

Sustaining Gloucester's Commercial Fishing Industry: Opportunities and Challenges

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OBJECTIVES OF THE DISCUSSION PAPER

- Assess current status and future prospects for Gloucester's commercial fishing industry.
- Identify challenges and opportunities related to preserving harbor infrastructure, providing needed services, and developing markets.
- Provide basis for discussion about what role community should play in supporting & sustaining the commercial fishing industry.

KEY FINDINGS

Current Status and Future Prospects

- While Gloucester’s commercial fishing industry declined substantially through the 1980s, the trend since then, while fluctuating on an annual basis, has not shown strong upward or downward movement.
- Landings in the all-important groundfish industry have been relatively stable during the past decade.
- Gloucester has become increasingly important among New England’s fishing ports, both in total landings and groundfish landings.
- While landings have remained stable, Gloucester’s commercial fishing fleet has declined considerably since the early 2000s.
- New England groundfish stocks are expected to rebuild substantially — to three times 2003 levels according the National Marine Fisheries Service. While this was initially projected to occur by 2015, recent trends indicate that the timeframe for reaching this milestone is likely to be extended.
- In the short-term, the uncertainties introduced by the new “catch share” system for regulating groundfish catches, along with reduction in catch limits for certain species, have dampened expectations for growth in catch levels.
- The aging of the fishing workforce and the difficulty of attracting new recruits, particularly to the groundfish industry, will present a challenge to fishing businesses as older workers retire and groundfish stocks recover.

Infrastructure and Services

- While the commercial fishing fleet has declined, concerns remain about the adequacy of dockage, which is key to retaining the industry in Gloucester. A considerable number of vessels use private dockage that is not explicitly reserved for commercial fishing vessels. In the longer run, industry consolidation is likely to increase demand for dockage among vessels in the 70- to 100-foot range, which is in short supply.
- Vessel owners rely largely on two businesses for vessel repairs. One of these businesses, Gloucester Marine Railway, is struggling financially, and its continued operation is in question. The loss of this business would reduce repair options, particularly for larger vessels.
- There are currently no commercial fishing training programs to provide a pipeline of new workers as older workers retire. While training was traditionally done on the job, the increasingly complex technical and regulatory dimensions of commercial fishing require classroom training.

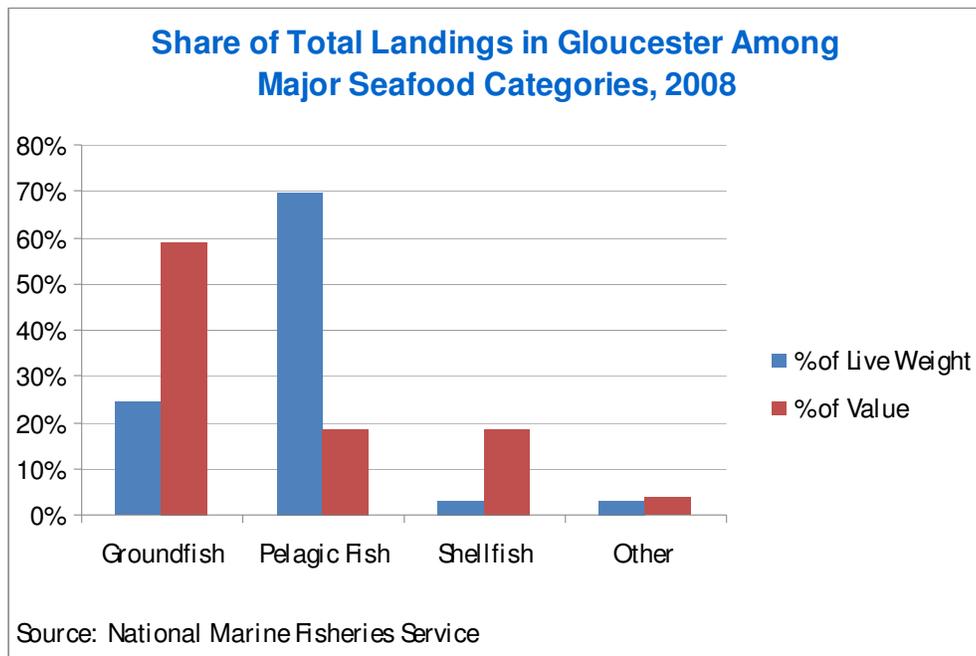
Markets

- While most processing of fish caught in Gloucester occurs outside of Gloucester, the continued presence of a number of processors of fish and fish byproducts creates opportunities for expansion if groundfish landings increase substantially as projected.
- There may also be niche opportunities for processing of fish currently caught in Gloucester but processed elsewhere, including shrimp and whiting. This would require the development of new marketing and distribution channels.

RECENT TRENDS AND CURRENT STATUS

Fish Landings: Volumes and Value

- Pelagics (primarily herring and mackerel) are predominant in terms of volumes of fish landed.
- Groundfish (primarily cod, pollack, flounder, haddock, and monkfish) are predominant in terms of value of fish landed.
- Shellfish (primarily lobster) are harvested in lower volumes but are very high-value.



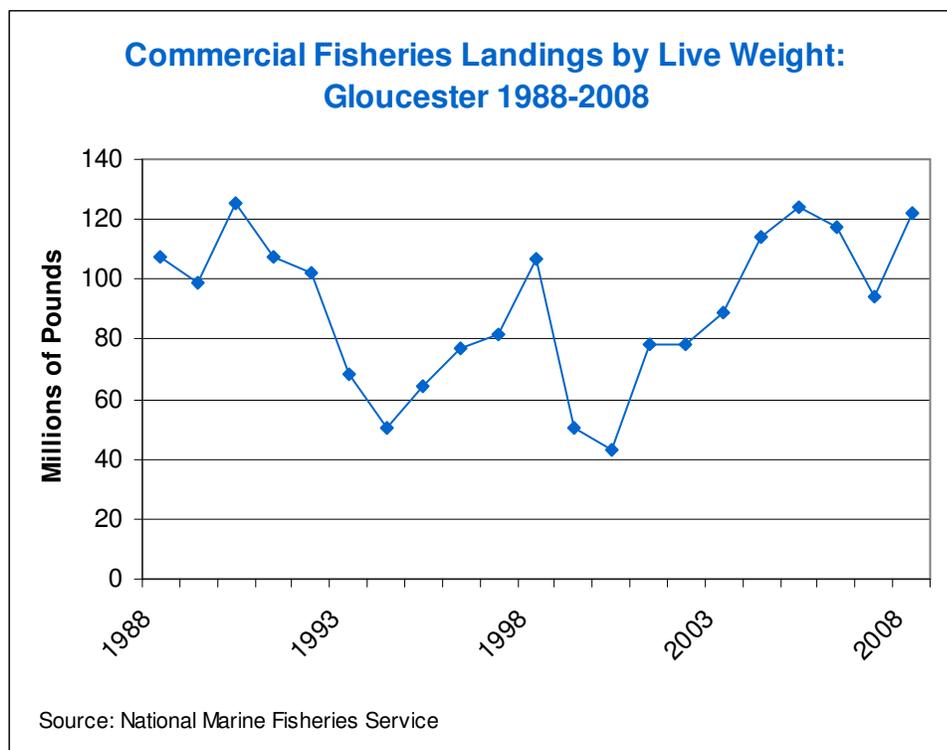
- While Gloucester's fishery is highly diverse, with over 50 species landed, a small proportion of these comprise most of the volume and value of landings.
- Many of the species most important to Gloucester's fishing industry, including cod, pollack, flounder, and white hake, are under stringent catch restrictions imposed by the federal government to restore overfished species.

Commercial Fishery Landings 2008 Top 10 Species by Value		
Species	Value	% of Total Landings
Cod	\$12,958,682	23.9%
Lobster	\$8,668,473	16.0%
Herring	\$7,269,791	13.4%
Pollack	\$4,999,973	9.2%
Flounder (all species)	\$4,552,674	8.4%
Goosefish (monkfish)	\$3,848,890	7.1%
Haddock	\$3,159,777	5.8%
Hake (all species)	\$1,873,796	3.4%
Mackerel	\$1,855,705	3.4%
Menhaden (pogy)	\$996,791	1.8%
Source: National Marine Fisheries Service		

Commercial Fishery Landings 2008 Top 10 Species by Live Weight		
Species	Live Weight (lbs.)	% of Total Landings
Herring	58,176,675	47.8%
Mackerel	18,070,277	14.8%
Pollack	10,575,534	8.7%
Menhaden (pogy)	8,381,834	6.9%
Cod	8,362,531	6.9%
Goosefish (monkfish)	3,157,982	2.6%
Haddock	2,569,590	2.1%
Flounder (all species)	2,477,071	2.0%
Lobster	2,105,274	1.7%
Hagfish (slime eels)	1,646,375	1.4%
Source: National Marine Fisheries Service		

Recent Trends in Fisheries Landings

- While varying considerably from year-to-year, the trend in fisheries landings has shown neither a strong upward nor downward trend during the past two decades. However the trend during the past decade has been generally upward.
- Year-to-year fluctuations in fishery landings have primarily been driven by pelagics, which constitute a large share of landings by weight (about 70% in 2008) but a much smaller share by value.
- After having declined through the early 1990s, groundfish landings were relatively stable during most of the past decade, ranging from 20 million to 25 million pounds, although they increased to almost 30 million pounds in 2008, accounting for almost one-quarter of growth in total landings over 2007.
- According to industry sources, landings in 2009 have declined as a result of the economic downturn and more stringent catch restrictions.



Gloucester's Role as a Commercial Fishing Port

Gloucester is an important fishing port both for New England and the entire U.S.

- In 2008, Gloucester was 10th in the nation among commercial fishing ports in volume of fisheries landings by weight (120.2 million pounds); it was 9th in the value of landings (\$54.2 million).
- Gloucester is the second most important fishing port in New England, after New Bedford.

Commercial Fishery Landings 2008 Major New England Ports		
Port	Live Weight (million pounds)	Value (million dollars)
New Bedford, MA	146.4	\$241.3
Gloucester, MA	120.2	\$54.2
Point Judith, RI	37.6	\$36.9
Portland, ME	35.1	\$22.6
Rockland, ME	29.6	\$8.1
Stonington, ME	17.4	\$15.4
Provincetown-Chatham, MA	15.3	\$18.3
Boston, MA	10.7	\$12.5

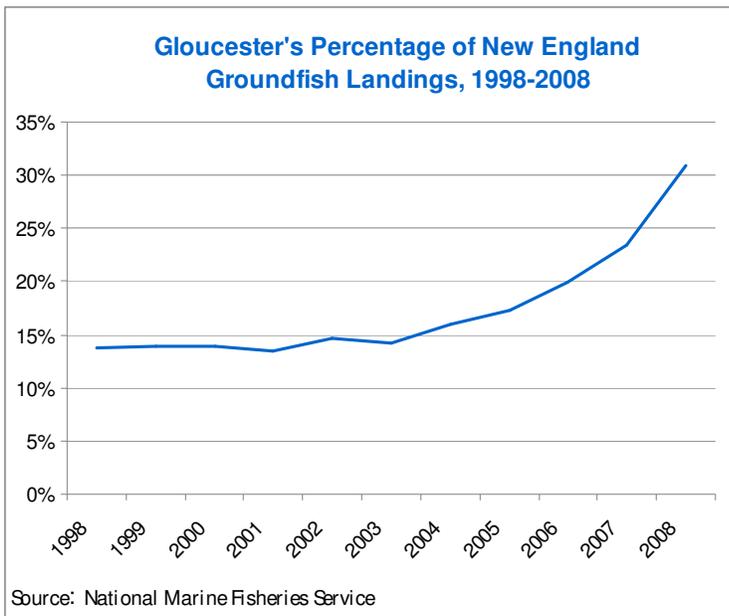
Source: National Marine Fisheries Service

- The Port of Gloucester accounted for 39% of New England's pelagic landings and 31% of the region's groundfish landings in 2008.

The Port of Gloucester has grown in importance both nationally and regionally during the past decade. In 1999:

- It ranked 29th nationally in value of landings, while Portland ranked 11th, and Port Judith ranked 8th.
- It ranked 22nd in volume of landings, while Port Judith ranked 16th and Portland ranked 21st.

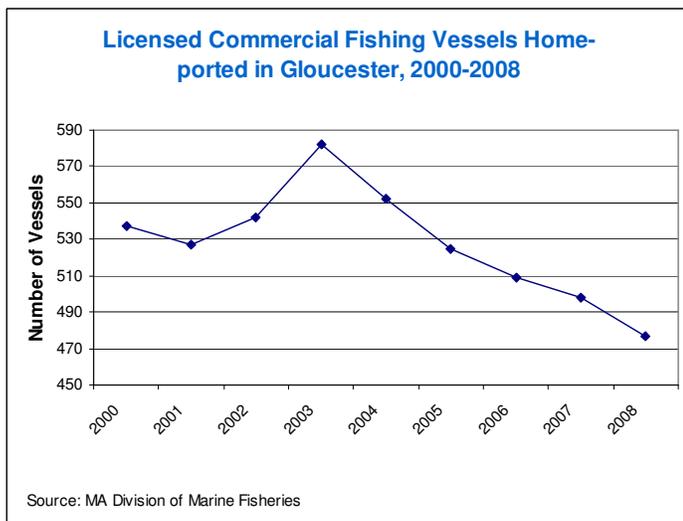
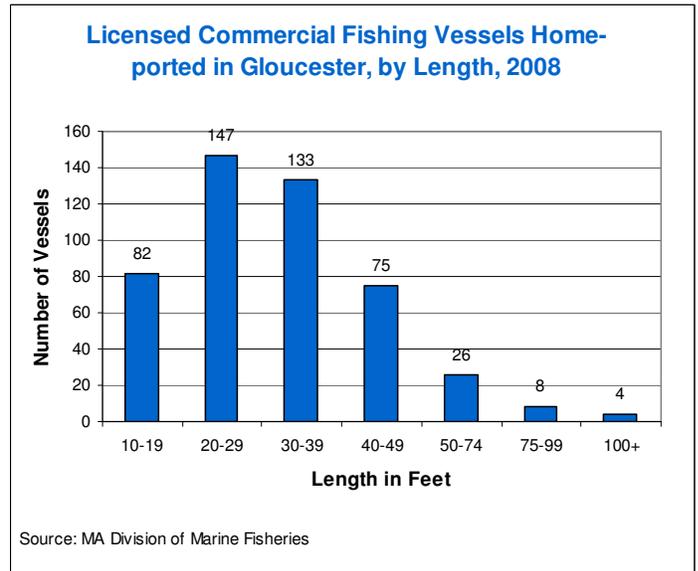
Gloucester has become the hub commercial fishing port of the North Shore as other North Shore ports have lost their commercial fishing infrastructure.



Because of a significant downward trend in total New England groundfish landings, while Gloucester landings have remained stable, Gloucester's importance as a groundfish port has increased considerably since 2003.

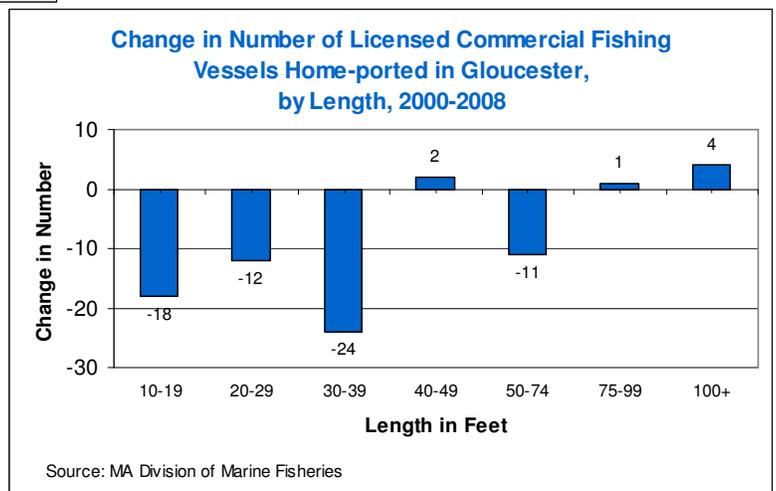
Gloucester's Commercial Fishing Fleet

- There were 477 licensed commercial fishing vessels home-ported in Gloucester in 2008, according to data provided by the Massachusetts Division of Marine Fisheries.
- Vessels of 100+ feet and some in the 90- to 100-foot range harvest high-volume, low-value pelagics; mid-size vessels tend to harvest groundfish; most smaller vessels harvest lobster and other shellfish.
- Fishermen estimate that 75-100 vessels represent the “full-time” commercial fishing fleet.
- Gloucester's commercial fishing fleet is primarily a small boat fleet, with the vast majority of vessels less than 50 feet in length — proximity to fisheries accommodates smaller vessels spending fewer days at sea.



- The number of licensed commercial vessels home-ported in Gloucester declined by almost 20% between 2003 and 2008.

- Between 2000 and 2008, vessels less than 40 feet and 50-74 feet declined in number, while vessels of 40-49 feet and 75 feet and over increased slightly.



Fish Processing

- Fresh fish processing in Gloucester Harbor has declined significantly during the past several decades. While the decline in landings has been a principal contributor to this trend, other factors are also at play:
 - Preference of wholesalers to process fresh groundfish for the retail and food service industries closer to markets in Boston and New York.
 - The growing share of landings comprised by herring, which is sold live for bait, shipped to canneries in Maine and Canada, or shipped frozen to overseas markets.
 - The relatively high cost of water, which is used heavily in processing.
 - The inability of Gloucester's sewer system to handle fish wastes, requiring processors to install their own pre-treatment systems.
- Despite this decline, a number of fresh processors have remained in Gloucester Harbor, indicating that water and pre-treatment costs do not necessarily eliminate Gloucester Harbor as a feasible location for processing.
 - Pigeon Cove Whole Foods processes haddock, cod, and flounder for more than 50 Whole Foods stores.
 - Steve Connolly Seafood processes cod, haddock, pollack, flounder, and other groundfish.
 - Ocean Crest Seafood processes 10% of its groundfish purchases primarily for direct sale to North Shore restaurants.
 - Zeus Packaging processes dogfish and packs whole whiting for international shipment.
 - A number of very small processors rent space on the harbor and buy and cut groundfish for retail or restaurant sale.
- Two other businesses freeze lower-value whole fish and ship them primarily to international markets — Cape Seafoods (pelagics), and New England Marine Resources (hagfish and monkfish).
- A recent development is the production of seafood byproducts. One Gloucester Harbor business, Neptune's Harvest, collects fish waste (gurry) from fresh fish processors in Gloucester and elsewhere to manufacture organic fertilizers and insect repellents. The business has been quite successful and recently expanded its production capacity significantly. It reports that production could be further increased if it were able to obtain additional gurry.

FUTURE PROSPECTS

Potential Growth of Fish Landings in Gloucester Harbor

- Any increases in fish landings are likely to occur primarily as the result of rebuilding of depleted groundfish stocks and the resultant increases in catch limits established by federal regulators.
- Some groundfish species, including haddock, Gulf of Maine cod, redfish, and plaice, are recovering; others, including Georges Bank cod, most flounder species, pollack, and white hake, continue to decline.
- In 2004, the National Marine Fisheries Service projected that New England groundfish stocks would rebuild such that, by 2015, the fishery would support sustainable landings three times higher than 2003 levels. However, regional groundfish landings have continued to decline through 2008. To reach NMFS' projections for 2015, regional landings in that year would have to exceed 2008 levels by more than 4 ½ times, an unlikely prospect. While NMFS has not formally revised these projections, it is likely that catch levels will increase at a slower pace over a longer timeframe.
- If NMFS projections for sustainable groundfish landings are ultimately reached, groundfish landings in Gloucester could increase to up to 95 million pounds based on Gloucester's current share of total New England landings. This is more than triple the 2008 level of almost 30 million pounds and would result in an increase in total landings of all species by about half over 2008. As noted, however, it is unclear when this milestone will be reached.
- Growing U.S. seafood consumption and the high percentage of consumption supplied by imports (84 percent in 2007) suggests that there will be adequate demand for any growth in New England groundfish landings that occurs because of increased catch limits.

Implications of New “Catch Share” Regulatory Scheme for Gloucester’s Groundfish Industry

- Fishermen with multi-species fishing permits have the option to organize into sectors beginning in 2010. Fishermen in a sector share catch limits for each groundfish species as an alternative to the current effort control (days-at-sea) system under which individual fishermen are restricted to specific days and fishing grounds. Catch limits assigned to a sector are based on combined historic catch levels of individual permit holders. At least half of active New England permit holders had signed on to sectors as of September 2009.
- The Gloucester-based Northeast Seafood Coalition organized 14 of the 17 new sectors, which should help to maintain or even expand Gloucester’s position as a groundfish fishing port.
- The new system is intended to make fishing businesses more economically viable by enabling them to better respond to market and weather conditions and reduce wasteful bycatch. It is also intended to give fishermen a stronger stake in sustainable fisheries management by aligning individual quotas with overall stock status and total allowable catch levels.
- However, uncertainties about how the catch share system will be implemented along with announced reductions in catch limits for certain groundfish species in 2010, have raised concerns among many fishermen that the new system will impose severe short-term financial hardships. These uncertainties are likely to depress investment in new vessels and equipment.
- In the longer-run, many fishermen as well as industry experts predict that the system will lead to consolidation of the industry into a smaller number of larger vessels as permit holders with lower quotas lease their quotas to the more efficient vessels within their sector. Increases in allowable catch levels may also encourage consolidation as larger vessels are needed to handle larger catch volumes.
- There is also some concern that, if sectors are not successful, regulation will shift to an individual transferable quota (ITQ) system under which quota rights are given to individual fishermen who have multispecies permit quota history. ITQs present greater potential for consolidation than sectors because individuals under an ITQ system are free to negotiate to buy and sell quotas without the approval of sector governance.
- Mitigating against the consolidation trend is the requirement that the federally-established New England Fisheries Management Council, which will regulate sectors in New England, avoid excessive consolidation of quotas to protect family fishermen and local fishing communities. Since sector regulations have not been finalized and will not go into effect until May 2010, it is unclear how the Council will seek to achieve this objective.

- The nonprofit Gloucester Fishing Community Preservation Fund is a local resource that is designed to preserve the local fishing industry in the face of pressures to consolidate and sell permits to outside interests. Using \$13 million in LNG terminal mitigation funds, the Fund buys permits and leases them to qualified local and out-of-town fishermen who have a history of landing fish and doing business in Gloucester. The additional permits will enable the recipients to increase their catch to more financially sustainable levels, reducing pressure to sell their permits. By mid-2009, the Fund had purchased 33 permits and planned to make additional purchases.
- Whatever changes occur in industry structure, Gloucester is likely to remain a primary port for groundfish landings because of proximity to the fishing grounds and its status as a full-service port.

Aging of the Fisheries' Workforce

- As fisheries' employment has declined, the average age of the workforce has increased. In 2008, the average age of a state commercial permit holder was 51. While age data on crew are not available, vessel captains indicate that crew members are often 50 years of age or older.
- Uncertainty about the economic future of the industry has increased the challenge of attracting new workers.
- While the projected turnaround in the industry could attract additional workers if fishing incomes increase, the lack of a pipeline of entry-level workers to respond to improved conditions could lead to shortages that reduce the efficiency of vessel operations, particularly in the short-term.
- More technologically advanced equipment and the need for compliance with complex regulations increases the need for pre-employment training. There are currently no such training programs in Gloucester or elsewhere in Massachusetts.
- Inability to recruit a local workforce may lead to reliance on immigrant labor. This has been successful in the past, but in light of higher skill requirements and greater immigration restrictions, may be more problematic in the future.

HARBOR INFRASTRUCTURE ISSUES AND CHALLENGES

Overview

- Gloucester is considered a regional hub and full service port. Key attributes related to this characterization include:
 - Ability to serve both vessels home-ported in Gloucester and transient vessels from more distant ports.
 - Adequate permanent, short-term, and transient dockage.
 - Ability to unload vessels and sell catch at auction or directly to buyers.
 - Availability of supplies such as ice, fuel, gear, bait, and crew provisions.
 - Haul out and repair facilities.

Dockage

- Adequate dock space is the linchpin for maintaining and expanding Gloucester's commercial fishing industry. If dockage is scarce, fewer vessels will homeport in Gloucester, offload their catch here, or use the services that make Gloucester a full-service port.
- Three kinds of dockage are needed: permanent berths for vessels home-ported in Gloucester; short-term berths for vessels home-ported elsewhere; and transient berths for on- and offloading.
- The sources of permanent and short-term dockage in Gloucester are a mix of publicly-owned facilities, businesses that serve the commercial fishing industry (e.g., fuel, repair, haul-out), and marinas that serve both recreational and commercial vessels.
- According to the draft 2008 Harbor Plan, there is currently dock space for about 260 commercial fishing vessels and an additional 27 moorings used by commercial vessels in the inner harbor. There are an additional 20 berths dedicated to vessels receiving port services.
- The decline in vessels home- or principally-ported in Gloucester appears to indicate a lessening of demand for dockage. However, other evidence suggests that supply of dockage remains an issue. A report by the Gloucester Community Panel in 2005 identified a number of factors that have restricted the supply of dockage:
 - Days at sea restrictions have reduced the supply of dockage at any one time because vessels are in port longer.

- Some vessels lay idle because owners of multiple vessels have the option of leasing permits from one vessel to another under federal regulations.
 - Some formerly active dock space has fallen into disrepair.
 - Because of a shortage of short-term dockage, vessels home-ported elsewhere that offload their catch and stay in the harbor temporarily dock at unauthorized spots or use transient berths for short-term dockage, sometimes interfering with the movement or offloading activity of other vessels.
- Fishing industry representatives report that several larger vessels (75-100 feet) seeking permanent berths in Gloucester have been unable to do so and have had to find space at alternative ports such as Boston and Portland.
 - In addition, many commercial fishermen who lease permanent dockage are not assured of its continued availability.
 - The only dockage that is formally restricted to commercial fishing vessels is publically-controlled — the State Pier, St. Peter’s Marina, and I4C2. Even at these sites, there are some vessels that are commercially-licensed but are not in active use or not engaged primarily in harvesting fish for commercial sale.
 - A number of commercial fishing vessels are docked at grandfathered recreational marinas (e.g., Beacon, East Gloucester, Cape Ann). Recreational marinas can obtain significantly higher revenue from recreational vessels, providing an incentive to favor recreational over commercial vessels. Many of the vessels on the State Pier waiting list are berthed at recreational marinas, reflecting concern among vessel owners about the long-term security of this space.
 - While unlikely in the short-run, privately-owned properties with commercial dockage within the DPA could displace commercial fishing vessels with vessels used for other commercial purposes, particularly if a change in property ownership and use occurs.
 - The projected increase in groundfish stocks and the implementation of the catch share regulatory scheme will likely affect demand for dockage among the groundfish fleet, although the exact nature of the impact is uncertain. The increase in groundfish landings and the expected consolidation of the fleet could lead to a shift in demand for dockage to larger vessels (70+ feet), an increase in total demand for dockage, or both.
 - A number of proposals have been made to increase dockage to meet the current and future needs of the commercial fishing industry:
 - The recently completed “Jodrey State Pier Planning and Feasibility Study” verified the feasibility of constructing two additional 50-foot berths at the Pier.
 - A group of waterfront property owners has proposed that development of new recreational dockage be allowed within the DPA, with a provision that 25% of total dockage developed be permanently reserved for commercial vessels. The low lease rates typically paid by commercial fishermen for dockage are viewed by

- property owners as a deterrent to the development of dockage exclusively for commercial fishing vessels.
- The Gloucester Marine Railways is considering expanding its dockage by 15 berths, but would have to charge higher lease rates than typically charged to commercial fishing vessels to make the investment feasible.
 - The development of dockage for large vessels along harbor frontage at the three Americold facilities, Gorton's, and Mass Electric has been suggested, provided that access and security issues can be resolved.
- The complexity of the dockage issue may require the establishment of an ongoing oversight process with the participation of key stakeholders to monitor supply and demand and to promote more efficient management of existing capacity and the development of additional capacity as necessary to meet the needs of commercial fishermen and other users.

Catch Offloading & Sale

- Vessels offload their catch at either the Gloucester Seafood Display Auction, an offloading site for the Boston Seafood Display Auction (which will eventually be moved to Fishermen's Wharf), or at docks of individual processors and distributors.
- Current offloading capacity is expected to be adequate even if the groundfish catch increases to levels projected by the National Marine Fisheries Service.

Vessel Haul Out & Repair

- The harbor's two haul out and repair businesses, Rose Marine and Gloucester Marine Railway, meet the haul out and repair needs of vessels up to 100 feet in length.
- Both businesses, which traditionally served the commercial fishing industry, have been adversely affected by the decline in the number of commercial fishing vessels based in Gloucester, and particularly the decline in larger vessels that are more likely to contract for vessel repair.
 - Rose has responded by diversifying away from commercial fishing vessel repair. This includes selling machine parts and doing machine work, selling fuels for vessels and home heating, renting dockage for commercial vessels, renting waterfront space to a whale watching business, and storing pleasure boats in the winter.
 - The Railway, with a smaller site, has had less opportunity to diversify, although it does lease dockage, sell fuel, and provide boat storage in its parking area. It remains highly dependent on its repair business, which has declined dramatically.
 - While designed to repair larger vessels, particularly in the 100-foot range, there are few such commercial fishing vessels based in Gloucester. It also repairs other

- commercial vessels, including tugboats, ferries, excursion vessels, barges, and schooners, but this has not compensated for the decline in business from commercial fishing vessels.
- Declining revenues have prevented it from investing in needed maintenance and repair of its drydocks. This, along with new environmental regulations that prevent it from doing certain types of repair work in open air and over water, has forced it to turn down some jobs.
 - Of its two drydocks, only one is typically in use, and staffing of its repair shop has declined from 40 to 3.
 - The Railway's owners have concluded that the investment required to modernize its facilities and address environmental requirements is not supported by its current revenue base or foreseeable income opportunities. It is considering all alternative options, including sale of the property.
 - The loss of the Railway would reduce repair options for larger vessels, and could lead some larger to home port in other regional ports.
- As long as the Railway remains in operation, the capacity is in place to handle the repair needs of any additional larger vessels (up to 350 tons) that result from future consolidation of Gloucester's commercial fishing fleet.
- Neither Rose nor the Marine Railway can handle vessels over 350 tons because of space and equipment limitations. While this capacity would provide convenience and cost-savings to the herring fleet, it is unlikely that investment in a larger-scale repair facility in Gloucester Harbor would be justified by the size of the market, even if an appropriate site could be found.

Supplies & Services

- The number of businesses providing equipment, supplies, and services needed by the commercial fishing industry has declined with the scale of commercial fishing and the size of the commercial fishing fleet. Businesses that remain include:
- A handful of gear shops.
 - One shop providing fishing supplies (e.g., tackle, blocks, chains, pulleys, wires, hooks, and stainless steel hardware).
 - An ice manufacturer, Cape Pond Ice, which is operating well under capacity and struggling financially. In addition to a declining market, high local water costs make it difficult to compete with its major competitor in New Bedford.
 - The harbor has four fueling facilities as well as fuel trucks serving small vessels at the State Pier.
- Some supplies, such as electronics equipment, and skilled labor such as electricians, are no longer available in Gloucester and must be purchased or secured at larger ports such as New Bedford.

- Increased activity or growth in the commercial fishing fleet resulting from fisheries restoration and increased catch limits will create a stronger market in Gloucester for these types of businesses, but the impact on business expansion or new business creation is difficult to predict at this point. It may result in increased demand for space along the harbor, although a harbor location is not necessarily essential for some of these businesses.
- The Gloucester Community Panel identified a need for temporary living quarters for visiting vessel crews and skilled tradespersons who come to Gloucester to work on vessels while in port.

Training Facilities

- Aging of the existing fishing workforce, increasing skills requirements, and potentially significant increases in the size of the ground fishing industry are likely to create demand for fishermen training programs, if not in the short-term, at some point in the future. The Harbor would be the most convenient location for such a program.

MARKET OPPORTUNITIES

Fish Processing

- Local processing of fresh-caught groundfish is unlikely to increase at current volumes of fish landings. Current processing methods and locations, markets, and distribution channels are likely to remain in place unless market dynamics change dramatically.
- Increases in groundfish landings projected by NMFS could eventually lead to increased local processing through expansion of existing processors or new entrants. Increased processing levels could lead to economies of scale in both production and distribution, offsetting to some degree Gloucester's cost disadvantages related to water rates and waste pre-treatment requirements.
- There may also be opportunities for processing of other species:
 - A shrimp processor recently approached the Cape Ann Commercial Fishermen's Loan Fund about the possibility of building a shrimp processing plant in the Harbor. This would yield the added benefit of stimulating additional local shrimp harvesting. There is strong demand for shrimp in national markets, with shrimp ranked as the top-selling fresh and frozen seafood.
 - Some fishing industry representatives consider conditions favorable for local processing of whiting, which is currently shipped to overseas markets. This would require the development of local marketing and distribution channels.

Fish Byproducts & Other Marine Products

- Increased groundfish landings would likely lead to increased processing of fish byproducts. Neptune's Harvest reports strong and growing market demand for its fertilizers and insect repellents and indicates a desire to expand if it can obtain more gurry.
- Neptune's Harvest sees opportunities to increase its product lines to cosmetics, pharmaceuticals, animal feeds, and health foods, and to use additional marine materials such as shellfish byproducts and seaweed, if it can partner with research scientists in product development.
- There may also be an opportunity to manufacture byproducts from pelagics, notably fish oil, although the financial feasibility in Gloucester Harbor has not been established.

Cape Ann Fresh Catch

- Established in June 2009, Cape Ann Fresh Catch provides direct-to-consumer sale of whole fish. It had 780 initial members and sold 5,000 pounds per week (approximately 1 percent of average weekly landings).
- It provides a guaranteed price, typically higher than paid at auction, and more predictable income for fishermen.
- Strong initial consumer interest indicates the potential to increase membership and sales with more extensive education, marketing, and distribution channels.
- If it reaches a large enough scale, it could push auction prices up, further increasing fishermen's incomes.