Fish Flow Workshop Summary Report – 125th SSC Meeting

Identifying how pelagic fish move through Hawaii's seafood distribution network

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Introduction

On February 15, 2017, the Western Pacific Fishery Management Council partnered with the Pacific Islands Fishery Science Center to host a Fish Flow Workshop. The half day workshop included sixteen representatives from large seafood processors and distributors from Oahu, Kauai, Hilo and Kona as well as representatives from the State Division of Aquatic Resources. The goal of the workshop was to discuss pelagic seafood product movement, share information about key management issues, and identify emerging markets and trends that may affect Hawaii's Fishing and Seafood communities.

Local Pelagic Fish Flow

The distributors mapped the flow of Hawaiian pelagic fish within and out of the Hawaiian Islands and gave estimations of the source and distribution of their pelagic products (Fig 1)[1].

- 74% of their pelagic product is local catch.
- 68% is sold to restaurants, hotels and caterers.
- Big Eye, Yellowfin, Albacore, Blue Marlin and Mahi are the most common product, and fish are most often sold headed and gutted.

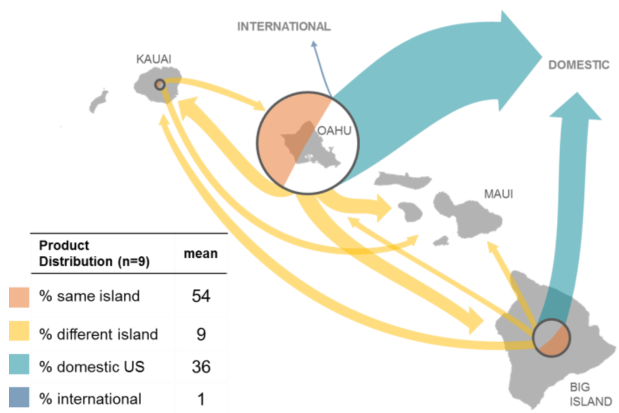

Figure 1. Local pelagic distribution network

Imported Pelagic Fish Flow

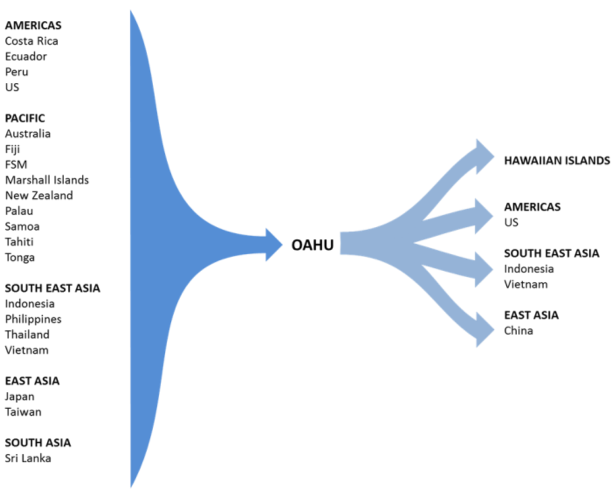

Figure 2. Imported pelagic distribution network

Imported pelagics was estimated to account for 26% of the distributor's product. They come from 20 identified countries, and either stay in the islands or are exported the US or Asia (Figure 2). The top three imported species are Mahi, Yellowfin, and Big Eye, and fish are most often imported headed and gutted.

[1] Here we report the mean of estimates made by representatives of nine seafood distribution companies.

Sourcing fish[2]

The quantity and quality of some fish species, such as Mahi, Snapper, and billfish is seasonal. Seasonality can also affect the ratio of target species to bycatch species (such as Opah). Multi-annual cycles such as El Niño and La Niña can increase productivity as well. Quotas can also have dramatic effects on the availability of fish. For example in 2016 the quota for Big Eye Tuna was reach in July. Other issues that could affect sourcing include fluctuating oil prices. Currently increases in oil prices are being absorbed by the fisher(men). Distributors vary the source of fish based on availability. Importing product from outside Hawaii is done to ensure access to product, even if it is not locally available at certain times. Local products are prized for their quality, whereas imported products ensure for a steady volume.

Processing and shipping

Certain types of processing equipment, such as -60° freezers and canning facilities are not available in Hawaii. This can limit the reach to certain markets and the ability to navigate seasonal variations in supply and demand. The freshest and best quality product gets shipped to the mainland, although there were also examples of restricted cargo space limiting the export of swordfish.

Markets for Hawaii fish

The local Hawaiian market is for fresh high quality fish, which can be difficult to supply from only Hawaiian fisheries sources. While the demand from some markets have been decreasing (e.g. Japan), other are expanding (e.g. US Mainland). Certain FDA and local regulations against the sale of fresh raw fish can limit markets (e.g. Utah). There are also seasonal increases in demand for fish (e.g. New Years and the Super bowl). Bad press regarding the sustainability of the fisheries, or labor practices can have a negative effect on the market.

Labeling Hawaii catch

There was a great deal of interest in branding Hawaii caught seafood products. One purpose of branding would be to distinguish it from imported products that would not carry the same guarantee of quality as well as safety and labor regulations. Labeling should be simple and would be most effective at the State level and done by restaurant and retailers. There was not universal agreement on the need for branding, especially for the local Hawaii market. Variation in the quality of product from different parts of the fisheries fleet and gear is important for local consumers and can't be captured at a State level. State level branding is more relevant for Mainland markets. Branding efforts would have to overcome lack of cohesion and infrastructure.

Future research

Participants were interested in more detailed information and expressed a willingness to provide more specific data on their import and export of pelagic products. There was also a specific suggestion of a market survey to understand consumer knowledge of seafood sources.

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[2] The following sections are based on small group discussions