

NL-GIDC Strategic Plan 2018-2020

**NL Groundfish Industry Development Council
October 2017**

Background

- The Newfoundland and Labrador Groundfish Industry Development Council (NL-GIDC) is comprised of:
 - Fish, Food and Allied Workers Union (FFAW/Unifor).
 - Eleven (11) NL groundfish processing companies (Annex A).

- The Council was established in April of 2016 with a mandate to:
 - Develop a Plate to Ocean strategic plan to revitalize the NL groundfish industry - *with an emphasis on the maximization of the export value of NL groundfish products.*
 - Provide an oversight and advisory role with respect to the delivery of the Council's strategic plan.
 - Develop collaborative, industry-led solutions to the various issues that will arise as the NL fishing industry transitions back to groundfish.
 - Provide advice and input into government programs and policies related to the re-development of the province's groundfish industry.

Strategic Plan Overview

- The NL-GIDC's Strategic Plan outlines the Council's:
 - Vision, objectives and principles for a revitalized groundfish industry.
 - Strategic objectives for the fishing industry over the 2018 to 2020 period.
 - Strategic priorities in support of the Plan's objectives.

- The Plan:
 - Has been developed based on industry's current understanding of the key challenges that will arise over this period.
 - Is based on the expectation that the focus over the 2018 to 2020 period will be primarily (but not exclusively) on cod.
 - Is an *evergreen document* that will be updated on an annual basis.
 - Will be modified as the strategic objectives and priorities change over time.

Vision

- The NL-GIDC's vision for a revitalized groundfish industry is for a sustainable, economically viable and internationally competitive industry that is able to:
 - Extract maximum value from world markets.
 - Provide a prime quality product to export markets on a consistent basis.
 - Create an environment to attract new investment to the processing sector.
 - Create an environment to attract the next generation of enterprise owners to the harvesting sector.
 - Provide improved incomes to fish harvesters and employees in the processing sector.
 - Attract and retain skilled fish harvesters, plant workers and other processing sector workers.
 - Act as an economic driver for coastal communities in vibrant rural regions.

Sustainability Objectives

- To achieve the vision for a revitalized groundfish industry, the NL-GIDC will be governed by three over-arching sustainability objectives:
 - Conservation and Sustainable Use.
 - ✓ *Conservation and rebuilding of the province of NL's groundfish stocks will remain the highest priority.*
 - Economic Viability and Sustainability.
 - ✓ *The economic viability of the province's owner-operator fishing fleets and onshore fish processing plants will represent the second order of priority.*
 - Community and Social Sustainability
 - ✓ *Achievement of the economic viability objective will lead to improved employment prospects and income levels for fish harvesters and plant workers; and will thereby establish vibrant and sustainable local economies in coastal communities.*

Principles

- Subject to the constitutional protection provided to First Nations, the key principles which will guide the Council's decisions include:
 - ❑ Precautionary Approach Framework
 - ✓ *All groundfish stocks managed in accordance with the precautionary approach.*
 - ❑ Adjacency and Historical Attachment.
 - ✓ *Priority of access based on adjacency and historical attachment.*
 - ❑ Independent Owner Operator Fleets.
 - ✓ *Participation in inshore fisheries restricted to the independent owner-operator fleet.*
 - ❑ Plate to Ocean Approach.
 - ✓ *Market requirements and specifications represents the most important priority.*
 - ❑ Inshore Allowance (Northern Cod)
 - ✓ *Initial 115,000 t of total allowable catch for 2J3KL cod allocated to the inshore fleet.*
 - ❑ Spawning Aggregations
 - ✓ *No fishing activity during peak spawning times or on pre-spawning and spawning aggregations.*

Strategic Objectives

- The 2018-2020 Strategic Plan is based on two overarching and interconnected objectives for the fishing industry over this period.
- These objectives are to:
 - ❑ Catch and land a consistent supply of top quality raw material over an eight (8) to (10) month season.
 - ❑ Produce prime quality fresh fish, salt fish and once frozen groundfish products for sale in international markets.
- The strategic objectives represent the pillars upon which the vision of a sustainable, economically viable and internationally competitive industry will be achieved.

Strategic Priorities

- To achieve progress on each of the strategic objectives nine (9) priority issues have been identified.
- The priority issues focus on the key issues that will arise with the redevelopment of the NL groundfish industry and include:
 - Strategic Objective #1 - Top Quality Raw Material
 - ✓ *Extended Seasons*
 - ✓ *Fish Handling Practises*
 - ✓ *Gear Diversification*
 - ✓ *Fish Stowage Systems*
 - Strategic Objective # 2 - Prime Quality Fish Products
 - ✓ *Strategic Landing Ports*
 - ✓ *Land Port Infrastructure*
 - ✓ *Onshore Handling and Transportation*
 - ✓ *Processing Plant Modernization*
 - ✓ *Product Branding*

Top Quality Raw Material

Strategic Priorities - Summary

Issue	Goal
<ul style="list-style-type: none">▪ Extended Seasons▪ Fish Handling Practises▪ Gear Diversification▪ Fish Stowage Systems (Boxing-At- Sea)	<ul style="list-style-type: none">✓ Develop and implement harvesting plans and management strategies that will result in the provision of a consistent supply of raw material over an 8 to 10 month season.✓ Develop and adopt province-wide fish handling protocols and procedures for fish harvesters in all NL cod fisheries.✓ Develop and deliver education and training materials to equip harvesters with the knowledge, skills and capacity required to meet the new quality standards for cod.✓ Continue to encourage and provide funding for the movement toward the use of a more diversified suite of gear technologies such as automated longline systems, cod pots and modified cod traps.✓ Adopt the onboard stowage infrastructure (insulated boxes or containment systems) required to maintain the temperature of the raw material during transport.✓ Assess available fish stowage systems to determine if they can be adapted to the structural constraints associated with the current fleet of vessels.

Prime Quality Fish Products

Strategic Priorities - Summary

Issue	Goal
<ul style="list-style-type: none"> ▪ Strategic Landing Ports 	<ul style="list-style-type: none"> ✓ Establish a process to identify a select number of strategically located groundfish landing ports - based on current and historical landings patterns, the need for regional balance across geographic regions, anticipated landing activity in future, etc.
<ul style="list-style-type: none"> ▪ Landing Port Infrastructure 	<ul style="list-style-type: none"> ✓ Establish priorities and timelines to address deficiencies in strategic landing ports; and equip these ports with the infrastructure (e.g. ice-making capacity, vessel off-loading systems, etc.) required to meet the prime product objective.
<ul style="list-style-type: none"> ▪ Onshore Handling and Transport 	<ul style="list-style-type: none"> ✓ Develop and adopt best handling protocols, quality control procedures and training programs across for all stages of the chain of custody - buying, transport and processing.
<ul style="list-style-type: none"> ▪ Processing Plant Modernization 	<ul style="list-style-type: none"> ✓ Modernize the province's groundfish processing capacity via investments in the re-tooling of plants with state of the art groundfish processing equipment and technologies.
<ul style="list-style-type: none"> ▪ Product Branding 	<ul style="list-style-type: none"> ✓ Examine the potential for the development of a generic product branding strategy for all NL groundfish products with a focus on attributes such as resource sustainability, wild catch fisheries, pristine waters, prime quality product, community sustainability, etc.

Conclusion

- The NL-GIDC's Strategic Plan is intended to:
 - ❑ Address the more immediate structural and infrastructure issues that the NL fishing industry will face over the short-term.
 - ❑ Establish a solid foundation upon which a revitalized groundfish industry can be further developed over the medium-to-long term.

- The Plan's strategic priorities support two fundamental objectives:
 - ❑ To consistently land top quality raw material over an extended season.
 - ❑ To produce prime quality fish products in order to maximize the export value.

- These objectives represent the foundation for the development of a revitalized groundfish industry.

Moving Forward

- The Strategic Plan provides a road map for the:
 - Revitalization of the province's groundfish industry with an emphasis on the maximization of the export value of NL groundfish products in order to improve in the economic viability and the long-term sustainability of owner-operator enterprises, onshore processing plants and coastal communities.

- However, the achievement of this vision will require:
 - A considerable amount of effort, investment and commitment by harvesters and processors alike.
 - Significant support and investment from government particularly with respect to issues such as boxing-at-sea, landing port infrastructure and processing plant modernization.
 - A commitment from harvesters, processors and both levels of government to work in a coordinated, collaborative and strategic manner to develop and implement industry-led solutions to the economic and structural challenges that will arise.

Annex A - NL-GIDC Membership

- **Harvesting Sector**

- Fish, Food and Allied Workers Union (FFAW/Unifor)

- **Processing Sector**

- Allen's Fisheries Ltd.
- Avalon Ocean Products Inc.
- Barry Group Inc.
- Beothic Fish Processors Ltd.
- Codroy Seafoods Inc.
- Deep Atlantic Sea Products
- Fogo Island Co-operative Society Ltd.
- Golden Shell Fisheries Ltd.
- Happy Adventure Sea Products Ltd.
- Harbour Seafoods Ltd.
- Labrador Fisherman's Union Shrimp Co. Ltd.

- **Ex- officio**

- Fisheries and Oceans Canada (DFO)
- NL Department of Fisheries and Land Resources (DFLR)
- World Wildlife Fund (WWF)
- Whitecap International Seafood Exporters