

MARKETING AND BRANDING

UNDERSTANDING THE OPPORTUNITY FOR COMMERCIAL FISHING ENTERPRISES

DRAFT

Prepared By: The PICFI Business Development Team

November 2017

1	INTRODUCTION AND BACKGROUND	2
1.1	WHY DO CFEs WANT TO BE MORE INVOLVED IN MARKETING AND BRANDING?	2
2	JOURNEY TO MARKET – THE VALUE CHAIN	4
2.1	WHAT IS A VALUE CHAIN?.....	4
2.2	THE VALUE CHAIN – PRODUCTION AND CAPTURE, AND PROCESSING.	5
2.2.1	<i>Stage 1: Production and Capture</i>	5
2.2.2	<i>Stage 2: Primary and Value-Added Processing</i>	6
3	MARKETING AND BRANDING – CURRENT STATE AND OPPORTUNITIES	7
3.1	WHAT IS MARKETING AND BRANDING?	7
3.2	CURRENT CFE INVOLVEMENT IN MARKETING AND BRANDING.....	7
3.3	WHY DO CONSUMERS WANT CFE PRODUCTS?	8
3.4	OVERVIEW OF MARKETS	8
3.4.1	<i>The International Market</i>	8
3.4.2	<i>The Market in Canada and BC</i>	10
3.5	KEY MARKETING CONSIDERATIONS AND OPPORTUNITIES.....	10
4	MOVING FORWARD – COLLECTIVE MARKETING AND BRANDING	11
4.1	OPTIONS FOR FORMAL COLLABORATION.....	12
4.2	OPTIONS FOR INFORMAL/VOLUNTARY COLLABORATION	13
5	RECOMMENDATIONS AND NEXT STEPS	14
5.1	CONSIDERATIONS SUMMARY	14
5.2	RECOMMENDATIONS	14
6	ACKNOWLEDGEMENTS	16
7	REFERENCES	17

1 Introduction and Background

Since the establishment of PICFI, many participating BC First Nations have been able to expand their commercial harvesting activities thanks to increased access to fishing licences and quota. Over time, we at the PICFI Business Development Team (BDT) have heard that many Commercial Fishing Enterprises (CFEs) are now interested in expanding operations beyond harvesting and leasing activity, and into value-added processing and market access. In other words, CFEs want to become more 'vertically integrated'. In particular, we heard that CFEs are interested in marketing and branding – they want to create brands and products that speak directly to consumers while also creating employment and training opportunities within their communities.

The BDT has prepared this discussion guide to provide an overview of the current situation, including:

- 1) CFE motivations for and current involvement in marketing and branding activities;
- 2) An overview of the seafood value chain;
- 3) A summary of the current state of opportunities in marketing and branding and key considerations for CFE involvement;
- 4) Options for moving forward; and
- 5) Recommendations and next steps.

This document does not provide specific recommendations for individual CFEs, but is a first step towards the development of collaborative CFE marketing and branding strategies.

1.1 Why do CFEs want to be more involved in marketing and branding?

We have heard from many CFEs that they would like to develop their own brands and become more involved in value-added sales. The following are the most common motivations that we heard.

- There are currently limited opportunities to expand harvest-based operations. Marketing and branding provides an opportunity for CFEs to expand their businesses beyond capture-based activities, which could have the following benefits:
 - Create more training and job opportunities for community members, including opportunities to create new roles (e.g. marketing and sales) that have not previously existed in First Nations communities' fishing economies.
 - Create more revenue and profits for the business, which could then be used to finance further business expansion or be distributed to shareholding nations for development projects.
 - Provide risk diversification so the business is not completely reliant on one revenue stream (i.e. diversification into a non-harvest area of the seafood industry).
- Through the PICFI program, funds have been made available for diversification projects. This funding has motivated CFEs to look for non-harvest opportunities.

- The current environment of title and rights could increase First Nations access to licences and quota, creating an opportunity for CFEs to capitalize on higher volumes of product and reap economies of scale.
- Some CFEs have seen success collaborating with processors through joint ventures and fee-for-service (e.g. contract selling or processing) models. They have seen success and would like to expand these types of relationships.
- CFEs want to demonstrate to the consumer the story and hard work that have gone into a product. This includes building consumer understanding that the product has come from a First Nation's commercial fishery that may have been in existence for thousands of years. Having a local brand also helps develop a sense of pride in the community.

DRAFT

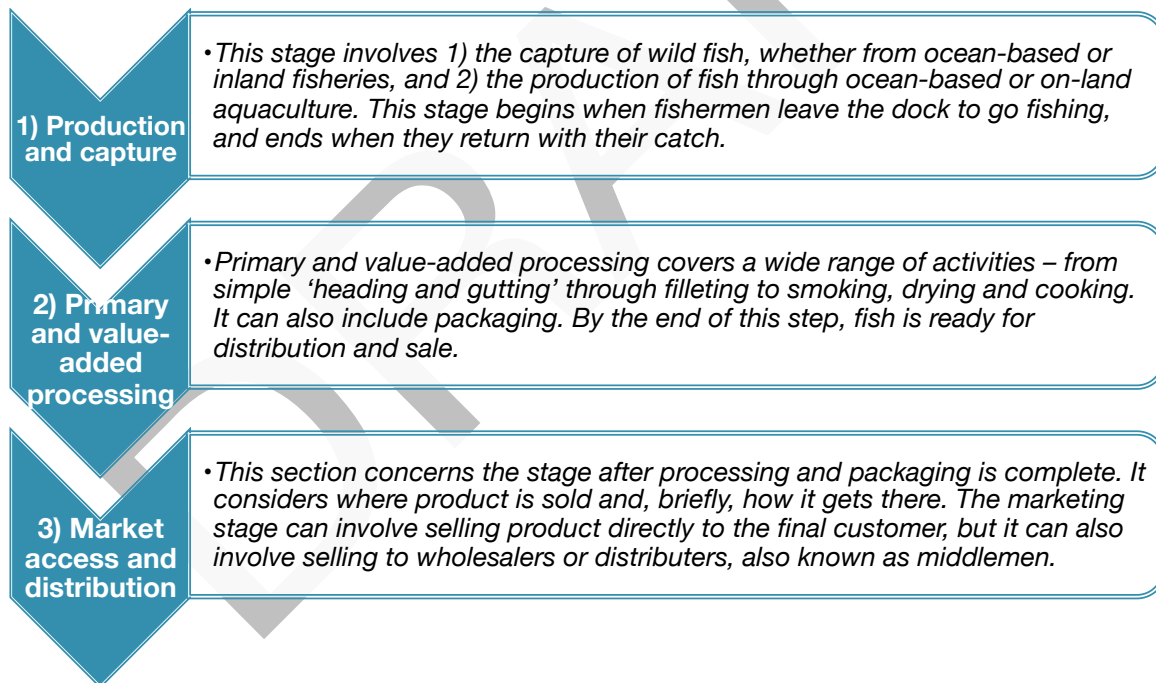
2 Journey to Market – the Value Chain

To begin, we provide a brief overview of the seafood value chain to outline how marketing and branding activities relate to other activities such as harvesting and processing. This includes a summary of current CFE involvement and key trends.

2.1 What is a Value Chain?

The term value chain refers to the concept that there are different steps or activities that take place within industries to bring a product to the market. In each step of the value chain, the product is changed in some way and value is added. This added value comes about due to investments in labour, equipment, land, and other inputs. Many companies find it is effective to be vertically integrated because they have more control of the product and can capture more of the value of the final product. However, vertical integration requires significant investments and an increase in complexity. At each step in the chain there is added cost, risk, and waste. Involvement in multiple stages of the value chain creates opportunities for businesses to earn more revenue, and, if done effectively, can increase profits and create job opportunities compared to only being involved in one stage of the chain. In the case of the fishing industry, a simplified value chain has three stages and is summarized below.

Figure 1: The Seafood Industry Value Chain



An Example of Added-Value in the Seafood Industry:

In September 2016, one pound of fileted halibut was earning fishermen an average of \$7.70 per pound dockside. As a result of moving through the value chain and being processed, transported, and marketed, the final sales price to the consumer can be as much as \$25.00 to \$29.00 per pound, representing over \$20.00 of added value.

2.2 The Value Chain – Production and Capture, and Processing.

At the current time, the majority of CFEs are involved only in the first stage of the value chain - production and capture - although some CFEs are also involved in processing and marketing as well. We will now explore the activities in the first two stages of the value chain and how CFEs are currently involved. This is followed in the next section by a more in depth look at activities related to the third stage - marketing and branding.

2.2.1 Stage 1: Production and Capture

CFE Involvement

- All CFEs are currently involved in primary production and capture activities through the licences and quota received through the PICFI program and purchased using own-source funds.
- It is estimated that CFEs currently hold approximately 10% of all of the fishing licences in BC.
- Most CFEs are involved only in fishing, however a few CFEs are also beginning to participate in aquaculture activities. Most coastal communities are already involved in aquaculture at the Nation level.
- CFE member communities are also involved in fishing for food, social, and ceremonial (FSC) purposes, although this activity is generally separate from but complementary to the commercial activity of the CFE.

Current Trends

- Licences and quota are becoming more expensive and can be difficult to source, which limits the ability of CFEs to expand their harvesting operations.
- Fishing access is becoming consolidated in the hands of fewer licence and quota holders. Often, licences and quota that are available to lease may be tied to specific fish buyers and processors, which limits to whom fishers can sell their catch. However, some fishers prefer this arrangement because it is a common practice for licence holding processors to provide fishers with advance payments for their expected catch, which fishers can use to buy supplies and other necessities.
- In the case of fishing quota, much of the quota is held in the hands of 'armchair fishermen' who lease the access rather than fishing it themselves. These armchair fishermen have little incentive to sell their quota, which further limits the ability of CFEs and individual fishermen to buy their own access.
- Many CFEs are interested in sustainable aquaculture, however high capital requirements and a lack of on-the-ground capacity are limiting entry in this area.
- There is some support from the provincial government for increased aquaculture activity, with a target to grow aquaculture output by 12,000 tonnes in the next five years.ⁱ This could lead to more funding opportunities and other support becoming available to First Nations in the coming years.

2.2.2 Stage 2: Primary and Value-Added Processing

CFE Involvement

- As of October 2017, at least five CFEs are directly involved in primary or value-added processing.
- Some CFEs are involved in processing activities by sharing capacity or outsourcing their processing to a custom processor.
- Many CFE member Nations and member fishermen have existing relationships with processors to whom they market their fish directly.
- CFEs are entering into partnerships with processors to make strategic investments in plant and equipment and to provide employment opportunities for community members.

Current Trends

- The long-term decline of BC fisheries has resulted in closures of many processing facilities. Today, much of the processing capacity has been consolidated into the hands of just a few processors, many of which are part of vertically integrated operations. For example, Canfisco operates its own fleets out of Vancouver and Prince Rupert as well as purchasing from other fishers. It is part of the larger Jim Pattison Group, which also has significant retail and packaging operations.ⁱⁱ
- Value-added processing is often carried out away from BC, where costs may be lower. This has resulted in job losses in communities over time.
- As the processing industry becomes more consolidated, margins are also getting tighter. This means that facilities must run at or near full capacity to be financially sustainable. In other words, a processing facility must be busy all the time to stay in business.
- In contrast to the small canneries that once ran up and down the BC coast in the hundreds, today's processing facilities are large and very capital intensive. Small-scale facilities are less competitive and must be constantly looking for supply to keep operations close to or at full capacity.
- The forecast growth of aquaculture in coming years may create additional opportunities in processing, but until this supply materializes, it will likely be difficult to secure the financial support needed to build new facilities.

3 Marketing and Branding – Current State and Opportunities

Having developed an understanding of the seafood supply chain, we will now focus on the Marketing and Branding stage – an area of key interest to CFEs. We begin with an introduction to marketing and branding, followed by an overview of current CFE involvement in these activities. We then provide an overview of market demand to understand: 1) What are the key markets for CFE products? and 2) What do CFEs need to consider if they want to enter these markets?

3.1 What is Marketing and Branding?

Put simply, marketing is about the process of delivering products to customers. Every time that you sell your fish, whether to a processor or to a final customer, you are engaging in marketing activities. Branding, on the other hand, is part of the *how* of marketing. Brands are developed to help communicate directly with your customers and are used to set your product apart from other products. A brand, therefore, is more than just a logo or the colours that you've picked for your packaging. Your brand sends a message to your customers, and helps to build an ongoing relationship. If your customers enjoy one of your products, they are likely to grow to trust you and to try your other products as well.

In the seafood market, branding is often used to add value to a product by appealing to certain buyers. For example In the US, 'national brands' can sell for 10-40% more than generic or grocery store brands.ⁱⁱⁱ Buyers have clear expectations of branded products, and are willing to pay more for what they perceive to be higher quality and consistency. In this way, strong brands create an opportunity to create strong long-term relationships with their customers. However, building and upholding a strong brand takes time, and requires a commitment to ensuring consistent, high quality supply of product. One bad experience could be enough to drive a customer to a competitor.

3.2 Current CFE Involvement in Marketing and Branding

Many CFEs have already developed their own brands or are interested in developing a brand. Some CFEs have succeeded in building strong brands that their customers trust. Others have developed logos and marketing materials but haven't yet been able to harness these assets to help grow their businesses.

Examples of existing brands and product lines include:

- NSDC – Raincoast and Nootka brands;
- Haico's Haida Wild;
- RiverFresh; and
- River Select co-operative
 - Chilko Select; Fraser Select; Harrison Select; Okanagan Select; Tsilhqot'in Select; Quesnel Select; and Stellako Select.

3.3 Why do Consumers want CFE Products?

Consumers are generally driven to buy certain products due to a combination of price, product quality, promotion (how they hear about the product), and place (where they can buy the product). However, each customer is different and will have their own motivations. While one customer may seek a low price above all else, other customers may be less price sensitive and will put more emphasis on convenience of location or on high quality product. Determining what factors are most important to your target market is an important part of developing a marketing plan.

As a preliminary list, CFEs identified the following drivers that they feel motivate consumers to seek out their products. In other words, these are key attributes of CFE products that differentiate them from the competition.

- Traceability – knowing that a product comes directly from First Nations fisheries.
- Sustainability – having confidence that the fish comes from sustainable fisheries that are fished responsibly.
- Quality – knowing that high quality standards are upheld throughout.
- Local Production – knowing that product is harvested and processed locally and helps support local economies.

It will be important for CFEs to do additional research to better understand the key drivers of their potential target markets. In some cases, the things that attract a customer to a brand are not what the business thinks they are. This information can be used to develop a brand that speaks to the target market.

3.4 Overview of Markets

When it comes to marketing their fish, CFEs have a number of options. In this section we provide an overview of markets from an international and domestic perspective.

3.4.1 The International Market

Market Overview

In 2015, BC exported \$1.1 billion of processed seafood to approximately 75 countries – up from \$981 million in 2014.^{iv} BC's top five exports by species in 2015 were:

- Cultured Atlantic Salmon (\$411 million)
- Crabs (\$116 million)
- Shrimp and prawns (\$50 million)
- Hake (\$44 million)
- Geoduck (\$44 million)

The top destinations for BC seafood in 2015 were the USA and China, as seen in Figure 2, below.

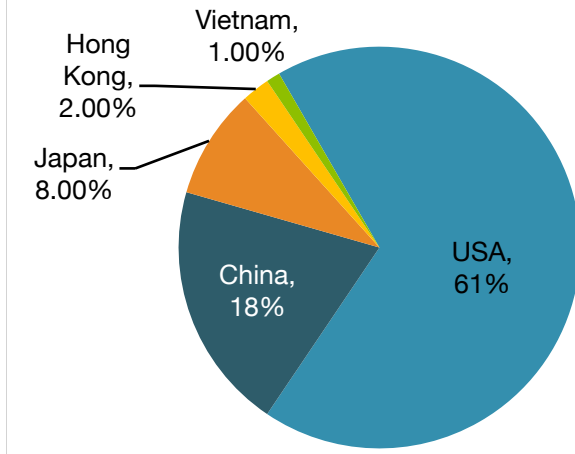


Figure 2: Destinations for BC fish exports, 2015

North America may provide CFEs with significant opportunities as demand for seafood products currently outstrips supply. The total production of fish in North America in 2008 was six million tonnes compared to 2006 consumption of 8.2 million tonnes. By 2030 supply is forecast to increase by just 6.9% to 6.5 million tonnes but consumption is set to jump by 30.9% to 10.7 million tonnes^v, leaving significant unfilled demand.

Key Considerations and Opportunities

- Access to international markets is changing. Canada has trade agreements with Europe, Korea and other Pacific Rim countries and new trade agreements are under negotiation, which could reduce trade barriers for new markets.
- Many international competitors have greater economies of scale and lower labour costs than Canadian companies, which means it can be difficult to compete on price.^{vi}
- International competitiveness can depend on the exchange rate between the Canadian dollar and the currency of the trading partner. This can change over time and make Canadian exports more or less competitive.
- Key international opportunities for CFEs include:
 - o Low-value, high-volume sales when there is excess product (e.g. during a large salmon run).
 - o High-value, lower-volume exports to markets that attribute value to Pacific, BC or First Nations products.
- The market for sustainable seafood brands is growing in North America. In the US over 20 retailers, accounting for more than 70% of seafood sales to consumers, have sustainable seafood policies.^{vii} This may translate into increasing demand for sustainable products.

3.4.2 The Market in Canada and BC

Market Overview

Annual fish consumption in Canada is 184,660 tonnes, and the average Canadian household spends \$211 per year on fish and seafood in stores.^{viii,ix} The wholesale value of BC seafood products in 2014 was \$1.44 billion.^{x1}

The Canadian foodservice² sector is large and growing. Industry data estimates annual foodservice sector sales of \$74.1 billion in 2015 – a 4% annual increase. Around 35% of all foodservice sales in Canada come from ‘full service’ restaurants; with another 35% from ‘quick service restaurants’ (fast food). Sales in BC make up 12% of the Canadian market.^{xi}

Key Considerations and Opportunities

- 61% of Canadian consumers say buying local food is important to them, with nearly half saying they will pay 15-30% more for local foods. Sixty percent say that a lack of availability in large chain retailers stops them from buying local products.^{xii}
- BC in particular has a strong ‘buy local’ culture.^{xiii} This is backed up by the increasing popularity of farmers’ markets since 2006.^{xiv}
- The growth of online shopping technology has also created new niche retail opportunities.^{xv} For example, the Soil Mate app can be used to search for locally-produced food in BC.^{xvi}
- Most Canadian grocery retailers demand that product is delivered to a store or distribution centre, adding both cost and complexity. Larger buyers (e.g. grocery retail chains) are interested in buying from as few suppliers as possible and look for consistency of supply.
- Distributing internationally can be easier than sending product to other parts of Canada. This is because many international buyers deal on a ‘factory gate’ basis where the buyer takes on the responsibility of transporting product directly from a processing plant.
- Local markets can be simple to access, more flexible and easier to reach quickly.

3.5 Key Marketing Considerations and Opportunities

At the present time, most CFEs and/or CFE community fishermen are involved only in the production and capture components of the fisheries value chain. This means that fish are sold to processors as a commodity, rather than being processed and sold as a value-added product. Moving from a harvest-only business model toward one that also involves marketing and branding is a big step, and there are numerous approaches a CFE could take.

Selling a product is about much more than developing a brand. CFEs must be ready to analyze their potential target markets, identify potential retailers to partner with, and develop strong long-term relationships, among other things.

¹ Wholesale is the sale of products in large quantities to be resold by others.

² The term food service refers to any meal prepared outside the home and sold to the general public.

The following is a summary of the key considerations for CFEs as they think about moving into marketing and branding activities.

- **Quality Control:** Customers want product to be as fresh as possible, and retailers will pay a premium for a product if it can stay on the shelf for longer. This requires fast and careful handling from the moment fish is caught. For CFEs that work with many individual fishermen, keeping a high standard could require a high level of monitoring and oversight.
- **Consistency of Supply:** Partnering with larger retailers such as international distributors, food service companies and grocery stores requires consistency of supply, and often requires large volumes of product which may be difficult to supply as a single CFE.
- **Emergence of Nearshoring:** Distribution has seen significant consolidation in recent years, with tight margins. This has made local and regional supply more viable, resulting in “a shift from offshoring to nearshoring”.³ This matches with a growth in demand for local food products.
- **Competitive Export Markets:** Relatively high labour costs make it difficult for Canadian products to compete in international markets. However, some high value seafood products, such as geoduck, can find success in low-volume, high-value markets. An export strategy can also be impacted both positively and negatively by trade agreements and currency fluctuations.
- **Niche Retail Markets:** It may be possible to find some success selling high-value products in niche markets such as farmers markets or local stores. However, the demand for these high-value products is often not enough to sustain a business, so it may be necessary to follow a hybrid strategy where some products are sold into high-value, low-volume niche markets, while other products are sold on a commoditized basis as high-volume and low-value.

4 Moving Forward – Collective Marketing and Branding

We have seen from the previous sections that CFEs are interested in marketing and branding, and that there are many things to consider before choosing a strategy to move forward. The key challenges that CFEs are likely to encounter include:

- Securing large enough volumes for large-scale retailers and wholesalers.
- Ensuring consistency and high quality of supply.
- Developing strong brands that speak with consumers when limited to small scale of distribution (i.e. brands may have a very small market).

On the other hand, there are many potential advantages and benefits stemming from an increased involvement in marketing and branding, including:

- Strong and increasing demand for local, sustainable, ethical products.
- Potential to engage with ‘niche retailers’ to capture high value from products, albeit on a small scale.

³ Supply Chain Quarterly. (2014). Accessed at: <http://www.supplychainquarterly.com/topics/Logistics/20140311-the-real-impact-of-high-transportation-costs/>

- Potential to tell the story of the CFE product, including messaging about First Nations heritage and history.

To address the above challenges and harness the potential benefits, CFEs may wish to consider the possibility of collaborating with other CFEs in both formal and informal ways.

4.1 Options for Formal Collaboration

We have identified three formal collaboration models to consider:

1) Cooperative

Under a cooperative model, CFEs would come together under a single umbrella for the purposes of processing and marketing their fish. Cooperatives are based on democratic decision-making between members and allow for the consolidation of resources. For marketing purposes, CFEs could adopt a single umbrella brand with sub-brands for each individual CFE, or they could adopt a single brand, as is the model used in the dairy industry.

2) Trade Association

A trade organization is an organization that is formed for the purpose of advocating for and increasing the profile of specific industry groups. In the case of CFEs, an industry group could be formed for the purposes of promoting CFE brands both domestically and internationally. This could provide benefits in terms of CFEs abilities to access markets. A trade organization could also provide advocacy to government agencies and funders and coordinate research and other initiatives.

3) Certification

An industry certification provides consumers with assurance that a product meets a set of requirements and standards. It gives a customer confidence that they can trust a product, even if they aren't familiar with each member brand or company. For example, Oceanwise and MSC certifications in the seafood industry provide certification with regard to the sustainability of a fishery. A similar certification could be developed by CFEs to confirm products meet environmental and/or social standards and to showcase the First Nations connection to the products.

The table below outlines the potential benefits of each form of collaboration.

Table 1: Benefits of Formal Collaboration

Benefit	Co-operative	Trade Association	Certification
Enhance reputation	✓	✓	✓
Protect livelihoods	✓		✓
Access to new markets	✓	✓	✓
Existing markets secured	✓	✓	✓

Possible price premiums	✓	✓	✓
Promotional opportunities	✓	✓	✓
Share research and knowledge of common benefit	✓	✓	✓
Share training opportunities	✓	✓	✓
Collaborative voice on industry issues	✓	✓	✓
Efficiency of working together on common goals such as international marketing; influencing policy.	✓	✓	✓
Develop industry standards	✓	✓	✓
Share risk on equipment purchases	✓	✓	
Collective buying power means lower prices	✓	✓	
Collective selling power means potential to access buyers who require larger volumes and consistency of supply	✓		
Balance production supply with customer demand	✓		

4.2 Options for Informal/Voluntary Collaboration

We have identified the following two options for informal/voluntary collaboration opportunities.

1) Joint Voluntary Retail Consortium

There is demand in BC for CFEs' products and CFEs have expressed a desire to sell more product direct to consumers. There is a clear opportunity to grow the current sales of each other's products. This helps to build consistency of demand and to build skills and experience. Also consider collaborating with other networks with similar goals and objectives. e.g. Soil Mate (www.soilmate.com).

2) Joint Voluntary Sales Operation

This would help CFEs to meet the need for consistent product supply and quality – a key element for future growth of individual brands and organizations. This provides the basic requirements from which to build a brand(s).

- A CFE retail network would fit with current retail trends for local product.
- Retail is changing, creating new ways to reach consumers, often directly using new technologies.
- By combining product, CFEs may be able to gain access to new markets without the need for third parties.

- Sharing market access knowledge and information between CFEs would build collective capacity and knowledge

5 Recommendations and Next Steps

This section summarizes the key considerations from the discussion paper and provides recommendations for consideration and discussion.

5.1 Considerations summary

Production and capture

It is recommended that CFEs consider how global industry and consumption changes will create challenges and opportunities. If seafood consumption rises while wild-capture availability remains static, the value of high quality, sustainable wild capture product with a clear chain of custody (traceability) will likely rise in the long-term and be a good area for investment.

Primary and value-added processing

BC has significant processing capacity, and developing new capacity requires investment and risk-taking. It is recommended that CFEs focus on using existing capacity to add value to products rather than investing in new processing capacity.

Market access and distribution

There is a clear opportunity to match demand within BC for fresh, local product with a clear chain of custody with CFE's desires for recognition and to add value. There may also be international demand for CFE products that matches with government programs to promote exports.

Chain of custody

CFEs' traditional knowledge brings a true understanding of product and its ecosystem. This knowledge is unique – and adds to the ability to show consumers that a product is culturally and environmentally responsible.

The market

Retail models are changing, with growth in direct-to-consumer models such as online sales and farmers' market creating opportunities for CFEs to bypass traditional distribution models. However, these models may not support large volumes and will need to be complemented by other marketing approaches.

Marketing and branding

CFEs must consider the opportunities to work collaboratively with other CFEs for matters that would be mutually beneficial. This is especially the case if some CFEs do not wish to enter the processing, distribution and marketing/branding parts of the supply chain.

5.2 Recommendations

The recommendations below provide suggestions for discussion to meet the needs of CFEs based on the situation at the time of writing and the considerations raised throughout this discussion paper.

i. Protect Individual Brands

- Each CFE has its own unique story, hopes and objectives, and therefore also has its own communications and marketing needs.

ii. Build a collaborative structure

By working together, CFEs will be better able to access funding and support from other organizations that align with common CFE goals. This could help CFEs to:

- Increase efficiency by sharing resources where appropriate.
- Bring a collective voice to common issues while respecting individual CFEs' needs.
- Promote the PICFI program and demonstrate success to supporters and funders.
- Provide access to and play a larger role with organizations that share CFEs' common goals (e.g. Fish 2.0 program).
- Collaborate on shared marketing and sales opportunities such as international trade missions.
- Share training, knowledge building and research requirements.
- Negotiate collectively – for example to secure third party processing agreements.

iii. Build knowledge network and information-sharing

Use the Pacific CFE Hub to:

- Share market updates and knowledge.
- Share resources, including staff and product.
- Provide a central reporting portal for the program.

iv. Product certification scheme

Consider the potential to develop a First Nations fish product certification scheme in conjunction with an existing program (e.g. Oceanwise). This could be part of the role of a collaborative structure. A certification scheme could provide a path for CFEs to increase product value and sales volume through shared marketing initiatives while also providing an opportunity to share a message of sustainability and stewardship with consumers.

6 Acknowledgements

We would like to thank all who have provided the input, information and perspectives required to produce this discussion paper, with a special note of thanks to the team at GB Capital and:

- Mark Duivan;
- Larry Johnson;
- Nikki Johnston;
- Stuart Nelson; and
- Chris Wick.

DRAFT

7 References

ⁱ Outlook is dismal for B.C.'s wild salmon. Accessed at <http://vancouversun.com/news/local-news/what-is-the-future-of-bcs-iconic-fish>

ⁱⁱ www.canfisco.com

ⁱⁱⁱ Marine Resource Economics. (2007). Value of Brands and Other Attributes: Hedonic Analysis of Retail Frozen Fish in the UK. Accessed at: https://www.researchgate.net/publication/23945236_Value_of_Brands_and_Other_Attributes_Hedonic_Analysis_of_Retail_Frozen_Fish_in_the_UK

^{iv} Sector Snapshot: B.C. Seafood – 2015. Accessed at http://www2.gov.bc.ca/assets/gov/farming-natural-resources-and-industry/agriculture-and-seafood/statistics/industry-and-sector-profiles/sector-snapshots/seafood_snapshot2015.pdf

^v World Bank. (2013). FISH TO 2030: Prospects for Fisheries and Aquaculture

^{vi} Province of British Columbia (2015). The B.C. Agrifood and Seafood Strategic Growth Plan.

^{vii} Fish 2.0 (2015) *Rights-Based Management An Investor Update on Sustainable Seafood*. Accessed at http://www.fish20.org/images/Fish2.0MarketReport_RBM.pdf

^{viii} Calculated from http://www.aquaculture.ca/files/documents/2013-11-19FarmedSeafoodandCanadianHealth_Paper.pdf

^{ix} <http://www.statcan.gc.ca/tables-tableaux/sum-som/l01/cst01/cpis08k-eng.htm>

^x Province of British Columbia (2015). The B.C. Agrifood and Seafood Strategic Growth Plan.

^{xi} *Canadian Chain Restaurant Industry Review*. (2015). http://www.restaurantinvest.ca/site/restaurant_invest/assets/pdf/2015_canadian_chain_restaurant_industry_review.pdf

- LoyaltyOne (2015). *Buy Local Hot Among 61% of Canadians*. Accessed at: <https://www.loyalty.com/news-events/latest-news/news-releases/buy-local-hot-among-61-of-canadians>

- Vancouver Sun (2015). *B.C.'s leaders in sustainable agriculture brainstorm growth strategies*. Accessed at: <http://vancouversun.com/business/local-business/b-c-s-leaders-in-sustainable-agriculture-brainstorm-growth-strategies>

^{xiv} Connell, David (2012) Economic and Social Benefits of Farmers Markets in BC. UNBC. Accessed at: <http://www.unbc.ca/david-connell/local-food/impacts>

^{xv} Industry Canada (2013) *Canada's Changing Retail Market*. Accessed at: [https://www.ic.gc.ca/eic/site/oca-bc.nsf/vwapj/CTU-2013_Q2_Canadas_Changing_Retail_Market-eng.pdf/\\$file/CTU-2013_Q2_Canadas_Changing_Retail_Market-eng.pdf](https://www.ic.gc.ca/eic/site/oca-bc.nsf/vwapj/CTU-2013_Q2_Canadas_Changing_Retail_Market-eng.pdf/$file/CTU-2013_Q2_Canadas_Changing_Retail_Market-eng.pdf)

- Vancouver Sun (October 18, 2016). BC's Soil Mate aims to make finding local food a lot easier.