

Globalization, Fisheries and Recovery

Report of the CURRA Globalization Group

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Burnt Islands

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Introduction

This project looks at fisheries and fishing-dependent communities of western Newfoundland in the context of broader regional and globalization processes, especially those affecting labour markets and markets for fish products. We hope to answer several inter-related questions: 1) *How is the fishing industry functioning in the post-moratorium period and what are its future prospects?* 2) *How can we best understand the current situation of, and prospects for, communities that have been dependent on the fishery?* 3) *How have they adjusted to the collapse of the groundfish fisheries?* 4) *What new opportunities are being pursued and what challenges exist, particularly in terms of labour and markets?* In the course of our research, we also found evidence of social and cultural change in these communities, which we will take into account as we address the core questions.

We selected three areas for case studies: Burnt Islands on the southwest coast (with some attention to Port aux Basques, the nearest services centre), St. Anthony on the northeastern corner of the Great Northern Peninsula, and Port au Choix, located about half way up the western coast of that peninsula. The first two showed signs of innovative strategies and increasingly diversified economies in 2008, when our work began, whereas the third appeared to be still largely dependent on what remains of the fishery. These initial impressions proved to be only partially justified according to our research data.

Population Trends

Population loss in rural Newfoundland is widely discussed in popular, bureaucratic and academic venues, although it varies greatly from place to place. As indicated in Figure 1, the post-moratorium period is marked by dramatic declines of 31 to 57 percent between 1991 and 2011 in our locations. The communities most dependent upon the fishery (Burnt Islands and Port au Choix) fared much worse than the regional centres of Port aux Basques and St. Anthony, but even they lost a much greater percentage of their people than the province as a whole.

It is possible that the declines are close to over, as respondents in all areas noted that some younger people had recently returned and that more new houses were under construction than they could remember in the past. This was also supported by recognition of labour shortages in construction and construction-related trades. A St. Anthony interviewee raised this with respect to local construction, whilst cabinet-making labour shortages were mentioned in Port aux Basques. Nevertheless, for the years 2006 to 2011, population still fell in all centres, but less than in the previous five-year period.

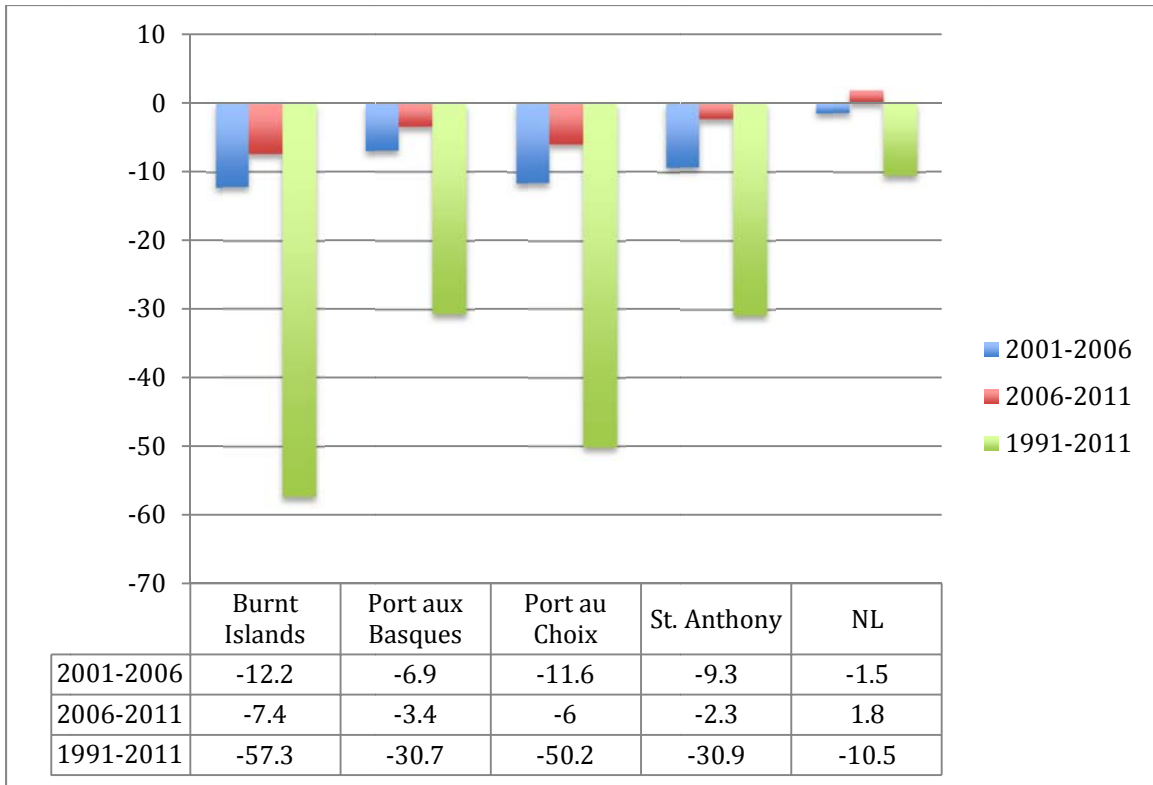


Figure 1: Population Change, Selected Periods (%)

Source: Statistics Canada, Census of Canada 2006, community profiles; Census of Canada 2011- www.statcan.gc.ca.

The population changes are due to a net out-migration flow and this movement is primarily composed of young people, some of whom may eventually return. That leads to concern about the greying of the communities. We examined the age structure in 2006 and discovered some evidence to support this belief, although the places we studied (except Port aux Basques) were close to the provincial averages for median age and percent of the population aged 15 and over (Table 1). Port aux Basques and St. Anthony appear to have attracted older people from neighbouring villages, which helps to explain the higher percentage of those over 65 compared with Burnt Islands and Port au Choix. In all locations, the number of people in their fifties far exceeds the number aged 10 to 19, reflecting trends across the island.¹

¹ Rounding in the census reports make the percentage figures somewhat unreliable.

Table 1: Age Distribution of Population, 2006

	Burnt Islands	Port aux Basques	Port au Choix	St. Anthony	NL
Total population	705	4320	895	2480	505470
0 to 4 years	25	200	35	105	22865
5 to 9 years	25	185	40	135	25905
10 to 14 years	45	225	50	145	29455
15 to 19 years	50	250	75	155	34105
20 to 24 years	40	180	40	130	31190
25 to 29 years	30	180	45	125	27425
30 to 34 years	50	230	45	150	30940
35 to 39 years	50	280	75	190	36535
40 to 44 years	70	345	75	185	41670
45 to 49 years	70	395	90	195	42770
50 to 54 years	85	440	100	215	42805
55 to 59 years	65	335	90	185	39370
60 to 64 years	40	320	50	150	30160
65 to 69 years	10	240	35	105	22160
70 to 74 years	15	180	15	80	17530
75 to 79 years	25	150	15	80	13505
80 to 84 years	10	115	5	75	9425
85 years & over	5	70	15	75	7650
Median age	42.9	46.1	42.7	42.9	41.7
% 15 years & over	86.5	86	85.5	84.4	84.5
% 65 years & over	14.9	17.5	9.5	16.7	13.9

Source: Statistics Canada, Census of Canada 2006, Community Profiles

Given that most publicity on population in our research area refers to out-migration, it is worth noting that the 2006 census shows some movement into these areas from outside NL, although it is understandably modest. Still, as many as 10.1 percent of women in St. Anthony had moved there from other provinces in the previous five years. This probably reflects the importance of the hospital in the local economy (see below). The employment-related mobility of the work forces in the three areas was high when compared with the province as a whole. This type of mobility includes those who report having no fixed place of work. These workers accounted for more than one-third of the workforce of Burnt Islands – mostly men (Figure 2). In some cases such as those working as fish harvesters, other boat workers or truckers, this reflects people whose workplace itself is mobile.

Figure 3 represents those who report a usual place of work that is outside their province of residence (distinct from the no fixed address variable). As can be seen, approaching half of Burnt Islands and Port au Choix men fall into this category, which is much more than in St. Anthony and the province as a whole. We suspect that this reflects the old pattern of working on Great Lakes boats (common in Burnt Islands) and the more recent attraction of Alberta's oil fields.

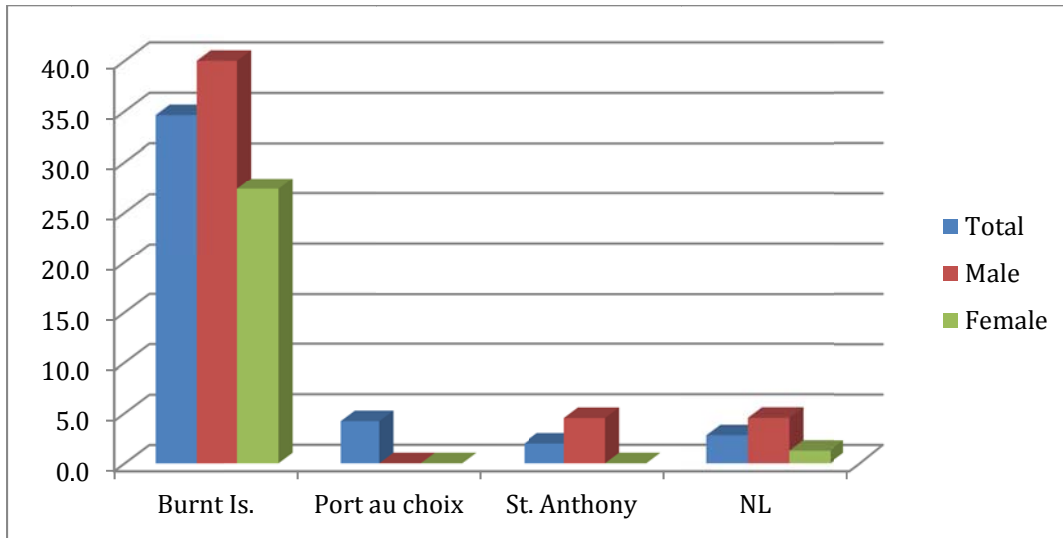


Figure 2: Percent of Working Population (15+) Reporting No fixed Workplace Address. Source: Statistics Canada, Census of Canada 2006

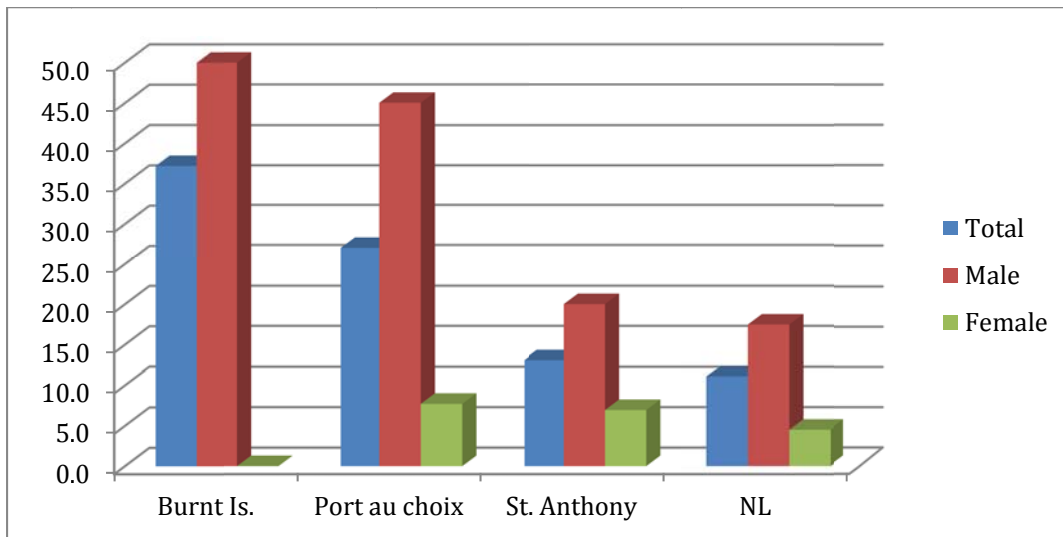


Figure 3: Percent of Working Population (15+) Reporting Usual Place of Work as Out of Province. Source: Statistics Canada, Census of Canada 2006

Employment and income issues

Data on incomes (2006) in the three communities we studied indicate that St. Anthony was more prosperous, as might be expected from the greater diversity of its local economy (Table 2). Indeed, St. Anthony compares favourably with the province as a whole. Dependence on transfer payments was much higher in Port au Choix, likely reflecting higher EI use and the seasonal nature of employment in this more fisheries-dependent community.

It is possible that labour market adjustment through the outmigration of so many people since 1991 has kept income levels from declining. Moreover, money transfers from those who have left may add to the income of some local people. Such remittances, however, tend to be understudied, due to data limitations.

Table 2: Selected Income Measures, 2006

Av. Couple Family Income

St. Anthony	\$72,200
Port au Choix	\$61,900
Burnt Islands	\$67,400
Port aux Basques	\$61,000
NL	\$69,200

Personal Income Per Capita

St. Anthony	\$24,000
Port au Choix	\$20,900
Burnt Islands	\$22,100
Port aux Basques	\$21,200
NL	\$22,800

Transfer-dependence (2005) (% of total income from government transfer payments)

St. Anthony	21.3
Port au Choix	39.2
Burnt Islands	22.8
Port aux Basques	27.2
NL	20.4

Source: Statistics Canada, Census of Canada 2006, Community Profiles

These factors may explain the initial surprise that personal income data, when adjusted for inflation, are higher in 2007 and in some places never fell much

below the 1992 level (Figure 4). Port au Choix incomes declined sharply after 1992 as this town had benefitted from the dragger fishery that closed in 1993, but from 1996 real disposable incomes began to recover. Previously, Port au Choix was more prosperous than the province as a whole and our other study site of Burnt Islands. By 2007, incomes in Burnt Islands rose to slightly higher than Port au Choix when both were a little below the provincial average.² These figures do not indicate that the communities were thriving, as the improvements in per capita income largely reflect the loss of economic opportunity and resulting outmigration.

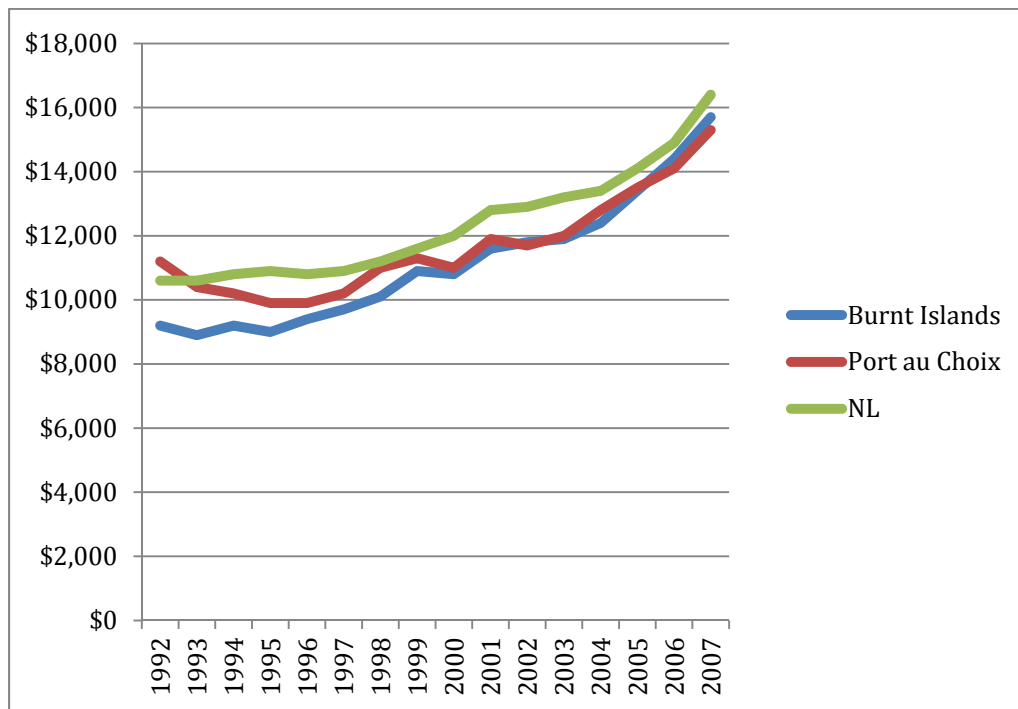


Figure 4: Real income in 1992 dollars, 1992-2007.
 Source: Newfoundland and Labrador, Community Accounts, taxfiler data.

Fisheries-related labour issues

The unfolding story of fisheries employment reflects the interplay of labour demand and labour supply in a changing market. At times there has been an excess supply of labour in the wake of falling demand, and more recently there is talk of a shortage of labour, both in these areas and across the island. In addition, of course, the fisheries labour market is not a classic 'free market' given the extent of government regulation concerning who has, and can have,

² Due to changing geographical boundaries, time series data on income are not available for Port au Choix and Port aux Basques in recent Newfoundland and Labrador's Community Accounts (accessed 29 March 2012).

processing and harvesting licenses, not to mention the role of the union in negotiating both prices and wages.

Fishery-based employment in the three areas has declined, though data sources conflict somewhat on the extent and pattern. Our key informant interviews indicate a decrease in employment in the plants, the inshore and the under-65 foot fleet (nearshore). The GNP Fisheries Task Force (2006:37) reports that the number of harvesters decreased from 1,601 to 1,347 between 2000 and 2004 in the Nordic Zone (based on data from the Professional Fish Harvesters Certification Board). Harvesters decreased from 640 to 564 in the Red Ochre Zone in the same period. Processing employment in the Nordic zone decreased from 449 to 402 workers between 2000 and 2004 (based on data from the Department of Fisheries and Aquaculture, NL) and in Red Ochre from 799 to 499 (hours of work also decreased).



The nearshore dragger fleet in Port au Choix

Falling labour demand – impact on employment and earnings

This decline in employment was precipitated by changes on the demand side of the labour market, caused by resource collapse (cod), changes in regulations (licensing, quotas) and changes in species (shrimp vs. cod). Employment levels in the plants decreased with closures and with the changeover to shrimp, which is less labour intensive than groundfish processing. Similarly, the under 65-foot

fleet was reduced from 63 to 50 boats. The inshore fishery has struggled with a loss of resource and loss of buyers. Until recently, it appeared there was an excess supply of labour in the industry – people who were interested in employment in harvesting or processing could not find work.

The downward shift in labour demand has been accommodated partly by decreased employment and partly by falling earnings. In the plants, while wage rates may have been maintained, the season has shortened and earnings have fallen for many. In the inshore, while some have left, many have hung on, despite falling earnings – often using strategies to keep more of the income in the family (e.g., wives fishing) or the ‘buddying up’ system, described in the next section. The nearshore fleet saw both a reduction in numbers of boats and earnings from the pre-moratorium heyday (Port au Choix interviews). While some hung on despite falling earnings, given their investments in the industry, homes and communities, the lower earnings have made the industry less attractive and the excess supply of labour has dried up.



St. Anthony fish plant

Efforts to increase earnings in harvesting

Meanwhile, the remaining harvesters are looking for ways to offset falling earnings and prices that vary radically from season to season. One way is to focus on the demand side (including markets, as discussed below). The other is to focus on reducing the supply of effort, through professionalization and fleet rationalization. Professionalization reduces labour supply and increases skill, putting upward pressure on earnings (for a reduced labour force). Fleet rationalization initiatives take different forms, involving adjustments to licence transfer regulations, quotas and vessel replacement rules. One example is allowing ‘buddying up’ - two license holders fish their quotas together, which reduces their capital costs and thus increases their earnings (but neither the number of people fishing nor the total effort). Another example is allowing

licenses and quotas to be bought, which increases earnings by reducing the number of fishers (and boats, usually). In shrimp, it extends the season, as the larger quota takes longer to catch, making it more attractive for crew also.

The model currently promoted is 'self-financed fleet rationalization' (discussed further below). The challenges are different in a fishery with individual quotas, such as shrimp, compared to one where fishers compete to catch an overall quota, or are limited by seasons and size and gear limits, such as lobster. In shrimp, you can double-up on the quota, but in lobster you can only double-up on the gear (the number of pots). In lobster there is an interest in looking at ways to combine licenses (reducing employment numbers) and also reduce the number of traps (Senate Committee on Fisheries and Oceans 2009). The former concentrates existing earnings among fewer fishers, while the latter puts upward pressure on prices by reducing effort. However, while initiatives like this aim to decrease effort, other policies over the years have worked in the opposite direction. In 2009, the Federal Government launched the \$50 million *Atlantic Lobster Sustainability Measures* (ALSM) program to address industry sustainability through conservation and stewardship, harvester organization governance, and restructuring and rationalization (DFO, 2009). Eligible groups of harvesters from the Atlantic region and Quebec can apply for funding under this program to assist them with fleet reduction and rationalization. Other policy initiatives have facilitated the movement of licenses. Licenses can be moved around so that in a particularly lucrative area like St. John Bay the number of lobster fishers has increased. Licenses that were not in use can also be activated, increasing the effective labour supply. Limits on the number of pots also impact on the number of active fishers and their earnings.

It should be noted that the goals of regulatory programs include resource sustainability as well as earnings enhancement – goals that can sometimes conflict. For example, combining lobster licenses will make fishing more lucrative for the remaining fishers, but will not reduce pressure on the stock, unless the number of pots is also reduced. There may be short-term and long-term trade-offs (higher earnings in the short-run vs. sustainable resources in the long-run). The challenge is to find policies that minimize such trade-offs (see *Renewal of Atlantic Fisheries Action Plan for Fleet Rationalization 2009*) and, according to one of our informants, a commitment from the Federal Government to ensure that resource sustainability is a priority built into the *Fisheries Act*.



Rainy weather at Straitsview near St. Anthony

Emerging labour shortage?

Harvesting

Is there a labour shortage in harvesting? In the short term, inshore fishers do not seem to be looking for crew – in fact, the challenge is that they cannot afford extra crew (buddying up and taking wives fishing reduce the dependence on crew). It is the shortage of enterprise earnings, not a labour shortage, that drives the desire to economize on labour. Given that harvesters are not looking for crew, it is hard to know whether the supply is out there. We heard mixed accounts of whether it was increasingly difficult to find crew for the under 65-foot boats. Some noted it was hard to keep a crew, with the pull of Alberta. On the other hand, we were told that doubling up stretched the season and made it easier to keep crew.

What is clear, however, is that the short-term strategies have created a longer term labour shortage issue – how will an aging group of harvesters be replaced? In 2010, the Red Ochre Zone Board carried out its own survey in all communities from Trout River to St. Barbe. The result suggests that the number of fishers will decline dramatically as the current group retire. Figure 5 shows very few fishers in the two youngest groups, only 7.5 percent of the total.

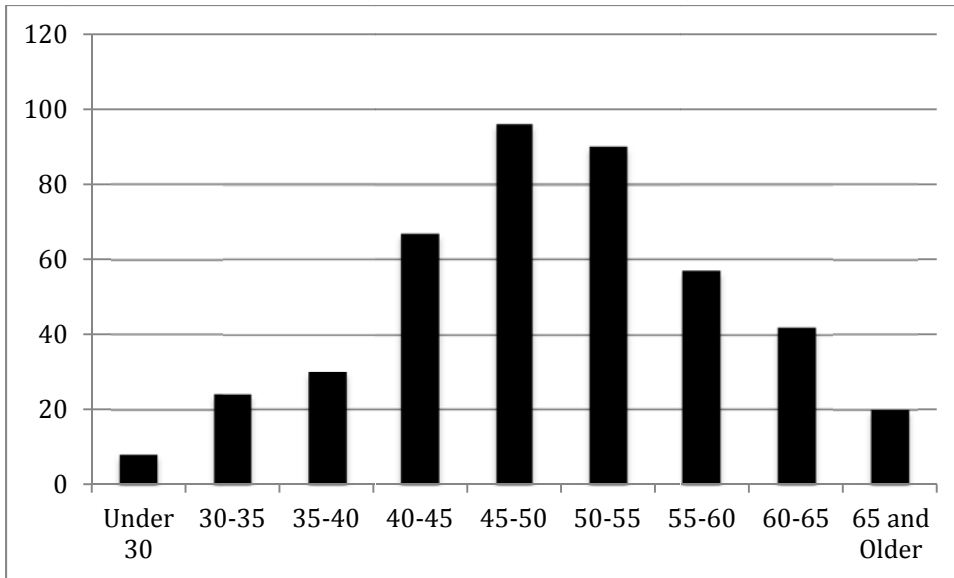


Figure 5: Number of fishers by age group, Trout River to St. Barbe. Source: Red Ochre Zone Board survey.

Low earnings, industry volatility and restricted entry have meant few young people have joined family fishing enterprises, especially in the inshore. It also means that self-rationalization of fleets is problematic – young people or working crew can't afford to buy the assets needed to take over enterprises (especially in the inshore), and aging fishers have to rely on the value of their assets to fund retirement. In some cases this creates problems even in turning over an enterprise to an interested son. As one shrimp boat owner put it: "It's a million dollar enterprise and you can't just give away the boat."

The federal and provincial governments have been reluctant to commit any funds to help with buyouts, as evidenced in reactions to Newfoundland and Labrador's recent Memorandum of Understanding on its fishing industry. The MOU process began in July of 2009. The Federal Government was an official signatory on the memorandum, and while then Fisheries Minister Gail Shea stated publicly that she was supportive of the initiative, she did not indicate that Ottawa would contribute money to any proposed rationalization measures (Roberts 2010). Ironically, the final MOU report, released in February of 2011, was rejected by the Government of Newfoundland and Labrador on the grounds that it dealt too much with rationalization, and did not focus enough on restructuring (see Walsh 2011). In it, proposed industry buy-outs totalled nearly \$450 million (MOU 2011) with most proposals suggesting that such buy-outs should be a government responsibility. Since the report, no provincial or federal funding has contributed to a formal rationalization process; however, the industry continues to self-rationalize, particularly in the processing sector.

Our interviews with key policy, union and industry informants indicate that there are mixed reviews on what model will work best and be most acceptable to alleviate problems in the sector and address overcapacity. On several occasions,

informants suggested that public support for increased public funds devoted to industry rationalization and buy-outs would not be strong. Furthermore, self-rationalization will not be adequate to address the long-term renewal of the harvesting labour force. As one informant told us, self-financed rationalization might work on the dragger fleet, with their higher earnings, but not in lobster.

Processing

The processing sector also faces challenges. Like the harvesting sector, it suffers from overcapacity. Similar to the harvesting sector, it is difficult and often impossible for processors to “get out,” given a projected lack of investment return as well as community pressures. Fish processing plants have long been recognized as central economic components of rural Newfoundland, as they have provided employment opportunities for local people. This employment has also meant individuals can qualify for EI benefits.

Employment has, however, declined in the processing sector and seniority rules in plants have limited the opportunities for new entrants since the moratorium. Those who managed to hang on through the demand-led changes are an aging workforce. This means serious changes in the labour supply side of the picture are imminent. In one plant we were told that 75 percent of workers were over the age of 45. One response to an aging workforce is to have an early retirement program, which has been advocated over the years. While this is attractive to workers who are facing many more years of hard physical labour in the plants, our interviews suggest it would not solve the labour supply challenge facing the plants. At one point it might have both helped the older workers and reduced unemployment in the communities. Now, however, as one manager put it “we would be out of business” as there is no one to replace them.



Port au Choix dragger with fish plant in the background.

The supply of people willing to work in the plants has declined. This partly reflects opportunities elsewhere. Also, a generation has been raised that has been discouraged from seeing a future in the industry, particularly in fish plant work – which is now considered by most not to be a “good job” (MacDonald, Sinclair and Walsh 2012). This does not mean no one is around to work – it means they are not willing to work for the earnings presently available in the industry. One manager noted that people are looking for higher wages and year-round employment. An employment counsellor said there were not a lot of new jobs in the plants and “people don’t want them anyway.” Wharf jobs seem particularly hard to fill, as the hours are sporadic; they are considered ‘jobs you could do in Alberta’ (fork lift drivers, electricians, engineers) where wages are known to be better. From the point of view of the plants, the options are to increase earnings (perhaps in combination with technological changes and better capacity management) or to find an alternative supply of labour willing to work under current conditions. In discussions with plant managers and others it became clear that NL plants are contemplating a future where they may have to rely on foreign, often temporary migrant workers, as has been the case in PEI. \

Is there an alternative? Again, we come back to the demand side discussed below – only if the product market side of the equation significantly changes will plants be able to provide the conditions that would be attractive to the next generation of workers. Like the harvesters, the processors emphasize that only by getting the price up (through marketing, value added, and quality) can they offer better jobs. Plants are also trying to adjust their labour demand through strategies such as managing capacity and spreading out the season – i.e. providing better work for fewer people, reducing excess capacity in the industry, and innovating so they need less labour. It seems, however, that in the current market conditions this cannot be done without some government money (St. Anthony plant manager).

Some differences exist by community. In St. Anthony, the plant competes with higher paid local jobs (hospital) as well as jobs out west, and is already feeling the pinch. The Port au Choix plant is finding it hard to fill management and wharf jobs. They cannot offer steady work for the latter, or pay high enough wages for the former. In general, the 2008 recession did ease the labour pinch, as more people were willing to work for what the plants could pay.



Burnt Islands fish plant

Fish production and marketing chains

In studies of various commodities, it has become common to view the stages from the inputs of primary production to final consumption as interconnected links that form commodity chains (Brown et al. 2010; Gereffi and Korzeniewicz 1994; Jackson et al. 2006; Quark 2008). Although other terms such as network may better capture the many different links that extend from a chain node (e.g. the fish, vessels, machinery, fuel, labour, regulations and financing that all contribute to the operation of a fishing enterprise), the term 'chain' has shown remarkable longevity and is acceptable when limited to the idea that products or commodities are best understood as outcomes of several stages or nodes that are linked together.³

Industry chains are often complex. In fisheries, they can vary significantly among the different products. Any link can be a point of stress or perhaps opportunity for capital and labour to improve their material positions. For both fishers and plant operators, it is often the combination of opportunities from different species and chains that allows them to survive and sometimes prosper. It is thus misleading to refer to the fishery or the fishing industry as if it were a coherent homogeneous entity. As our examples illustrate, this industry is strongly influenced by the economic circumstances in external markets, currency fluctuations, changing demand, tariffs, and even environmental expectations or regulations. Moreover, the fishery is highly regulated from the federal level, while fish processing is a provincial responsibility. All this makes for uncertainty and complexity. Before looking at the main sectors of the regional fishing industry, we summarize several characteristics of the global structure in which they must function.

³ See Jackson et al. (2006) for a valuable overview of the concept.

In the years 2004-2010, the total weight of captured wild fish for the world declined each year from 92.6 million tons to 88.6 million tons, while farmed fish continued to increase at an annual rate of 6.3 percent since 2001 reaching 59.9 million tons in 2010 (FAO 2013a; 2013b). In both fisheries and aquaculture production, China held the number one position, while Canada produced 0.7 percent of the world's total captured fish and accounted for only 0.2 percent of world aquaculture. Further expansion of total fish products is limited by the pressure on wild fish stocks, most of which were fully (57.4 percent) or over-exploited (29.9 percent) in 2009 (FAO 2013c:53).

A valuable indicator of the impact of globalization in the fish industry is the extent to which fish products are traded across national boundaries. The global figure for 2010 is 38 percent of production measured by live weight (FAO 2013c:67). In 2007, the US overtook Japan as the largest importer and held that position in 2010, while China led all exporters by a large margin. After China, Norway, Thailand, Viet Nam, the USA and Denmark, Canada took seventh place (FAO 2013c:71).

The structure of trade is complex as it extends much beyond intra-regional movements. As measured by weight, developing countries were more likely than developed countries to retain fish products for domestic consumption – 57.9 percent was exported from developed countries compared with 28.1 percent from developing countries. Roche's (2008) report identifies that the domestic market for seafood products is, in fact, underdeveloped. Exports from Canada and the US are often destined for China and other parts of Southeast Asia – 46.6 percent by value in 2005-7; in the reverse direction, 20.6 percent of Asian exports ended up in Canada and the USA. Shrimp is much ahead of other species as the most important traded commodity (roughly 15 percent of the global total value in recent years).

Overall, global fish consumption is increasing, which provides some measure of hope for Newfoundland and Labrador producers, but markets are also difficult to enter without previously established links and adequate investment for research and development. The strong Canadian dollar makes it even more difficult for local producers to succeed.

*Shrimp*⁴

Shrimp are central to the fishing industry on the Great Northern Peninsula. Most are landed from owner-operated, near-shore trawlers, but some larger, deep-sea vessels also supply the St. Anthony plant. The near-shore vessels, on the other hand, actually operate in the Atlantic off the Labrador coast at certain times. The number of near-shore trawlers from the southwest coast to Cook's Harbour has fallen in recent years from 63 to 50 (interview) as a result of the more aggressive

⁴ Other CURRA team members have collected basic information on trends in NL and Global shrimp catches and consumption. See Mather and Joensen (2008).

or better-off fishers buying up the quota of others; they can do this to a maximum of double their initial quota. A knowledgeable informant suggested that the fleet would generate more acceptable returns to each operator if it were further reduced to 40 vessels. Another commented that consolidation reflected the aging of existing skippers and the difficulty in finding crew.



A dragger at Port Saunders. Vessels like this catch shrimp and groundfish.

The St. Anthony plant itself would not exist without the success of St. Anthony Basin Resources Inc. (SABRI). In 1997, the town successfully negotiated for 3,000 tonnes of shrimp quota. SABRI was immediately formed to administer the quota, which it leased to operators of offshore boats (initially from the Faroe Islands) to provide income for local development. The current plant in St. Anthony is operated through an arrangement with Clearwater Seafoods, based in Nova Scotia, with SABRI having a 25 percent share. Three other regional plants owned by Quinlan's, Ocean Choice and the Barry Group vary in size and to some degree according to where their shrimp comes from.

The passage from the plant to market is a multi-dimensional process that involves arrangements with transporters and sometimes brokers and storage companies. The processors typically try to establish on-going contractual arrangements with large buyers. In the case of smaller companies, they may choose to work through a market broker such as Sirena Canada, which would

receive a percent of the value of the product. Trust is usually important in all of these relationships and is often maintained through more personal informal links as demonstrated in research on Norwegian fish exporters (Dulsrud and Grønhaug 2007). For the Great Northern Peninsula's shrimp industry, marketing relationships are close to global in scope in the sense that shrimp are sold to North America, the UK, Western Europe and parts of Asia. The UK and Denmark are the primary markets for this product. Currency fluctuations and tariffs influence preferred destinations, but major buyers are not likely to be turned away simply to protect against currency problems by finding a new short-term outlet for product. Intense lobbying led to the EU dropping its \$6 per ton tariff for the first 20,000 tons of imports from Canada, as of January 1, 2010 (Foreign Affairs and International Trade Canada 2013).

There is relatively little that producers can add through processing shrimp, beyond cooking it, that would increase spin-off employment and the value of the final product. However, a plan to build an anaerobic digestion plant that would have processed shrimp shells in St. Anthony did not receive support from ACOA, although a similar proposal was funded in Nova Scotia. This decision has proved extremely discouraging to development activists in the St. Anthony area.

Plant managers and the marketing managers of the largest companies typically work closely in establishing and maintaining contracts with suppliers. They do not use brokers. One company has a major contract with Marks and Spencers in the UK. This involves accommodating the demanding specifications of the buyer, whose representatives visit the plant to examine the production process. Another has a major contract with the Publix supermarket in the US.

Shrimp producers have also experienced pressure from the retailers in Europe to ensure that they follow ecologically sound management practices. Indeed, the shrimp industry was the first in Canada to receive certification from the Marine Stewardship Council (in 2008) (see Foley 2012 for an extended discussion). This is likely to spread to other fish products with lobster currently under consideration. Some fishers and processors are concerned that it will increase their costs without necessarily raising prices. Whatever the validity of that argument, certification may become a necessary requirement for selling seafood of various kinds, as numerous informants have stated.

Getting the shrimp to market is a complex process that requires co-ordination with land and sea transporters. This opens various opportunities for smaller businesses. For example, Port Saunders Seafoods provides an offloading service for processors who then truck the freshly caught shrimp to their plants. About 25 boats, some from as far away as New Brunswick, regularly use this facility.



The Port aux Basques ferry service is critical to transportation

Trucking is a key service on which processors depend. Thus, frozen shrimp move by truck to destinations in North America, but this also requires ferry transportation to the mainland. The ferry is often stressed by weather and technical problems so that transporters may have difficulty in maintaining their schedules. Shrimp moves to Europe by container ship from Halifax or St. Anthony where it may be held in a cold storage facility. At the overseas destination, land transportation to the point of sale takes over again. St. Anthony Cold Storage, owned by SABRI, plays an important role on the GNP as it serves the transshipment needs of all four shrimp plants with much of the product moving via the Icelandic shipper, Eimskip. The cold storage company is attempting to expand its services to other commodities.

Lobster

Whereas shrimp may be marketed almost anywhere in the world, lobsters are typically sold live into the regional market of northeastern North America, especially through Boston. Lobsters are vital to the inshore fishers of most of the coast except the northern tip of the Great Northern Peninsula. They are caught over a short season of about six weeks, with the opening dependent on location. In Burnt Islands and the broader southwest coast, inshore fishers often combine spring lobster with hook and line cod in summer. There is no longer a winter fishery in this area.

Before 2009, lobster provided core income for most fishers who did not work with nearshore vessels. In 2009, however, the global recession appeared to have been responsible for depressed prices in Boston, around \$4 per pound. When we conducted our research in May 2009, the price to fishers was \$3.25. This led to a four-day tie-up in protest and later to occupation of the Newfoundland office of the federal Minister, Peter MacKay, which ended with the promise of modest help

from the federal government (CAW 2009). Controversy over pricing in the lobster fishery continues.

Lobster are shipped live to Boston and other mainland markets. Shippers encounter the same ferry problems as those selling shrimp. Moreover, they face the possibility that the lobsters will die before reaching their destination. Most lobster landed in Port au Choix is destined for Boston, via Deer Island in New Brunswick, with some moving from Boston to Europe. Smaller amounts are sold directly to Sobeys and Dominion, the largest food retailers in the region. At first glance, it seems wise to sell directly to Europe but this would create a serious transportation problem and would mean having to compete with the current brokers in gaining access to those markets. These were presented to us as prohibitive problems. Marine Atlantic's new policy that two day's notice is required for a shipment endangers the quality of fish getting to market because shipments cannot be timed perfectly. Informally, this policy has been ignored, but could easily be activated when traffic is heavy.

Low prices in 2009 probably stimulated political action resulting in the formation of the Lobster Council of Canada in October 2009. This council is charged with generic promotion and marketing of Atlantic Canadian lobster and is jointly supported by both industry organizations and the governments of the Atlantic Provinces and Canada, which have provided initial funding (CBC News 2009).



Lobster boats at Port Saunders

In 2009, as part of Canada's Economic Action Plan, the federal government allocated \$65 million of its budget toward *Atlantic Lobster Sustainability Measures (ALSM)*. Under this program, commercial harvester groups in Nova Scotia, New Brunswick, Prince Edward Island, Newfoundland and Labrador and Quebec can seek project proposal funding to address the following areas: conservation and stewardship; harvester organization governance, and restructuring and rationalization. In particular, the program focuses on economic prosperity and sustainability through approved sustainability plans (to date, only two have been awarded in Quebec – totalling \$3 million).⁵ A portion of the ALSM funds (\$15 million) was dedicated to short-term transitional contributions for low-income harvesters affected by the 2009 market collapse.

Other species

Small amounts of cod, flounder, turbot, redfish, halibut, lumpfish, crab, herring, mackerel, capelin and rock cod are available in the region, but fishers and processors face difficulties in taking advantage of what is available. For example, high quality hook and line cod are caught on the southwest coast, but there is no price advantage at the wharf or in the market place – and none is likely without a widely accepted grading system. On the Great Northern Peninsula, cod⁶ was worth only two percent of total landed value in 2004, and lobster only six percent of an industry dominated by shrimp and to a lesser degree by crab (Great Northern Peninsula Fisheries Task Force 2006:28). Should the groundfish stocks recover sufficiently well to sustain a substantial fishery in the future, local producers would have to face competition from Chinese and other Asian exporters. China, in particular, has become the largest exporter of fish, often importing the raw material from as far away as Europe and North America, then processing it with cheap labour (FAO 2009b:47).

The Barry Group processes herring and mackerel, but only landings from their 'own' boats. This makes it difficult for others to find a buyer for these species. The St. Anthony plant did agree to purchase mackerel, but at the time the manager was willing to process them, the mackerel had already left the area to the frustration of inshore fishers (2009 interviews). From the plant manager's perspective, shrimp is the central product followed by crab; other species are fitted in only when possible because they are not consistently available in sufficient volume to justify increasing plant capacity.

In general, several informants believed that processing and marketing regulations unreasonably limit what can be done. Various examples have come

⁵ Eligibility details and further information can be found at <http://www.dfo-mpo.gc.ca/fm-gp/peches-fisheries/fish-ren-peche/lobster-homard/alsm-elig-adm-mdih-eng.htm>.

⁶ For a study of the regions cod fishery using a commodity value chain approach see Khan (2010), whose work was conducted as part of the CURRA.

to our attention, including the following. Seasons for species are insensitive to local conditions, such as the late ice that is common in northern waters. Fishers are unable to make their own salt fish. St. Anthony Cold Storage has no licence to freeze, as happens in Denmark, because it is limited to holding products prior to further shipment or it would be considered a 'processor' (similar restrictions apply to the offloading operation in Port Saunders). On the southwest coast, a secondary processing plant was under construction by a French entrepreneur, but it had no licence to buy fish directly from fishers. It is unclear who would supply this company, which hoped to sell to high-end French restaurants. Indeed, we understand that the regulatory process seriously slowed down this development. Another example is that the Burnt Islands plant is small and flexible, but cannot command a premium price for fish and is "boxed in" by regulations; for example, they used to have a multi-species license but now need species-specific licenses. Their scallop license lapsed when fishers did not catch scallop for two years, and now they cannot afford to buy it back. A final example is that processing regulations inhibit SABRI's attempt to serve a niche market by salting cod on the fishing boats.

Another problem for small plants is that they are weak compared with buyers who can offload the cost of carrying inventory onto processors. The small companies also feel they are hurt by companies (like SABRI and the Labrador Shrimp Company) that have offshore shrimp quota and can use the shrimp money to subsidize the price they pay for other species, or tie the fishers to them by giving fishers access to the shrimp quota in return for taking their competitive quota catch.

General marketing issues

We found some support for a joint marketing organization if it was restricted to generic promotion of NL fish products, but there was also sensitivity about any form of collective marketing that would remove the company-buyer links that had been formed over time, or that would give other companies information about the markets of their competitors. This was also outlined as a concern in Roche's (2008) seafood marketing review panel report. Some companies with a strong presence in the market may feel that they have little to gain. We note that the processing companies defeated the provincial government's plan for a marketing council by a narrow margin in a vote in 2008. A seafood marketing strategy for the province remains high on the industry and government agenda – one of the MOU working groups devoted its efforts to establishing proposals for such a strategy – however the likelihood that it will come to fruition remains unknown.

Several interviewees remarked about the problem of secret or under-the-table sales past and present. One suggested to us that this also requires coming together on the part of the whole industry in order to prevent it from harming the industry in the future. We see this as part of the problem of distrust that pervades the industry.

Another strategy with some potential is direct producer to consumer marketing. If provincial government rules that prohibit this process can be overcome, then fishers might be able to achieve a higher price for fish they sell into the Newfoundland market, perhaps through a guaranteed advance purchase system as described by Temple et al. (2010). It would take considerable effort to establish, but there are successful examples on the mainland in both agriculture and fisheries (Anchor Consulting 2010; Temple et al. 2010). This strategy could be a part of the solution, but we do not envision it on a scale sufficiently large as to improve significantly the economic situation of most fishers.

Migration, Labour and Education: The Alberta Factor

It is impossible to discuss any aspect of contemporary community life in coastal Newfoundland without reference to Alberta. This was equally true of the interviews that took place in the three study areas. In what follows, we discuss the Alberta factor in terms of labour, including temporary migration for work and education.

The people who were going to leave have already left

According to Harry Hiller (2009) the 1980s was a decade of decline in Alberta's economy but growth returned in the 1990s and exploded with the rapid expansion of the oil sands from 2004. This, of course, coincided with economic decline in Newfoundland. In a "push-pull" sense, the pull of Alberta has been obvious in the study areas. Untangling the "who" of the migrants, however, requires an examination of other factors rather than just a blanket statement that people have left.

It is clear that working age people who were going to leave after the moratorium have already left. For others who maintained fisheries-related employment but who have lately experienced changes to the local fishery labour market (the closure of the Port aux Basques plant in particular), the age of the worker influences the choice either to stay, leave, or assume some other strategy for survival, including working away but maintaining a residence in the community. For example, some former female workers from the Port aux Basques fish plant have become home care workers, commuting to and from Nova Scotia on a two-week rotational basis. For older workers throughout the study areas, short-term strategies include staying in the labour force until they are eligible for CPP and OAS/GIS.



Natural beauty is not enough to keep the young. Norris Point.

Youth out-migration was seen as normal in the research sites. Young people continue to leave to attend university and some leave to pursue employment. Because of local post-secondary education opportunities (in St. Anthony and Port aux Basques in particular), leaving is often delayed while training occurs. After training, some do find local employment, but many go west. Indeed, educational institutions, responding to changing demand, offer training in skills that facilitate going 'away' (see below). In both towns with post-secondary institutions, it was noted that there has been an increase in enrollment in trades courses. Choosing a trades-related career means more immediate gains in terms of experience, entering the workforce and making money. For example, some programs only last a year, require only a high school education and can almost always guarantee high-paying positions soon after course completion.

While all areas had experienced out-migration, some return migration was observed, especially among people looking for a good place to raise their children. Sometimes this meant returning to their home communities, but often it meant relocating to a different place, often in the region. Of course, the return is

affected by the availability of appropriate job opportunities for working individuals in a household.

Local Labour Markets: The Increasing Service Sector Gap

The Alberta factor has played a role in pulling trades people and young people away. This has meant a labour shortage in some key trades areas. In addition to this, a local labour market in the professional and semi-professional sectors is opening up as a result of retirement waves. These include numerous positions in the government (health) and private service sectors (banks and Marine Atlantic) that are now being filled by people who went away for education and experience, and who now want to settle back to small town life. These young adults were identified as bringing energy to the communities, but they also bring demands in terms of amenities for themselves and their children. For employers, this has meant also finding the right incentive balance, as questions regarding competitive wages arose. For example, one person noted that while it is impossible to compete with nursing wages in Alberta, it is important to consider whether the right incentives are in place to make working locally (St. Anthony) even more attractive.

Labour shortage issues were noted in the service sector. As one person said, there is work for people who want work, yet the minimum wage jobs available are simply not attractive for most people, particularly those who have previously worked in Alberta (i.e., those who have returned to live in the area) or who are maintaining residency in the province but travelling out of province for work. Local service sector employers continue to struggle in this respect, and this has implications for the development strategies that depend upon these positions (i.e., tourism). In Port au Choix, the zone board is working with local businesses in the tourism sector to establish business plans that identify: 1) how to make positions more attractive; and 2) how to engage more people who could work (via the Skills Link program; tied female in-migrants or partners of those working away). As stated below, students were noted as no longer returning for work in tourism and service-related industries.

Effective January 2013, new regulations defining 'suitable work' and 'reasonable job search' for claimants of EI Regular or fishing benefits will alter the terrain for workers and employers in the CURRA study areas of West Coast Newfoundland. The latest attempt to discourage EI reliance focuses not on eligibility, or on the benefit rate, but on getting claimants back to work. The new regulations divide EI claimants into three categories: long tenured workers who have paid into the system for seven of the last 10 years and have claimed EI for no more than 35 weeks over the last five years; frequent claimants who have had three or more claims of a total of more than 60 weeks in the past five years; and occasional claimants (all others). Given the shortage of jobs in the CURRA region that are full year, or that have complementary seasons that would allow one to take a second seasonal job, the *direct* impact of the new regulations may be minimal –

i.e. there may be relatively few claimants who will actually be made to take 'suitable work' or lose their benefits.

Efforts at diversification and stabilizing population

Each case study area was working on diversification strategies and innovations to adapt to the reality of a declining and aging population, loss of the fisheries economic base and competition from Alberta.

In each area, those involved in education and training (e.g., at CONA, HRLE, and career centres) are training people for both local opportunities and jobs away. They observed an increased demand for specific skill training – short programs that provide a certificate and a ticket to lucrative work. For example, the Non-Destructive Testing program at CONA in Port aux Basques is very much in demand, as are trades-related programs at the other campuses. Marine hospitality serves the needs of Marine Atlantic as well as preparing people for jobs further afield (such as work on cruise ships, lake boats, and the coast guard).



The Hook and Line Centre at Burnt Islands links the fishery and tourism

In general, all areas were looking more to tourism but were facing increasing problems attracting labour to that sector. Youth are not interested in staying for tourism jobs – indeed not even for summer work while they attend school. All areas identified that youth are not returning home in the summer for work, as they often did in the past. The exception is in Port aux Basques, where hotel jobs are seen as a training ground for higher-paying secure jobs with Marine Atlantic (though this creates problems with high turnover). Eco-tourism and high-end tourism hold some promise as evident in the hook and line centre in Burnt Islands and the salmon interpretation centre in Hawke's Bay. The zonal boards and operators are all focused on strategies to extend stays and extend the season, though this is proving challenging.

In all communities there is also a trend toward long-distance commuting, where the family remains based in the community. This means the money is earned away and then injected into the local economy. In each area new houses were under construction. It means the local school population is maintained. In talking with people, it seems that this is viewed as a new development strategy – a new economic base for communities that have lost their traditional resource base. However, the recession of 2008-09 is a reminder of the fragility of this strategy for communities. Other indirect effects were also mentioned, such as the loss of team sports and volunteers. In Port au Choix, some of the local service clubs (both the Lions Club and Kin Club) have been struggling, with the Kin Club ceasing to operate. In addition, there are indications of negative impacts of the strategy on the health and well being of families and children, which need to be addressed. Several people who work with youth indicated that behavioral problems are common among children with one or two parents working away from home. One teacher commented that “we know when dad is gone” and that, in her profession, a full move is seen as preferable to the commuting patterns because of the negative effects on children.

Another issue facing communities is the challenge of maintaining services with declining (and aging) populations. In each area decisions have to be made about consolidation of services such as health and education. The aging population is also providing new local employment opportunities. Home care and personal care homes were mentioned in particular (St. Anthony). In each area communities are trying to work together, whether on tourism promotion, or school consolidation. This is proving more difficult in the Port au Choix area, where there are three quite distinct and independent municipal governments. Port au Choix in particular dropped out of regionalization discussions with Port Saunders and Hawkes Bay. The other two areas have a natural regional centre – St. Anthony and Port aux Basques.

While common challenges and strategies are evident, there are significant differences by area. St. Anthony has several strengths. The hospital serves as an anchor for the community. It offers good jobs for both men and women and many families rely on at least one member working there. As such, it supports

the inshore fishery and complements the seasonal work available in both the fishery and tourism sectors. The hospital is the single most important employer in the area. Everyone we interviewed seemed to have a family member working there. In addition, St. Anthony has the benefit of the shrimp quota, which creates fisheries-related employment and generates funds for economic development and diversification. SABRI has exercised tremendous initiative and leadership in identifying and promoting new opportunities. Though this is clearly challenging and frustrating work, it gives this community leverage that others lack. SABRI's initiatives have been aimed at: supporting the fishery (e.g., cold storage, anaerobic digester, underutilized species, salt fish); developing infrastructure to serve diversification as well as fisheries (e.g., the Atlantic Gateway Initiative around shipping, new wharves to support cruise ships and container ships, as well as fisheries); and getting involved in other diversification initiatives (around tourism, in particular).

Burnt Islands has a tradition of people combining working on the lake boats with local seasonal activities, including inshore fishing. This continues, and gives the community the highest average income on the coast. Very few families rely totally on the fishery. The larger Port aux Basques area also has a diverse economic base. Marine Atlantic provides a high wage key employer, while Port aux Basques also serves as a regional service centre. The closure of the Port aux Basques fish plant was a major blow. Marine Atlantic has been hiring recently, as people reach retirement age. In addition to work on the boats and the dock, the administrative office provides finance and IT jobs. The Port aux Basques area seems to have a strong network of professionals in various government and community agencies who work together on initiatives. The partnership approach appears to be working well here, compared with other communities, and seems to depend very much on the leadership and initiative of people in key positions. At the community level, Burnt Islands has a reputation for volunteer work and community initiatives, including the recreation committee, which started the community radio. Other initiatives include the Hook and Line Centre, recycling, and community theatre.

Port au Choix has suffered from fiscal problems and political divisions that resulted in the provincial government removing its council in 2006. In these circumstances, the town of Port au Choix has not been in a position to take part effectively in regional development networks, despite several active individuals. Once the most prosperous centre of the Gulf coast fishery, there are now signs of empty business premises and no evidence that the remaining fishery will return to its former strength. Yet, there are some enterprising small businesses in tourism, and the area benefits from its historical links, a national archaeological site, and its rugged ocean setting.



The shoreline at Point Riche, near Port au Choix.

Possible Future Actions

It has proven difficult to propose new initiatives that are precise in terms of what should be done and that have a reasonable chance of success. In part, this is because our community partners and other local people have already followed various strategies, some of which we have reviewed. We may be able to suggest further action with respect to fisheries after completing additional interviews and documentary analysis. Our analysis to date points to the following possible course of action.

The fishing industry

1. Although a provincial marketing organization to promote NL seafood in a general way was rejected by processors in 2009, we feel that this plan should be reconsidered. We recognize that actual sales transactions through a central organization are unlikely and, more importantly, undesirable, due to opposition from plant owners, but there is potential for all to benefit from greater awareness of the qualities of NL seafood. Possibly NL fishers and processors will then be able to receive higher prices. Through marketing, greater emphasis can be placed on the consumer and changing needs in the marketplace can be addressed in a timely fashion. Collective investment in an initiative would hopefully lead to increased opportunities for both harvesters and processors.

2. Pursue ecological certification for species in addition to shrimp. In these cases government should subsidize the costs. The benefit lies in establishing a reputation for promoting sustainable fishing before everyone is effectively required to do so. This does make a difference to many customers, especially Europeans.
3. One-person advanced technology boats may help cope with labour shortage and increase productivity for remaining fishers. The viability of such boats has already been tested in Burnt Islands.
4. Licensing and other means to control both harvesting and processing are often criticized for discouraging the flexibility that operators require to adjust to changing environmental and market conditions, while not necessarily protecting the resources. We will continue our examination of regulations and alternatives, particularly those affecting fleet rationalization and the ability to access new markets.

Labour Markets

1. Tracking labour market changes with regard to employer and employee needs is important. Perhaps the merger or devolution of Service Canada to HRLE will prove valuable as a means for more concerted effort around this. It will also be important to understand if this change does or does not have impacts for local areas (and whether these changes are positive or negative). How will access to training be affected (regarding EI eligible workers and others)?
2. The Red Ochre's graduate registry is a good model for others to follow. Tracking graduates is useful as a means to understand the career choices and career paths of youth, and the changes that have occurred. For example, staff at CONA in Port aux Basques mentioned an interest in wanting to track those who enrolled in the Non-Destructive Testing program. A question was asked in St. Anthony regarding the tracking of graduates from CONA.
3. Regionalization continues to be the model of governance of the day (e.g., the Marine and Mountain Zone's initiatives around regional tourism and the fisheries committee). The key for people and communities will be appropriate leadership, interest and support to aid in this form of governance and to ensure that people's interests across industries and sectors are being represented.
4. Commuting work must be more strongly recognized institutionally (i.e. even though it is occurring, there needs to be greater effort to understand

how to address the needs of commuters, their families and the people that provide them with services such as health and education).

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