

The Way Forward

— on aquaculture



Sector Work Plan

What is the Aquaculture Sector Work Plan?

As part of The Way Forward, industry and the Provincial Government have partnered, through the Cabinet Committee on Jobs, to support economic growth and foster private sector job creation. As part of this work, the Provincial Government and the Newfoundland Aquaculture Industry Association have jointly developed the Aquaculture Sector Work Plan. The Aquaculture Sector Work Plan includes actions that each of the partners will take to achieve the collective goal of growing the aquaculture industry and stimulating new private sector employment.

Vision for Aquaculture Sector Growth

Together, we will pursue opportunities and remove barriers to support aquaculture sector growth. Our collaborative actions will cultivate the conditions that will foster new and expanding aquaculture business activity, stimulate private sector employment for residents in Newfoundland and Labrador, and help us achieve the industry growth and food self-sufficiency targets set out in The Way Forward.

Targets for Growth

This work plan outlines steps necessary to reach the following aquaculture growth targets:

- Increase commercial salmon production to 50,000 MT (from 25,411 MT, valued at \$263 million in 2016) and commercial mussel production to 10,750 MT (from 3,211 MT, valued at \$13.6 million in 2016) by increasing the water area available for development in 2018;
- Generate 1100 person years of employment, upon attainment of the salmon and mussel production increases targeted above; and,
- Support Newfoundland and Labrador to increase its food self-sufficiency to at least 20 per cent by 2022 (from approximately 10 percent at present).

Sector Partners

The Aquaculture Sector Work Plan was collaboratively developed by representatives of:

- Government of Newfoundland and Labrador
- Newfoundland Aquaculture Industry Association
- Government of Canada
- Fisheries and Marine Institute, Memorial University
- College of the North Atlantic

What Growth Potential Does the Aquaculture Sector Offer to Newfoundland and Labrador?

Aquaculture has increased employment in rural communities throughout our province, and has the potential to grow. Aquaculture production in Newfoundland and Labrador is currently mostly comprised of growers of high quality salmon and organic mussels. In 2016, the production value of the industry was more than a quarter billion dollars and growing. Significant expansion is expected in the salmon sector, with potential growth of over 50,000 MT anticipated. The mussel sector has grown substantially since 2003, from 1,300 MT to 3,200 MT in 2016, and is poised for future expansion.

As this industry grows, here are some things that you should know:

- In terms of environmental protection, Newfoundland and Labrador's aquaculture industry adheres to extensive federal and provincial regulations. Industry is actively engaged in the regulation process because they want to ensure that global best practices are followed. Customers in the global marketplace demand stringent environmental safeguards.
- Those living in the Coast of Bays, Notre Dame Bay and Green Bay often note the positive impact that aquaculture continues to have on their communities. Families have returned to the region and local economies have diversified.
- The World Bank has forecasted that by 2030, 63 per cent of fish food will be produced by aquaculture and beyond 2030, aquaculture will dominate future global fish supply.
- New ways of ensuring that farming fish has the most minimal impact on the environment possible are being deployed, including in this province. Operators in Newfoundland and Labrador use leading edge technology and procedures, and their pursuit of best practices is supported by the Provincial Government via the Centre for Aquaculture Health and Development that was established in St. Alban's.

For more information on how we are working together, visit www.gov.nl.ca/aquaculturesummit

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This Work Plan is intended to be an interactive and working document. We encourage you to post this in your office or boardroom to reflect the active focus of this plan.



How We Are Working Together to Grow the Aquaculture Sector

Together, industry, researchers and the Provincial Government, with input from federal representatives, have identified key challenges and opportunities related to: aquaculture production; human resources and labour; research, innovation and diversification; market access and development; and, business development and risk management. What follows are the actions we will take together to accelerate growth in the aquaculture industry in Newfoundland and Labrador.



Study the current and future infrastructure and telecommunications needs of the finfish and shellfish sectors to inform a multi-year investment plan, including exploring potential federal and provincial investments.
(Completion target: 2018-19)
Lead: NAIA **Support:** FLR, TCII

Update site marking requirements to reflect vessel size and site parameters.
(Completion target: 2018-19)
Lead: FLR **Support:** NAIA

Review provincial fees for the aquaculture industry.
(Completion target: March 31, 2018)
Lead: FLR **Support:** MAE, NAIA

Complete a jurisdictional analysis on the cost of aquaculture production, including factors impacting varying costs.
(Completion target: 2018-19)
Lead: NAIA



Review and implement improvements to Crown Lands development referrals near shellfish farms and reserves around shellfish sites.
(Completion target: March 31, 2018)
Lead: FLR **Support:** SNL, NAIA

Identify options to improve access to fish health and feed products.
(Completion target: 2018-19)
Lead: NAIA/CAIA **Support:** FLR

Complete a comprehensive review and modernization of the provincial aquaculture licensing policy and procedures manual.
(Completion target: 2018-19)
Lead: FLR **Support:** NAIA

Undertake a feasibility study to access shellfish production and processing capacity, and potential annual sales, to help determine the amount of shellfish live holding capacity required to support expansion, including considering whether establishing a shellfish live holding facility or cooperative is feasible.
(Completion target: 2018-19)
Leads: NAIA **Support:** FLR

Shift to a multi-year licensing system that corresponds to the life-cycle of the fish.
(Completion target: 2018-19)
Lead: FLR **Support:** NAIA

Review the provincial license cancellation policy (e.g., "use it or lose it") in consultation with industry.
(Completion target: March 31, 2018)
Lead: FLR **Support:** NAIA

Complete an industry review of finfish and shellfish strain performance to determine needs for broodstock development, including cleanerfish.
(Completion target: 2018-19)
Lead: NAIA **Support:** FLR

Human Resources & Labour

- ▶ Create a working group to develop options on how to increase awareness of the aquaculture industry among the province's youth. (Completion target: March 31, 2018)
Lead: NAIA **Support:** FLR, MI, EECD, PYC, AESL
- ▶ Develop labour market information tools and products for the aquaculture industry through a Labour Market Partnership project. (Completion target: 2019-20)
Leads: AESL, NAIA **Support:** MI

- ▶ Profile the aquaculture industry in provincial labour market information tools and engagements. (Completion date: 2018-19)
Leads: AESL, NAIA
- ▶ Develop an Aquaculture Attraction and Retention Strategy to address employment issues, strengthen the human resource capacity of the industry, and undertake new initiatives to attract and retain workers. (Completion target: 2018-19)
Lead: NAIA **Support:** AESL, MI
- ▶ Prioritize the aquaculture sector for provincial immigration supports. (Completion target: March 31, 2018)
Lead: AESL **Support:** NAIA, FLR

Market Access & Development

- ▶ Develop a provincial marketing strategy to promote aquaculture products (primarily mussels), support local and export development, and build social license and public trust. (Completion target: 2018-19)
Lead: NAIA
Support: FLR, TCII, MI

- ▶ Undertake an industry-wide assessment of the value chain of mussels from a marine biomass perspective. (Completion target: 2018-19)
Lead: MI
Support: MUN, NAIA, FLR
Regional Service Boards



Research, Innovation & Diversification

- ▶ Establish a forum to engage aquaculture researchers in the province on opportunities to collaborate. (Completion target: 2017-18)
Lead: NAIA
Support: MI, FLR, OSC, CNA
- ▶ Consider the research and development needs of the aquaculture sector as part of the establishment of InnovateNL. (Completion target: on-going)
Lead: TCII
Support: MI, OSC, NAIA, CNA, FLR

- ▶ Engage industry and all regulatory waste management authorities to advance aquaculture and provincial marine biomass goals, as set out in the provincial Aquaculture Waste Management Plan and Provincial Waste Management Strategy, including research and development to advance opportunities for full utilization of materials in the provincial aquaculture industry. (Completion target: 2017-2020)
Lead: FLR
Support: NAIA, MAE, Regional Service Boards
- ▶ Integrate and communicate aquaculture development priorities and regional opportunities into economic development regional planning initiatives, and continue to build awareness of infrastructure funding priorities through conferences held by organizations such as Municipalities NL and Professional Municipal Administrators (Completion target: on-going)
Lead: TCII, MAE **Support:** NAIA, FLR

Business Development & Risk Management

- ▶ Release a resource listing of all the financial program supports available to aquaculture businesses and suppliers. (Completion target: Fall 2017)
Lead: NAIA, TCII, FLR

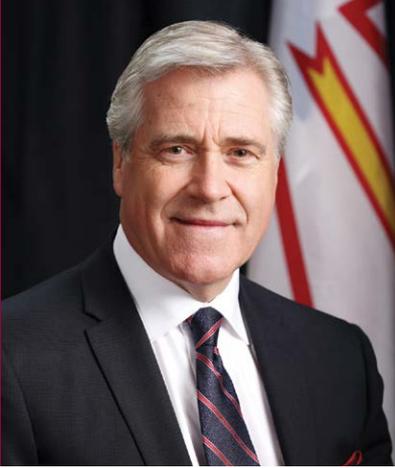
- ▶ Collaborate with the Government of Canada to advance opportunities to accelerate aquaculture growth as identified by the Aquaculture Work Plan Steering Committee. (Completion target: on-going)
Lead: FLR **Support:** NAIA

- ▶ Review and modify the Aquaculture Capital Equity Program to better meet the needs of the shellfish sector (Completion target: 2018-19)
Lead: FLR

- ▶ Identify, target and advance aquaculture service and supply sector development opportunities to maximize local economic benefit and enhance sector competitiveness. (Completion target: 2018-19)
Lead: FLR, TCII **Support:** NAIA

- ▶ Configure government supports to enable the mussel sector to grow to 10,750 MT (Completion target: March 31, 2018)
Lead: FLR **Support:** NAIA

- ▶ Explore ways to provide improved risk management programs for the aquaculture sector. (Completion target: on-going)
Lead: NAIA, FLR **Support:** CAIA



“Our vision for the future of Newfoundland and Labrador is a place where potential is realized and opportunities abound. Through unprecedented partnerships with high potential industries, we are fostering the economic growth, innovation, and job creation needed to support bright futures for the people of our province.”

Premier Ball

- AESL** Department of Advanced Education, Skills and Labour
- CAIA** Canadian Aquaculture Industry Alliance
- CNA** College of the North Atlantic
- EECD** Department of Education and Early Childhood Development
- FLR** Department of Fisheries and Land Resources
- MAE** Department of Municipal Affairs and Environment
- MI** Fisheries and Marine Institute of Memorial University
- NAIA** Newfoundland Aquaculture Industry Association
- OSC** Ocean Sciences Centre, Memorial University
- PYC** Premier’s Youth Council
- SNL** Department of ServiceNL
- TCII** Department of Tourism, Culture, Industry and Innovation



Alternate formats available upon request

www.gov.nl.ca/aquaculturesummit