



PUHA NEWSLETTER



“GO Canada Go” Edition Eh!

Presidents Report Mike Featherstone

The East coast of Haida Gwaii red sea urchin fishery just finished and the fleet moved to Daajing Giids. This year the red urchin fleet landed less on the East side, than last season, slightly over 405,000 lbs, leaving behind over 540,000 lbs. The

Lower 2W was the largest remaining, which is surprising, as typically this area was a good production area. This year only 78,000 were taken, over the previous 3 years 100 – 150k were landed. Going back to 2019 over 220k was landed annually.

PUHA is gathering specific information why the catch is dropping so drastically; all divers are requested to submit their thoughts to PUHA.



PRESIDENTS REPORT



MARKETING REPORT



D&D PACIFIC REPORT



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The decrease has been attributed to just under harvestable size urchins, closed areas and lack of kelp. This year PUHA will recommend a slight size reduction of 5 mm, this may help with C&P issues as well as lowering densities in the barrens. Generally, the decrease in landings on East side Haida Gwaii areas is attributed to the closures for the MPA's attributed to Gwaii Haanas and the Cumshewa/Skedans study area.

Reported prices (unconfirmed) ranged from \$1.30 to \$1.90, the high range is quite surprising and as the total expenses are higher from Haida Gwaii.

On February 26 and 27th, PUHA representatives met in Skidegate at the Haida Heritage Centre to share knowledge, discuss, and assess the current Red Sea Urchin Fishery in Gwaii Haanas as part of the Land Sea Peoples Plan: <https://parks.canada.ca/pn-np/bc/gwaiihaanas/info/plan>

The Eco system based Management Assessment Workshop Participants included myself and Bob Hegadus, Pauline Ridings and Christine Hansen from DFO, Haida, Parks Canada and NGO representatives totally over 20 stakeholders. There were presentations from PUHA, DFO, Parks Canada and Haida.

The group used seven ecological and socio-economic Ecosystem Based Management targets derived from the Gwaii Haanas Gina 'Waadluxan KilGuhlGa Land-Sea-People Management Plan to evaluate the fishery. The workshop was very successful and there was general agreement that the fishery is well managed and that there is potential for the fishery to improve eco system goals. PUHA will publish the assessment once it has been reviewed and approved.

The recommendations from the assessment workshop will be passed on to the Archipelago Management Board for consideration. PUHA recommends that some areas currently closed under the plan be reopened and we have requested fishers to provide specific sites and details to provide the AMB and DFO.

The mainland north coast is also showing decreased landings this year, more attributable to weather and hard to find quality. The green fishery this season has been quite successful, with few hiccups and landings nearing 100% of the quota. PUHA will continue to expand the fishery based on the biomass and the abundance of green sea urchins in many areas. There maybe challenges next season related to China tariffs on seafood. Currently geoduck prices have dropped 50% due to market and tariffs.

The south coast red fishery is currently at 54% of the TAC, a large portion of remaining quota is in Port McNeil where virtually no pounds have been landed. This is due to the sea otters which have decimated the population. Again, the trend this season is lower landings in the south coast.

On the health and safety file, Lawrence Anderson has been busy distributing the Dive Safe Manual and reviewing it with crews up and down the coast. Lawrence also attended the National Underwater Conference in Richmond in April as well as attending the Boston Seafood Show. You can catch more details later in the newsletter.



Geoff will have all the updates on the latest marketing efforts in the Marketing section. Geoff and I recently returned from Tokyo and Seoul where we met with Consulate officials and did market exploration. Although Japan has slipped from our number one export market, it is still an important importer of Canadian sea urchin. As described in previous newsletters, the weakness of the Japanese yen, lead to less imports and Japan increasing exports of their uni. The Japanese economy had been either deflationary or stable for over 20 years. Only in the past few years had the consumers seen any price increases for sea urchin.



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In the Kaitenshushi (conveyor style) bars, the price of uni went from 100 to 110 yen. This was a shock to the consumer and led to a drop in demand. Over the past 2 years consumers have been accustomed to the increased price and more adapted to the inflationary environment. As a result, demand is bouncing back, we do expect demand in Japan to continue to increase towards previous levels. Except for the past few years Japan has been the largest importer of Canadian sea urchin. Unfortunately the Japanese wages have not increased.

Another interesting discovery was the difference in the unis from various areas in Japan, and how those tie into the marketing and pricing of the Japanese domestic sea urchin. In the old Tsukiji market area, we visited a uni speciality restaurant and sampled a 6 uni sampler plate, from 6 different areas and all with a unique taste and flavour. For reference this sampler of high end uni cost \$130.



PUHA has several ongoing initiatives to increase value, quality, safety and landings. Kelp restoration and sea urchin barrens with respect ecosystems are new focal point in these efforts.

PUHA is collaborating with Ocean Wise and the Tsehalt First Nations to identify suitable sites and we have reached out to other First Nations groups to explore the opportunities. The interest in this work has grown from the success of the Nurturing Kelp to Grow project in Haida Gwaii. Although the landings are down the efforts of PUHA are continuing with efforts to increase prices and productivity, thru these projects.

In closing I should mention tariffs, which have been a hot topic every where. There was a lot of uncertainty where tariffs would land on seafood but as of this time, the US tariffs are not being applied to seafood. This is good news as the US market is very important for our industry, particularly at this time of year when Mexico is not fishing. China tariffs may effect greens next season.





The world is, as noted in the last newsletter, again revolving around Donald Trump, with markets bouncing around trying to anticipate his next move (or even brainstorm). On again-off again tariffs and constant threats escalating tensions are causing all sorts of problems for markets, traders and investors who prefer a more stable environment than he is allowing. It is not looking any relief is in the wind in that regard at this time as we are likely to remain at his mercy for the foreseeable future so we will have to just try to work around that.

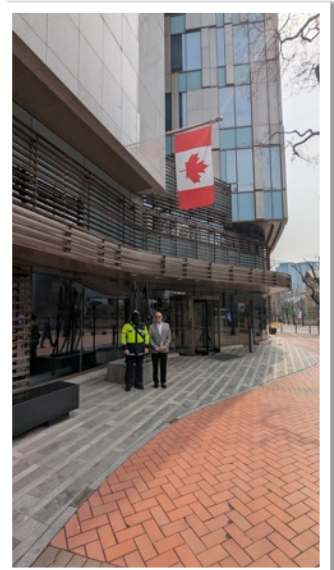
I attended the Seafood Expo North America in Boston with Lawrence Anderson and Fraser Rieche back in mid March and was for the most part pleasantly surprised at how things went. I was anticipating more tension at the show than I actually encountered, though I must admit we did not get as many visitors stopping by this year. My experience at this show since about forever has been that a couple four old guys are likely like to stop by and reminisce about how things were back in the day. That did not happen at all this year. In addition it struck me that people were wandering past were not as open to directly meeting my gaze and were tending to avert their eyes and just keep on moving. It was encouraging though that on the couple of occasions when we went out for after-show entertainment with customers and acquaintances they were without exception totally choked, even pissed, that things were going so badly sideways between the US and the rest of the world, and most especially with Canada. That gives some assurance that we will get past this - though even The Economist reports that many Americans, most especially of a more conservative (GOP) persuasion are looking at Canada with more suspicion because of the attitude emanating from the President. Getting through this "episode" unscathed is not a given by any means and we are going to have to good care of our relationships down there.

We had about 33 people stop by to enquire about our products. I have not had time yet to process the contact information but it is worth noting that this is down about 20% from the last few years even though the number of visitors reported for the show overall has stayed pretty much constant at about 20,000. Still, we got some solid leads out of it including some that could prove very substantial. Following up on those is beyond my remit as I am not able to offer terms or assurances but the parties involved were advised on how to reach out to exporters for more direct discussions.



Mike and Geoff undertook a 10 day mission to Japan and South Korea around the end of March.. This trip was a priority because both countries are important markets for Canadian sea urchin and and we need to put in some effort to build our relationships with buyers there to ensure our business continues to develop beneficially for all involved. Japan used to be the overwhelmingly dominant destination for our production but has since been partly eclipsed by other countries as we established and nurtured direct lines of sale in other markets when the Russian IUU fishery forced us to diversify our sales options. Hong Kong, South Korea and the US now join Japan in the top tier of our four largest markets and while we are continuing our efforts to diversify we feel we must also make sure we are taking care of our existing customers and addressing any concerns they may have.

Plans for this trip have been part of our multi-year plan since 2024 but our motivations became more urgent with the election of Donald Trump. The changing trade environment triggered by emerging policies of his new administration are threatening to upend decades of more or less congenial international trade relations and replace them with a more protectionist, less generous and even more hostile environment. This is likely to shrink international trade and the economic benefits it provides. Canada, and Canada's fishing sector including our dive fisheries, has built its prosperity on open market assumptions and remains critically dependent on international markets.





We also managed to get a tour of the new Toyosu Wholesale Auction Market arranged for us. Toyosu replaced Tsukiji a few years back and is a definite upgrade as far as technology, design, access and security etc are concerned. Access is controlled by security and public access is generally only permitted by tours in certain areas of the facility. Our tour included the display area for the uni coming up for auction though we were not able to observe the auction action itself.

This mission also included South Korea which has developed into a significant market for BC urchin since the signing of a free trade agreement between Canada and South Korea in 2015. They have been taking between \$ 2 - 2.5 M CAD worth of product each year since at least the pandemic and we felt it imperative that we should become more familiar with the country and the people. Other than a

meeting with Canadian Trade representatives at the Canadian Embassy in Seoul, we did not have a definitive meeting agenda laid out for this part of the trip. We were hoping for a couple of meetings arranged through companies in Vancouver, but communication issues and the rushed time line of getting the trip arrangements in place resulted in compromises that rendered them unrealistic.

South Korea is a technologically advanced society with a good helping of the expected advanced transport and communications infrastructure supporting high mobility, good public transit and the modern amenities we all expect. It has one of the fastest broadband internet systems in the world and as a free society with few overt restrictions on information or expression, has a very vigorous (if perhaps sometimes to our Canadian sensibilities overly excitable) democracy. The general feel we got on the streets walking and transiting around was that things are safe. There are lots of small businesses keeping things going, including many small probably-family- owned restaurants and stores sustaining a strong sense of local community, It is a bit of a two-tiered society as most of the economic activity is dominated by large vertically integrated firms, known as Chaebols, that drive the world leading innovation and productivity of their large industrial enterprises.



We did not see any sea urchin at the Garak Market but did find some at the Noryangjin market. In one store there were 100 g trays of Peruvian product priced at 19,000 WON and a 300 g tray from Hokkaido priced at 250,000 WON. There are about 1,000 WON per Canadian dollar so these prices work out respectively to about \$190 and \$833 CAD per kg. We ran across another booth that was selling Chilean product and Canadian product at 20,000 WON and 30,000 WON respectively per 100 g tray. These prices work out to about \$200 and \$300 CAD/kg respectively.



We had a cordial and very informative meeting at the Canadian Embassy with Trade Commissioners who clarified a number of points for us. Koreans are very interested in trying new things and depend on imports for about 60% of their food. This extends to seafood even though they have well developed fishing and aquaculture sectors. China is the largest single overall food importer to South Korea while Russia is the largest single seafood importer. Canadian import numbers are still recovering from the pandemic but uni seems stable at between about 2.4 – 2.6 M CAD/year. We heard from a number of sources that Korean consumers are apparently only interested in “A” or possibly “B” grade product- they are not looking at all for “C” grade or lower products, no matter the price advantage(s).



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RED SEA URCHIN FISHERY – 2024-2025 Season

South Coast Fleet

- The south struggled in the fall to keep up production levels comparable to previous season(s)
- November landings exceeded expectations compared to the last 3 seasons
- December took a huge hit with no harvest from QMA 12k Port McNeill
- January was solid and landings strong
- February and March tanked compared to previous seasons
- We have vessel(s) now looking at 12K Port McNeill
 - Due to the rumour mill from last season, no effort this season to harvest
- The live Market Program out of Steveston remains active around weather

North Coast Fleet

- Weather dominated the fleet in the north over the fall and into the winter
- Landings the lowest by month for the past few years until weather and effort aligned in December to land 300k
- January was solid as the weather allowed multiple days of fishing landing over 390k, a huge improvement compared to the previous 5 plus seasons
- The fleet persisted through February maintaining strong landings
- March had the fleet work earlier on the Kelp Project before starting the run down to Rose Harbour
- Substantial portions of the coastline closed, the fleet did their best to fish within the size limit and maintain quality through QMA 4B to QMA 5B
- The fleet worked QMA RU6 and RU7 out of Rose Harbour prior to moving to Skidegate
 - No effort made to visit QMA RU8 Flamingo Inlet

General

- Harvest charts submitted by email is becoming the normal way of delivery
- Canada Postal strike in the winter resulted in multiple packages lost in transit
- CoL infractions overall have improved
- Average landing per vessel has dropped again this season, indicating an increase in effort / cost
- The number of validations of product increased due to micro markets and export rules
- Fourteen buyers this season (up from 12). The additional buyers relate to First Nation and Public sales



Figure 1 – RSU Landings by Season by Month to Date 5-Year Trend

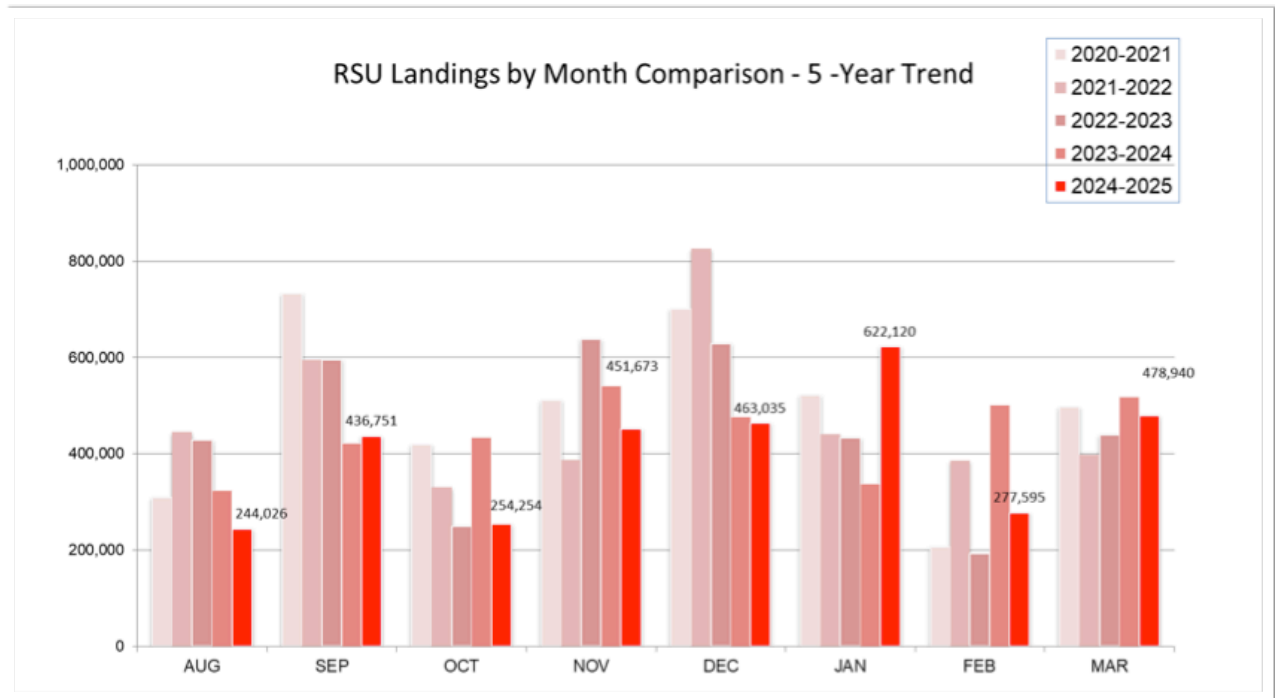


Figure 2 – RSU Landings by Season to Date 8-Year Trend

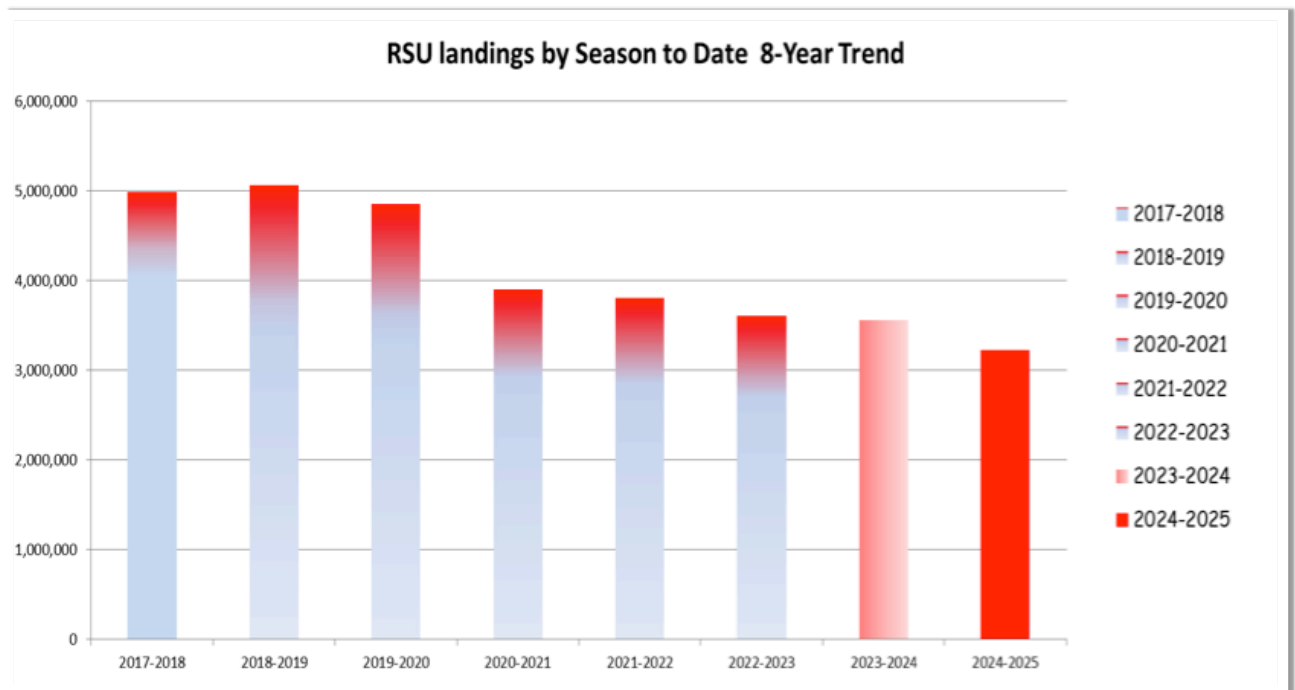




Figure 3 – RSU North Coast Catch Comparison by Month – 6-Year Trend

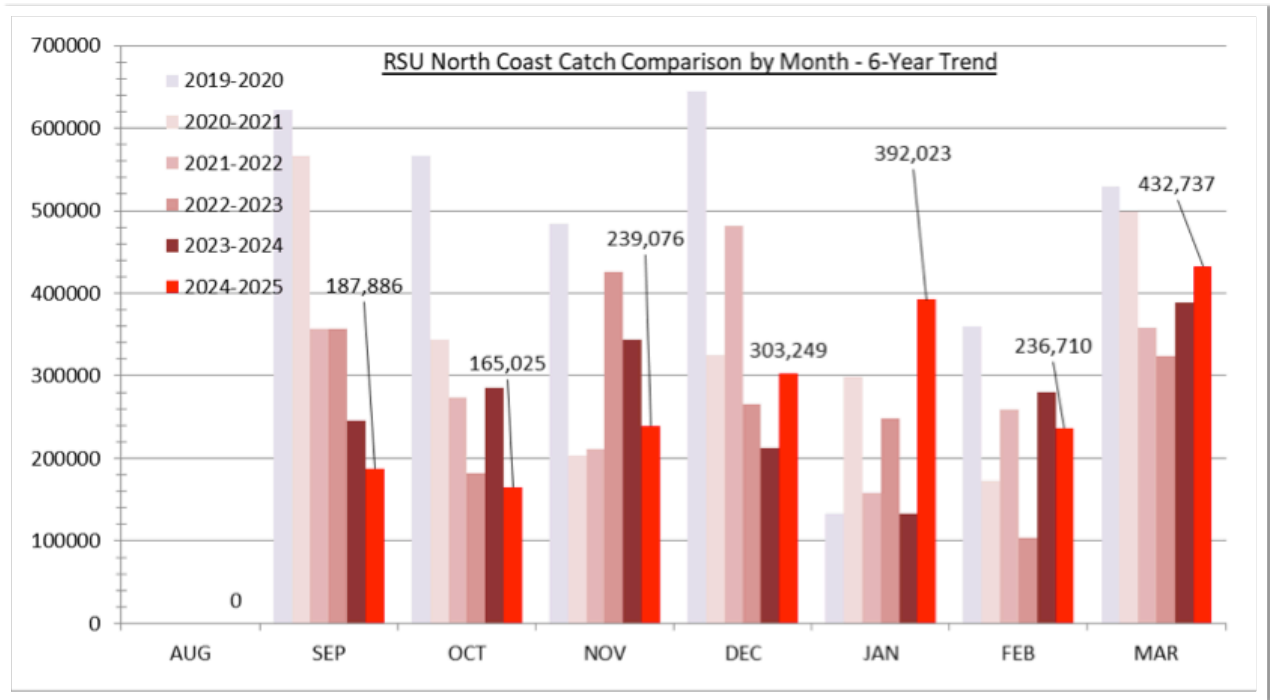


Figure 4 – RSU South Coast Catch Comparison by Month – 6-Year Trend

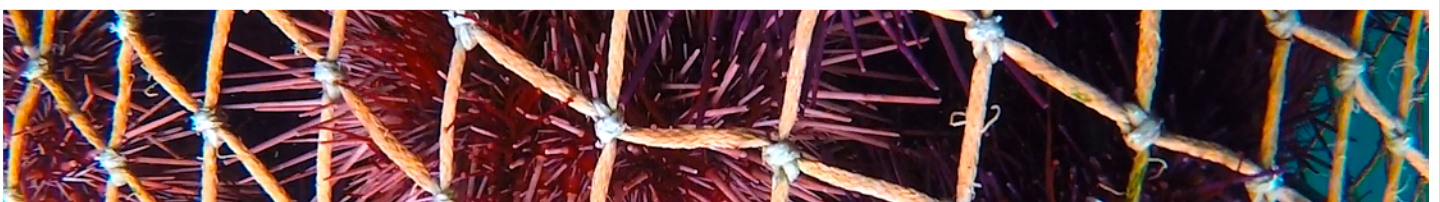
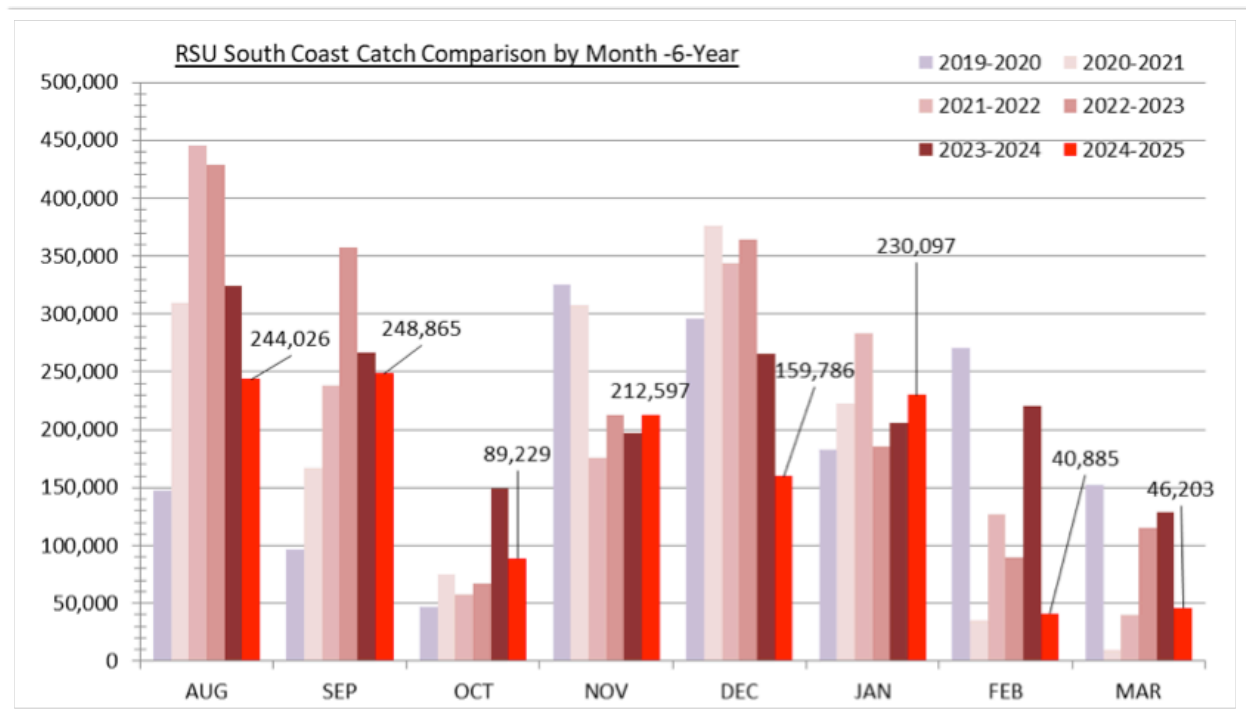
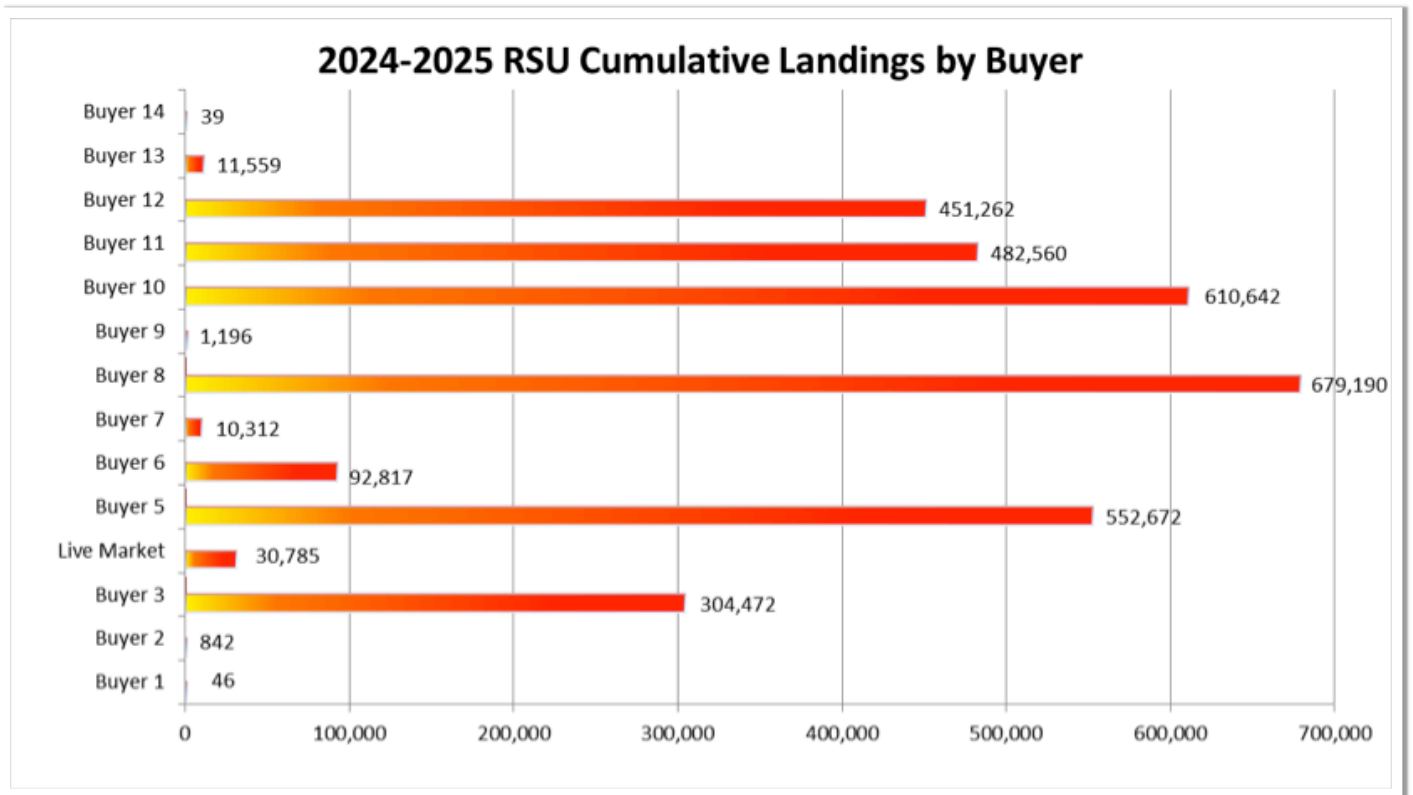




Figure 5 – RSU Cumulative Landings by Buyer to Date

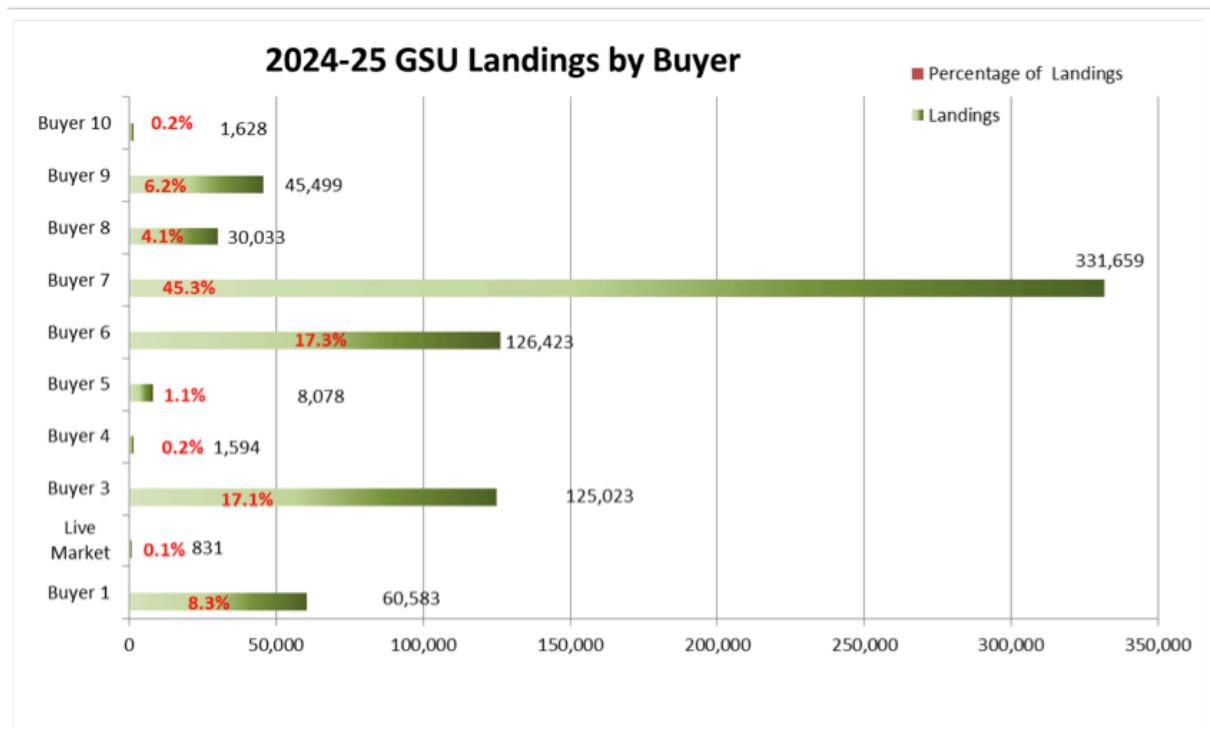
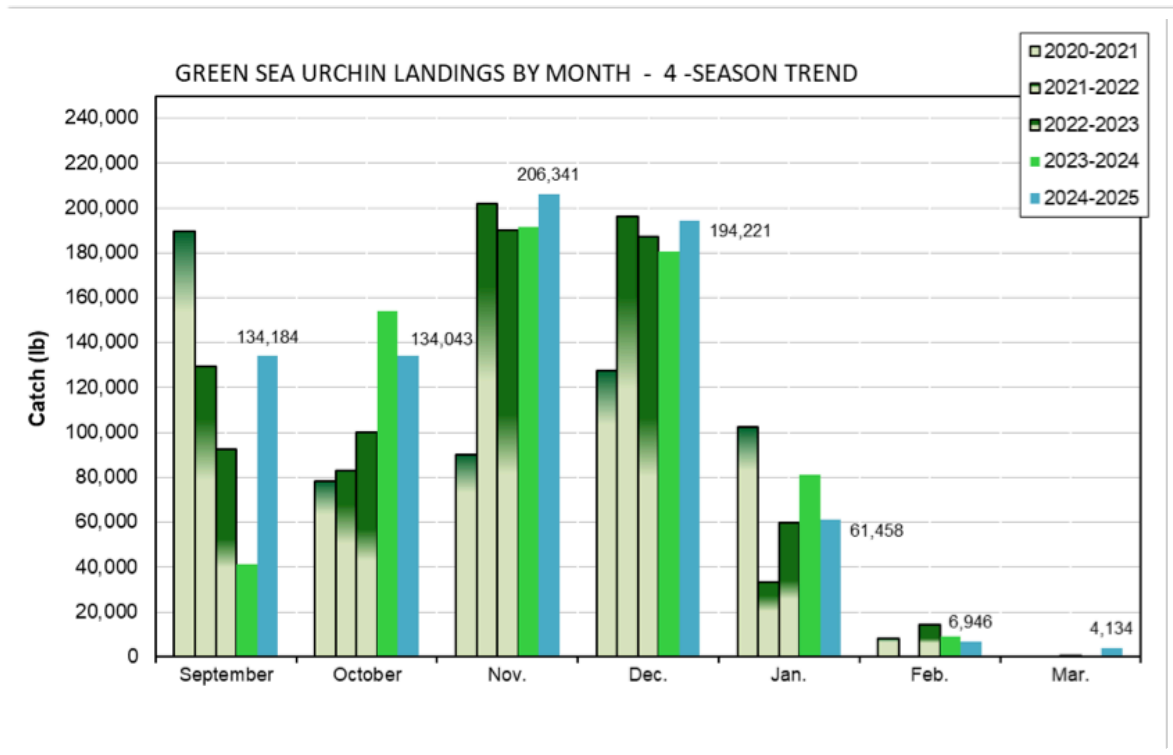


GSU FISHERY- 2024-2025 Season – March 31, 2025

- Minimal activity after January
- Vessels cleaning up their tabs and testing live markets
- Anticipate Minimal landings out of QMAs left with quota in the Victoria region
- Average landing per vessel has dropped again this season, indicating an increase in effort / cost
- The number of validations of product increase due to micro markets and export rules
- QMA 14's quota increased this season, and under the Exploratory protocol, received additional quota in-season from QMA(s) 12b & 20b
- No activity in the Exploratory QMA 16
- QMA 17 Exploratory landed 605 lbs
- Sidney to Sooke QMAs have minimal quota left
- Harvest chart delivery good
- No major infractions
- No negative comments on bio-mass, although discussions on quality noted throughout the season
- 10 buyers total this season to date



Figure 4 – GSU Historical Landings by Month 5-SeasonTrend





Safety Report/Lawrence Anderson

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The Best Practices Dive Manuals have been handed out to the majority of boats. The manual was distributed in December and January to the South Fleet while the Manuals were given out and explained in Prince Rupert in early March to the North coast fleet. Several copies were left with D and D Pacific dockside observers for the boats that I did not visit or have any interaction with.

Downloadable versions are also available-follow this link: www.puha.org/recruitment



There will be a one to two page addendum with emphasis on Critical Incident and Stress management procedures and protocols. This will be completed later this Spring and put to the boats before next season. Members from the various dive fisheries associations met with WorkSafeBC at the National Underwater Conference and Exhibition at the beginning of April in Richmond. In attendance in this meeting was Dive Safe International and Shearwater Research to try and get some sort of regulatory approval for the use of dive computers. It was a very positive meeting and WorkSafeBC is in the process of reviewing their current policies. The dive fisheries associations will now be lobbying for CSA approval. A side note until this happens West Coast Geoduck Research Corporation is planning on applying for a variance to gauge the process and approval procedures with WorkSafeBC.

Lastly mark your calendars for the inaugural Divers's Catch Gala to take place in Richmond on September 20th. We have a lot of people and companies excited about the event. Extending an invitation to the folks in the Industry to attend. www.diverscatchbc.ca And follow on Instagram Diverscatchbc The BuyBC program has generously helped to partially fund this event.

