avoid it. However, there was consensus that if fishermen land bycatch they should try to sell it. The on-going challenge is how to create added value along the chain for by-catch species without incentivising overfishing.

### Achieving Market Access

One of the biggest challenges to resolve is connecting independent fishermen to the local, regional and domestic markets. Small producers recognize that disconnection between suppliers, processors and markets is inhibiting the development of new relationships and new marketing strategies. While large, vertically-integrated companies can dedicate staff time and reinvest profits in marketing and exploring new buyers, this capacity is generally not available to small-scale fishermen. Fishermen also noted they don't have access to a lot of information on the international marketplace.

Legal access to local markets was also seen as a barrier. For example, despite a growing local demand for Newfoundland cod caught on the inshore, the requirement that fish be sold to licensed buyers prevents fishermen from developing local direct marketing strategies. In many communities, local seafood is sold but typically "under the table" because it is not legal to filet fish on a boat and then sell it.

<sup>3</sup> Hazard Analysis Critical Control Point (HACCP) is an approach to food safety that is systematic and preventive. It is recommended by the Codex Alimentarius Commission, the United Nations international standards organization for food safety. HACCP is used by most countries around the world. It has been in use since the 1960s. <http://www.inspection.gc.ca/about-the-cfia/newsroom/food-safety-system/haccp/eng/1346306502207/1346306685922>

<sup>4</sup> <http://www.futureoffish.org/>. Future of Fish Founders and Executive Director Cheryl participated in EAC's workshop "Social Impact Investing for Sustainable Fishing Communities" held in Halifax, April, 2013.

It was also recognized that while local sales are useful for building product brand and promoting local food consumption, local marketing alone would not solve the current problems of low prices and commodity markets. However, local markets can help set the stage for export to higher end markets that demand high quality and “storied” seafood.

The current focus on high volume, low price commodity markets was also seen as a barrier to small-scale fisheries looking to gain access to institutional markets, such as hospitals, universities, schools and military facilities.

### Distribution

Distribution challenges were identified as a significant barrier to creating a sustainable seafood value chain. In some cases current provincial policy does not allow for direct sales from fishermen to consumers or restaurants. Several participants remarked that it is easier to get fresh Atlantic Canadian seafood in Boston than in local communities and even regional centres. Handling procedures were also seen as an obstacle to selling seafood at Farmers’ Markets, and examples were given where seafood was not permitted at farmers markets.

Off the Hook CSF, which has been in operation since 2010, noted that distribution posed the most significant challenge to getting fish to customers. Fishermen have to deliver the fish as part of the vendor’s agreement and as a result travel four hours in one direction on a weekly basis during the OTH season. Cost of transport is also a factor in the sustainability of OTH. Unlike Sea2Table in the US, Nova Scotia fishermen are unable to use FedEx as a third-party distributor.

### Challenges and next steps:

- Moratorium on processing licenses in NS, claim overcapacity on processing because they’re already shipping everything out of the province.
- Unused capacity in existing transportation infrastructure must be mapped, and new infrastructure needs to be developed where needed.

### Quality

Buyers identified that acquiring quality seafood is a challenge. Fishermen also expressed quality as a challenge, in that there has often been little incentive to ensure good quality and well-handled fish. Some of the quality issues can be addressed by changing perception – for example, if fishermen are fishing a product for bait (i.e. herring, mackerel) they are less likely to ensure that the fish is properly handled.

Competition between buyers was also noted as a barrier – particularly when buyers preferred lower quality as a mechanism to bring down the overall price of fish to the fishermen.

Fishermen also rarely see a price increases based on quality, despite the fact that buyers in the room were saying that they would be willing to pay more if quality was guaranteed.

The closer the fishermen felt to the end buyer/consumer, the more they care about quality because they are accountable if the product is not good. This is where programs like CSFs and ThisFish can incentivize good quality and accountability with fishermen and at same time garner a higher price for the fish.



## Organizational Improvement and Relationships

One of the greatest challenges to achieving change along the value chain was in engaging fishermen directly in the solutions. Fishermen should be more involved in product marketing and branding and be willing to invest capital in these ventures. Further, the solutions require cooperation among individuals and even between fishing associations.

There is a significant amount of distrust and lack of transparency in the current supply chain and this was viewed as an obstacle to progress in linking supply and demand and getting equitable pricing. New relationships were seen as necessary between buyers and fishermen to build a resilient regional value chain. However, there is a perceived reluctance to risk current relationships between harvesters and buyers.

Differences in provincial policies were also raised as obstacles to achieving more cooperation between fishing organizations in different regions of Atlantic Canada. Coordination between government departments – for example linking the halibut or lobster fishing season to the tourism season to build in more value was suggested. This already occurs in the tuna industry, where a specific amount of quota is set aside for the recreational fishery. However, fishermen in PEI that have been discussing how to build value in the fishery feel that there has been no government involvement.

Participants also felt that there was only a small percentage of people who understand seafood enough to know the broad range of the market and different tools to expand markets. More information sharing and communication is needed.

## General Comments and Ideas

### What is “Sustainable”?

A discussion on the definition of “sustainability” included the following points:

- The current trend is to link “sustainability” to the environment. The sustainability of our coastal communities is equally important as the sustainability of our oceans. Therefore, social sustainability should play a more important role when defining sustainability in a fisheries context.
- Fishing is not only an industry with consumers and buyers. Communities must be included along with discussion about how the communities can be sustained.
- A production company may hold licenses and their products are labelled as sustainable and socially responsible while fishing may not be economically viable for the people supplying the raw product and therefore unsustainable.
- Organic labelling in agriculture has become questionable due to unregulated marketing. There are warning signs that the same may happen with sustainable seafood.

### **Demonstrate and Communicate Success**

There is a need to communicate examples of success in building seafood value chains for small-scale fisheries. Because fishermen are often occupied with the business of fishing, and fishing associations are busy with various tasks from science meetings, management meetings, dock-side monitoring programs, policy consultations, negotiations with processors etc, there is often little time to share success stories and communicate innovative projects to the public and to other fishing communities. The Ecology Action Centre has done this with the SmallScales.ca blog, which

provides weekly posts sharing stories and issues from Atlantic Canada's small-scale fisheries. Additional efforts were suggested, including:

- Promote successful models that do not involve ITQs/catch shares
- Engage harvesters and educate consumers

### Who can address these challenges?

While identifying challenges is a starting place, ensuring that the right people are on board to work on solutions is essential for achieving change. Part of defining the "who" is ensuring that those involved share a value system and also have a common understanding of the issues facing small-scale fisheries and the stakeholders who rely on them. Because this was the start of a much longer conversation, suggestions on who needed to be involved were broad and not specific. The challenges defined above need to be addressed through cooperation and collaboration between key players and be based on transparency, integrity and trust. In addition, it was agreed at the workshop that representatives from all aspects of the value chain must be involved at the outset - including fishermen, buyers, processors, distributors, marketers, wholesalers, restaurants, chefs, market managers, and policy makers.

### Key comments from the floor:

- We all need to be part of the solution. The fishermen have been left out of the equation for far too long. They need to be included in the conversations with policymakers, lawmakers, politicians, etc.
- We need to ensure that marketing boards are comprised of fishermen and community stakeholders. We also need people with expertise. We can't have individuals with vested corporate interests calling the shots.
- Ecology Action Centre has a role to play too.
- Action needs to start with fishermen's associations/industry.
- Lots of people through the whole chain need to get involved but much has to come from harvesters.

- Fishermen are unhappy with the state of things and acknowledge that change is needed but need to act!
- When the price goes up a bit and people are less worried about enacting change but need to be consistently adamant about improving things, even if there is a temporary improvement.
- Is there existing infrastructure for distribution? What are the reasons that it isn't working for us? Why doesn't the existing infrastructure does not capitalize on opportunities in small scale fisheries.
- Need a bigger, consistent market.
- Existing infrastructure may not capitalize on opportunities that might arise?

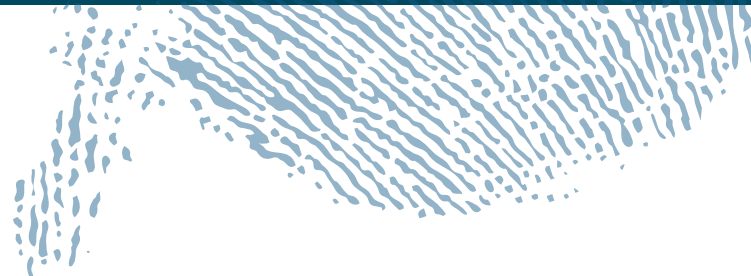


## Short, Medium, and Long Term Opportunities

A discussion on **SHORT, MEDIUM, AND LONG TERM OPPORTUNITIES** and Goals was facilitated. This is a summary of some of the comments:

SHORT TERM	MEDIUM TERM	LONG TERM
<ul style="list-style-type: none"> <li>• Use existing traceability tools (thisfish.ca) to promote accountability and add value to high quality products</li> </ul>	<ul style="list-style-type: none"> <li>• Create brand for Nova Scotia's small-scale fisheries</li> </ul>	<ul style="list-style-type: none"> <li>• Succession planning in fisheries</li> </ul>
<ul style="list-style-type: none"> <li>• Push back on regulations that don't make sense (e.g. dive-caught scallops not currently a permitted fishery)</li> </ul>	<ul style="list-style-type: none"> <li>• A hub! Need wider distribution beyond farmers markets</li> <li>• Creating a virtual platform to support marketing for seafood products in communities.</li> <li>• Online marketplace, live supply and demand</li> </ul>	<ul style="list-style-type: none"> <li>• Quota/licence banks</li> </ul>
<ul style="list-style-type: none"> <li>• Story telling! Use any tools possible (social media, etc) to tell the story behind small-scale fisheries</li> </ul>	<ul style="list-style-type: none"> <li>• Establish regional pricing for products rather than being tied to Boston auctions. Look to minimum pricing models in Newfoundland as an example</li> </ul>	<ul style="list-style-type: none"> <li>• Fleet diversity/protecting owner operator fleet</li> </ul>
<ul style="list-style-type: none"> <li>• Map and utilize existing transportation and processing infrastructure</li> </ul>	<ul style="list-style-type: none"> <li>• Maintain processing capacity (i.e. don't ship whole products to China and then re-import)</li> </ul>	<ul style="list-style-type: none"> <li>• Sustainability of coastal communities</li> </ul>
<ul style="list-style-type: none"> <li>• Explore value added opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Secure social finance for fisheries</li> </ul>	
<ul style="list-style-type: none"> <li>• Rebuild relationships among value chain stakeholders, re-build new ones where necessary</li> </ul>	<ul style="list-style-type: none"> <li>• Development and promotion of quality enforcement and incentives in fish</li> </ul>	

The following organizational, marketing and communications and funding opportunities were also identified. Building new relationships was seen as both an immediate need and a longer term opportunity.



ORGANIZATIONAL OPPORTUNITIES	MARKETING AND COMMUNICATION OPPORTUNITIES	FUNDING OPPORTUNITIES
<ul style="list-style-type: none"> <li>Organizational capacity among some fishing associations</li> </ul>	<ul style="list-style-type: none"> <li>Need to celebrate collective successes</li> </ul>	<ul style="list-style-type: none"> <li>Fish levees for money for marketing (i.e. 1 cent/lb of lobster from all harvesters)</li> </ul>
<ul style="list-style-type: none"> <li>New federation could be a possibility but still being explored</li> </ul>	<ul style="list-style-type: none"> <li>Various industries need to tell their stories! Fishermen in particular!</li> </ul>	<ul style="list-style-type: none"> <li>Follow the money trail. Where does the money go? Who gets it now and who gets it in the future? Answers could reveal money loss in the system</li> </ul>
<ul style="list-style-type: none"> <li>The use of existing tools like ThisFish and expanding these tools to encourage transparency, accountability and equity</li> </ul>	<ul style="list-style-type: none"> <li>Educating people on sustainable and responsible ways to fish and eat seafood.</li> </ul>	<ul style="list-style-type: none"> <li>Long term investments</li> </ul>
	<ul style="list-style-type: none"> <li>Using social media to create and ensure community-based markets</li> </ul>	
	<ul style="list-style-type: none"> <li>Targeting national and local markets using outreach programs and social media</li> </ul>	
	<ul style="list-style-type: none"> <li>Holding events and campaigns to advertise how to eat quality seafood, eating the whole fish, all the parts of the fish</li> </ul>	
	<ul style="list-style-type: none"> <li>Focusing marketing efforts on high value, responsibly harvested products, rather than commodity markets that value high volumes at low prices</li> </ul>	
	<ul style="list-style-type: none"> <li>Telling the story of legitimate enterprise and social responsibility in small-scale fisheries to consumers</li> </ul>	
	<ul style="list-style-type: none"> <li>Broadening seafood choices to include underappreciated species with healthy stocks</li> </ul>	



## EXPLORING OPPORTUNITIES AND IDEAS FOR ATLANTIC CANADA'S SMALL SCALE FISHERIES

Lack of differentiation in the marketplace between what is “sustainable” or fairly traded seafood and what is industrially produced limits marketing opportunities for small-scale fisheries. If product differentiation can occur through the development of a sustainability brand or certification, there remains the challenge of transportation and distribution networks to connect small-scale producers to appropriate buyers, and the mechanism to aggregate supply and streamline demand.

Two speakers were asked to present their perspective on exploring opportunities for sustainable seafood branding and an Atlantic seafood hub. The speakers included:

- Marc Allain - *Fisheries Policy Consultant*
- David Alder - Manager, *Off the Hook*

### Is there a need and opportunity for a new sustainable fisheries certification system for small-scale fisheries? Marc Allain, Fisheries Policy Consultant

Marc Allain gave a presentation to the group outlining challenges and opportunities facing small scale fisheries. The key points are listed here.

#### Global challenges:

- Climate change: increased carbon load in the ocean results in ocean acidification, which can have ramifications on plankton, the fundamental building block that sustains marine food webs; poses significant challenges.
- Global supply: after the second world war, factory freezer trawlers with advanced post-war sonar were fishing at industrial levels never seen before (tripled production);

fisheries jurisdiction was extended to 200 miles, resulting in a mild levelling off; but by the mid-1980s, effort had shifted and production increased in developing countries; overall production has increase sevenfold in 60 years.

- Aquaculture is now producing just as much food fish as wild fisheries; the wild capture fishery has been flat since 1985 (no growth), but human consumption has been increasing steadily.
- Aquaculture has been able to continue increasing—while wild fisheries have not—by rerouting where fishmeal and oils go; they are increasingly going to feed aquaculture operations; the aquaculture industry has been able to reduce the amount of fishmeal required to produce farmed fish, but hasn't been able to curb the amount of fish oil it has to use.
- Industrial aquaculture: exercised downward pressure on fish prices; what this does is drive up the price of wild fish. However, aquaculture production should flatten out, and the surge in aquaculture has resulted in more people eating more fish. This behaviour change could assist in driving wild fish sales.

#### Opportunities for enhancing what is working

Atlantic Canada is part of the world's largest, most productive, most sustainable fisheries sector. Globally, small-scale fisheries generate 90% of world's fisheries employment (half of whom are women) and 50% of wild fisheries production. In Atlantic Canada, owner-operator fleets in Atlantic Canada can be considered “small-scale.” These small-scale or owner-operator fisheries are a model of sustainable development but are largely invisible because they are being defined very narrowly by others.

## Challenges in the existing Sustainable Seafood Movement

- One study by the Monterey Bay Aquarium, noted that sustainability was not on a list of consumers' primary concerns when buying fish (food safety, price, type of fish, and health/nutrition were)
- MSC, now sold in Wal-Mart, pushed by DFO, etc.: but the MSC is not being honest. They have many contradictions: New Zealand hake, for example, is industrially fished, often by foreign vessels which have been accused of treating workers unfairly. Alaskan pollock is being fished at a rate of 2.5 million tonnes per year.
- MSC's annual reports do not contain information about industrial vessels.
- There have been broad concerns about MSC's performance on the water relating sustainability.

### Opportunities for a new standard:

- A global sustainable fisheries standard rooted in sustainable development values (it needs to be global because markets are global).
- Something credible that will set small-scale fishers apart from unsustainable fishing and aquaculture.

The technical consultation on international guidelines for securing sustainable small-scale fisheries at the United Nations Food and Agriculture Organization was presented as one step towards international consensus. A second draft of the Guidelines will be negotiated in February 2014, with a final version expected in June, 2014. The Canadian Independent Fish Harvester's Movement proposed the need for certification schemes in the Guidelines to be "based on social, economic and environmental sustainability and fair trade" for small-scale fisheries. If this clause remains in the final version of the guidelines, it will serve as a powerful tool for leveraging and opening the door. East Coast fisheries can take leadership in implementing these changes (there are still owner-operator

fleets, and ITQs haven't taken over, for example).

In the terrestrial food movement, "produite de terroir" is an important concept to consider for marketing and education. The French word "terroir" refers to the unique flavors and qualities that a region imparts on the products grown or raised there. Transferred to the marine environment, the concept becomes "merroir."

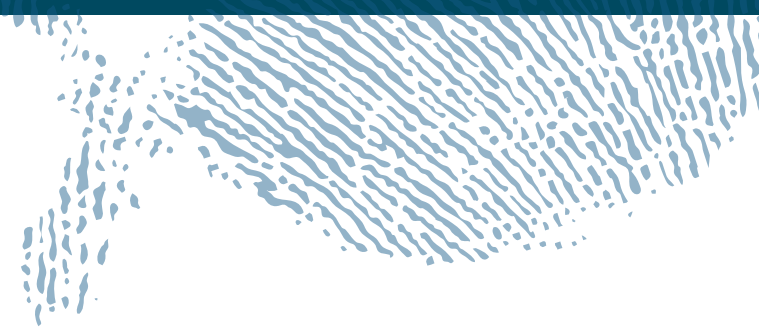


Photo: Courtesy of Off the Hook Community Supported Fishery

## SWOT Analysis: Sustainable Fisheries Certification

The concept of a new sustainable fisheries certification system for small-scale fisheries was explored in small groups using a SWOT (Strengths, Weaknesses, Opportunities and Threats) format. Summaries of the SWOT findings are included here, plus strategies that emerged from them.

Strengths (internal)	Weaknesses (internal)
<ul style="list-style-type: none"> <li>• Consumers are increasingly seeking the “story” behind their food, and small scale fisheries have great stories to tell</li> <li>• Small scale/sustainable fisheries generate higher quality products than industrial fisheries due to shorter trips, careful handling, shorter distance to market, etc.</li> <li>• We have fishermen who can supply sustainably harvested seafood, and market segments who are eager to buy it</li> <li>• We have a processing sector with the capacity to process high quality seafood in many forms (fresh/frozen/value added)</li> <li>• Atlantic Canada’s small scale fisheries produce a variety of top quality seafood all year round (i.e. there is always a fishery in season, no matter which month)</li> <li>• Atlantic Canada’s small scale fisheries represent a significant portion of the region’s economy</li> <li>• Consumers are looking for help in making purchasing decisions regarding seafood</li> <li>• Will promote honesty, integrity and transparency in fisheries</li> <li>• There is a growing willingness among small scale/owner operators from different communities and fisheries to work together to overcome common challenges</li> <li>• A “fair fish” brand would be transferable internationally, not specific to a place, region, or fishery</li> <li>• “Fair trade” labels are accepted as a proxy for quality and value by consumers in other markets</li> <li>• Fisheries groups already have a significant amount of experience with certification and standard setting Efficiencies have been established and the process has been streamlined in many fisheries</li> <li>• Already have an effective and adaptable traceability system in place (thisfish.ca)</li> </ul>	<ul style="list-style-type: none"> <li>• Currently, consumers don’t know where most of their seafood comes from, and fishermen don’t know where most of their catch ends up</li> <li>• Fishermen who harvest responsibly can’t find a fair market for their products, and consumers (including chefs) find it hard to find high quality, sustainably harvested seafood</li> <li>• The post harvest supply chain is currently fragmented, so currently there is no way to ensure that increased value created by fair trade brand will actually benefit the fishermen and communities</li> <li>• Gear-type/harvesting technique are not differentiated in the marketplace</li> <li>• The terms “small scale” and “sustainable” are difficult to define</li> <li>• Significant infrastructure and funding needed for certification body</li> <li>• Time needed to develop certification, need standards, enforcement, auditing, chain of custody, compliance</li> <li>• Certification may be missing the point: values based brand vs standard based certification</li> <li>• Small scale fisheries are already feeling overburdened- risk of a new set of standards being perceived as yet another set of hoops to jump through</li> <li>• From a small scales fisheries perspective, seafood is not currently fairly traded OR fairly managed</li> <li>• Possible exclusion of people who might be doing things right, but can’t get the certification (or are not interested)</li> <li>• Fishermen are generally change-adverse</li> <li>• Wary of new cost to fishermen &amp; more work for the producer</li> <li>• There is a problem of oversupply in many fisheries which this brand will not help resolve</li> <li>• Will people in other countries care in the case of exported? Will this brand be relevant?</li> <li>• Other than owner operators, other industry participants are perceived to be (and in many cases are) uncooperative</li> <li>• There is currently no unified coalition of small scale fisheries across Canada</li> </ul>



Opportunities (external)	Threats (external)
<ul style="list-style-type: none"> <li>• Fair trade fish label doesn't yet exist, so there is an opportunity to create it</li> <li>• There is a growing awareness of unfair practices in fisheries</li> <li>• There is a demand for seafood all year around</li> <li>• There are other groups internationally who are working to establish standards for small scale and sustainable fisheries, such as the FAO Small-scale Fisheries Guidelines. (Guidelines set for adoption in July 2014 at COFI). These guidelines could provide the basis for a fair fish brand.</li> <li>• Currently, consumers have very little idea of where their seafood comes from, but they'd like to know</li> <li>• Strong branding opportunity because in many cases gear-type is binary decision (hook and line vs. trawling)</li> <li>• Opportunity to diversify the supply model: currently large volumes for short periods, what about longer seasons with a diversity of products?</li> <li>• Partnership with existing international networks (Slow Food, small-scale fishery forums, etc.). Infrastructure is already in place</li> <li>• Opportunity to deal with certification and more responsibility on local level, with peers and community</li> <li>• Values based brands have been successful in other markets (i.e. coffee)</li> <li>• Develop more opportunities to give advice, question, compare each other's practices locally</li> </ul>	<ul style="list-style-type: none"> <li>• Small scale/owner operator fisheries are being put out of business by privatized, corporatized, consolidated, vertically integrated industrial fisheries</li> <li>• The current condition of owner operator fisheries is tenuous- these fisheries may become unsustainable because not enough young people want to enter the fishery</li> <li>• Coastal communities are at risk of socio-economic erosion</li> <li>• Unfair treatment of crew is a growing threat in fisheries</li> <li>• Industrial seafood industries are driven by commodity markets and foreign demand and typically do not appropriately address questions such as when, where, and how much we should fish</li> <li>• Other eco-certifications such as MSC are seen as exclusionary for small scale fisheries due to cost and effort required to meet requirements each year</li> <li>• Environmental factors such as ocean acidification are a threat to small scale fisheries</li> <li>• Potential for abuse of brand and co-opting by others</li> <li>• Current regulatory framework may hamper development of fair trade label</li> <li>• Potential to be dismissed as yet another label</li> <li>• Seeks to point out failings of other certifications, could become target</li> <li>• Companies already telling a "story", can we compete?</li> <li>• Risk of lack of uptake on global scale</li> </ul>



<sup>5</sup> Trafficked: Human Rights Abuses in the Seafood Industry [http://fishwise.org/images/pdfs/fishwise\\_human\\_rights\\_seafood\\_white\\_paper\\_nov\\_2013.pdf](http://fishwise.org/images/pdfs/fishwise_human_rights_seafood_white_paper_nov_2013.pdf)



## Strategies:

### Sustainable Fisheries Certification

#### SO (use internal Strengths to take advantage of external Opportunities)

- Leverage premium quality of sustainably harvested seafood along with fair trading to create value proposition of brand
- A “fair fish” brand would be transferable internationally, not specific to a place
- “Fair trade” labels are accepted as a proxy for quality and value by consumers in other markets. Use this pre-existing market condition to add to fair fish value proposition and to support premium pricing
- Use fair trade brand to help tell the stories behind sustainable seafood
- Use the brand to help consumers make purchasing decisions which will support our small scale fisheries
- Will highlight and support fisheries where greater return is seen by coastal communities
- Included traceability in Fair Trade brand (using thisfish.ca) to connect consumers to the food they eat (and producers to the people who eat what they catch)
- Celebrate seasonality in seafood to generate market demand for (and acceptance of) seasonal variability
- Use fair trade community to develop best practices in small scale fisheries

#### ST (use internal Strengths to mitigate external Threats)

- Provides a mechanism to bring fishing communities together, building sense of community, identity and a unified voice among small-scale fisheries. This will help build resilience and encourage succession in small boat fleets.
- Will mitigate risk of unfair treatment of crew by promoting honesty, integrity and transparency in fisheries
- Leverage quality of sustainable seafood to help mitigate

threat to owner-operator fisheries by corporate consolidation

- Expose unsustainable practices by establishing a consensus and common set of values as a platform from which to leverage change and open eyes.
- Provide an alternative to other eco-certifications that is based on a set of values and not on a lengthy bureaucratic process: un-intimidating, simple, and inexpensive for producers to take part in

#### WO (take advantage of Opportunities by overcoming internal Weaknesses)

- Greater market strength through unified fair trade brand can be used to leverage more equitable management decisions by fisheries policy makers
- Fair Trade brand could help unify small scale fisheries across Canada
- This is an opportunity to work towards a consensus on what we mean by “sustainable”, “small scale”, and “Fair Trade” in a fisheries context

#### WT (defensive strategies to minimize internal Weaknesses and avoid external Threats)

- Work towards greater transparency in post harvest supply chain to ensure equitable distribution of value in order to mitigate threats to small scale producers and processors
- Work towards gear-type differentiation in the market place and tie small scale fishing to value and quality in order to incentivise sustainable fishing

## Exploring the idea of a Seafood Hub in Atlantic Canada.

Dave Adler, Ecology Action Centre

Dave Adler presented the major findings of a regional value chain assessment recently released by the Ecology Action Centre:

**Pricing:** Most seafood pricing in Nova Scotia is based on prices that are set at fish auctions in New England. The auctions establish a regional baseline price that many Nova Scotia fish buyers consult regularly and use as the starting point for the prices they offer to fishermen. Additional costs of transportation, brokerage, insurance, and currency exchange are then factored in. Auction prices are based on the perceived quality of fish landed daily at each market, regardless of gear type. Therefore, the price offered to a hook and line fishermen in Cape Breton on any given day may be determined by the quality of fish harvested by a dragger off the coast of Boston. The result is that prices vary widely, unpredictably, and without any direct relationship to regional supply and regional demand. This leaves small scale fishers vulnerable to the price fluctuations of the international commodity market. The fundamental difference between Atlantic Canada and markets like Boston and Portland is that our fishing ports and population bases are too spread out to allow for a display auction. Through this business planning phase, we will investigate software and hardware solutions that will aggregate both supply and demand of sustainable seafood in order to create a virtual auction space.

**Distribution:** Regional distribution remains one of the key deficiencies in the Nova Scotia's seafood sector. The post-harvest supply chain of seafood is aligned with the international commodity market, resulting in some of Nova Scotia's finest seafood products being frozen at sea or at the dock, then being shipped immediately overseas or via truck

to the Northeast United States. Nova Scotia's best seafood literally drives right past Nova Scotians without stopping. The result is that chefs, retailers, and consumers have only sporadic access to fresh seafood, and seafood harvesters are beholden to the international market.

**Access:** Fishing families lack access to dependable regional markets, and consumers (chefs, retailers, individual consumers) lack access to dependable supply of fresh seafood. We identified five market segments where demand for sustainable seafood exists and have connected with individual potential buyers in those markets. By building the connections between producers and consumers, we plan to provide this access to sustainable seafood.

### The creation of a distribution hub is a solution to some of these problems:

- ☞ Access: How do fishermen access markets that will pay a fair price?
- Price: How do fishermen ensure a fair price, not dictated by distant markets? How do fishermen define value in a way that makes sense?
- Distribution: How to develop a distribution network that makes sense? The supply is currently disaggregated.
- There is a disconnection between suppliers and buyers. Buyers are often convinced that there is not enough small-scale fish to supply their needs, and harvesters find it difficult to find markets they can reach.

### Potential solutions:

- Clusters can be identified by analyzing an asset map of our province (suppliers, processors, farmers' markets, etc.)
- A CSF is not that hard to put together when there is a dock, a processing plant, and a farmers' market in the same hub/region.
- But a CSF is not enough to solve all of the current problems.
- Food hubs can serve to aggregate both supply and demand, supply and connect the two with a distribution network
- Physical structure: could range from a physical hub with infrastructure to a non-asset based virtual hub using existing infrastructure be a physical building, or a fleet, etc.
- Corporate structure: could be producer-owned co-operative, for example many options ranging from a producer's cooperative to a privately owned corporation. Need to research these to determine which structure is appropriate



Photo: Courtesy of Shan Daph Oysters



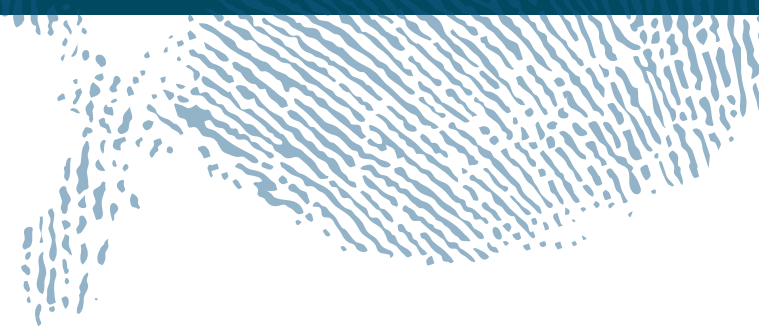
Photo: Courtesy of Corinne Dunphy

## SWOT Analysis: Seafood Hub

The concept of a seafood hub for sustainable fisheries was explored in small groups using a SWOT (Strengths, Weaknesses, Opportunities and Threats) format. Summaries of the SWOT findings are included here, plus strategies that emerged from them.

Strengths (internal)	Weaknesses (internal)
<ul style="list-style-type: none"> <li>• Atlantic Canada has ample supply of high quality, sustainably harvested seafood which varies from place to place and season to season</li> <li>• There is unmet demand in several market segments (local/regional retail, restaurants, farmers markets, institutional, domestic export)</li> <li>• We have a processing sector with the capacity to process high quality seafood in many forms (fresh/frozen/value added)</li> <li>• We have existing infrastructure – roads, government maintained wharfs, processing plants, cold storage, airport</li> <li>• We have existing 3rd party distribution operators: Canada Post/Purolator , UPS, Fedex, bus system, couriers, trucks from other industries and food systems, freight carriers (both road and air)</li> <li>• We have other successful distribution models to look towards (not reinventing the wheel: Sea to Table, Red’s Best, Red Tomato, terrestrial food hubs)</li> <li>• Themes like local, seasonal &amp; traceable are well established in terrestrial food systems</li> <li>• Supplying local, regional and domestic market segments will create resiliency in business model</li> <li>• Hub would only distribute sustainably harvested, fairly traded seafood</li> <li>• Strong branding potential</li> <li>• Farmer’s markets have been an effective way to access local markets for small scale farmers</li> <li>• Some Provincial funding opportunities exist</li> <li>• Some fishermen already marketing their products directly</li> <li>• Expertise to develop the IT framework to support the virtual hub is locally available</li> <li>• Already have an effective an adaptable traceability system in place (thisfish.ca)</li> <li>• There is a growing interest amongst many stakeholder groups (such as the one which gathered for the workshop) to work towards solutions in small scale fisheries and access to sustainable seafood</li> </ul>	<ul style="list-style-type: none"> <li>• Post harvest distribution is currently aligned with export market</li> <li>• Post harvest supply chain is currently fragmented: there is a lack of transparency and trust across steps in the chain</li> <li>• Relationships between harvesters and buyers/processors is transactional at best and feudal at worst</li> <li>• Fishermen may be reluctant to get involved with new distribution model for fear it will put their current arrangements with buyers at risk</li> <li>• Fishermen are generally not involved with marketing their products</li> <li>• Non-traditional financing will be necessary (social finance is relatively new)</li> <li>• If it is a virtual hub it will require a dependable aggregation and distribution system to support it (which does not currently exist)</li> <li>• Currently both supply and demand are fragmented</li> <li>• Atlantic Canada’s ports are geographically isolated from each other and from population centres, so things like a display auction are not possible and shipping is a challenge</li> <li>• There is a lack of data on demand side: we do not know what is being consumed – by whom, where and when</li> <li>• Perception that this will create more work for fishermen, who are already feeling overburdened</li> <li>• Requires organizers, leaders and capital to get started</li> <li>• Seafood is perishable and each species has a specific set of handling best practices that need to be developed.</li> <li>• New distribution hub may be seen as a threat to people who can’t participate and traditional buyers</li> </ul>





Opportunities (External)	Threats (External)
<ul style="list-style-type: none"> <li>• Consumers in many market segments ranging from farmers markets, to hospitals and universities, to major retailers, to restaurateurs, are seeking sustainable seafood from Atlantic Canada but can't access it</li> <li>• Using existing transportation and cold storage capacity to develop a 'non-asset' based distribution network has worked in other regions and markets (i.e. Red Tomato)</li> <li>• Existing farmers markets and CSAs represent a distribution opportunity</li> <li>• Values based brands have worked well in other markets</li> <li>• We have demonstrated through marketing studies and case studies that people are willing to pay more for sustainably harvested, fairly traded seafood</li> <li>• Shifts are occurring in the local food and food security movements that we can capitalize on by incorporating our values and stories in the discussion</li> <li>• Perception that there are a lot of financial leakages in system that should go to fishermen represents an opportunity to create a fair trade system through the development of a transparent hub</li> <li>• Development of best practices for premium quality seafood</li> <li>• Promotes quality assurance for consumers through transparency and traceability</li> <li>• Ability to bring together different fisheries, to combine and collaborate</li> <li>• Incentivises small scale, low impact fishing practices by creating a resilient value chain to provide financial sustainability to sustainable fisheries</li> <li>• Develop distribution hub concurrently with fair trade brand</li> </ul>	<ul style="list-style-type: none"> <li>• While the harvesting technique used by small scale fisheries may be environmentally sustainable, their businesses are not financially sustainable due to low prices and/or regulatory restrictions</li> <li>• Small scale/owner operator fisheries are being put out of business by privatized, corporatized, consolidated, vertically integrated industrial fisheries</li> <li>• The current condition of owner operator fisheries is tenuous- these fisheries may become unsustainable because not enough young people want to enter the fishery</li> <li>• Coastal communities are at risk of socio-economic erosion</li> <li>• Environmental factors such as ocean acidification are a threat to small scale fisheries</li> <li>• Currently most seafood pricing is determined by foreign markets and auctions such as Boston and Portsmouth</li> <li>• Potential for isolating and creating friction within fishery (fishermen might have a hard time dealing with existing allegiances)</li> <li>• Larger business attempting to undercut and compete based on price</li> <li>• Perceived value of some seafood (such as ground-fish) is not economically viable for small scale, sustainably harvested seafood</li> <li>• Green-washing by large scale competitors is a threat</li> <li>• Need to engage existing processors because there won't be more coming along (processor moratorium)</li> <li>• Current government (DFO/CFIA) regulations are obstacles to many small scale fisheries</li> </ul>



## Strategies: Seafood Hub

### SO (use internal Strengths to take advantage of external Opportunities)

- Bring value chain partners together creating sustainable seafood hub
- Leverage sustainable harvesting techniques to fetch higher prices, thereby making environmentally sustainable fishing financially sustainable
- Leverage existing infrastructure where possible to create distribution network
- Use available IT expertise to develop software platform to provide virtual hub which will connect buyers with available supply at prices that are detached from international commodity markets
- Use existing traceability system (thisfish.ca) to ensure that the story of each individual harvester is not lost through the aggregation process of the hub
- Capitalize on shifts occurring in the local food and food security movements by incorporating our values and stories in the discussion.

### ST (use internal Strengths to mitigate external Threats)

- Reduce potential for creating friction within fisheries by being inclusive, transparent, and clear about standards
- Use transparent pricing to shift the perceived value of seafood so that it matches actual cost and viable margins
- Use clear labeling and fair trade brand to mitigate threat of green-washing
- Engage existing processors and include them in post harvest value chain on a fee for service basis

### WO (take advantage of Opportunities by overcoming internal Weaknesses)

- Foster transparency and trust in value chain to ensure financial sustainability for all stakeholders in hub through equitable distribution of revenue

- Supply consumers in many market segments (ranging from farmers markets, to hospitals and universities, to major retailers, to restaurateurs) with sustainable seafood from Atlantic Canada by removing distribution barrier
- Use virtual hub to aggregate both supply and demand, and connect the two with distribution network
- Develop best practices to ensure quality for each species distributed
- Increase the ease of purchasing for smaller purchasers by aggregating variably sourced products into a singular hub. The biggest hurdle for small buyers is that only a small amount of each fish is being purchased. Aggregating supply allows for a one-stop shop that doesn't disadvantage singular suppliers.
- Build consumer confidence by providing consistent access to highest quality seafood

### WT (defensive strategies to minimize internal Weaknesses and avoid external Threats)

- Start small with a few key fisheries and stakeholder partners to minimize friction and reduce perception of threat to existing market players
- Work towards rebuilding new relationships between stakeholder groups to create a relationship based value chain that competes on quality, sustainability, and integrity rather than a transactional supply chain that competes on price. The end result will benefit coastal communities that rely on the long term viability of our fisheries, while protecting and incentivizing small scale, sustainable fishing by the owner-operator fleet.

## Exploring Distribution Options

(facilitated discussion)

### **Question: Distribution is a problem, so what about the possibility of physical or virtual auctions?**

Michael Dimin, from Sea2Table, explains that auctions bring people together, but based on his experience distribution should be organized in partnership with a third party. He acknowledges the value of auctions, but it's not the way he would approach it.

Dave Adler, from EAC/Off the Hook CSF, clarifies that disaggregated fisheries don't have the possibility to hold auctions because they are not dense enough. So there needs to be a virtual aspect.

### **Question: How do we avoid price undercutting among competing suppliers? Live trade and processing trade presents issues.**

Max Stanfield, former DFO staff, states that auctions bring buyers together so that they cut each other's throats, rather than promoting supplier/fisher infighting. He supports the idea of creating a forum and context in which there can be an interaction between potential buyers.

Philip Docker, from ShanDaph Oysters, recommends establishing cooperation among fishermen to avoid infighting. He proposes that small-scale fishermen need to stop competing against each other. According to him, through that lack of competition amongst each other, consistency can take shape and the market place can open up.

Marc Allain sustains that infighting will only result in feeding the low value, high volume commodity chain. Sharing the same view, Dan Donovan reflects that commodification and auctions tend to go together and breaking out of the commodity cycle is critical for the future of the small-scale fisheries.

Mike MacEachern, from PEI, explains that fishermen have been trained to fish in volume for commodity markets and the competition amongst fishermen is fierce because everyone is trying to outcompete each other. Breaking the commodity market is difficult when fishermen have been trained to get as much as possible, outcompeting fellow fishermen. Fishermen don't make enough money selling fish under the current market conditions, so it needs to change.

### **Question: How do you differentiate yourself to promote the value of quality? Making the distinction between wild caught and aquaculture, small-scale and industrial, etc.**

Lee, from PEI, tells that PEI fishermen are working closely with processors to bring in quality, proper handling, and proper storage.

Marc Allain reasons that MSC is probably not the way. Pushing and promoting personal values of local fisheries is a way of distinguishing small-scale fisheries from big groups such as Clearwater Seafoods. We can't replace conventional marketing and get rid of our buyers. We would need to have only some fishermen entering the CSF and Seafood Hub route, but this would further divide fishermen. Only a few would become "select" when entering the hub, while others remain behind.

Beau Gillis, from Off the Hook CSF, outlines that fish plants are already here and it is not necessary to re-invent the entire system. We just need to promote cooperation, and grow trust in existing relationships.

Susanna Fuller, from EAC, questions what is the value proposition for our fish, owner-operator, independent, community-based, etc. and advises against missing the opportunity to supply to the increasing demand for high quality fish. She restates that the demand is out there, but if we don't try to figure out what the steps are to get there, then we can miss the chance.

Elaborating on the need for a brand, Marc Allain explains there is a difference between certification and branding. For example, Fair Trade has grown significantly, and is now a symbol. When people see the symbol they think of the stories about farmers and the relationship that consumers have with their food. A potential solution to differentiate the product from small-scale fishermen is through a Fair Fish label or symbol that would tell story of fishermen to consumers.

Brett Tolley, from NAMA, says local seafood is an integral community value that we need to maintain a hold on and promote. The opportunity is not just about price, but also a "political base". Focusing on the local can help foster a local political base among individuals who can rally collectively behind the message of the fishery and promote and propagate their values.

Chris Aerni suggests looking at other industries for ideas, for example Certified Angus Beef in the US.

Phil Docker reminds the audience the need to ensure that there is a larger, overarching brand which also encompasses the smaller, personal story of the individual owner-operators. Small-scale branding is also crucial. Marc Allain proposes a regional branding as a potential solution, such as France's "Nos regions on du gout", "Our regions have taste".



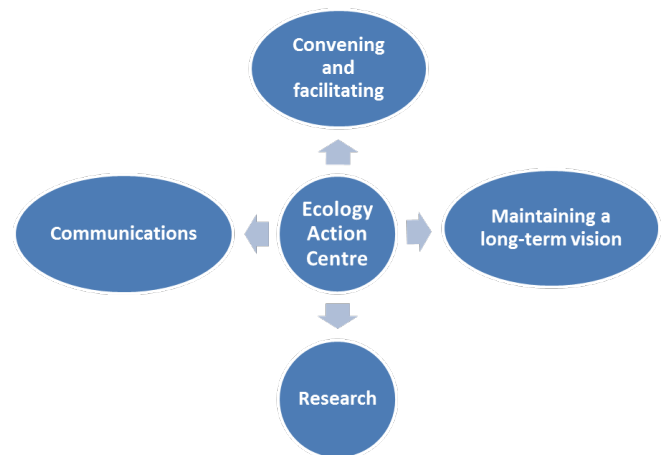
Photo: Courtesy of Slow Fish Nova Scotia



## What is the most productive role for the Ecology Action Centre?

Part of the motivation for bringing together diverse stakeholders who share the same set of values in terms of sustainable fisheries and fishing communities was to further clarify how the Ecology Action Centre can best utilize its capacity in our sustainable fisheries work. The EAC fully understands that there is sometimes little trust between conservation organizations and the fishing community and that sometimes they will not agree on specific outcomes or strategies. However, they also know that they have shared values and that the organization's connection to the market place as well as experience in leading environmental campaigns and strategies can be shared with the fishing community. They are also well aware of the fact that without sectoral support from the owner operator fishery, many of our longer term goals will not be realized.

The discussions resulted in the suggestions for an ongoing and future role for the EAC in **convening and facilitating** as an honest broker in the marketplace, in continuing to act in a **communications** role, and **conducting research** in areas for next steps around building a more resilient marketplace for sustainable seafood. EAC was also tasked with **maintaining a long-term vision** and working with government to protect small-scale fishermen, **acting as a watchdog** to ensure transparency in government decision making. Participants also suggested that EAC could help with developing the local market and national markets that would help fishing communities. National marketing would help bring seafood to different communities within the country, from Nova Scotia to Alberta for example. Fishermen don't have the capacity to sell all over the country so right now fishermen are losing national markets. Some people still believe that the only way to eat fresh seafood in Canada is living by the water.



### Convening and facilitating:

- "Keep developing events like this one to bring together people involved that can discuss these issues." The EAC is not a direct player in the marketplace so is perfect to bring everybody together.
- "Facilitate discussions with federal and provincial government representatives and continue to facilitate networks of people to problem solve."
- "More info exchanging needed!"
- "Facilitate creative funding options."

### Communications

- "Tell the positive success stories." Get the story of the fishermen out to the general public. Remove the secrecy.

Maintaining a long-term vision:

- "EAC should work five to ten years down the road. Someone responsible has to look at these issues in five years down the road."
- Rebuild and promote traceability. Watchdog; absolve secrecy and promote transparency/traceability.

### Research:

- Determine what kind of infrastructure we definitely need and what is already existing.
- How to structure network? What is it? A coop, a corporation, an online/virtual entity?
- Research! Need something between discussion and action, research what is really the right and most appropriate course of action.
- Continue to promote good public policy that supports the value of the resource from a social, economic, and environmental sustainability perspective.
- Encourage government to address fishery concerns in creative ways, rather than outright rejecting or proposals that are not supported by rarely achieved consensus.
- There needs to be more horizontal integration and two-way conversation between the fishermen and government.
- EAC needs to protect fishermen, and the resource, from counter-productive regulations.
- "Continue helping the little guys find local high value markets in our own backyard. Today's menu is a great example!"



Photo: Courtesy of Off the Hook Community Supported Fishery



Photo: Courtesy of Off the Hook Community Supported Fishery

## APPENDICES

### Appendix 1 Workshop Invitation & Agenda



#### WORKSHOP INVITATION

##### WHAT:

The Ecology Action Centre invites you to participate in a two-day workshop called **Creating a Sustainable Value Chain for Atlantic Canada's Small-scale Fisheries**.

We will bring together local, regional and international experts and industry participants to discuss models for improving the price for fish harvesters and identify markets. By bringing together fishermen, producers and distributors, we can foster collaborative relationships in order to develop a value chain that allows increased sales to targeted market sectors, at increased price and margin. We will also explore the option of a "Fair Fish" label or brand; one that recognizes and rewards sustainable catch methods while supporting owner-operator fishermen and their communities.

##### WHEN:

Wednesday, October 16th and Thursday, October 17th, 2013

##### WHERE:

Hart and Thistle Gastropub & Brewery, Historic Properties, Halifax, Nova Scotia

##### REGISTRATION:

Please register at <http://www.ecologyaction.ca/fisheries-workshop> by Wednesday, October 9th. Email Katie Schleit [kschleit@ecologyaction.ca](mailto:kschleit@ecologyaction.ca). Registration will be limited to 50 participants. Host hotel information available next week.

##### COST:

\$50 plus HST person, lunches and snack included. Payment arrangement information will be available next week.

##### ACCOMODATION:

We have booked a block of rooms at the Westin Nova Scotia on 1181 Hollis Street, a short walk to the Hart and Thistle. Please say that you are attending the Ecology Action Centre workshop to secure the \$129 a night rate.

##### CONFIRMED SPEAKERS – September 20

- **Dave Adler**, Community Supported Fisheries Coordinator  
Ecology Action Centre
- **Chris Aerni**, Rossmount Inn  
St. Andrews By-The-Sea, New Brunswick
- **Marc Allain**  
Fisheries Policy Dialogue
- **David Decker**, Secretary treasurer  
Fish, Food and Allied Workers (FFAW)
- **Michael Dimin**  
Sea to Table, Brooklyn, New York
- **Dan Donovan**, Hooked, Inc.  
Toronto
- **Susanna Fuller**, Marine Conservation Coordinator  
Ecology Action Centre, Halifax
- **Beau Gillis**, Fisherman  
Founding member Off the Hook Community Supported Fishery
- **Rob Johnson**  
Atlantic Coordinator SeaChoice
- **Stewart Lamont**  
Managing Director, Tangier Lobster
- **Keith Sullivan**, Assistant to the President  
Market Analyst, FFAW
- **Tasha Sutcliffe**, Vice President and Program Director,  
Fisheries and Marine, EcoTrust Canada
- **Brett Tolley**, Community Organizer  
Norwest Atlantic Marine Alliance, Gloucester Massachusetts



## OBJECTIVES

- Bring together small-scale fishermen, retailers, chefs and distributors to quantify the demand from different market segments for Atlantic Canada's ecologically and socially sustainable seafood.
- Explore different mechanisms for small-scale fishermen to meet these market demands.
- Identify barriers and opportunities to marketing by Atlantic Canada's small-scale fishermen including branding opportunities.
- Identify priority action items to move forward in the promotion of ecologically and socially sustainable seafood products from Atlantic Canada.

## SUMMARY

Atlantic Canada's fishing industry is built on small-scale, community based owner-operator fisheries. The products of the small-scale sector, however, are not marketed as such. This workshop will explore whether it is possible to increase the value and employment in the owner-operator fisheries sector by tapping into markets that value high quality, social and economic sustainability (e.g. Fair Trade) and genuine connections with food producers. The momentum of local food movements, along with growing demand for sustainable seafood has helped open the doors for small-scale fishers to direct marketing opportunities. Consumers are increasingly willing to pay more for local, high quality seafood caught with low-impact gears, especially if the premium is invested back into the traditional fishery, local communities and the marine environment. Additionally, market potential exists for Atlantic Canada's small-scale fisheries at the national and international retail levels.

However, regional distribution remains one of the key deficiencies in Atlantic Canada's seafood sector. The post-harvest supply chain of seafood is aligned with the

international commodity market, resulting in some of the region's finest seafood products being shipped overseas at low prices. Local and national chefs and consumers have only sporadic access to fresh seafood. Further, developing markets for sustainable fish can be challenging. A potential solution is to define a small-scale fishery value chain, starting with what consumers want - fresh, fair fish - and then establishing relationships that enable this value chain to be created and maintained.





## Draft AGENDA

### Wednesday, October 16

#### 8:30 – 9:00

Registration at Hart & Thistle, Historic Properties

#### 9:00 – 9:15

Welcome and Introduction to workshop

*Susanna Fuller, Ecology Action Centre*

#### 9:15 – 9:40

Building A Value Chain for Atlantic Small-scale Fisheries

*Dave Adler, Ecology Action Centre*

#### 9:40 - 10:00

Break

#### 10:00 – 12:00

Identifying the Market Demand for Sustainable Seafood

*Panel providing the perspective from different market segments - high end retail, national grocery store chains, gourmet chefs, institutions and consumer direct initiatives.*

*Facilitated Plenary Discussion*

#### 12:00 – 1:00

Lunch

#### 1:00 – 1:15

Introduction to Meeting Market Demands

*Dave Adler, Off the Hook*

#### 1:15 – 3:00

Meeting Market Demands Case Study Panels

Tracing Fish Back to the Harvester - Newfoundland Atlantic Halibut:

*David Decker, FFAW and Tasha Sutcliffe, ThisFish*

Transparent Pricing and Producer /Processor Collaboration:

*Stewart Lamont, Tangier Lobster and Keith Sullivan FFAW*

Seafood Distribution:

*Michael Dimin, Sea2table*

#### 3:15 – 3:30

Break

#### 3:30 – 5:00

Discussion and Marketing Sessions Recap

*Facilitated Group Discussion*

#### 6:30 – 9:00

Slow Fish Canada Reception & Dinner (payment separate)

*Elements Restaurant at Westin Hotel Nova Scotian*

### Thursday, October 17

#### 9:00 - 9:30

Review of Day One & Day Two Orientation

#### 9:30 - 10:00

Certifying the owner-operator fishery and socio-economic sustainability: Is there a need/opportunity?

*Marc Allain, Fisheries Policy Dialogue*

#### 10:00 – 10:15

Break

#### 10:15 – 12:00

Exploring the idea of a Seafood Hub in Atlantic Canada

*Dave Adler, Ecology Action Centre*

*Facilitated Group Discussion*

#### 12:00 - 1:00

Lunch

#### 1:00 - 2:00

Small Break Out Groups – Barriers & Opportunities

*Facilitated Discussion*

#### 2:00 - 3:00

Small Groups Report

*Facilitated Discussion*

#### 3:00 - 3:30

Wrap Up and Next Steps

## Appendix 2 Workshop Participants & Speaker Biographies

Name	Affiliation
Marc Allain	Fisheries Policy Dialogue
Chris Aerni	Rossmount Inn
Dan Donavon	Hooked
Michael Dimin	Sea2Table
Brett Tolley	Northwest Atlantic Marine Alliance
Tasha Sutcliffe	EcoTrust/This Fish
Stewart Lamont	Tangier Lobster
Andrew Chatham	The Whalesbone
David Decker	Fish, Food and Allied Workers (FFAW)
Keith Sullivan	FFAW
Suanna Fuller	Ecology Action Centre
Dave Adler	Off the Hook/Ecology Action Centre
Rob Johnson	Seachoice/Ecology Action Centre
David Jones	David Jones Associates
Keltie Butler	Farmer's Market Nova Scotia
Peter Connors	The Eastern Shore Fishermen's Protective Association
Kevin Squires	Local 6
Hubert Saulnier	Local 9
Ian MacPherson	Prince Edward Island Fishermen's Association (PEIFA)
Lee Knox	The Prince County Fishermen's Association (PCFA)
Beau Gillis	Fisherman, Off the Hook
Linda Walker	Casey Seafoods
Veronika Brzeski	Project Manager LFA27 Management Board
Ginny Boudreau	GCIFA
Stephan Leblanc	Fisher to Platter coordinator
Robin Poirier	Oceanwise
Ruth Innis	Maritime Fisheries Union
Christine Larade	Lobster Council of Canada
Mike McGeoghegan	PEI Fishermens Association
Ken Drake	PEI Fishermens Association
Brittany McGuire	Dalhousie Office of Sustainability
Martin Mallet	Homarus Inc.
Darryn Steeves	Saint Mary's University
Katie Schleit	Ecology Action Centre
Heather Grant	Ecology Action Centre
Candice Kanepa	Ecology Action Centre
Justin Cantafio	Ecology Action Centre
Nikole Poirier	Ecology Action Centre
Sadie Beaton	Ecology Action Centre
Lenore Burke	Fundy North
Maria Recchia	Fundy North
Ken Paul	First Nations
Max Stanfield	Retired
Philip Docker	ShanDaph Oysters
Hana Nelson	NS Department of Agriculture

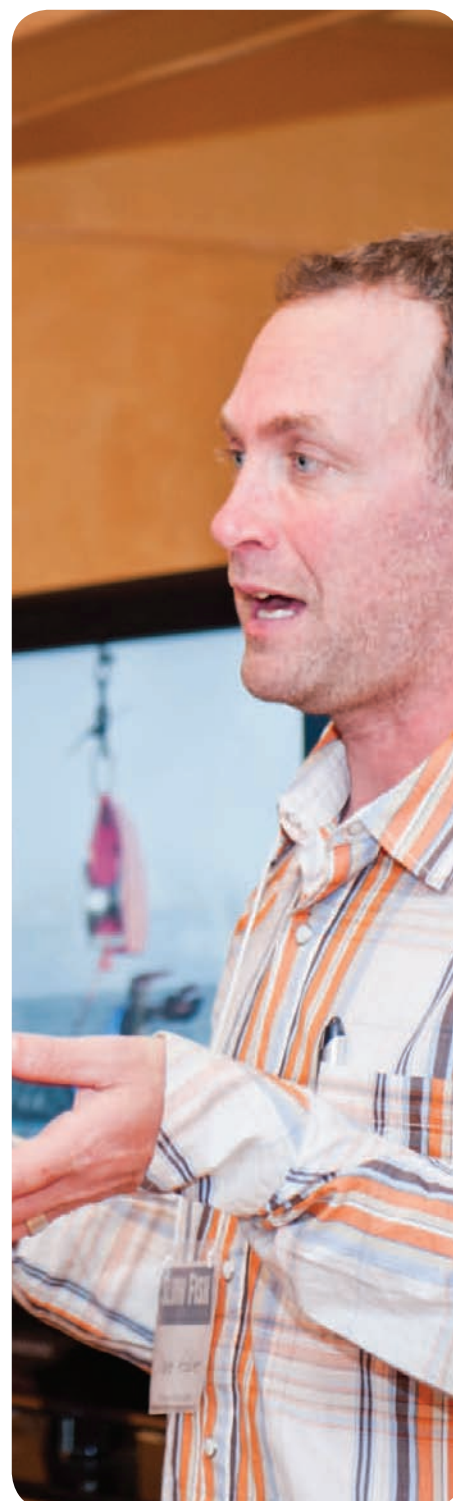


Photo: Courtesy of Cherry Pie Photography

## SELECT SPEAKER BIOGRAPHIES

### DAVE ADLER –

#### *Manager, Off the Hook, Ecology Action Centre, Halifax*

Dave Adler manages Off the Hook Community Supported Fishery, an initiative of the Ecology Action Center to establish a regional value chain for sustainable seafood by connecting small-scale fisheries to strong regional markets. He has a background in marine ecology and business, and holds an Executive MBA from Saint Mary's University in Halifax.

### CHRIS AERNI –

#### *Rossmount Inn, St. Andrews-By-The-Sea, New Brunswick*

In 2001, Chris and his wife purchased the Rossmount Inn in St. Andrews By The Sea, New Brunswick. Chris' kitchen has become an important training ground for young chefs and culinary students. Its daily menu focuses on the availability of the products from the kitchen garden, the nearby organic farmers, the community supported fisheries and not least the seasonal foraging. The Rossmount is an avid promoter of the Bay of Fundy, New Brunswick and Atlantic Canadian products, and Chris has become a regular speaker at sustainable seafood events along the Atlantic coast. Chris was also a member of the National Advisory Board of the 2010 Governor General's Table Awards.

### MARC ALLAIN –

#### *Consultant Fisheries Policy Dialogue*

Marc has more than thirty years' experience working on fisheries issues in Canada and overseas. His specialty is participatory policy development with fishermen and community based fishing fleets. He is a consultant on fisheries policy to numerous fishermen's organizations, ENGOs and the Canadian Fisheries Research Network. Marc has a Masters in Marine Management and a Bachelor of Arts (Political Science) from Dalhousie University. He is fluent in French, English and Spanish and lives in Chelsea, Quebec.



### MICHAEL DIMIN –

#### *Sea to Table, Brooklyn, New York*

Michael Dimin had a long career in the packaging industry before he and his family founded Sea to Table in 2005. Started by working with local fishermen on the island of Tobago, sending their catch directly to top chefs in NYC, Sea to Table now works with over 30 traditional fishing communities, creating better markets for their harvest, delivering directly to over 600 kitchens across the United States, connecting fishermen and chefs.

### DAN DONOVAN –

#### *Co-owner, Hooked Inc., Toronto*

Dan Donovan and his wife Kristin opened Hooked in March 2011 in the Leslieville neighbourhood of Toronto and Kensington Market neighbourhood in October 2012. Dan and his wife are chefs with years of experience with food as cooks, chefs, restaurateurs, caterers, wine educators and culinary teachers. For a number of years, they have been part of a shift in the chef community that is bypassing the traditional supply chain and buying directly from producers. They are motivated by both quality choices and a need to clarify where our food comes from; how it was handled and why. They are proud to deal personally with local fish farmers and Great Lakes fishers, knowing exactly where the fish was caught, how and when. They handle all of their own freight to ensure that they have control of the fish from the moment the boat arrives at the dock, both on Western and Eastern shores.

## **SUSANNA FULLER –**

### ***Marine Conservation Coordinator***

Susanna has been an active member of the Ecology Action Centre for over a decade, working on marine, transportation, and green building issues, editing the Centre's quarterly publication, and serving as Chair of the Board for three years. She became the Marine Conservation Coordinator in 2006. This past year she was recognized for her tireless effort on behalf of the environment and communities with an "Activist of the Year" award from Halifax's weekly paper. Susanna finds time to recharge her batteries by enjoying gardening, cycling, and a fine pair of boots, among other things. An Islander through and through, she finds solace both in the frenetic bustle of downtown Manhattan and the serenity of small coastal communities like Ramea, Newfoundland.

## **ROB JOHNSON –**

### ***Seachoice Atlantic Coordinator***

Rob has a diverse background of NGO and corporate program coordination and project management, as well as varied research experience. He has a master's degree in Natural Resource and Ecosystem Management from Stockholm University, and is a passionate advocate for the application of ecosystem-based management principles, resilience thinking applied to socio-ecological systems, and community-based adaptive management approaches to marine conservation. He strongly believes in the promotion of sustainable fisheries and sustainable seafood initiatives as important aspects of a wider marine and coastal management framework for healthy oceans that support healthy communities.

## **STEWART LAMONT –**

### ***Managing Director, Tangier Lobster Company Limited***

Tangier Lobster is a live lobster export firm to the international Marketplace. Lamont has a Bachelor of Law and Masters in Public Administration from Dalhousie University. He is a Board Member of the Lobster Council of Canada and a coastal advocate. He writes and speaks extensively on behalf of wild fisheries.

## **TASHA SUTCLIFF –**

### ***Vice President and Program Director, Fisheries and Marine, EcoTrust Canada***

Tasha Sutcliffe serves as Vice President of EcoTrust, and also Director of the Fisheries and Marine Program, a position she has held since 2007. She brings extensive experience in fisheries, community economic development and business systems. Prior to joining EcoTrust Canada, Tasha spent nine years as the Regional Director for the Community Fisheries Development Centre in Prince Rupert, where she worked with First Nations, governments, community organizations, businesses, and industry to create community economic alternatives in the face of reduced commercial fishing opportunities. EcoTrust is an enterprising non-profit whose purpose it to build the conservation economy in coastal BC and beyond.

## **BRETT TOLLEY –**

### ***Northwest Atlantic Marine Alliance***

Brett comes from a four-generation commercial fishing family out of Cape Cod, MA. He has worked in the fishing industry hanging nets, working on boats of various gear-types, and digging steamers on the flats of South Beach and Monomoy. Codfish and clams paid for his education at Elon University where he received a degree in International Relations with a focus on Social Justice. The Northwest Atlantic Marine Alliance is a fishermen-led organization that promotes small-scale, community based fisheries.



## Appendix 3

### Post Workshop Survey Results

#### Sustainable Seafood Workshop Evaluation Survey - Compiled Results\*

*\*Compiled from 11 survey responses. Accurate as of November 13, 2013.*

#### 1. What stands out for you about this workshop?

Common themes included praise for the high level of professionalism and diversity of the group of individuals who attended the event, which included non-profit members, fishermen, fishing organization members, non-profit organization members, chefs, food distributors, and fish processors, among others. Participants noted several characteristics about the group as a whole, which included an action-oriented approach, shared values, qualified stakeholders, a high level of optimism, and a high level of engagement from all participants. Participants also noted that the event was well organized and ran smoothly despite the diverse array of speakers, multiple events, and tight deadlines.

#### 2. How did this workshop improve your understanding of what a regional value chain for sustainable seafood is and how it could be developed?

Several participants noted that they had already done research on and/or had heard of value chains before the workshop. A general theme, however, was that the case studies highlighted during the workshop helped to further clarify what value chains are and how they can be forged and expanded. A focus on Atlantic Canada also helped to put the concept into a regional context. Some participants noted that the workshop helped them distinguish the difference between supply chains and value chains.

#### 3. What worked well in the workshop?

Common themes included the diversity of the crowd, the strong educational aspect of the presentations, the utility of

the small group activities, the quality of the locally sourced seafood which was featured during the meals at the workshop, the sharing of information, the organized structure of the presentations, and the respectful and diplomatic disposition of the group in general.

#### 4. What could have been improved?

The most common theme noted by the participants was high level of background noise in the adjacent restaurant during busy hours which proved distracting at times. Other common themes included the need for more diversity in the highlighted species (there was a noted lobster bias), a need for increased interactivity between workshop participants, and a need for increased opportunities for intermixing and networking.

#### 5. What new ideas did the workshop generate about developing a regional value chain for sustainable seafood?

One of the most common themes identified included the new methods through which a regional sustainable value chain could be developed: chiefly a regional seafood hub and "fair fish" certification. Participants appeared to be interested in both the virtual and physical seafood hub ideas.

**6. What do you think is needed next to help take action? The following are suggestions that were made during the workshop. Please rank each suggestion in order of importance, with 1 being lowest priority and 5 being highest priority.**

Suggestion	Lowest priority	Low priority	Moderate priority	High priority	Highest priority	Rating
“Fair Fish” Sustainable Seafood Brand/Certification Development	9.1% (1)	18.2% (2)	36.4% (4)	0.0% (0)	36.4% (4)	3.36
Regional Sustainable Seafood Distribution Hub	0.0% (0)	9.1% (1)	27.3% (3)	36.4% (4)	27.3% (3)	3.82
Regional Market Development To Support Small-scale Fisheries	9.1% (1)	0.0% (0)	27.3% (3)	36.4% (4)	27.3% (3)	3.73
Web-based Sustainable Seafood Distribution Hub	0.0% (0)	0.0% (0)	27.3% (3)	27.3% (3)	45.5% (5)	4.18
Regional Branding/Storytelling	0.0% (0)	0.0% (0)	36.4% (4)	45.5% (5)	18.2% (2)	3.82
Help from Government	9.1% (1)	18.2% (2)	27.3% (3)	27.3% (3)	18.2% (2)	3.27
Connect Fishermen with Processors	9.1% (1)	9.1% (1)	36.4% (4)	36.4% (4)	9.1% (1)	3.27
Other ideas about next steps not listed*	0.0% (0)	0.0% (0)	20.0% (1)	40.0% (2)	40.0% (2)	4.20

\*Note: Only five detailed responses were given for the “other ideas about next steps not listed” suggestion. The five “other” ideas were: modifying fisheries management approaches from a commodity (high effort, export focused) approach to a diversified (low effort, multiple species/methods focused) approach (rated 4/5); consulting the “fair trade” coffee model (e.g. Just Us!) for its applicability to a regional “fair fish” brand (rated 5/5); working with DFO (rated 4/5); expanding the US market (rated 3/5); and establishing a EAC Marine Program-led sustainable seafood hub (rated 5/5).



Photo: Courtesy of Off the Hook Community Supported Fishery



**7. In the workshop we discussed the development of a values based "Fair Trade" brand for regional sustainable seafood. Please list the values that you feel are important to be represented by the brand.**

The most common values noted by the participants were: ensuring a fair price for fishermen, sustainable fishing practices, maintaining independent (owner-operator) fishermen and an independent fleet, local distribution, small-scale fisheries, lack of additives, ensuring traceability, fishing gear selectivity, fish size selectivity, low impact fishing gear, focusing on importance of regional and seasonal availability, environmental and social responsibility, high quality-focus, low carbon footprint, detachment from the commodity market, safe working conditions, and sustainable management.

**8. How would you like us to communicate about this with you in the future? (Email, post, etc.) How would you like to be involved in the next steps?**

All 11 participants stated that they would like receive communications by email. Other ideas include establishing an online forum to enhance stakeholder engagement and facilitating volunteer opportunities.

**9. Any other feedback?**

The majority of participants simply gave thanks and praises for this section, however several participants voiced interests in particular issues. One participant noted that the EAC Marine team should take the lead on building a sustainable seafood hub initiative. Further discussion regarding the size and extent of regional markets and their potential expansion was also requested. Another participant held that there exists a need to improve communications between processors and suppliers in order to debunk myths and work together to expand markets.

One participant noted that they don't believe that third-party certification is the most effective method to expand markets and fetch a fair price for fishermen. Instead, they espoused a direct trade model, claiming that fostering relationships (starting with the fishermen) would be more applicable to the value chain concept. This participant called for a value chain based on ensuring sustainable livelihoods, with a community focused, relationship-driven model.





## Appendix 4 Workshop Slow Fish menus



# SLOW FISH

NOVA SCOTIA

**An evening of Good, Clean & Fair Fish**  
 October 16, 2013 • 6:30 pm • \$50  
 Elements on Hollis • 1181 Hollis Street, Halifax, NS

Join us for guest speakers and a menu that features some of Nova Scotia's best local, fresh seafood.

**- RAW BAR RECEPTION -**  
 Shucked Oysters, Quahogs & Scallops • Apple Thyme Mignonette • Smoked Bacon & Celery Vinaigrette • Green Onion Salsa Verde  
 - Shan Daph Oysters -

**- DINNER -**

**OCEAN PERCH**  
 Wild Mushroom Consommé • Roasted King Oyster Mushroom • Gremolada  
 - Off the Hook Community Supported Fishery -

**CHEDABUCTO BAY SHRIMP AND HAKE BOUDIN**  
 Malted Tomato, Leek & Fennel • Fried Leek Kings • Shrimp Oil • Radish Shoots  
 - Chedabucto Bay Trap Caught Shrimp -

**ALBACORE TUNA**  
 Seared Rare • Egg White Vinaigrette • Cornfl Grape Tomatoes • Arugula • Yellow Bean • Black Olive  
 - Sambro Fisheries -

**HALIBUT**  
 Limpia Rye & Toasted Pumpkin Seed Crust • Pumpkin Caponata • Pumpkin Urchin Bisque Sauce  
 - Off the Hook Community Supported Fishery -

**SPICED APPLE CAKE**  
 Apple Thyme Compote • Cinnamon Anglaise • Vanilla Ice Cream

Space is limited. For reservations call 902.496.7960 • Menu is subject to change based on availability.

<b>Wednesday, October 16, 2013</b>	<b>Thursday, October 17, 2013</b>
<b>10:30am</b>	<b>10:30am</b>
<b>Coffee &amp; Water Station</b>	<b>Coffee &amp; Water Station</b>
<b>12:00 noon</b>	<b>12:00 noon</b>
<b>Hake Fish Taco</b> Local greens with guacamole, tomato jam, lettuce & tomato – calypso rice	<b>Pan Seared Haddock</b> with crisp fried capers – jasmine rice
<b>Steamer Clams</b> Hart ale, lemon, sea salt & parsley	<b>Salt Cod Fritters</b> with lemon herb mayo or romolade
<b>Nigiri Sushi Sea Urchin</b> with a sweet soy & wasabi drizzle	<b>Peel 'n Eat</b> Local cold water shrimp with a citrus butter & white wine
<b>Pulled Pork Sliders</b> Slow Braised in Hart BBQ with frizzled onions	<b>Little Jerk Sliders</b> Jerk rubbed Chicken breast with habanero, banana ginger aioli & spicy mango slaw
<b>2:30pm</b>	<b>2:30pm</b>
<b>Coffee &amp; Water Station</b>	<b>Coffee &amp; Water Station</b>

Menu subject to change based on whether the fish bite, the shrimp get trapped, the divers find urchins, and the clambers find clams.

