

Canadian Embassy In Tokyo

Sea Urchin Presentation

1. Introductions

Mike Featherstone - President of the Pacific Urchin Harvester's Association (PUHA)

Juanita Rogers - Chief Management Biologist

Tim Joys - Director PUHA

Ken Ridgeway - Director PUHA

Dave McRae - Director PUHA

Herb Watson - Director PUHA

Dave Kensall - Research Director for the West Coast Green Urchin Ass'n

Geoff Krause - Trade and Market Consultant

2. Purpose of Meeting

1. Present goals and objectives of Canadian Urchin Fisheries in British Columbia;
2. Provide a current update of the fishery;
3. Discuss the current management policies of Fisheries and Oceans Canada;
4. Get first-hand the thoughts and perceptions of Japanese sea urchin handlers about Canadian sea urchin products; and
5. Identify interest in working jointly to improve the BC industry.

2.1 Goals and Objectives of BC's urchin harvester associations

PUHA and the WCGUA represent all 110 Red Sea Urchin and all 49 Green Sea Urchin licences in British Columbia respectively.

The primary aim of the Associations is focused on the sustainable management of the fishery. The effective realization of this goal was acknowledged at the 2003 sea urchin forum held in Chile this past spring. This feature sets the BC fisheries apart from all other urchin fisheries around the world.

A strong emphasis is placed on improving the scientific information and research programs to support the development and implementation of the best fishery and environmental quality management practices. Programs which are largely funded by the associations include biomass surveys, protected research areas, on-grounds monitoring and off-load validation. There is continuing strong collaboration between the associations and Fisheries and Oceans Canada (DFO).

On the environmental side, growing waters are carefully tested on a regular basis and all areas are protected from pollution and contamination. Each harvested urchin is weighed and the date, exact area of harvest and other important information recorded. The existing procedures would allow the tracing and labeling of each tray of uni to include details on the name of the harvest vessel, the date of capture and the area of harvest.

Maximizing the economic returns from the allocable harvest are an important part of the primary goal of sustainable management. Each year fishermen, processors and scientists gather to review the harvesting schedule and management plan. Careful attention is paid to which areas have the best recoveries and product quality and to the consequent timing of the fishery. Areas producing sub-standard recoveries or quality are examined to find ways to improve the situation for the next season.

Canadian processors are also constantly working with their Japanese counterparts to forecast market conditions and project demand for different product mixes. This information is used by industry and Fisheries and Oceans Canada to organize the schedule around the Japanese market projections and requirements. One recent result of this was the reduction of the minimum sea urchin size limit to 90 mm to accommodate the market's need for smaller skeins.

We feel there is still considerable room for further improvement. This ongoing exercise is part of a long term strategy and we realize some time ago that we need to build closer ties with our Japanese clients and work together more for our mutual benefit.

2.2 Current Update of the Fisheries

Japan is the largest export market for Canadian sea urchin products, accounting for approximately 80% of all the country's production of sea urchin products. Canada exports approximately 460 MT of sea urchin products to Japan each year, a figure which makes it the third largest supplier of sea urchin products to the Japanese import market. Only Chile and the United States provide more product to Japan.

There are, of course, a few problems, the most significant of which involve issues over which we have limited influence. For example the Canadian currency has strengthened by about 20% against the American dollar and by about 7.5% against the Japanese yen over the past year. This, in and of itself, is seriously impacting our working margins.

Another example revolves around Russia, another significant producer and supplier to the Japanese market. In this case, serious questions remain over the sustainability of that fishery and even the legitimacy of much of the harvest activity. The Russian imports hurt all other countries which export sea urchin products to Japan to the extent that the economic performance of a number of these fisheries, including our own, are under threat. This situation is likely temporary but it is apparently undermining the continuing development of responsible fishery practices.

At this point however, our harvest quotas and management costs remain steady. The quotas look to be stable for sometime into the future and we remain focused on trying to deliver high quality products and sustaining a steady supply particularly over the period extending from November through March. The harvesting season has shrunk from 10 months per year to about 7 months this year in order to avoid competing with cheaper Chilean product but as an industry, we are also working closely with DFO to control costs and find alternate ways to fund the management system.

2.3 Fisheries Management Policies

Juanita Rogers provided an overview of Canada's current fisheries management policies and measures and an overview of the associated costs. DFO's priorities of conservation and sustainable use of the resources mandate the use of a conservative precautionary management approach based on the biological characteristics of the stocks.

Management obtains advice through a collaborative mechanism which includes government, industry, First nations and other interested stakeholders. This collaboration is critical for a full consideration of all available information in the development of a biological basis for the management. The measures include biomass surveys, research sites, on-grounds monitoring and landings validation. Both Associations fund the research and actively participate in the research activities with First Nations while DFO develops the protocols and analyzes the data. The information developed by the cooperative stock surveys, all the other research and other fishery-dependant information is used every second year in the Pacific Stock Advice and Recommendations Committee (PSARC) fora every second year to update the operative parameters governing the fishery.

The main bodies facilitating and guiding the collaborative process are sectoral committees comprising industry and DFO representatives for each fishery as well as other interested parties. The main job of these committees is to provide information, advice and a variety of perspectives to DFO to sustain the long-term management objectives. These committees review the information collected over the previous year(s) and look for for new options each year.

DFO and industry have Joint Project Agreements (JPA) in place which mandate and ensure the delivery of the biological and catch monitoring and information collection programs for both fisheries each year. A critical component of this is the industry-provided funding which entirely supports the catch validation, biomass surveys and stock assessment programs. PUHA also hires a contract biologist to work with DFO on these projects.

The success of this approach was recently acknowledged by the scientific participating at the World Sea Urchin Congress held in Chile in the spring of 2003 as one of two successful management regimes in the world. Experience in other jurisdictions have demonstrated that this collaboration is critical to successful management of the fisheries and that it cannot be taken lightly lest the good-will and cooperative pursuit of the mutually defined objectives of long-term sustainability of the resources be lost.

2.4 Thoughts from Japanese uni handlers

1. Current Situation
 - a. Canada
 - b. others

2. Strengths of Canadian uni
 - a. taste
 - b. clean growing waters and pristine quality environment

- c. sustainable fishery practices
- d. High food safety standards
- e. reliability
- f. relative value

3. Weaknesses of Canadian uni

- a. limited annual supply
- b. weather impacts on harvest schedule
- c. uni size
- d. other

2.5 Challenge(s) for the future

The new Japanese labeling legislation requiring the country of origin be identified at the retail level offers the Canadian sea urchin industry an excellent opportunity to raise the awareness of Japanese consumers of the advantages of buying Canadian. Canadian industry needs to establish itself as a reliable supplier of safe, high quality sea urchin products. This might involve a marketing and advertising program concentrated in and around supermarkets using in store demonstrations. Supporting materials such as flyers, print advertising, point of purchase materials, banners, flags and/or video(s) etc could be jointly developed and deployed by similarly minded Canadian producers and Japanese distributors.

Joint development of standardized grading guidelines with Japanese sea urchin handlers, Canadian processors and Canadian fishermen could contribute to increasing the consistency of the BC product.

Higher quality standards would be supported by the development of a Quality Assurance Program (QAP) which includes harvest, transport, and processing standards as well as compliance measures.

Discussion, Summary and then...

On a closing note, the Canadian Delegation, on behalf of ourselves and the entire BC Sea Urchin production Industry, would like to express its heartfelt thanks to our Japanese partners for attending this meeting. We very much look forward to seeing you all again in Japan and in Canada.

We would also like to thank Mr Nakai, the Canadian Trade Commissioner in Tokyo, and his staff for their efforts in putting this meeting together.

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