



# PUHA NEWSLETTER



## Presidents Report Mike Featherstone

With the season passing the halfway mark, landings remain below historical averages, for both the red and green urchin fisheries. Currently only 27% of the total red sea urchin TAC has been landed, which is an increase of over 16% since our last newsletter but still below the

6 year average. Landings were stronger in November, but October and December both lagged any year in the past 6 years. Only 16% of the north TAC has been achieved, whereas almost 70% of the south has been landed. The landings were low from the third week in

December to the middle of January, mostly due to the cold weather and windy conditions. Things started picking up in the north toward the end of January, but the south is running into quality issues, both areas have vessels trying to fish but weather has been an issue.



PRESIDENTS REPORT



MARKETING REPORT



D&D PACIFIC REPORT





## Presidents Report /Mike Featherstone Page 2

The green urchin fishery has fared better than the reds with 92% of the TAC taken, although this is slightly lower than the past few seasons. The month of September was substantially lower than previous Septembers. The main issue effecting the fishery was the low Japanese Yen. With the low Yen and the poor exchange rate the Japanese buying power was weakened. With the low demand from Japan, the smaller Chinese market was over supplied and this resulted in a general weakening of the prices. There was still almost 60,000 lbs remaining near the end of January which is substantial given the quota have been 99% completed the past few seasons. As we near the end of January, quality product is getting more difficult to find and some areas are starting to show spawning.



There is an Industry/DFO Steering Committee meeting on February 9<sup>th</sup> at 9 am to provide any recommendations for quota changes. The meeting is open to any divers and skippers, if you are not available, please provide any comments or recommendations to D&D or to any PUHA reps.

Title: RSU and GSU Steering Meeting with PUHA

Location: Microsoft Teams Meeting

When: March 9, 2023 9:00 a.m. – 10:30 a.m.

Organizer: Ridings, Pauline <Pauline.Ridings@dfo-mpo.gc.ca>

Description: Meeting with PUHA to plan for upcoming Red Sea Urchin and Green Sea Urchin seasons. Would be great to get recommendations on quota, boundary changes and anything else for the upcoming IFMP development.

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Please e-mail [info@puha.org](mailto:info@puha.org) for the meeting link.



PUHA is also looking for 2 divers for the annual Green Sea Urchin Fulford Island survey. The survey is scheduled for February 28<sup>th</sup> for 2 days. Divers should be experienced green sea urchin harvesters and have their current WCB medical and harvest certificates, as well as updated gear servicing record and current First Aid. Contact Karolyn at 604 524 0322 or e-mail [info@puha.org](mailto:info@puha.org) if you wish to participate.



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As can be expected, with the low landings, there have been fewer validations for reds. In the south there is 45 red validations to date and only 18 validations in the north. The south red validations are on par with preseason forecasts, however the north validations are behind the 40 validations forecast. Hopefully the north activity will pick up now that the south is winding down and weather, market and the sea urchins will cooperate to turn the season around.

For greens, there are 48 licences validated which is 1 behind the 49 forecast. It is hard for PUHA to determine, but the 49<sup>th</sup> licence is thought to be tied up in the Government buy back program and not issued this season.

On the market side, you can find more information in Geoff's report following in this newsletter. As I discussed earlier, the weak Japanese Yen was the main market influencer earlier this season. Fortunately, on Dec 10<sup>th</sup>, the Bank of Japan raised rates and the Yen surged and is now trading around the 130 mark. This is good news lowers the price of Canadian uni in Yen. However, overall the market is expected to be choppy with pent up consumer demand meeting raising inflation. PUHA will have a delegation at the Seafood Expo North America aka Boston Seafood show March 12 -14<sup>th</sup>. Other missions are planned but awaiting Government announcement of the program.

On the Science and Ecology subject, PUHA will again participate in the Nurturing Kelp to Grow (Kelp Reforestation project) in the third week of March, in cooperation with the Haida Nation, Parks Canada and several partners. This is a great project bringing together industry, DFO, Parks Canada and First Nations. The preliminary results have been very promising, showing positive ecological outcomes with the removal and lowering the densities of the sea urchin population. Here are some links to the project:

<https://kelpforestalliance.com/restoration-projects/parks-canada-haida-gwaii>

<https://parks.canada.ca/agence-agency/bib-lib/rapports-reports/core-2018/ouest-west/ouest-west14>

[https://parks.canada.ca/pn-np/bc/gwaiihaanas/nature/conservation/restauration-restoration/nurture-nourrir-1#ocean\\_partners](https://parks.canada.ca/pn-np/bc/gwaiihaanas/nature/conservation/restauration-restoration/nurture-nourrir-1#ocean_partners)



In other news, PUHA has joined the BC Seafood Alliance, the UHA and other Seafood Harvester Associations in rejecting the current Northern Shelf Bioregion (NSB) Network Action Plan (NAP) as presented for consultation. As presented, the Management Measures for fishing will be developed during the Implementation stage, which makes it impossible to assess any effects on the fisheries or provide any meaningful input from fishers. The consultations to date have not been objective, unlike the previous process with the Gwaii Haanas National Park Reserve and Marine Conservation Area and Haida Heritage Site. There are further concerns that this NSB looks more like A Reconciliation proposal than an MPA and there are no proper Economic Impact Assessments.

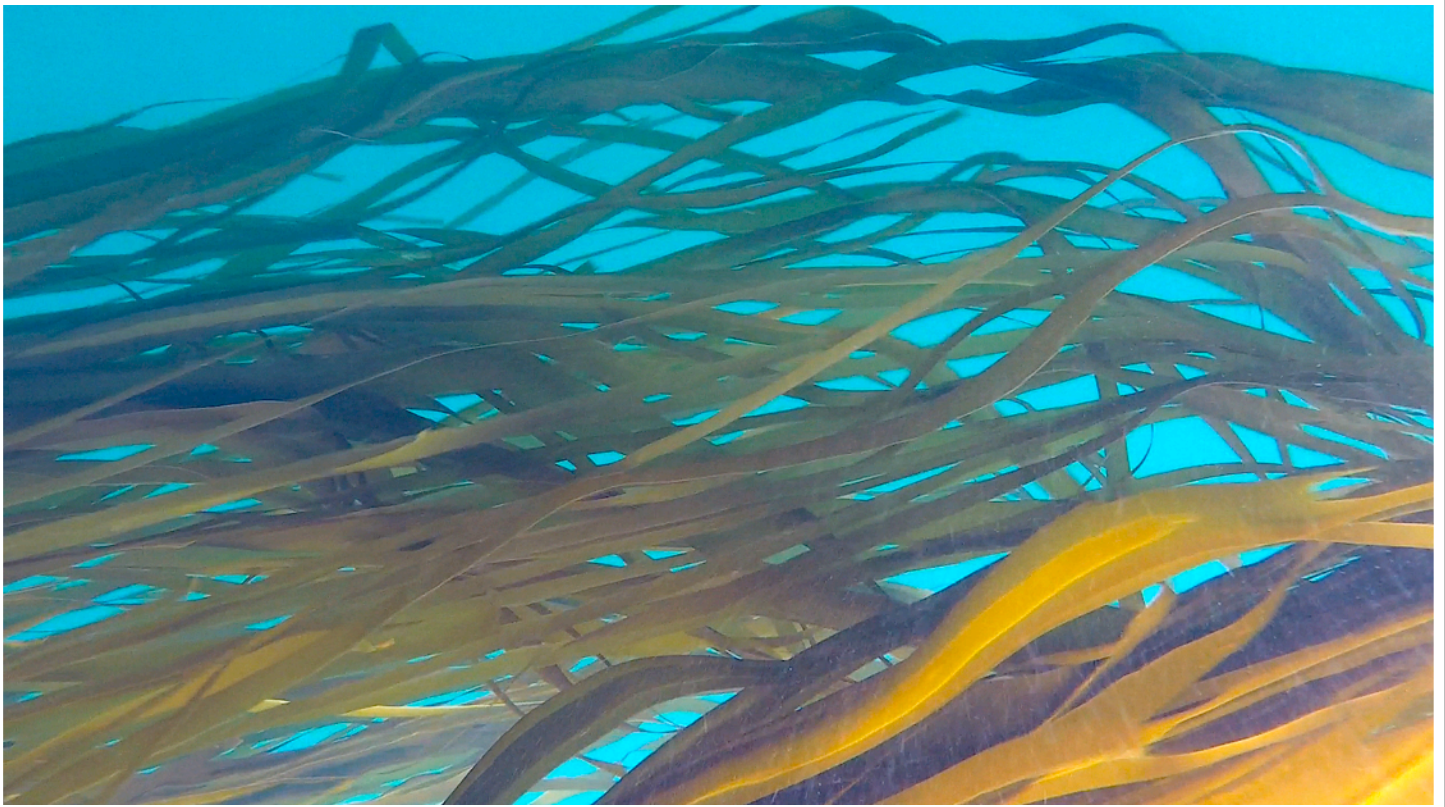






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PUHA continues its long standing participation, support and collaboration for the science, research, marketing and fisheries management for sea urchins along with it's DFO, Parks Canada, Agri Food Canada and First Nations partners and Community Organizations.



## INDUSTRY NEWS

Bank of Japan Raises rates: <https://www2.deloitte.com/us/en/insights/economy/asia-pacific/japan-economic-outlook.html>

Province wants Feedback: <https://www.pqbnews.com/news/province-wants-feedback-on-coastal-marine-strategy/>

DFO Buy Back: <https://www.cbc.ca/news/canada/british-columbia/federal-fishing-license-purchases-1.6686192#:~:text=CBC%20News%20Loaded-.Ottawa%20announces%20details%20of%20plan%20to%20buy%20fishing%20licences%20to,protect%20the%20fish%20that%20remain>







# Marketing Report/Geoff Krause Page 5

It is difficult to say what is driving markets this year because there is just so much going on, so much that it strikes me this a time to just keep our heads down and do what we do and hope things are going to work out. As an optimist, I see a lot of people of good faith despite the turmoil looking to get back to some kind of normal. Russia remains the biggest wild card - for now- even as they are providing brutal object lessons on why it is so very important to avoid a breakdown in civility, dialogue and non-violent relations. Hopefully the all-too-apparent costs will encourage others to more enthusiastically pursue constructive competitions that avoid the downsides on display, most especially in Ukraine and Russia. More cooperation/collaboration reassures markets which is in turn good for business and will help boost trade.

Checking into what sales have been like of late, the latest numbers I have from Stats Canada go up to the end of November 2022. Processed uni is going to 4 primary markets: Japan at \$3.3 M (vs \$2.7 M up to Nov 2021), Hong Kong at \$2.9 M (vs 3.3 M), South Korea at \$2.1 M (vs \$1.9 M) and the US at \$1.7 M (vs 1.2 M) with Taiwan and China coming in at about \$605 K (vs \$942 K) and \$353 K (vs \$526 K) respectively. Live sales have been primarily to Japan at \$1.6 M (vs \$2.15 M) and China at \$1.16 M (vs \$1.27 M) with smaller amounts going to the US at \$ 261 K (vs \$306 K) and Taiwan at about \$50 K (vs \$0). Sales of frozen product are small compared to the other categories but it is worth noting that Germany and South Korea are now neck and neck at about \$145-146 K each while Italy, France and Japan came in at \$68 K, \$62 K and \$27 K respectively. December is a big month for most markets but we will not get those numbers until towards the end of February.



As I mentioned on the last newsletter, we returned to the Seafood Expo Asia this past year when it was held in Singapore. Singapore is one of the richest markets in the world and has a varied and sophisticated cuisine which is very appreciative of BC uni. I am mentioning this because we have not seen anything that could be called a sales bump that might have resulted from that show. It is not real surprising as it was our first time exhibiting in that market, though we did attend a provincially sponsored seafood showcase in November 2019. In fact it is also kind of predictable because we did not have representatives from any of our major exporting companies. Business in Asia is strongly influenced by personal relationships and I suspect we are not likely to see a lot of success in Singapore until we get more buy in from exporters. We are committed to at least one more outing at that show - next September in Singapore- and we are hoping to get more companies joining us, companies able to find to find some extra production to service new and possibly exceptionally valuable markets like Singapore.



I am afraid our program moving forward is still a bit uncertain as we are still waiting for Agriculture and Agri-Food Canada (AAFC) to pull the trigger on the new AgriMarketing Program. We are sharing an information counter with the PSCHA at the Seafood Expo North America (SENA) in Boston in mid-March but that is about as far as we can go right now. We cannot submit and they will not accept any proposals until they take that critical step and it is starting to get close to a time when we need it to commit to any number of actions for the upcoming year(s). We are just finishing up the last phase of our last approved project so need a new proposal in to cover future activities.





## Marketing Report/Geoff Krause Page 6

I have yet to discuss it fully with the executive but am thinking that we should be looking to largely carry on with what we have been trying to do for the past few years. We should - I believe- make the effort to visit our main markets- that includes Japan, Hong Kong, South Korea and the US, and also try to feel out European markets through the Seafood Expo Global (SEG) in Barcelona. That show offers not only access to the EU markets, but is also a great place to put in an appearance simply because it is global in scope and most everybody is still in a "coming out of the pandemic" stage. As mentioned above, we are also committed to the Sea Expo Asia (SEA) in Singapore for at least one more go round. I would also advise continuing with the SENA and trying to get into the Restaurant and Bar Hong Kong (RBHK) if we can make it work, which I think we can if the AAFC makes their move. South Korea continues to grow in importance for us as well but I am not sure what might be the best way to start checking that out. Any advice on that would/will be most appreciated.



As a final note, Lynn Lee is working with a consortium of researchers, including scientists from across the Canada and the US as well as representatives from the Haida to develop a socioeconomic model of what can be expected as sea otters move back onto the islands. As you guys know- they are coming. The project has been going on for a couple of years now and a wrap up session is scheduled for the beginning of March. I believe a virtual option will be on the table for at least part of that and I will report on any developments or information of interest.







# Marketing Report/Geoff Krause Page 7

**That's about it for now- though again - I have included some background links for those who might be interested.**

2022\_11\_03- SCMP: [Doomsayers should think twice before writing off China's economy](#)

2022\_11\_03- BBC: [China and the US](#)

2022\_11\_07- NYT: [China's Business Elite See the Country Slipping Away](#)

2022\_11\_07- PhysOrg: [Temperature trends 2014-22](#)

2022\_11\_10- AAFC: [Taiwan food service trends \(from AAFC\)](#)

2022\_11\_12- Nikkei Asia: [Impact of Chinese wealth will transcend slowing economy](#)

2022\_11\_14- The Economist: [Financiers' pronouncements on China do not match their actions](#)

2022\_11\_16- SCMP: [Hong Kong immigration to Vancouver reversing years of decline](#)

2022\_11\_19- The Atlantic: [A history of Russian brutality](#)

2022\_11\_19- Malaysia News: [Singapore wants to sell the world on cell-cultured seafood](#)

2022\_11\_24- CleanTechnica: [Refrigeration system gaskets that work](#)

2022\_11\_29- PhysOrg: [Climate Change and oceanic hypoxic zones](#)

2022\_12\_04- CBC: [Scientists trying to prevent kelp from disappearing from West Coast](#)

2022\_12\_05- PhysOrg: [Research reveals how extinct Steller's sea cow shaped kelp forests](#)

2022\_12\_06- NYT: ['Male Malaise' With Work- Could One Answer Be at Sea?](#)

2022\_12\_07- Nikkei Asia: [China's white-paper protests will have long-term impact](#)

2022\_12\_09- PhysOrg: [Impacts of heat on young kelp](#)

2022\_12\_15- Caixin: [Is the World on the Brink of an Entirely New Era?](#)

2022\_12\_18- NASA: [ENSO- a good description](#)

2022\_12\_24- NOAA: [Connecting Earth's climate patterns](#)

2022\_12\_19- Seafoodsource: [Japan's seafood exports increase 2022](#)

2022\_12\_21- SeafoodNews: [Project to grow Sea Urchins in Landlocked Saitama Pref.](#)

2022\_12\_21- PhysOrg: [Paralytic Shellfish Toxin quick assessment possibility](#)

2022\_12\_26- SCMP: [US-China business cooperation is prevailing, despite tensions](#)

2022\_12\_28- G&M: [Xi Jinping's grip on China is weaker than it seems](#)

2022\_12\_29- SCMP: [China needs to rethink its relationship with Russia in 2023](#)

2023\_01\_02- NYT: [Spain the Magic Capital of the World- Be Aware in Barcelona](#)

2023\_01\_05- Foreign Affairs: [China's dangerous decline](#)

2023\_01\_07- PhysOrg: [Hypoxic oceanic zones and GCC](#)

2023-01-12- PhysOrg: [Scientists alarmed that oceans were hottest ever recorded in 2022](#)







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2023\_01\_12- PhysOrg: [Instantaneous geolocated fish catch data tech](#)

2023\_01\_16- NYT: [China's Population Falls, Heralding a Demographic Crisis](#)

2023\_01\_16- NYT: [China's changing tone on business](#)

2023\_01\_18- The Economist: [What the great reopening means for China—and the world](#)

2023\_01\_19- NYT: [Entrepreneurs Flee China's Heavy Hand: 'You Don't Have to Stay There'](#)

2023\_01\_20- CTV: [Japan relaxes mask wearing, other COVID measures](#)

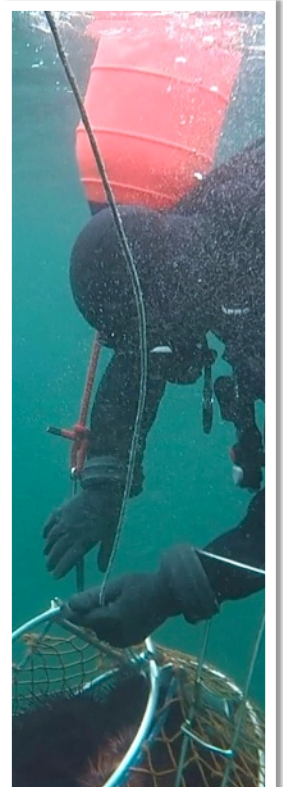
2023\_01\_22- Guardian: [The secret world of Japan's robot sushi chefs](#)

2023\_01\_23- Nikkei Asia: [China's growth story will convince the world once again](#)

2023\_01\_23- Nikkei Asia: [Carbon dioxide is poisoning the seas, not just the atmosphere](#)

2023\_01\_23- Nikkei Asia: [Maximum Xi Jinping' will be costly for China and its people](#)

2023\_02\_01- Foreign Affairs: [How Russians Learned to Stop Worrying and Love the War](#)







# D&D Pacific Report/Darin Macey Page 9

## RED SEA URCHIN FISHERY – to January 31<sup>st</sup> ish, 2023

### North Coast Fleet

- October landed less than 250k as the dive industry moved to the Sea Cucumber opening October 1<sup>st</sup>, but still, the worst month(landings) in 6 years
- November the fleet was able to land pounds around weather
- December the fleet work hard and then extreme cold shut them down with a small fleet trying over the new year
- The North coast protocol is working well
- Only 16% of the NC TAC has been landed. Up from 10% in mid-November

### South Coast Fleet

- Vessels are still active since August
- The number of vessels has declined since December
- The live market program in Steveston is active
- Commercial landings seen out of every QMA as they close around the coast
  - vessels maintain fishing effort out of
    - Port McNeill
    - Campbell River
    - Steveston
    - Port Alberni
- Over 66% of the SC TAC has been landed. Up from 40% in mid-November

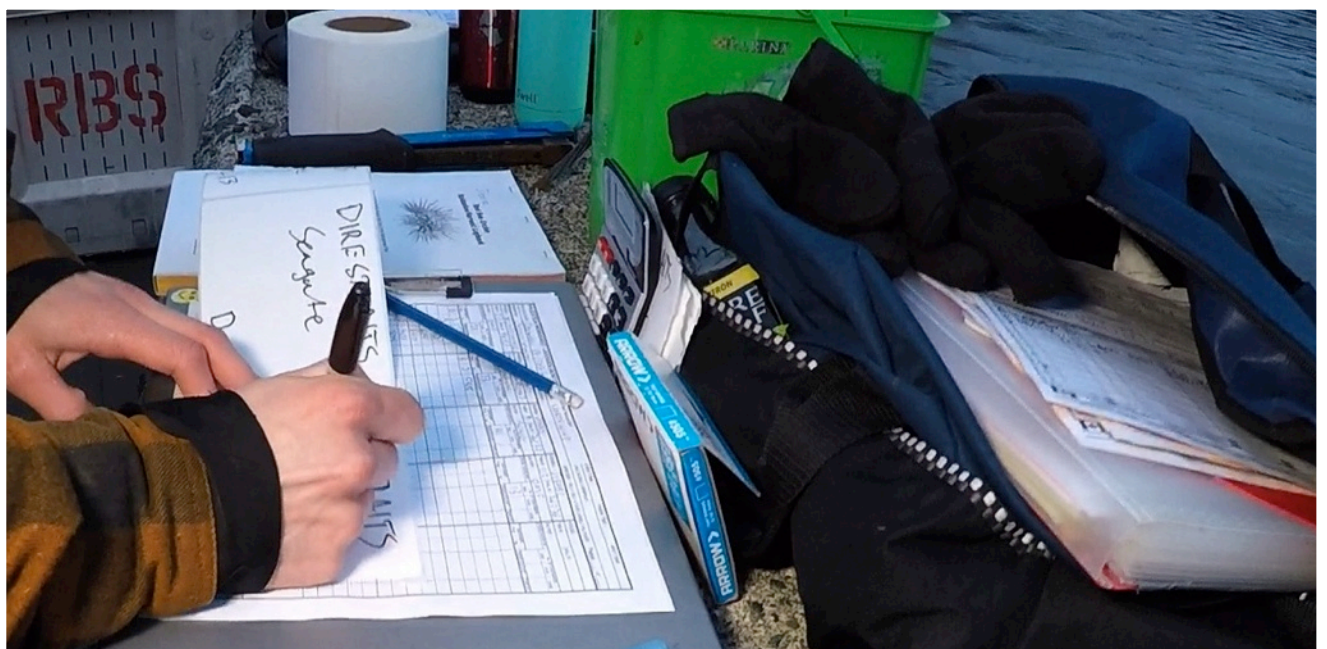




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## General

- Overall, the RSU fleet has landed 26.6% of the TAC coast wide. Up from 16.1% in mid-November
- Undersize is noticed more coast wide
  - Bent rakes and new divers the main issue
- Hail Notification prior to fishing and prior to landing (24 hrs.) is being breached by many vessels with improvement being noticed in January
  - Reasons why
    - Buyer notification is last minute due to market and or poor planning
    - Trucking is an issue
      - limited trucking companies
      - breakdowns
      - no drivers
      - BC ferries lack of continuity
      - Vessel Masters and crew not reading the CoL
- Electronic Logbooks coming
  - DFO Ottawa has set a deadline for electronic logbooks for 2024 but minimal details so far.
  - DFO has decided to let industry pay for the entire program and each fishery will have to develop their own app. D&D will keep you updated as soon as DFO provides some intel.







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Figure 1 – RSU Landings by Season to Date - 6-Year Trend – to January 31<sup>st</sup> ish, 2023

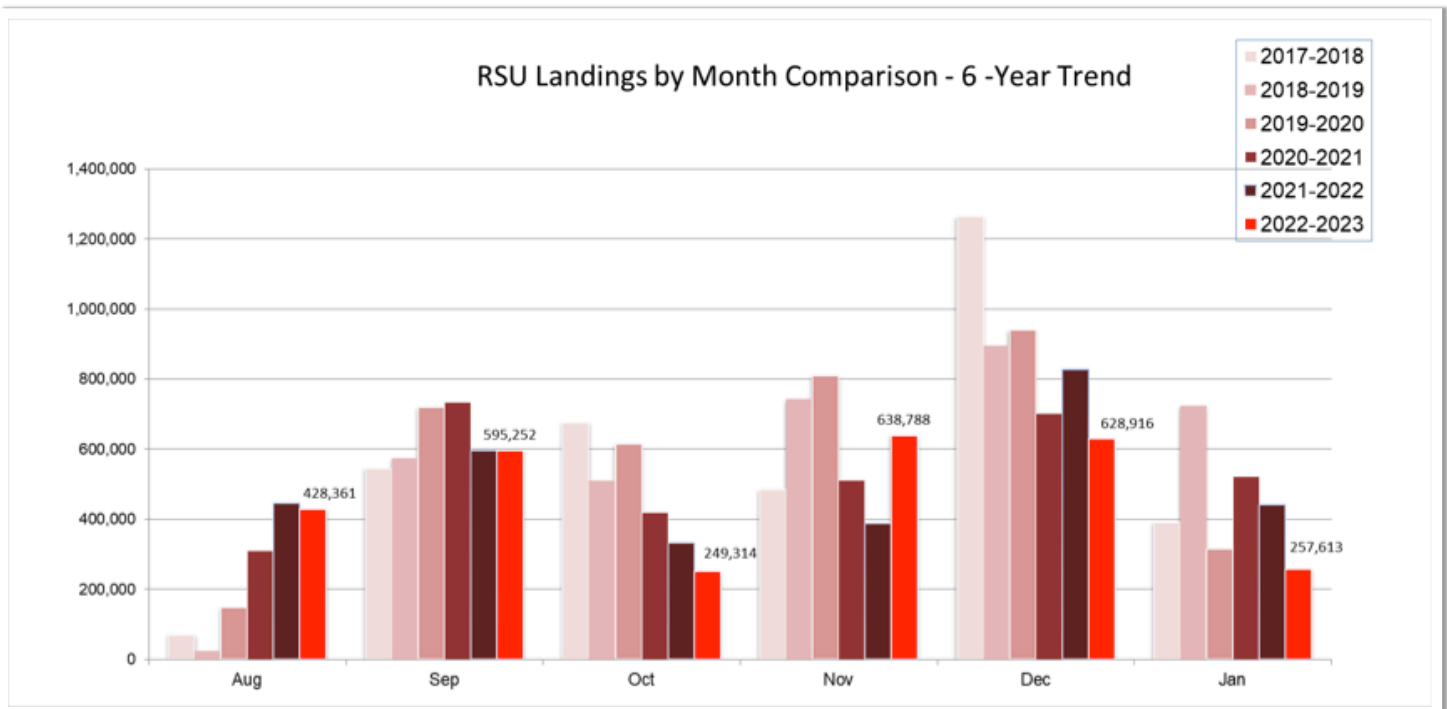
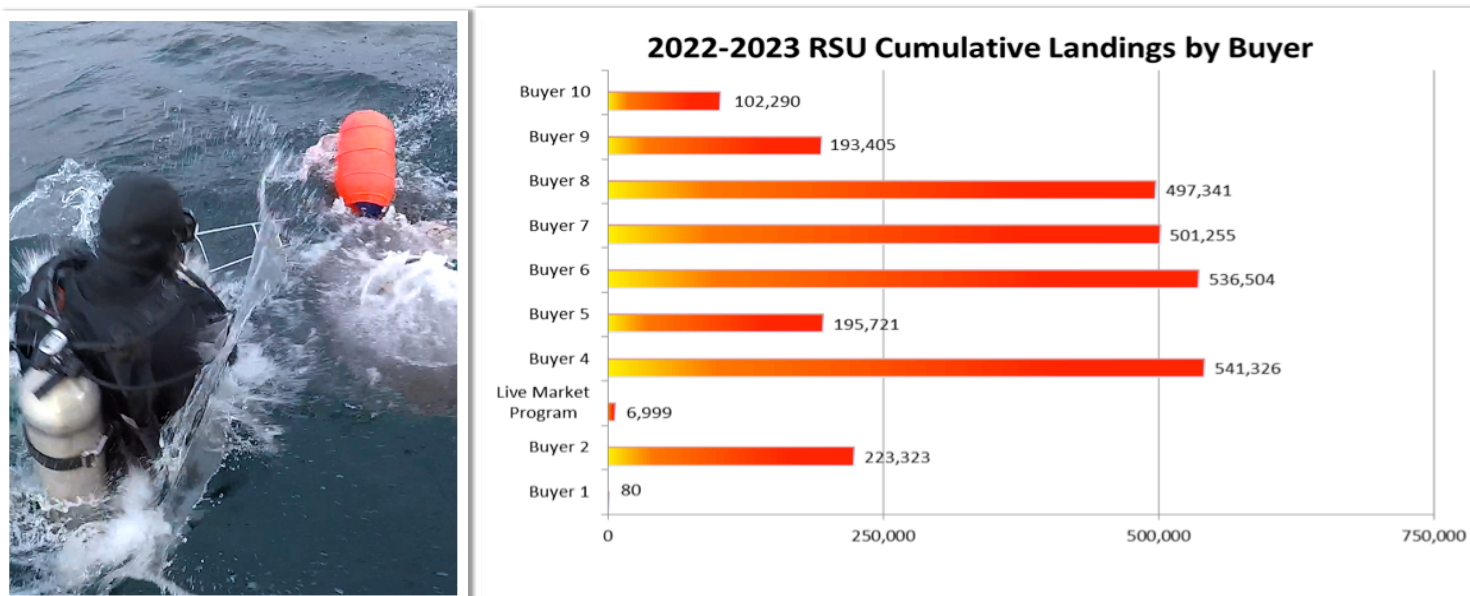


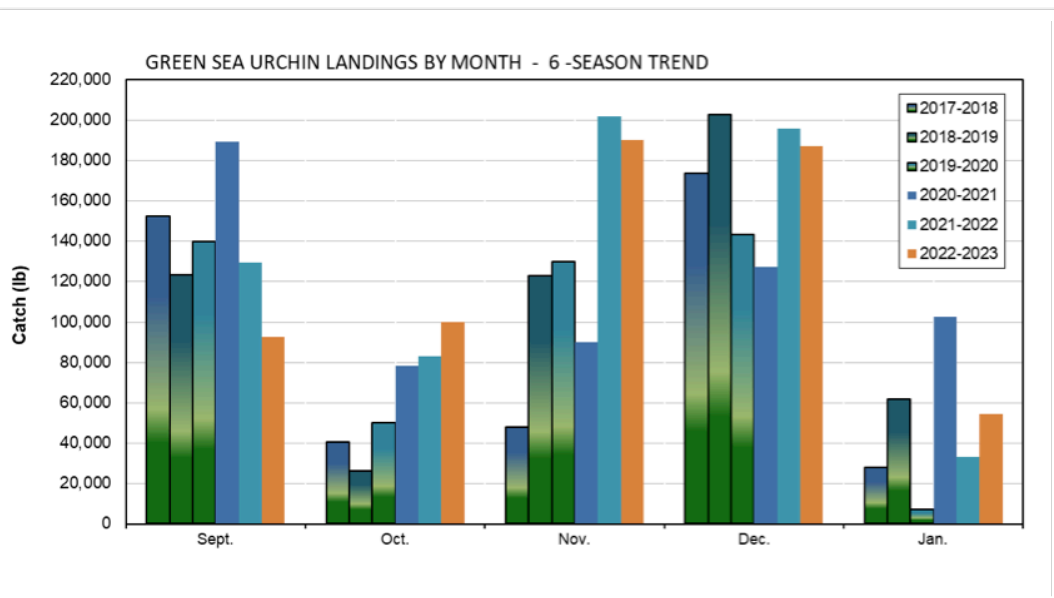
Figure 2 – RSU Cumulative Landings by Buyer – to January 31<sup>st</sup> ish, 2023





## 2022-23 GSU FISHERY– to January 31<sup>st</sup> ish, 2023

- The 2022-23 GSU season is winding down with roughly 57k remaining in the TAC
- 8 QMAs have closed with 2 more on final clean-up
- Market is soon to be lost as other countries start flooding markets
- Live market program in Steveston had the public interested in greens this season
- Kelsey Bay QMAs have the most quota left in the water at this time
  - Sidney, Sooke and Port McNeill QMAs also have remaining quota in the water
- Adherence to Conditions of Licence overall good
  - Subarea corrections increased this season
  - Knowledge of the Conditions of Licence and Harvest Plan needs to be enhanced with new crew
- Comments on Healthy bio-mass in all QMAs, with the least comments from 13c – Cordero
  - Quality varied in all QMAs



The PUHA fleet harvested 91.7% of the TAC as of January 31<sup>st</sup>, 2023 or close to it 😊





Figure 4 – GSU Landings by Buyer to January 31<sup>st</sup> ish, 2023

