Bringing Seafood into Food Regime Analysis:  
The Global Political Economy of Newfoundland and Labrador Fisheries

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Abstract

How can we understand the nature and trajectory of Newfoundland and Labrador fisheries from a food studies perspective? This chapter presents an overview of changing social, economic, and political relations of fisheries regulation in NL through the lens of food regime theory. Food regime theory provides a qualitative social scientific framework for examining food systems as historically constituted forms of regulation and accumulation that are embedded in geo-political capitalist relations of production, trade and consumption. From this perspective, the world food system has developed through three dominant food regimes spanning from colonialism to the contemporary period of “green capitalism,” consisting specifically of (1) colonial-diasporic (2) mercantile-industrial, and (3) corporate-environmental. Surprisingly, however, fisheries—a major source of food globally—have not been examined through this approach. This paper contributes to the food regime literature by integrating fisheries into food regime analysis and by investigating the challenges of identifying a third food regime in the NL context, where the third food regime policies and practices are both challenged and emergent. Our analysis contributes to the social sciences literature on food in NL by examining the extent to which the application of three ‘ideal type’ analytical categories of food regime can explain the changing patterns of production and the role of the state in NL fisheries. We identify an ongoing encroachment of policies supportive of corporate and corporate-environmental food regimes on the one hand and alternative networks and trade relations that sit uneasily within and alongside the corporate food system on the other. The paper argues that food regime theory provides a useful yet incomplete account of the changing nature of regulation of fisheries in Newfoundland and Labrador.

Introduction

For centuries, the harvesting, processing and international trading of fish by people living in coastal communities has fundamentally shaped Newfoundland and Labrador (NL) society. The fishing industry was dominated by the production and export of cod for nearly 400 years and by the production and export of shellfish in 1990s and early 2000s in the wake of the historic collapse of cod and other groundfish. Current fundamental ecological changes in the northwest Atlantic ocean suggest that cod and other groundfish are making a comeback (Mather 2013; Rose and Rowe 2015), prompting industry players, government officials and academics to begin work preparing for another challenging transformation in the fishing industry and the people and communities that rely upon it. What is clear is that despite the tragedy of the cod collapse and the legacy of ecological and social problems that came

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with it, the fishing industry remains the economic foundation of most rural coastal areas of the province and will remain so for the foreseeable future (Dean et al. 2001: 5; Neis and Ommer 2014). Moreover, recent studies suggest fisheries offer potential for creating space for grassroots and community-based responses to food security and sovereignty challenges in the province (Lowitt and Neis, this volume; Dare, this volume). However, this chapter suggests that a critical food regimes perspective identifies deep, structural political economic challenges and contradictions facing efforts to transform NL fisheries in more sustainable and socially just directions.

Although the NL fishery is one of the most researched fishing areas in the world, few studies have examined it explicitly from a food regime (or even a food studies) perspective. Neis’ (1991) work on the restructuring of the cod sector in the Northwest Atlantic in the 1970s and 1980s provides insight into understanding fisheries as food systems. She explores changes in groundfish production and consumption through the lens of the French regulation school and traces a shift in the regime of accumulation from fordist production to flexible specialization. Although Neis’ work was not framed explicitly by food regime theory, her emphasis on changes in the consumption of fish and her attention to household-factory relations provides important insights that are relevant to food regime theory. In addition, the emphasis Neis places on ecological processes, which play an important role in shaping the shift in the regime of accumulation, aligns well with recent debates on food regime theory (e.g. Campbell 2009). Reade Davis (2014) provides a more recent analysis of changes in NL’s fish sector associated with debates on the potential for the return of cod following more than two decades of moratoria. His work is also sensitive to cod as food, which he situates within a broader global whitefish market. This is a market that is shaped by new developments in aquaculture, and by the seamless substitutability of one whitefish species for another. As Davis (2014, 717) explains, “Growing openness of trade has resulted in a situation in which commercial fishing and fish processing operations in Newfoundland must now struggle to compete for market share with producers of similar products around the world, many of which are able to process cod or substitute species at a lower cost”. These challenging market conditions for seafood explain why many in NL are worried about a regime shift from shellfish back to cod. Our paper builds on and contributes to this research that attends to fish as food in the politics of global production and consumption relations.

The limited number of studies on NL fisheries that situate fish in global food regimes is matched by the almost total absence of fish within food regime theory. Indeed, despite being recognized as “among the most influential framing tools in agrofood studies” (Magnan 2012, 372) we were unable to find a single study that analyses fish using food regime theory. Part of the explanation for the absence of studies on fish is the strong agrarian base of food regime analysis. As Bernstein (2015) explains, food regime theory emerged out of dissatisfaction with 1970s and 1980s agrarian political economy that had failed to engage with the increasingly globalized nature of food production and consumption (also see Campbell and Dixon, 2009). As a result, food regime theory has been applied to agricultural production rather than food production more broadly. An important goal of this paper is to begin to explore how and whether fish can be productively understood through food regime theory.

Food regime analysis was developed in the late 1980s by social scientists as an approach to analyzing agricultural change in a context of national and international power relations that shape production and consumptions. After sparking some debate in the 1990s, as well a notable critique (e.g. Goodman and Watts 1994), the analytical approach has experienced a resurgence since the late 2000s (Campbell and Dixon, 2009; McMichael 2009; Magnan 2012; Bernstein 2015). Proponents of the approach argue that key processes of global food production and consumption can be explained by understanding historical and political actors, relations, institutions, and structures. Three food regimes span from colonialism to
the contemporary period of “green capitalism” and consist specifically of colonial-diasporic food regime from about 1870 to 1914, the mercantile-industrial food regime from about 1945 to 1970, and the corporate or corporate-environmental food regime since about the 1980s.

The food regime approach is instructive not only because it enables a social scientific framework of fisheries as food systems, but also because it enables an analysis of the global relations in which seafood production in NL is embedded. A global analysis is appropriate given that the vast majority of the seafood produced in NL has been exported historically and the export-dependent nature of the industry continues. Approximately 90 percent of the province’s seafood was exported to more than 40 countries in 2014, with export values reaching $950 million the following year (DFA, 2015: 23; DFA, 2016). Figure 1 shows the top market destinations of NL seafood products across based on export value; these markets received nearly 80% of total exports by value.³

Figure 1: Top Five Export Markets by Value for NL Seafood Products (2015)

Source: Map developed by Myron King, Environmental Policy Institute

The need for an analytical approach sensitive to the global level of analysis is made clear by the deep integration of NL seafood production into the global economy. The food regime approach is similar to

³ Note: Some products exported to these destinations undergo further processing and re-export to other destinations including Canada and NL.
Food regime analysis

The concept of ‘food regime’ was first formulated by Harriett Friedmann nearly three decades ago (Friedmann 1987), with the first systematic formulation by Friedmann and McMichael (1989). The approach explores the role of agriculture and food in the development of the capitalist world economy and in the international state system since the 1870s, linking forms of food production and consumption to geo-political historical trends and transformations. While significant international trade in food commodities pre-date 1870s, the distinguishing feature establishing world food regimes was the establishment of “a world price for staple foods” (McMichael 2013: 24). Friedmann and McMichael (1989) identified two food regimes, the first from 1870-1914 during British hegemony in the world economy and a second from 1945-1973 during US hegemony in the world economy. A third food regime since the 1980s under corporate neo-liberal globalization appears to be ‘in the making’, although there are debates on whether this represents a stable third regime (Friedmann 2009). Food regime analysis has included a strong normative dimension, explicitly challenging and critiquing the dominant food regimes at the center of analysis.

A key contribution of food regime analysis is that it identifies how food production and consumption are embedded in, and shaped by, global power relations including colonialism and imperialism (McMichael 2009). And while the early literature contained an emphasis on structural dynamics of periodization with state and capital as the dominant analytical categories, recent engagement of the food regime concept is far more attentive to transformation and uncertainty with new categories such as social movements receiving more analytical attention (McMichael 2013, 7; Bernstein 2015). Bernstein suggests there are eight analytical dimensions of food regime analysis:
• the international state system;
• the international division of labour and patterns of trade;
• the ‘rules’ and discursive (ideological) legitimations of different food regimes;
• relations between agriculture and industry, including technical and environmental change in farming;
• dominant forms of capital and their modes of accumulation;
• social forces other than state and capital;
• the tensions and contradictions of specific food regimes; and
• transitions between food regimes (Bernstein 2015).

These analytical dimensions lead to three key research questions: a) Where and how is food produced in the international economy of capitalism; b) where and how is what type of food consumed, and by whom; and c) What are the social and ecological effects of the international relations of food production and consumption in different food regimes (Bernstein 2015)?

Although a key aspect of the food regime project involves identifying distinct periods in the global food system from the late 19th Century to the present, current research informed by food regime theory is overwhelmingly focused on identifying the dynamics of the third food regime, while remaining open to the possibility that this regime has not yet stabilized (more on this below). Drawing from a range of different commodities and geographical contexts, researchers have pointed to the contours of what might be an emerging third food regime. Significantly, Harriett Friedmann and Philip McMichael – originally responsible for food regime theory – differ on what they see as the key elements of the third food regime. Friedmann (2005, 229) has proposed the idea of a corporate-environmental regime that is shaped by a ‘standoff’ between agrifood corporations and environmental and other movements: “a new round of accumulation appears to be emerging in the agrifood sector, based on selective appropriation of demands by environmental movements and including issues pressed by fair trade, consumer health, and animal welfare activists”. In other words, the third food regime is characterized and shaped by large corporations responding to the pressures of environmental and social activists through their control of global food chains.

In these privately regulated global food chains, large corporate food companies are able to impose new conditions on food producers. An outstanding example of this compromise in the fish sector is Marine Stewardship Council (MSC) certification. The MSC emerged as a sustainability certification mechanism through a joint effort by Unilever, one of the world’s largest food producers, and the World Wide Fund for Nature (WWF). It provides an excellent illustration of what Friedmann calls a corporate-environmental regime, or green capitalism. While the MSC represents an important example, Friedmann’s claim is that this form of compromise or standoff between powerful corporations and environmental and other movements represents a driver or potential pivot of the third food regime. Consumers may benefit from this standoff but the outcomes for small-scale producers, particularly in the global south, may not be as positive: the imposition of new and stringent standards for northern consumers is likely to “deepen longstanding processes that dispossess and marginalize peasants and agrarian communities’ (Friedmann, 2005, 257).

McMichael’s (2009) analysis of the third food regime stresses the power of corporations shaping the global food system in a world that is increasingly shaped by neo-liberal policies. There is no meaningful standoff here between environmental movements and agri-food corporations as in the Friedmann formulation. Instead, agri-food corporations have become increasingly powerful in a global political economy that has become liberalized and where national state functions have been largely privatized. In
this way, McMichael’s formulation situates the third food regime squarely within process of neoliberal globalization. Bernstein (2015) has usefully broken down McMichael’s formulation into four key processes operating at the global scale. First, agriculture has become deregulated, which has led to the corporatization of agro-exports and the casualization of farm labour. In this liberalized economic environment, world food prices do not reflect costs, which has in turn led to the increasing vulnerability of farmers in many parts of the world. Second, the third food regime is characterized by processes of accumulation by dispossession. This is David Harvey’s term to describe the contemporary nature of capitalism, which McMichael uses to situate and explain key processes in agri-food and land based restructuring. A key source of evidence for accumulation by dispossession is the rapid progression of land grabs in global south that is shifting the basis of production from food to staples that are destined for animal feeds and biofuels, with devastating implications for food security.

The third aspect of the contemporary food regime, highlighted by Bernstein, is its ecological impact: this is a regime that is ecologically destructive to soils and is contributing in significant ways to climate change through greenhouse gas emissions. The ecological impact of this food regime includes those associated with genetically modified organisms and biopiracy, both of which are compromising the biological diversity of farming regions across the world, but especially in the developing world. Finally, McMichael (according to Bernstein) points to key questions around how food is produced and consumed, and for whom. In answering this question, he identifies two contrasting approaches to food production and consumption: the generic production of ‘food from nowhere’ for poor consumers in the Global South, and a new progressive ‘place based’ alternative that he describes as a ‘food from somewhere’. This alternative vision of food production and consumption is where McMichael sees the potential for strong and ecologically sound alternatives to the corporate food regime. These alternatives are currently being pursued by agrarian and land based social movements, most notably La Via Campesina, that provide the foundation for a radical alternative to the current globalized food system. As Bernstein has argued, McMichael’s formulation “demonstrates how definitive and, at the same time, how encompassing the arguments are” (Bernstein, 2015, 16).

While much work has explored the contours and drivers of an emerging third regime, most contributors to the debates are reluctant to claim that a third regime is stable or can be definitively specified. This reluctance is in part a response to the difficulty of analyzing and describing a global food regime that is in such dynamic flux. As Le Heron and Lewis (2009) argue, the risk of identifying a stable food regime is that it will obscure the “diversity and fluidity of the relations, actors, metrics, translations and contexts” (Le Heron and Lewis 2009, 346). Friedmann (2009, 335) has been most vocal on this issue suggesting that we need to ask a series of critical questions of an emerging regime before it can be considered stable: “Are the relations stable and durable, is there a central pivot (as there was in the first and second food regime), are there converging interests between states, corporations, producers and consumers? And what are the institutional foundations for the regime?” The effect of this thinking on food regime theory has been profound. It has led researchers to shift their attention away from attempting strict periodizations of food regimes. Instead, food regime theory is used as a lens or framework with which to understand the global food system. As McMichael (2009, 148) writes, “the ‘food regime’ can be considered to be simply an analytical device to pose specific questions about the structuring processes in the global political-economy, and/or global food relations, at any particular moment. Here the ‘food regime’ is not so much an episodic structure, or set of rules, but becomes a method of analysis”.

NL Fisheries in global food regime development
In the first section of the chapter, we traced the origins of food regime theory, and examined debates and changes in focus within the field. Perhaps the most significant development in the field has been a shift away from attempts to detail the precise contours of a food regime, and in particular the third food regime. Instead, researchers are now using food regime theory as an analytical framework and methodological orientation to ask questions about the relations between food production and consumption and global capitalist accumulation. In other words, food regime theory has become a framework/lens through which to analyze the global food system (McMichael 2009). This section examines the historical development of fisheries in Newfoundland set against the backdrop of the food regime periodization as a heuristic device.

The first food regime

The first food regime, which lasted from 1870 to 1940, is also called ‘the settler-colonial food regime’ or ‘the colonial-diasporic food regime’, which saw the creation of fully commercial farming in settler territories, such as Canada, the US and Australia, based on family labour (Friedmann 2004; Friedmann 2005, 235). The evolution of European fishing in NL was embedded in similar patterns of the settler-colonial food regime, with British settlement and commerce emerging as the dominant pattern in the 19th century when the first food regime became consolidated.

The emergence of household commercial fishing was a defining feature in settler-colonial NL fisheries. During the 16th century, a predominant seasonal migration to North America’s oldest industry, the cod fishery, began to see a new pattern of unregulated English settlements that were established and sustained by the exchange of cod for wine, in the broader context of the early development of a modern consumer economy mediated by metropolitan merchants and international competition (Pope 2004). By the early 18th century, the migratory fishery declined as the white settler population of NL grew. Permanent settlement resulted in the establishment of household production, which dominated rural development well into the late 20th century (Ommer 2002: 25). The cod fishery remained arguably the most important dimension of European commercial activity in North America for centuries (Pope 2004: 13-14) and cod was clearly the historic staple of the North Atlantic political economy (Innis 1940).

The role of the state was limited but not absent during this period. Acts of the British Parliament were passed for the control or regulation of the Newfoundland fishery as early as 1788, but formal resource management ideas and practices did not emerge until the late 19th century. In 1888, during the Responsible Government period, a Fisheries Royal Commission proposed establishing a centralized bureau devoted to fisheries research and assistance to address the problem of what it considered uncoordinated resource planning and development. An independent Fisheries Commission was subsequently established in 1889, which conducted research, prepared reports, proposed rules and regulations, and made suggestions for the proper curing of fish. The first department devoted fully to fisheries was established in 1898 as the Department of Marine and Fisheries. From about 1888, during the Responsible Government period, to 1949, when NL joined Canada, the primary concern of NL fisheries administration bodies involved the control and development of production and marketing in the salt fish industry. The objective of government was to maximize export earnings from the fishery so that surplus labour could be accommodated, including taking steps to develop new processing activities (fish freezing), improve quality of products, and modernize fishing vessels and gears. There was no consideration given to limiting the catches of any species or limiting the numbers of people participating in the overall fishery (Vardy and Dunne 2003: 106-107).
In addition to its integration in the international state and capitalist system, NL fisheries were characterized by regimes of accumulation containing non-capitalist domains during the early development (Neis 1991: 152). The most notable non-capitalist social relations included household production relationships, as well as household reliance on subsistence agriculture in many communities. By the middle of the twentieth century, however, state and capital facilitated a process of industrialization that began to replace the household production-based salt cod fishery with increasingly industrialized and mechanized deep-sea trawlers and frozen fish plants that employed paid labour (Ommer and Sinclair 1999).

The second food regime

The second food regime, lasting from about 1945 to 1970, is characterized by two patterns, mercantilism and industrialism. Mercantilism resulted in ‘national agricultures,’ which were systems characterized by price supports and export subsidies that, combined with new comprehensive foreign aid regimes, led to competitive dumping and trade competition (Friedmann 1993, 32). The industrialization of agriculture was characterized by the increasing role of global agribusiness in food production and distribution, as well as greater mechanization and chemicalization.

The industrialization of NL fisheries coincided with the emergence of the second food regime and a shift in markets from Great Britain, which dominated the first food regime, to the US, which dominated the second food regime. During WWII, the majority of exports of NL frozen fish products shifted from Great Britain to the US. Advances in ‘quick freezing’ technology, the rise of public cold storage plants, and the expansion of home refrigerators transformed the US food industry and helped transform social relations of production in food producing regions. Demands for frozen food products, especially in the US, fueled the expansion of the fishery (Wright, 1997, 728). According to Neis, this transformation was rooted in the Fordist regime relationship to nature and depended on external, largely US mass markets including the fish stick revolution (Neis 1991). The state, under the Commission of Government in the 1930s and the 1940s and subsequently with the federal and provincial governments following Confederation, played a major role in facilitating these transformations (Wright 1998). While Confederation changed the constitutional status of responsibility for how fisheries were managed, the direction of fisheries development continued on a path of industrialization and North American orientation that had begun with the advent of WWI (Wright 1998).

The development of infrastructure for frozen food marketing that characterized the rise of Fordism in North America and Europe also altered the structure of the fishery (Neis, 1991: 147). According to Miriam Wright, “massive industrialization” was “the most striking” aspect of NL’s fishery in the decades following World War II (Wright, 1997: 727). Industrialization began in earnest in the 1940s, transforming the fishery from a saltfish trade based on merchant credit to a vertically-integrated frozen fish industry. The fishery transformed from a household based production of saltfish to the mass production of semi-processed blocks of fish fillets. The production of dried saltfish by individual families that were exported to southern Europe, South America, and the Caribbean during the first food regime declined while the production of frozen cod fillets and blocks that were exported to the US rapidly expanded. NL firms did not control block markets, which were instead controlled by US food conglomerates (Neis 161). The inshore, household fishing society based on merchant credit was

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4 In Confederation with Canada in 1949, NL became a different kind of state, one that still involved a fierce nationalism and subsequently influenced decision-making around the fisheries. While management responsibility shifted to the Government of Canada, conservation activities remained limited to the nearshore area until the late 1970s. Much of the focus for the 1950s and 1960s remained on marketing, quality control and fisheries development (Vardy and Dunne 2003: 92).
transformed into a cash-based economy with fishers selling fish to vertically-integrated harvesting/processing firms while other members of fishing communities went to work at frozen fish plants or offshore trawlers owned by vertically integrated fishing companies (Wright, 1997: 728). Fish harvested both by corporate owned fresh fish trawlers and by small, artisanal inshore fishers was processed in onshore plants using freezing and filleting technologies developed by factory-freezer trawlers (FFTs) to produce fish blocks for the fish stick market (Neis, 161).

The northwest Atlantic fishery rapidly expanded after World War II and was largely unregulated until 1977. Both international and domestic industrial organization in the fishery facilitated intensive competition among nations for the resource. The inshore, household-based fishery in which communities regulated resource access within a three mile limit co-existed with the largely unregulated corporate trawlers from Spain, Portugal, France, the Soviet Union and other Eastern bloc countries, Japan, Cuba, West Germany, and Britain (Neis, 1991 147-148). By 1974, 1,076 Western European and Communist bloc fishing vessels fished off the North American coast in 1974 (ibid: 156). Canadian and NL-based factory freezer profitability was organized around serving mass markets for standardized products, producing more fragmented jobs embedded in standardized technologies separating work from community for prolonged periods (ibid: 157). As Neis explains

The profitably of the FFTs also depended upon the existence of mass markets and on corporate control over those markets. Such markets for fish, created in the early postwar period, were primarily located in the retail sector where mass produced, semi-processed, frozen fish products were sold to housewives, small restaurant owners and firms offering food service to institutions. Control over these markets was based primarily on the relative cheapness of the mass produced commodities and on the use of advertising to create demand for certain brand name products. However, in all three markets consumers could, relatively easily, substitute alternative protein products or cheaper fish products if prices were to increase substantially (Neis, 1991: 158).

The state played a key, but contradictory, role in this transformation, supporting the frozen fish industry that expanded through the 1980s (Wright 1997), highlighting the relationship between capital and the state in fisheries development in NL. Prior to 1974, federal and provincial governments responded to accumulation crises (caused by stock depletion) by financing local companies, constructing trawlers, and encouraging multinational food conglomerates to set up operations in NL. The multinationals were unsuccessful and soon supplanted by regional firms (Neis 1991, 148).

The state also helped protect the inshore harvesting and processing sectors. In an effort to prevent the corporate consolidation of fishing rights in the inshore, small scale fishery sector, federal Minister of DFO Romeo LeBlanc introduced the Owner-Operator Policy and a Fleet Separation Policy in the 1970s. The Fleet Separation Policy applies to fishing vessels less than 65ft in length and is designed to prevent the issuance of inshore licenses to corporations, including processing companies. The Owner-Operator Policy applies to license holders using vessels that are less than 65 ft in length and requires license holders to be present on their vessels and personally fish their license. The goal of the two policies is to promote distribution of fishing access and to restrict vertically integrated fishing companies from owning and consolidating their ownership of vessels. These state policies provided some important protections against the growing power of corporations in the Atlantic fishing industry.

In terms of processing, the Canadian constitution grants provincial legislatures the authority to legislate on property and civil rights, which include the authority to license processing facilities that operate on provincial lands, and the implied power to specify the types of species, the types of products and the
location to which the license applies (Dunne 2003: 131). The provincial government of NL first required fish processing plants to obtain operating licenses in 1875, but by the crisis of the offshore sector in the early 1980s, the government imposed a freeze on the issuance of additional licenses (Dunne 2003).

During the period of the second food regime, the Provincial Government passed the Fish Inspection Act, which has been amended to include Minimum Processing Requirements (MPR) legislation, and introduced legislation mandating Collective-Bargaining Price Setting. The MPR legislation through the Fish Inspections Act, which required over 30 species caught by provincial fishers to be processed in the province before exported. Until the mid-1970s, and arguably beyond, the policy approach of the Provincial Government of NL to the fish processing sector was based on agendas of industrial development and modernization. Public subsidies were distributed to encourage NL-based companies to expand capacity against outside competitors, with a Loans Guarantee program lasting into the late 1980s. These national and sub-national (provincial) development agendas can be understood as the ‘national-provincial fisheries’ counterpart to ‘national agricultures’ identified by Friedmann and McMichael in the second food regime.

In the 1970s and 1980s, a crisis in the Atlantic fishing industry facilitated a process of restructuring that shifted the fishery from a Fordist towards a more flexible or post-Fordist regime of accumulation, a process facilitated by ecological factors (Neis, 1991). In 1977, the Canadian state introduced an exclusive economic management zone extending jurisdiction to 200 miles. New regulation, stock recoveries, government subsidies, and predictions of global food shortages combined to entice investment in the fishery (Neis, 1991, 148). The increased segmentation of markets for fish products caused by the expansion of the fast food industry in the US combined to deepen the contradiction between capital accumulation and ecological limits (ibid: 155). Fish stock depletion, combined with the emergence of a conservation-oriented regulatory regime and the rapid expansion of the fast food and food service industries Fordist commodity markets for fish and undermined the profitability of the FFT technology; this process was occurring not only in Canada but globally, initiating a general process of global restructuring that is arguably still in progress. In addition, competition from other fishing countries intensified and the rapid expansion of US chicken production encouraged consumers to switch from fish to chicken, both of which reduced fish prices in the early 1980s. In NL, the changes resulted in the near collapse of the large, vertically-integrated fish companies like Fishery Products and Nickerson-National Sea, which were most wedded to Fordism.

The failure to take natural barriers into account “contributed to the crisis in Fordism in the fishery and these have continued to hamper efforts to establish a new effective regime of accumulation, not only in the North Atlantic, but globally as well” (Neis 1991 168). Almost four hundred years after the expansion of large-scale transatlantic commercial fisheries in the Northwest Atlantic,

The resource-based communities of Canada are in crisis. Their ability to survive is now in question, not only because their resource bases have been foundering (for a variety of reasons), but also because the exigencies of deficit reduction and long-term recession have combined to cut away much of the state support that had kept them relatively secure in the past. This is as true in other parts of the world as it is in Canada, and it raises serious questions about the viability of rural communities in the current post-industrial era of globalization (Ommer 2002: 21).

The third food regime?

The second food regime underwent transformation with the demise of “national agricultures” and the rise of globalization, or neoliberal globalization. As discussed above, the discussions about a possible third food regime are characterized by a difference between McMichael and Friedmann, the former suggesting
a ‘corporate food regime’ while the latter suggesting a ‘corporate-environmental food regime’ (Bernstein 2015). In this section we consider the evidence for both formulations in Newfoundland’s dynamically changing fish sector.

**Corporate food regime**

The foundation and driver of McMichael’s corporate food regime is the rapid spread of neo-liberal orthodoxy. In practice, this is facilitated by the liberalization of markets and the privatization of state regulations that allow corporate capital to shape food production and consumption. There is strong but uneven evidence for this shift in Newfoundland and Labrador’s fishing sector, particular since the late 2000s with the global financial crisis. In this section we explore efforts to liberalize markets and reduce state protection. We also note the strong resistance to these changes within the fish sector in this province and within Atlantic Canada more broadly. In other words, while the corporate food regime’s effects are being felt in the local fish sector, there is considerable resistance to the spread of neo-liberal orthodoxy.

Ecological and social transformations associated with the cod and groundfish closures to some degree militated against corporate consolidation. The post-1992 cod and groundfish moratoria period of restructuring of the industry resulted in a decline in the role of the offshore fishery and much of the corporate dynamics are being driven by changing dynamics in the inshore harvesting and processing sector (Dean et al. 2001), where federal owner-operator and fleet separation polices prevent formal vertical integration and corporate consolidation of fishing rights. Specifically, the collapse of groundfish and the expansion of shellfish sector in the post-1992 period saw the role of certain firms with a groundfish dependency decline, and the expanded involvement of firms with a major involvement in shellfish sector (Dean et al. 2001: 100).

However, during the 1990s and early 2000s, three forms of corporate consolidation linked to broader trends of corporate consolidation in the era of globalization had an impact on NL seafood production relations. The first consists of transformations in the international division of labour. The growth of China as a manufacturing area is affecting NL processors, driven principally by the availability of capital in China to open manufacturing plants and labour cost advantages (Dunne, 2003: 12). The second consists of the consolidation of global seafood buyers, particularly large food retailers and food service corporations (Dunne 2003). According to the province’s Fish Processing Policy Review (2003), a single large buyer became responsible for purchasing what had been purchased by as many as five or six independent retail chains, meaning that large buyers have significance pricing power and influence over production (Dunne, 2003: 13). Consolidation in the foodservice industry also resulted in increasing the buyer power over producers. As Dunne explains with reference to the US, “Generally, a company will develop relationships with one or two primary suppliers for a given commodity, and then encourage that supplier to pack under their specifications. When this happens, a large portion of a processor’s business can come to depend on a single customer, again with ramifications for pricing” (ibid: 13). The consolidation of buyer power results in increased vulnerability for NL producers. Third, the consolidation of buyers has facilitated the consolidation among seafood producers. Large global seafood companies have aggressively expanded by either buying other producing companies or entering into agreements that expand their marketing coverage. These shifts are prompting calls for NL processors to consolidate in order to compete with these global companies that are able to offer buyers more stable resource supply (Dunne 2003; Clift 2011).
These three forms of corporate consolidation have shaped an ongoing debate in the province about restructuring the NL fishery in ways that challenge the highly distributed and community-based character of harvesting and processing sectors: thousands of small-scale, independently owned harvesting enterprises with a dozens of relatively small fish processing plants spread across the province. Various apparent economic crises in Newfoundland and Labrador’s fish sector in the 2000s led to new and apparently urgent calls for a restructuring of the province’s fish sector. Some analysts pointed to deeper structural problems in the industry’s ability to compete globally, which, for them, required a new and concerted effort to restructure the fishing sector. One of the outcomes of a crisis originating in the shrimp fishery starting in 2009 was a process of research and consultation called the ‘Memorandum of Understanding’ (Clift 2011), which was endorsed by the provincial government, the major processors and the Fish, Food and Allied Workers Union (FFAW), an organization that represents both processing workers and harvesters. The MOU process lasted several years involving extensive research and many meetings with relevant stakeholders around the province. The MOU had found the industry to be largely ‘unviable’ and recommended drastic downsizing or ‘rationalization’ of both harvesting and processing sectors that would be particularly hard felt in remote fish-dependent coastal communities (Ibid). When the much-anticipated final report was released in 2011 it was, however, quickly dismissed by the provincial government. The provincial government was unwilling to commit to the large projected costs associated with restructuring – as much as CAD 750 million dollars – and was clearly uncomfortable with the social impact that was likely to follow the MOU’s recommendations (McLeod 2011).

The MOU’s proposal for a provincial government led plan to restructure Newfoundland and Labrador’s fishery according to ‘market logics’ that benefit vertically integrated corporate structures clearly failed. Yet the discourse of rationalization and restructuring to better align with vertically integrated market logics continues to be articulated locally and nationally. Within the province, some academics and policy analysts continue to call for a deep rationalization of the fishing sector in order to become internationally competitive in global markets. A recent analysis co-authored by the Chair of the MOU argues for a new ‘three R’ approach: rationalization, restructuring and reorientation. The authors note that Newfoundland and Labrador’s fish sector has recovered remarkably well from the financial crisis of the late 2000s, and that there has been ongoing rationalization in harvesting, processing and employment. Despite these developments, and the apparent financial resilience of the local fish sector, the authors argue that the level of restructuring “at this pace is insufficient to allow the industry to achieve the type of production efficiencies and financial performance that is required to allow it to remain competitive in the international marketplace” (Clift and Cooper 2014, p. 38). They add that the pace of restructuring is “insufficient to allow local processing firms to compete more effectively against the well-financed, vertically integrated seafood companies that operate in Western Europe” (ibid, p. 40). For those promoting the neo-liberal globalization agenda, financial success in global markets does not seem to dampen the call for deeper restructuring and rationalization with its attendant social impacts on harvesters, processing workers and coastal communities.

At the national scale there have been similar efforts to transform the fishery through the language of rationalization and restructuring. In 2012 the Department of Fisheries and Oceans released a discussion document called ‘The Future of Canada’s Commercial Fisheries’. Similar to NL’s MOU, this document called for a strong focus on profitability and global competitiveness. Absent from this discussion, as progressive policy analysts noted, was any commitment to the policies that have protected coastal communities and small scale harvesters from restructuring and dispossession of fish resources. These include fleet separation and owner-operator policies, which prevent vertical integration and ensure the viability of an independent fish harvesting sector. There was also no mention of long standing policies of adjacency and coastal community sustainability, which have shaped resource allocation policies.
especially in Atlantic Canada (Foley, Mather, and Neis 2015; Foley and Mather 2015). The response by fisheries organizations representing independent harvesters was vehement, with the mobilization of various harvester organizations into a new national advocacy organization called the Canadian Independent Fish Harvester’s Federation (The Telegram, 2013). The new group successfully convinced the federal government to reassert its commitment to social protection policies such as the federal Owner-Operator Policy and the Fleet Separation Policy despite the highly neoliberal orientation of the then governing Conservative Party of Canada.

Although local and national efforts to push a corporate food regime for NL’s fisheries may have stalled in some policy arenas, other policy developments are set to enhance corporate interests and power in this sector. The erosion of policies aimed at protecting food production employment and infrastructure in coastal communities may be exacerbated by a pending bilateral trade agreement designed to bring about more dramatic market liberalization and deregulation of state functions. The Canada-European Union Comprehensive Economic and Trade Agreement (CETA), which is expected to be ratified in 2016, has been lauded by both the provincial government, the FFAW, and the ASP as an important new opportunity for Newfoundland and Labrador’s fish (export) sector. When it is signed, CETA will effectively eliminate all EU tariffs for Newfoundland and Labrador fish exports, and will make it easier to export higher value processed fish, as opposed to raw product. As Song and Chuenpagdee (2015) write, CETA is “expected to create new opportunities for provincial seafood producers with respect to secondary processing, brand building and marketing strategies to deliver high-quality, premium products to EU markets”. Yet, according to an important and detailed analysis by Scott Sinclair of the Canadian Centre for Policy Alternatives (2013), the new trade deal may challenge existing national and provincial regulations aimed at protecting small scale harvesters and on-shore processing jobs that are so important to the sustainability of coastal communities. Indeed, Sinclair has argued that longstanding policy commitments of adjacency and historical dependence may be challenged under a bilateral trade agreement that sees Canadian and provincial regulations as contrary to the principle of ‘national treatment’, a provision that ensures that Canadian and EU commercial interests are treated equally. Regulations that protect domestic fishery interests – including minimum processing and fleet separation provisions – may be seen as discriminatory by EU corporations and under international law. Sinclair (2013: XX) is concerned that CETA may lead to the erosion of policies that “help spread the benefits of the fishery more widely among smaller, independent fishers and coastal communities”. Indeed, the Provincial Government of NL agreed to phase out MPRs, the provincial regulation that requires fishing companies to process fish in the province rather than export it for processing overseas, in response to federal pressure to conform to CETA principles. While the NL province has been reluctant to entertain exceptions to the MPR regulations in recent decades, large companies have also found ways to leverage promises of secure processing jobs in return for temporary or even permanent exemptions from MPR rules. Not surprisingly, these actions have been extremely divisive pitting coastal communities against each other in the struggle to maintain local processing jobs.

The evidence we have provided suggests that Newfoundland and Labrador is facing strong pressures from corporate interests, and the policy analysts that support neo-liberal globalization. These pressures have been particularly evident since the financial crisis of the late 2000s, and are being articulated at a range of scales: at the provincial level through the MOU process and ongoing debates about restructuring and rationalization, at the national scale through new attempts to privatize, commodify, expand markets for fish harvesting rights especially relevant to Atlantic Canada, and now internationally through a free trade agreement that promises much in terms of tariff liberalization, but comes with many new obligations that run counter to the policies that have protected small scale harvesters and coastal communities from neo-liberal globalization.
Corporate-environmental food regime

Some proponents of the third food regime concept suggest that a key element of the regime consists of the transformation of agri-food supply chains, particularly the leading role and power of supermarkets in the management of supply chains. The food system involves a shift in control over management of the chains from the manufacturing sector to the retail sector dominated by large supermarket chains such as Wal-Mart, Tesco and Carrefour. In this food system, retailers require more flexible production organized around a wide array of product criteria, based on convenience, choice, health, wellness, freshness, and innovation manifested in ready meals and other convenience foods (Burch and Lawrence 2005). Other increasingly powerful segments of the market include the food service sector, including companies that supply food to schools, universities, hospitals, prisons, and restaurants (Burch and Lawrence 2007) and the financial sector and private capital markets (Burch and Lawrence 2009).

Friedmann anticipates the possible emergence of a corporate-environmental food regime based on the convergence of environmental politics and retail-led reorganization of food supply chains. The third food regime, according to Friedmann, is based on “selective appropriation of demands by environmental movements, and including issues pressed by fair trade, consumer health, and animal welfare activists” (Friedmann 2005, 229). It is shaped by the convergence of environmental politics and corporate repositioning, particularly supermarket revolution and retail-led reorganization of supply chains (Bernstein 2015, 13). Whereas the second food regime was characterized by the consolidation of state regulation, the third food regime is characterized by the growing role of social movements of environmentalists in the private transformations of agrifood supply chains.

The rapid expansion of the food service industries and the development of competing fast food chains in the 1970s increased the demand for specialized products. In NL fisheries, this had the effect of facilitating a shift away from fordist mass production towards more “flexible”, specialized batch production in the 1970s and 1980s (Neis 1991). This required the reorganization of labour in response to changing market demand, including increasing the labour time required for production of more specialized packs and for grading (Neis, 1991, 166).

The potential emergence of the corporate-environmental food regime in NL fisheries is perhaps clearest in the area of NGO-led third-party environmental certification systems. As noted above, over the last decade, NL fisheries have become deeply integrated into the most influential international environmental certification program for fisheries, the Marine Stewardship Council (MSC) certification and eco-labeling program. Reflecting the high-point of neo-liberal optimism in the market and a crisis of legitimacy in state-based regulation, the MSC was created by the corporate giant Unilever and the World Wildlife Fund in 1997 in the UK with early leaders citing the NL cod collapse as a key motivation for creating a market-oriented approach to addressing fisheries management crisis (Sutton 1998). Like the development of private third-party certifications standards in the agrifood sector (Hatanaka et al. 2005), the structural power of retailers in European markets and US markets is the most important factor driving producer uptake of MSC certification (Ponte 2012). These structural pressures directly manifested in NL’s fisheries by the mid 2000s when the NL-based processors in the Association of Seafood Producers, with support from federal and provincial agencies, entered the Northern shrimp fishery into third-party assessment against the MSC environmental standard for sustainable fishing. The processing agency was responding directly to expressions of interest from European buyers connected to large retailers to get MSC-certified (Foley 2012; Foley 2013). With Northern shrimp certified in 2007, the processing association continued to engage the MSC by successfully acquiring certification for NL snow crab by
2013. This marked the 200th fishery certified to the MSC and, with shrimp already certified, brought NL’s two most lucrative fisheries into the MSC’s global initiative (MSC, 2013). Other fisheries are in various stages of assessment, including parts of the historic and rebounding cod fishery. A Fishery Improvement Project (FIP) for southern Newfoundland cod fishery began in 2011 under the leadership of the World Wide Fund for Nature (WWF) and the fishery subsequently entered a third-party assessment for Marine Stewardship Council (MSC) certification.

There are other social relations in NL fisheries that exhibit more grassroots social movement characteristics that appear as potential alternatives to the corporate-environmental food regime. NL fisheries are not only engaged in the corporate-environmental food regime of the MSC, but also increasingly engaging in other certification, traceability, and alternative marketing initiatives, strategies, and alliances. The MSC is one powerful player in a broader, complex movement commonly referred to as the sustainable seafood movement, which is driven by a complex and dynamic mix of corporate actors, and various types of international environmental NGOs. However, the limited influence of environmentalism as a social movement is demonstrated by the lack of international NGO presence in NL historically, with the WWF hiring a NL-based employee only in the last decade. As in other jurisdictions where industry and state actors have developed alternatives certifications in part due to dissatisfaction with the MSC (Foley and Hebert 2013; Foley and Havice, 2016), NL producer organizations have sought out alternatives means to assess, and communicate seafood attributes (see Haghiri, next chapter) and have begun to engage broader ideas and organizations affiliated with international environmentalism. A core motivation in producers’ engagement in alternatives strategies and alliances is a basic interest in economic benefits, which are ambiguous in the MSC.

Emerging strategies and alliances share characteristics with the ‘food from somewhere’ movement. An important example includes new traceability technologies that allow fishers to bridge geographic distances between producers and consumers (Parlee and Wiber 2011). One new initiative was developed recently in Newfoundland’s Southwest Coast and Gulf of St. Lawrence halibut and lobster fisheries. The traceability project was started in 2013 through a partnership between the provincial Fish, Food and Allied Workers (FFAW-Unifor) union and the British Columbia-based NGO EcoTrust. The initiative uses a consumer-facing seafood tagging and tracing system called ThisFish, a system developed by EcoTrust that allows consumers to trace individual fish products back to fish harvesters. With more than 250 harvesters engaged in the project, the initiative is designed “to help Newfoundland tell its unique story to the world,” (ThisFish & Ecotrust Canada, 2013). Other strategies include integrating alternative fishing methods with alternative marketing and trade networks. Two examples from Fogo Island illustrate alternatives to corporate-controlled supply chains. The first pilot project uses an experimental method for catching cod with pots, which is designed to minimize damage to the ecosystem and the food product. A second pilot project called Fogo Island Fish focuses on hand-line caught cod and selling products directly to high-end chefs and restaurants, with 20 Toronto restaurants participating in the early stages of the program. The niche market method allows direct feedback between chefs and harvesters on fish quality and is designed as part of a broader set of initiatives to revitalize the rural and remote island’s economy (CBC 2016). Examples of other alternative trade networks includes calls for the development of Community Supported Fisheries, similar to Community Supported Agriculture initiatives, in NL (Lowitt, 2009); the recent provincial stakeholder engagement in the launch of Slow Fish Canada, a movement spawning from the international Slow Food movement, in 2013 (Ebel and Adler 2013) and a “Great Fish for a Change” developed through the MUN-based Too Big To Ignore (TBTI) research project (http://toobigtoignore.net/great-fish-for-a-change-initiative/).
These alternative methods of catching, processing, and marketing fish contrast with the industrial fishing methods and mass export strategy that characterized the pre-cod moratorium fishing in the early 1990s. They signal attempts to integrate social and ecological dimensions of food production, trade, and consumption, with the underlying goal to capitalize on artisanal and community embedded nature of social relations in small-scale NL fisheries. The examples above are consistent with research showing how producers in other food sectors have exerted power to mobilize “bottom-up,” alternative institutions of certifications, eco-labels and alternative trade networks that are locally embedded and globally connected (Friedmann and McNair 2008). The emerging patterns of trade in NL also appear consistent with research on the potential third food regime in other parts of the world. Examining how Australian and New Zealand food production systems have contributed to, or have been reshaped by, an emerging third food regime, Campbell (2009) points to the significance of flows and feedbacks of information from producers of agricultural commodities to consumers of food products. These “information flows and feedbacks between consumers and distant ecologies” have led to new emphases on food quality and food safety, a concern to reduce the environmental impact of food production, and a strong commitment to taste and locality (ibid: 316). These new quality conventions are regulated through a pervasive audit culture, and a strong commitment to certification and traceability. While the goal is to provide a more profitable ‘food from somewhere’, these systems sit alongside poor quality food production chains that continue to deliver ‘food from nowhere’ to the vast majority of consumers. In this sense, the third food regime is characterized by two contrasting food systems, one of which provides high quality food through certified and audited food chains to wealthy consumers in the global north, and a second that is less regulated and provides food to a larger number of poorer consumers.

**Conclusion**

This chapter began with two questions: How can food regime analysis help us understand the trajectory of seafood production and trade in NL, and; what lessons does the NL fish sector provide for advancing scholarly debates about food regime analysis?

Food regime analysis can help us understand the trajectory of seafood production and trade as deeply embedded in global political economy of food. First, NL’s commercial fishing and seafood industry remains predominantly export-oriented, as it always has. It remains, in other words, deeply interconnected with global market forces and the political institutions that affect market regulation and transformation. Second, the social and political relations of NL fisheries have transformed in ways that more or less correspond with the three ‘ideal-type’ historical food regimes: 1) The consolidation of the NL settler society embedded in European markets through the colonial-diaspora period, 2) the post-WWII industrialization and mechanization of ‘national-provincial fisheries’ driven by demands from the US food sector, and 3) the corporate-led neoliberal globalization transformations towards flexibilization and specialized products through the integration of quality, health, and environmental considerations. Our argument is not that food regime theory perfectly explains NL fisheries or that the periodization of food regime analysis corresponds neatly with NL fisheries. However, our analysis above suggests that food regime theory provides an insightful lens through which to explain and understand transformations in NL fisheries over time and that the use of the three-regime typology in this context is relatively defensible. We invite researchers to engage critically with this approach in studies of seafood in NL and beyond.

Our second objective was to explore how the NL fisheries in particular, and fisheries more generally, might advance scholarly debates about a food-centric analytical approach that has surprisingly ignored
seafood, one of the most important food commodities globally. NL fisheries provide an ideal case study through which to ‘test’ food regime theory as one of the most important and early commodities embedded in European, primarily British, capitalist expansion. The development of NL fisheries over time, including the historic cod collapse of the 1980s and 1990s, provide evidence that fisheries share important similarities with agricultural food commodities. Two potential differences include the role of the state and ecological limits in fisheries. First, the substantial role of the state in fisheries regulation and development has been distinguished from other food sectors (Wilkinson 2006). One factor that distinguishes the state’s role from other agri-food sectors is its role in allocating fish resources, especially since the international extension of state sovereignty from 12 to 200 miles. The declaration of the 200 mile exclusive economic zone fundamentally consolidated fisheries resources under state control in Canada and elsewhere. This change resulted in extensive state interventions in both domestic industrial expansion and conservation. The state’s role in shifting the industry towards industrialized and highly mechanized production systems has contributed to the decline in traditional fishers knowledge and in turn undermined the capacity for people to support transitions to local food production and provisioning that depends on such knowledge (King, this volume). The role of the state is substantial, though contested, in developmental and conservation efforts. Secondly, ecological limits played a significant role in the transition from Fordism to post-Fordism (Neis 1991), which is closely related to the transition from the second to third food regimes.

We were particularly interested in the question of what the case of NL fisheries might tell us about the potential emergence and characteristics of a third food regime. Anticipating the demise of the second food regime, Friedmann and McMichael proposed two alternatives, one of which included the promotion of regional, local and municipal politics of decentralization to reconnect and redirect local food production and consumption (113). The advocacy of smaller farming based on agroecological principles emerged as a central component of the resistance to the current global food system under the umbrella of food sovereignty (Bernstein 2015). Internationally popular policy instruments are being appropriated by producers in NL as a way to define those instruments on their own terms in ways that serve their specific, place-based interests and identities. These initiatives, from traceability program organized by labour-NGO collaboration to alternative marketing networks, provide examples of the place-based ‘food from somewhere’ alternatives to the corporate food regime that McMichael sees as promising. McMichael sees alternatives to the corporate food regime in the form of land based NGOs like Via Campesina; in the fishing sector the alternatives to the corporate food regime exist through networks of progressive scholars and through organizations that support independent harvesters and vibrant fish dependent coastal communities. The production of seafood from coastal seas adjacent to rural and remote communities offer important opportunities for creating space for grassroots responses and solutions to food security and sovereignty challenges (Lowitt and Neis, this volume; Dare, this volume). Some but not all of the alternatives emerging in NL are indeed challenging the corporate food regime. Yet these initiatives are arguably not yet radically transformative. NL fisheries appear to be shaped by, and shape, processes consistent with an emergent, yet highly dynamic and contradictory third food regime. It includes a complex ensemble of social forces, including organized labour in forms of ‘accumulation from below’. The initiatives are not forms of food sovereignty, though have the potential to transform into forms of food sovereignty.

In sum, in NL fisheries, we see the existence of corporate food regimes, corporate-environmental food regimes, as well as alternative networks and trade relations that sit uneasily within and alongside the corporate food system. As in other food sectors such as the dairy industry (Pritchard 1996), the persistence of organized small-scale producers supported by social protection policies and a strengthening of transnational corporate influence are mutually compatible. What, then, do NL fisheries
mean for the question of the third food regime? In short, yes, we see corporate, neo-liberal globalization and the corporate-environmental food regime, meaning that both Friedmann and McMichael are right. But we see continued and powerful struggles against it and still other social relations and networks that are more ambiguous in nature. While the case of NL points to the continued ability of the state to work against the vertical integration of capitalist development, recent developments in the province suggest the ability and willingness of the province is in a situation of transformation that is more consistent with the third food regime.

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