

The Aquaculture Opportunity



Sharing the facts about Nova Scotia's Aquaculture Industry

“Nova Scotia Sea Farmers”



By: The Sea Famers Team
September 2015



Today's Agenda

1. Introduction
2. AANS: Who we are – Sea Farmers
3. The Case for Seafood
4. Aquaculture Industry Statistics
5. Nova Scotia's Aquaculture Industry
6. Aquaculture as an Economic Driver
7. Aquaculture Regulation: An Opportunity to Grow
8. The Sea Farmers Membership
9. The Codes Initiative
10. Community Engagement
11. AANS Success Stories and Initiatives
12. Fish for Hope

Aquaculture Association of Nova Scotia

“Nova Scotia Sea Farmers”

- ✓ 14 Board Members + 1 Independent Science Adviser
- ✓ Founded 1977
- ✓ Promotes the interests of fish farmers across Nova Scotia
- ✓ 70+ Membership
- ✓ 10 Different seafood products offered

Mission:

To support the production of quality food in the cool, clear waters of Nova Scotia, creating wealth based on a renewable resource.





Food and Agriculture
Organization of the
United Nations

2014

9789 92511 9029

The State of World Fisheries and Aquaculture



Opportunities and challenges

‘Fisheries and Aquaculture play a vital role in achieving FAO’s Strategic Objectives of eliminating hunger, food insecurity and malnutrition.’



Food and Agriculture Organization
of the United Nations

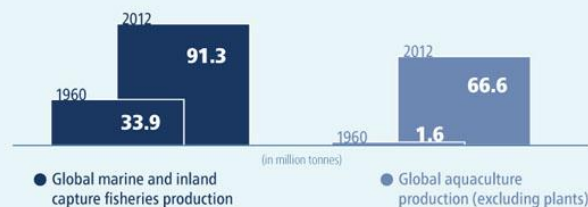
2014

THE STATE OF WORLD FISHERIES and AQUACULTURE

People have never consumed so much fish or depended so greatly on the sector for their well-being as they do today

PRODUCTION

World fisheries produced 158 million tonnes of fish in 2012



Understanding Omegas – Coleen Nolan

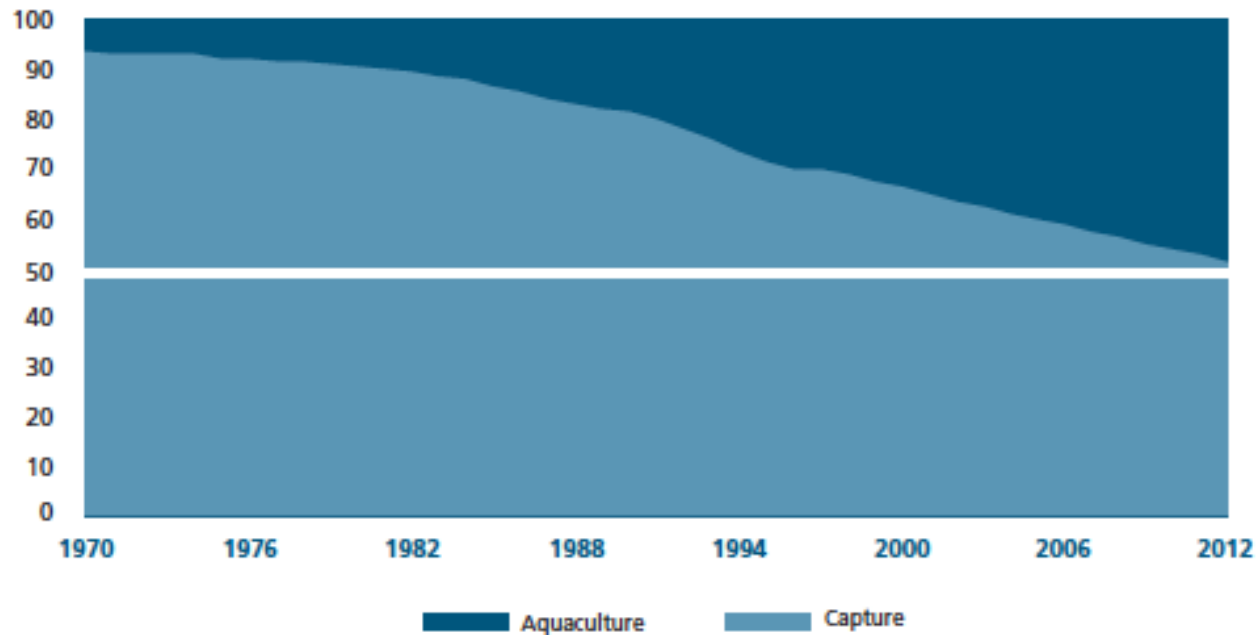
UNDERSTANDING OMEGAS

Coleen Nolan

‘Aquaculture remains one of the fastest-growing food-producing sectors and is set to play a key role in meeting the rising demand for fishery products.’

Relative contribution of aquaculture and capture fisheries to food fish consumption

Percentage of fishery food supply (kg/capita)

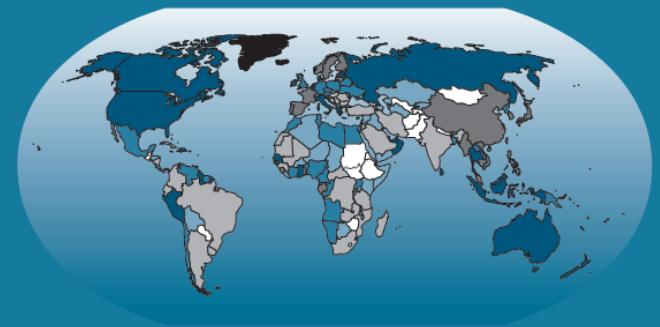


Canada

Canada's Aquaculture Sales 2013:
Just under 963M

(sourced DFO)

Fish as food: per capita supply (average 2008–2010)



Average per capita fish supply
(in live weight equivalent)



Note: The map indicates the borders of the Republic of the Sudan for the period specified. The final boundary between the Republic of the Sudan and the Republic of South Sudan has not yet been determined.

How do we compare with Global Production?

172,000 tonnes of farmed seafood
produced in Canada 2013

(sourced DFO)

90M tonnes of farmed seafood produced and
sold globally in 2012 (including almost 24M
tonnes of aquatic plants)



Fisheries and Oceans
Canada

Pêches et Océans
Canada



AANS
AQUACULTURE
ASSOCIATION
OF NOVA SCOTIA

Canadian Aquaculture Production and Value

Aquaculture Production Canada 2013 (tonnes)					
	NFLD	PEI	NS	NB	BC
Total Finfish	17%	0%	5%	14%	58%
Total Shellfish	10%	62%	5%	2%	20%
Total Aquaculture	15%	15%	5%	11%	49%

Aquaculture Production Canada 2013 (CDN dollars)					
	NFLD	PEI	NS	NB	BC
Total Finfish	21%	0%	5%	13%	56%
Total Shellfish	16%	41%	12%	6%	24%
Total Aquaculture	20%	4%	6%	13%	53%

**Canada's Aquaculture Sales 2013:
Just under 963M**

(sourced DFO)



“Atlantic Canada is the fastest growing region for aquaculture in Canada, with production at about 50% of the national total in 2010 and annual growth expected to be in the double digits over the next four to five years.”

(source ACOA webpage)



Nova Scotia's Aquaculture Sites



“At present, there are 44 companies actively farming fish in Nova Scotia.”

(DFA website May 2015)



Finfish species include:

Salmon, Arctic Char, Haddock, Halibut, Trout, Eels



Nova Scotia's 2013 Aquaculture Industry Statistics

Finfish Sales of 43M

Shellfish Sales of 4.2M

Other species farmed sales of 7M

Worth more than **\$54.3M** in 2013

Shellfish species include:

Oysters, Mussels, Clams, Quahogs



Sea Plants:

Rockweed, Kelp, Irish Moss, Bladderwrack, amongst others



Aquaculture: An Economic Driver

650 Direct Jobs on Aquaculture Farms



1,000 indirect jobs that support the industry



Local Business Opportunities created with Market Expansion Strategies!



Aquaculture: An Economic Driver

State-of-the-Art Facilities and Technologies



Positioned for Growth!



Aquaculture Participants in Nova Scotia

Academics:

Schulich School of Law (DAL)

ECELAW (East Coast Environmental Law Association)(DAL)

NSERC (Natural Sciences and Engineering Research Council of Canada):

Jon Grant and Cookes Aquaculture (DAL Dept. of Oceanography)

NSCC – Aquaculture Studies

DAL Agricultural Campus – Aquaculture Program

Government Officials and Regulators:

DFO, DFA (Regulatory Advisory Committee); Health Canada, along with the Pest Management Regulatory Agency; Coast Guard; Transport Canada; Minister of the Environment; CFIA, coordinates with: WTO – World Trade Organization, along with World Organization for Animal Health; Fisheries and Aquaculture Loan Board; ACOA

Community Groups:

Atlantic Salmon Federation; NS Salmon Association; Atlantic Canada Fish Farmers Association; Mi'kmaw Community; NS Fisheries Sector Council; Nova Scotia Fish Packers Association; Union of NS Municipalities;

Environmental Groups:

EAC; Coastal Coalition of NS



Aquaculture Documents

Fisheries and Coastal Resource Act (NS);
Canadian Environmental Assessment Act (federal);
Navigable Waters Protection Act (federal);
Atlantic Canadian MOU (interprovincial);
Environmental Goals and Sustainable Prosperity Act (NS);
Mi'kmaw Rights Initiative;
Fisheries Act (federal);
Species at Risk Act (federal)
National Aquatic Animals Health Program (NAAHP)(CFIA);
Health Canada – Veterinary Drugs Directorate, Health of Animals Act (federal);
Animal Protection Act (federal);
“A New Regulatory Framework for Low-Impact/High-Value Aquaculture in NS”

A photograph of an aquaculture facility. In the foreground, there are several metal cages on the water. In the background, a white boat with a blue stripe is visible. The text "A New Approach to Aquaculture: From Our Minister" is overlaid on the image.

A New Approach to Aquaculture: From Our Minister

Doelle-Lahey Panel

The Independent Aquaculture Regulatory Review for Nova Scotia

New Regulatory Framework

- ✓ 3 New Sets of Regulations:
 1. Animal Health
 2. Environmental Management
 3. Licensing and Leasing
- ✓ Independent Aquaculture Review Board for new site applications
- ✓ Regulation enforcement transferred to the Dept. of the Environment
- ✓ Greater transparency
- ✓ More accountability

Landbased Aquaculture Membership

Making headlines...

- Canaqua Seafood Ltd.
- Scotian Halibut Ltd.
- Sustainable Blue
- North River Fish Farms
- Pronet Micro Systems Inc.
- Atlantic Canada Eels



Kirk Havercroft, CEO of Sustainable Fish Farming, says the company will sell its Atlantic salmon to restaurants and brokers in Nova Scotia, along with a small broker in Toronto. (CBC)

Fish Hatchery Membership

- Dunphy's Oysters
- Dartek
- North River Fish Farms
- Merlin Fish Farms
- Bay Enterprises Ltd.
- Big Falls Fish Growers Ltd.
- Innovative Fishery Products Inc.
- Scotian Halibut Ltd.
- Strickland Farms Ltd.



Finfish Membership

- Snow Island Salmon Inc.
- Ocean Trout Farms Ltd.
- Innovative Fishery Products Inc.
- Nova Eel Inc.



Shellfish Membership

- Aquadelights Seafoods Ltd.
- Aquaprime Mussel Ranch Ltd.
- Bay Enterprises Ltd.
- Bill and Stanley Oyster Company Ltd.
- Cape Breton Bivalve Inc.
- Cape North Mussels Ltd.
- Dunphy's Oysters
- Merigomish Oyster Farm
- Strictland Farms Ltd.
- Quarry Island Oyster Farm
- Shandalph Oysters
- Eel Lake Oyster Farm Ltd.
- Future Seafoods Inc.
- Innovative Fishery Products Inc.
- Long Reef Shellfish
- Premium Seafoods Ltd.
- Sober Island Oyster Ltd.
- Pristine Bay Premium Oysters
- Riley Oysters
- Ocean Trout Farms Ltd.

Business Networking



The Codes of Best Practices Initiative

Project Start: January 2014

The AANS is committed to continuing the conversation with stakeholders as our codes develop and our sector grows.

2014 Codes of Best Practice Sessions took place:

January 31st

May 22nd

July 30th

October 2nd

*Summaries of each of these sessions are available at www.aansonline.ca

The Codes of Best Practices Initiative

As of February, 2015 the following codes have been developed and are available for public comment.

Code of Containment

Code of Fish Health and Welfare

Code of Shellfish Health

Code of Engagement

Bio-security Plan

Coming soon: Code of Environment

Commitment to Community Engagement

“The Aquaculture Association of Nova Scotia and its farmers are committed to responsible aquaculture and to the communities where our farms operate.

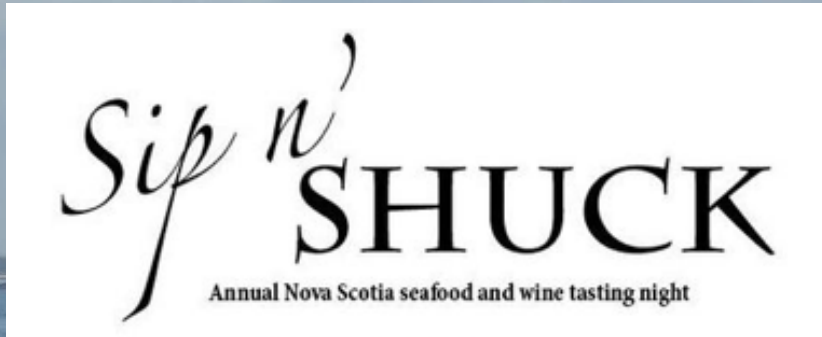
The AANS outreach program is designed to reach Nova Scotians with answers to their questions about aquaculture and to have conversations about the economic, social, and environmental value of responsible growth throughout Nova Scotia.”



AANS Success Stories and Initiatives

- ✓ AANS Codes of Best Practices
- ✓ Oyster Hatchery Development Project
- ✓ Cultivable Seaweed Project
- ✓ Organic Initiative – Producer Training
- ✓ Certification Strategy
- ✓ Community Engagement Strategy
- ✓ Strategic Partnerships
- ✓ Monthly Newsletters
- ✓ Youth and Education Initiatives
- ✓ Aboriginal Engagement Strategy
- ✓ Past 2 years – over 20 R&D projects for improvement of producer productivity

Sea Farmers Upcoming Events



Fishermen's Forum



Sea Farmers with Heart



<http://fish4hope.org>



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Questions?

