

Fisheries

Sector Profile

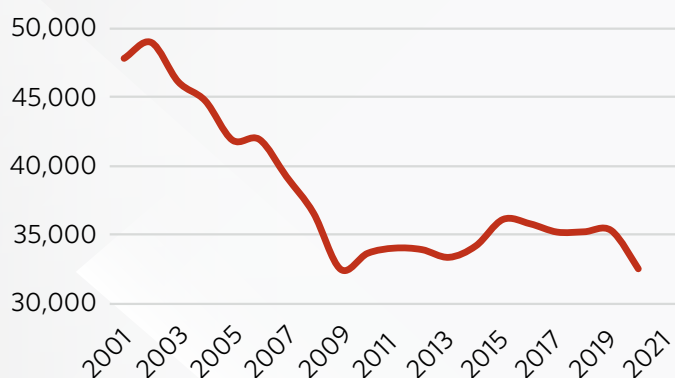
Sector Facts and Figures

Total GDP <i>Share of Canadian GDP</i>	\$2.6 billion 0.13%
Exports	\$8.0 billion
Imports	\$4.5 billion
Foreign Trade Balance <i>5-year change</i>	+\$3.5 billion +48.8%
Total Employment (2020) <i>Change since 2011</i>	32,500 -4.5%
Real wage growth (2011-2019)	+14.7%
Labour Productivity (2019)	\$32.7/hr
Average Work Hours/Week (2019)	43.0
Greenhouse Gas Emissions (2019) <i>Change since 2009</i> <i>Share of Canadian industry total</i>	1,149kt +37.4% 0.18%
Union Coverage Rate (approx.)	30%
Unifor Members in the Industry	13,000
Share of Total Unifor Membership	4%
Number of Unifor Bargaining Units	17

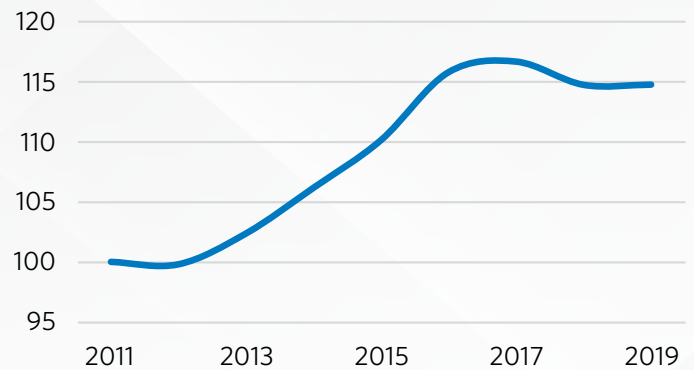
Current Conditions

The fisheries industry includes workers directly involved in commercial fishing and aquaculture, along with those who process and package seafood for retail distribution. With the longest coastline in the world, Canada is unsurprisingly a major player in global fishing, with the Canadian fisheries industry generating \$2.6 billion in GDP in 2021 along with \$8 billion in exports. The industry's trade balance was +\$4.5 billion last year, which amounted to a nearly 50% increase since 2017. Exports are expected to increase as Canadian seafood products become increasingly attractive to foreign consumers, driven by both increased global demand and a strong appreciation of the US dollar, which has rendered Canadian food exports more competitive. The fisheries industry is also a key segment of Canada's marine sector, which includes transportation, tourism/recreation, oil/gas, public sector, and manufacturing jobs. In fact, the fisheries segment accounts for the largest share of GDP in the marine sector, just ahead of offshore oil and gas extraction, along with the second largest share of direct employment.

Fisheries employment, 2001 - 2020



Fisheries: Real wages (2011=100)



However, while the fisheries industry is expected to recover quickly from the COVID-19 pandemic, which saw production, sales and employment levels sharply decline, jobs within the sector have yet to recover to pre-2009 levels. Since 2001, employment levels have declined approximately 32%. While the value generated by production has risen due to increasing prices, the volume of fisheries production has been cyclical, falling in recent years, which partly accounts for some of the employment decline. Vertical integration and advances in technology have also had negative impacts on jobs in the sector.

Real wages (adjusted for inflation) increased steadily from 2011 until 2016, in line with employment. However, since then, real wages have stagnated and even declined somewhat. Since wages typically constitute the largest cost for seafood producers and processors, employers have significant incentive to apply downward pressure on wages in order to increase their margins, adding to the importance of having robust union representation in the sector. With union coverage at approximately 30%, organized labour plays a critical role in bargaining improved wages and working conditions for workers in the industry.

Unifor in the Fisheries Industry

Select Unifor Employers	Approx. # Members
Beothic Fish	515
Icewater Seafoods	303
Highliner Foods Inc.	300
Harbour Grace CS	232
Unipeche M.D.M.	150
Highland Fisheries	100

Unifor members in the fisheries industry are primarily members of its affiliates, the Fish, Food and Allied Workers Union (FFAW) and the United Fishermen and Allied Workers' Union (UFAWU), which together represent more than 13,000

members who work primarily in fishing, harvesting and processing. Unifor also directly represents workers in a number of processing and packaging plants throughout the country.

The vast majority of members are located in Newfoundland and Labrador, B.C., and Quebec. While many FFAW and UFAWU members in the fisheries do not work for any particular employer, some of the most notable employers in the industry that count Unifor members among their employees are Ocean Choice International, Highliner Foods, Unipeche, and Highland Fisheries.

Moving Forward: Developing the Fisheries Industry

A perennial issue that confronts the future of the fisheries industry is sustainability, with a number of Canadian fish stocks under pressure despite government attempts to implement sustainable fisheries management, most notably under the Sustainable Fisheries Framework (SFF) introduced in 2009. While the SFF made a suite of policy tools available to incorporate a precautionary approach to fisheries management, recent audits found that

several key components had yet to be fully implemented or consistently applied. In April 2022, the federal government announced new regulatory changes that would mandate the development and implementation of rebuilding plans for 16 out of 30 major fish stocks by 2025.

The fisheries industry also faces a sustainability challenge in the form of its carbon footprint, with emissions having increased more than 37% from 2009 to 2019. The Department of Fisheries and Oceans Canada (DFO) recently provided funding to commercial fisheries and aquaculture producers to implement

lower emissions production under a clean technology adoption program, however, total funding was limited to \$30 million. Far more investment will be needed to ensure that the industry can successfully transition to clean tech.

Finally, more needs to be done to ensure that small-scale fisheries are able to contribute to Canada's food security by successfully marketing their catch to domestic consumers rather than large-scale, export-oriented processors. Without protections, these fisheries will increasingly disappear, with negative ramifications on workers across the country.

Major Sector Development Issues

- While the federal government has implemented several legal frameworks to support sustainable fisheries management, many key policy tools have yet to be fully utilized to ensure Canada's fish stocks remain sustainable over the long-term.
- More funding from both public and private sources will be needed to ensure that the fisheries industry can meet the challenge of transitioning to cleaner technology and production methods.
- Small-scale fisheries will need targeted protections to ensure their viability and to preserve employment.