



NOVA SCOTIA SEAFOOD SECTOR STRATEGY

2026–2029

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Minister's Message

Nova Scotia's seafood sector is the core economic engine for our province. It supports thousands of jobs, anchors coastal and rural livelihoods and communities, generates billions in exports, contributes to provincial Gross Domestic Product (GDP), and carries a world-class reputation for quality seafood. From harvesters and processors to aquaculture operators, exporters, researchers, suppliers, and partners, this sector is built on skill, resilience, and ambition.

Now, more than ever, the global seafood sector is changing. Markets are shifting, costs are rising, labour pressures persist and technology is changing how business gets done. These pressures require focus and a coordinated plan. Nova Scotia has the resources, expertise, infrastructure, and drive to capture more value at home and to compete more aggressively abroad.

That is why this Strategy matters. It sets a clear three-year direction focused on where Government and industry can deliver the greatest return: growth and innovation, market and product diversification, operational efficiency, higher-value use of our resources, and stronger coordination across the sector. A strategy is most impactful when it drives action.

This Strategy reflects what we heard directly from industry. Over the past year, harvesters, processors, aquaculture operators, exporters, associations identified the priorities that matter most. Their input shaped a plan centered on practical action, clear roles, and measurable progress.

Our Government is committed to improving the conditions for growth: modern regulations, support for innovation, better service delivery, stronger market access, fewer investment and expansion barriers, and improved communication between industry and the Department.

Working together, we will grow the sector to increase productivity, develop higher-value products, be export ready and collaborate to deliver stronger results.

The sector is strongest when industry leads, government supports and partners move with intention in the same direction. Together, we can strengthen competitiveness, create more value from our seafood resources, attract investment, support good jobs, and build a more resilient sector.

This is a Strategy for the people, businesses, and communities that make Nova Scotia Canada's #1 seafood exporter, and for the economic future they are building here at home.



Honourable Kent Smith E.C.N.S.
Minister of Fisheries and Aquaculture

Introduction

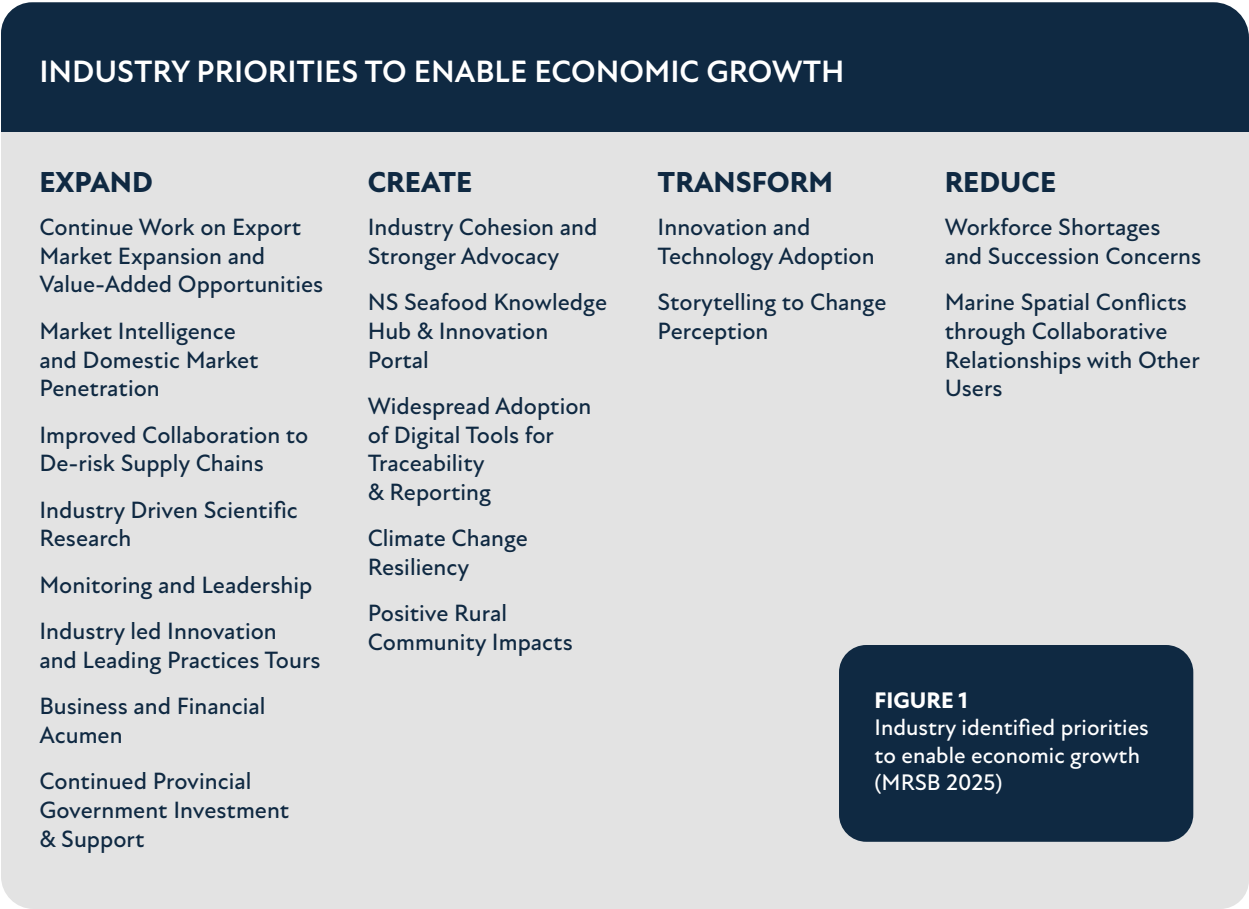
The Department of Fisheries and Aquaculture (DFA) has developed this Strategy to respond to the key challenges and opportunities shaping Nova Scotia’s seafood sector and to chart a path for sustainable sector growth from 2026 to 2029.

The Strategy and its actions are informed by the *State of the Nova Scotia Seafood Sector Analysis* (MRSB 2025), which provided the evidence base for this work. That analysis drew on research, key informant interviews, regional focus groups, and sector surveys conducted in 2025. The analysis is a snapshot of the sector’s current state, challenges, and opportunities.

The analysis identified key challenges, including trade friction and tariff threats, labour shortages, rising costs, climate impacts, and complex regulatory and social dynamics. It also highlighted important strengths, including global demand growth, Nova Scotia’s reputation for quality, strong export performance, industry adaptability, and significant research and innovation capacity.

Through this process, industry identified key priorities to enable economic growth that have informed this Strategy, grouped into areas to expand, create, transform and reduce, as shown in Figure 1. The full report of the *State of the NS Seafood Sector Analysis* is available here: <https://novascotia.ca/seafood-sector-strategy/docs/seafood-sector-analysis-report.pdf>

This industry input, sector data, economic analysis, and market intelligence shaped the Strategy that follows.



Roles and Responsibilities

Acting on the challenges and opportunities facing the sector requires coordinated effort across the entire seafood value chain, including industry, associations, service providers, academia, rural and Indigenous communities, and other levels of government.

Across the seafood value chain, economic value is generated at every stage, from harvesters and aquaculture producers who source the seafood, to processors and value-added manufacturers who increase product value, to logistics, wholesalers, retailers, and food service providers who connect Nova Scotia seafood to global markets. Exporters, suppliers, service providers, research institutions, and independent certifiers further strengthen competitiveness by supporting innovation, market access, and consumer trust. Together, these participants contribute directly to provincial GDP, employment, exports, and local economy. See a diagram of the *Nova Scotia Seafood Sector Value Chain* here: <https://novascotia.ca/seafood-sector-strategy/docs/seafood-sector-value-chain.pdf>

This Strategy focuses on the actions and roles of Government and industry.

Government's role is to provide clear and predictable regulatory pathways, modernize systems and services, support innovation and investment, expand and develop markets, strengthen compliance and enforcement, and provide the data and tools that help businesses make decisions with confidence.

Industry's role is to use these tools and opportunities to invest, adopt new technologies, diversify products and markets, improve supply, quality, and consistency, and collaborate where needed to meet buyer expectations and capture more value in Nova Scotia.

Shared responsibility means that government action alone will not deliver growth. Government can create better conditions for success, but stronger productivity, profitability, investment, and export performance will depend on industry response and leadership. To deliver on the vision and objectives set out in this Strategy, industry and Government must work together.



Seafood Sector Opportunity

Nova Scotia's seafood sector has strong growth potential. It is the major source of export earnings. Seafood exports were approximately \$2.5 billion in 2023, \$2.4 billion in 2024, accounting for about 37 per cent and 36 per cent of total provincial exports. Preliminary data for 2025 shows exports remained strong at approximately \$2.2 billion despite tariffs and broader global economic uncertainty.

The sector's economic footprint extends beyond exports. It contributes \$1.4 billion to provincial GDP (2022) and supports nearly 19,000 jobs across harvesting, processing, aquaculture, and related activities. Nova Scotia also ranks first in Canada for seafood export value and landed value, and for employment in primary production and processing.

These export and employment statistics tell us that our seafood sector continues to show resilience in the face of global challenges and is a strategic sector for Nova Scotia's economy into the future.

Demand for healthy, high-quality, and sustainable protein continues to grow in domestic and international markets. This creates opportunities to expand into new and existing markets, introduce new product offerings, and increase efficiency through innovation and advanced processing technologies.

Aquaculture is also a major area of opportunity. It now accounts for more than half of the seafood consumed worldwide and continues to grow faster than any other protein sector. Nova Scotia has natural advantages that support this growth, including our extensive 13,000 kms of coastline, clean coastal waters, and established marine infrastructure.

These opportunities are active today. New and experienced entrepreneurs are already looking to invest in Nova Scotia's seafood sector. That interest underscores the importance of having a clear Strategy for growth.





OUR VISION

THIS STRATEGY SETS OUT A LONG-TERM VISION FOR THE FUTURE OF NOVA SCOTIA'S SEAFOOD SECTOR.

Nova Scotia seafood will be recognized globally for premium quality products, innovation, and driving strong and sustainable economic growth for the province.

Nova Scotia's seafood sector will deliver increasing contributions to the provincial economy through exports, tax revenue, and employment, supported by diversified species, markets, and product forms.

The sector will be diversified, efficient, resilient, technology-enabled, and supported by predictable regulatory frameworks that enable profitable, competitive businesses to reinvest and grow in Nova Scotia.

Goals

The Strategy aims to:

- **Accelerate innovation and value-added processing** to ensure the seafood sector keeps pace with global leaders and generates more economic output from the resources.
- **Increase aquaculture production** to support sector growth and generate more economic output to meet growing demand for seafood at home and around the globe.
- **Strengthen export resilience and earnings** by diversifying markets and expanding product ranges shifting toward higher-value, consumer-ready products produced in Nova Scotia.
- **Increase sector productivity and economic impact** through modern, predictable regulatory systems, improved licence and site utilization, and stronger compliance and enforcement.
- **Improve collaboration, communication, and resilience** to unlock investment, support sustained economic growth and be better prepared for future challenges and opportunities.

Pillars

To deliver on this vision and opportunity for Nova Scotia's seafood sector, the Strategy is built on four pillars:

- 1. Industry Growth & Innovation** – Fostering growth and innovation across harvesting, aquaculture, processing, and distribution by enabling investment and technology adoption to raise productivity and value-added output.
- 2. Market and Product Diversification** – Strengthening the resilience of Nova Scotia's seafood sector by expanding its presence in national and international markets through diversified sales distribution channels, expanded product offerings, and destination markets.
- 3. Operational Efficiency** – Optimizing processes, tools, workflows, and services to support efficiency, traceability, compliance, and growth in the seafood sector for greater productivity and economic impact.
- 4. Communications & Collaboration** – Improving communication and collaboration within the sector and with other marine users, while elevating the profile of Nova Scotia seafood globally.

These pillars are interconnected. Investment in capacity and innovation matters most when products can reach the right markets, and stronger growth depends on efficient systems, clear communication, and coordinated action across the sector.

Under each Pillar, the Strategy identifies a clear objective, the actions Government will take, opportunities for industry and measures of success.



PILLAR 1

INDUSTRY GROWTH AND INNOVATION

Objective: Fostering growth and innovation across harvesting, aquaculture, processing, and distribution by enabling investment and technology adoption to raise productivity and value-added output.

Context and Evidence

Pillar 1 focuses on growth and innovation by increasing production, strengthening productivity, technology adoption and value-added processing so the sector can generate more value.

This matters because Nova Scotia's seafood sector, while deeply rooted in tradition, is increasingly oriented toward innovation and growth. Industry engagement shows many operators are ready to modernize in response to rising costs, labour constraints, climate impacts, and growing demand for value-added, sustainably produced seafood.

Public and private investment over the past decade has strengthened Nova Scotia's innovation ecosystem. Programs such as the Atlantic Fisheries Fund have accelerated technology adoption, especially in processing and aquaculture. The province also benefits from a strong ocean technology cluster and solid applied research, training, and extension capacity.

Innovation uptake remains uneven across the sector. Some operators are leading in automation, digital tools, and product development, while others face persistent barriers related to capital costs, access to applied research, commercialization risk, and the technical capacity needed to scale new products and processes. Industry consistently identifies the need for stronger knowledge transfer, better coordination between research, technical advice, and market intelligence, and tools to de-risk investment in technology, automation, and multi-species processing.

Experience in jurisdictions such as Norway, Denmark, and Iceland shows that coordinated innovation, full fish utilization, advanced processing, sector integration and data enabled decision-making has increased productivity and returns. Although Nova Scotia's regulatory, ownership, and fleet structures differ, these examples highlight opportunities to consider by building on existing strengths in ways that fit the provincial context.

Government Actions To-Date

Innovation, productivity, and resilience are central to the long-term competitiveness of Nova Scotia's seafood sector.

Government's role is to enable growth by improving access to applied research and technical expertise, aligning funding and financing tools, and supporting innovation and investment.

Government has made important strides to-date with:

- The federal-provincial **Atlantic Fisheries Fund**, which supported 365 Nova Scotian projects with a total value of more than \$215 million, made huge strides in advancing innovation, technology, research, and sustainability across the seafood harvesting, processing, and aquaculture sectors.
- The **Seafood Accelerator Program**, delivered through Perennia, which supports product development, quality, and food safety projects for Nova Scotian seafood and aquaculture companies.
- The **Seafood and Agriculture Strategic Investment Fund** launched in 2025 to support companies proposing large-scale projects to boost productivity and help their business, and our sector expand.
- **The aquaculture Coastal Classification System**, completed in July 2025, which has mapped Nova Scotia's coast to identify high potential areas for new aquaculture development. Access the CCS tool here: <https://novascotia.ca/aquaculture-coastal-classification-system>.
- Re-issuing nine inactive aquaculture sites, totalling 117 hectares for active production through the **Site Reallocation Process**.

Improving Product Value and Market Access

With support from the Atlantic Fisheries Fund (AFF), Scotia Harvest upgraded its operations with a modern processing facility and automated equipment for scallops, haddock, and redfish. These improvements are helping the company produce higher-value products, improve quality, and get more value from each pound landed.

This kind of progress depends on making significant investments. Projects like this are helping Nova Scotia processors move up the value chain, meet demand for higher-quality products, and stay competitive in global markets.

AFF investments are helping processors increase product value, improve quality, and access higher-value markets.

- The **Argyle Aquaculture Development Area** – an innovative, collaborative pilot with the Municipality of the District of Argyle, pre-assessed and designed 53 sites spanning 784 hectares for shellfish and marine plant aquaculture. To-date, three sites have been approved for development.
- Began **accepting proposals for new marine finfish farms** following a pause while the Coastal Classification System was being completed.
- The **Fisheries and Aquaculture Energy Efficiency Innovation Fund (FAEEIF)**, a \$6.5 million fund incentivizing the adoption of innovative and efficient technology by the seafood sector, reducing its carbon footprint and contributing to provincial greenhouse gas emissions reduction targets. To-date, FAEEIF has committed funding to 36 projects, totaling \$3.54 million, saving an estimated 42,500 tonnes of lifetime greenhouse gas emissions and reducing operating costs for businesses across the province.
- The **Fisheries and Aquaculture Loan Board (FALB)**, providing competitive financing to support growth, innovation, and sustainability in the fisheries, aquaculture, processing, and boatbuilding industries. In 2025-2026, the FALB approved 178 loans for a record annual lending value of \$89.7 million. Arrears as of March 31, 2026, were at a near-record low of 0.60% of the outstanding loan balance.

Supporting Seafood Enterprises through FALB Financing

Competitive financing from the Fisheries and Aquaculture Loan Board (FALB) is helping people enter the industry and grow their operations.

Billy Henneberry, from Sambro, worked with the Loan Board in 2018 to purchase his lobster licence, a small boat, and a core fishing licence. Since then, he has used additional financing to upgrade his vessel and buy more licences. This has allowed him to fish year-round and employ six people, including his wife and four crew members.

FALB financing is helping harvesters and processors invest, grow their businesses, and create jobs in coastal communities. (<https://nsfishloan.ca>).



Government Actions 2026–2029

Building on this foundation, Government will focus on the following actions to strengthen the conditions that enable sector growth and innovation:

1. Strengthen Knowledge Transfer and Technical Services through the launch of the new Seafood Sector Innovation Hub

The Department will launch the Seafood Sector Innovation Hub, in partnership with Perennia and the Centre for Marine Applied Research (CMAR). The Innovation Hub will be a focal point for applied research, product and process innovation, technology adoption, and commercialization support. The 2026-2027 Provincial Budget invested \$1.5 million in 2026-2027 plus ongoing annual funding to deliver on this priority commitment to support growth in the seafood sector. This investment provides sustained funding for Perennia and CMAR to deliver products and services driven by and tailored to the needs of the seafood sector.

The Seafood Sector Innovation Hub will:

- Integrate technical advisory services and applied research expertise to help companies design, test, and commercialize new value-added products and formats.
- Enhance extension, outreach and technical advisory services through Perennia, with a focus on advanced processing, food safety, quality, and new value-added product development.
- Expand coastal monitoring programs and tools delivered by the CMAR, including the Coastal Monitoring Network and Coastal Classification System, to support evidence-based decisions in aquaculture, in-shore fisheries, and other marine sectors to enable responsible growth.
- Connect industry participants across the sector and service providers to support a seafood sector-specific innovation ecosystem. It will include an information portal for the seafood sector to access relevant data, tools and supports.
- Play a leading role in communications, outreach and education materials to help tell the seafood sector story to the public.

2. Improve Programs and Funding to Grow Sector Innovation, Efficiency and Resilience

- Leverage and, where appropriate, adapt existing programs such as the **Atlantic Fisheries Fund (AFF)**, **Seafood Accelerator Program**, **Seafood and Agriculture Strategic Investment Fund (SASI)**, and **Fisheries and Aquaculture Loan Board (FALB)** tools to support innovation, technology adoption, and commercialization so the sector can generate more value and grow.
- Work with the federal government to negotiate and renew the **Atlantic Fisheries Fund (AFF)** to ensure continued support for innovation, competitiveness, and sustainability post 2026, applying lessons learned from the original AFF.
- Deliver departmental commitments under the provincial Climate Plan, including funding through the \$6.5 million **Fisheries and Aquaculture Energy Efficiency and Innovation Fund (FAEEIF)** that supports industry projects to save on operational costs, realize energy savings and reduce emissions.
- Collaborate with industry, utilities, and subject matter experts to guide **adoption of energy management technologies** and best practices that reduce energy related costs and emissions while improving resilience to climate impacts.
- Work with stakeholders to **better understand the impacts of climate change on the seafood sector** to inform policy development and industry planning.

Investing in Cleaner, More Sustainable Operations through FAEEIF

Nova Scotia is supporting innovative and practical projects that help the seafood sector cut emissions and stay competitive. The Strait of Canso Superport Corporation received \$250,000 to install a marine charging station, reducing emissions when vessels are in port by more than 33,000 tonnes over time. Clearwater Seafoods Ltd. was a key partner in this project, providing funding and in-kind support. Bill and Stanley Oyster Co. also received \$250,000 to add an electric workboat and expand solar power at their farm, reducing emissions by about 400 tonnes.

Together, these projects are expected to reduce lifetime emissions by nearly 34,000 tonnes, about the same as avoiding almost 15 million litres of gasoline or taking nearly 8,000 cars off the road.

FAEEIF is helping the seafood sector cut costs, reduce emissions, and improve bottom-line performance.

3. Grow Nova Scotia's Aquaculture Sector

Aquaculture is an important source of sustainable and healthy food for Nova Scotia and the world. It contributes to our economy by creating hundreds of jobs and in 2024 generated approximately \$115 million in revenue. Finfish aquaculture accounts for 87% of Nova Scotia's total aquaculture production – valued at \$99.5 million. Atlantic Salmon represents 81% of all aquaculture production in Nova Scotia, with a value of over \$93.4 million in 2024. The total value of shellfish production was \$6.2 million in 2024.

By 2030, seafood consumption is expected to increase by 89%, combined with a 32% increase in aquaculture production, according to the United Nations Food & Agriculture Organization. Aquaculture therefore represents a key opportunity for growth in Nova Scotia with our long coastline, pristine waters and the right enabling conditions created through the recently modernized regulatory framework.

The following actions to grow aquaculture go together with actions identified under Pillar 3 about implementing improvements to the regulatory process and application system:

- Advance collaborative work with partners on **local oyster seed development** for a more reliable and bio-secure oyster seed supply to be resilient to the impacts of shellfish disease outbreaks.
- Enable new aquaculture sites to be established through the **Aquaculture Development Area** process. By proactively identifying and pre-assessing sites suitable for aquaculture development, this new approach helps to streamline the licence and lease application process for sea farmers, saving time and resources, while providing additional opportunities for communities to be part of the licensing process.
- Work with existing operators to **increase productivity at active aquaculture sites** by using better site data and sharing proven industry practices to improve day-to-day performance.
- Set clear expectations for **aquaculture site use and reallocate inactive or under-used sites** to operators who can put them into productive use, increasing output from existing sites.
- **Identify and advance new aquaculture sites and species** using the Coastal Classification System and environmental data to increase production and improve site productivity.
- Expand the **shellfish health surveillance program** to include additional aquaculture sites and wild populations.

Securing Oyster Seed for a Growing Industry

Nova Scotia is taking action to strengthen its oyster sector. After recent shellfish disease outbreaks in eastern Canada, the Department partnered with the Centre for Marine Applied Research (CMAR) to build a more reliable, bio-secure oyster seed supply here at home. This work includes developing broodstock, testing hatchery production, monitoring spatfall, and offering hands-on training to help support a strong and growing industry.

Strengthening a reliable, bio-secure oyster seed supply is essential to protecting and growing Nova Scotia's oyster sector.

4. Support Product Diversification, Value-Added Processing and Full Product Utilization

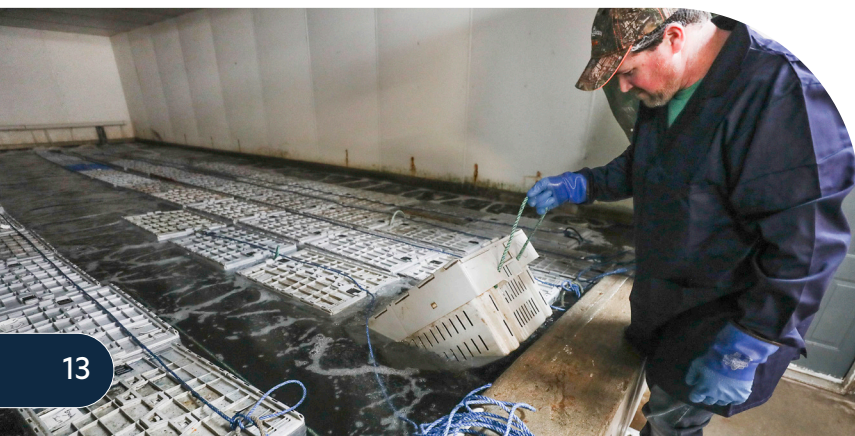
- Support companies adopting automation, advanced processing technologies, and circular economy approaches that improve productivity, increase product yield, and create new products.
- Encourage full utilization of harvested and farmed species, drawing on international leading practices such as “100% fish” models to maximize value from available resources.
- Continue and enhance extension, outreach, and technical advisory services, with a focus on advanced processing and new product development that meet changing market demands.

Industry Opportunities

Long term competitiveness in the seafood sector will depend on the industry’s ability to invest in modern technologies and innovative practices that increase productivity, create greater value from available resources, and the ability to adapt to environmental changes and market volatility in an increasingly technology driven global seafood market.

Industry can contribute by:

- Modernizing and investing in **processing technology adoption and digital tools** to strengthen competitiveness, address labour challenges, and supporting long-term resilience.
- Investing in **multi-species processing technologies** to be responsive to changing market demands, conditions and species availability, as well as improving overall efficiency of operations.
- Investing in **R&D, product development and value-added production**.
- Applying time and effort in knowledge transfer through **industry-led innovation activities**.
- Investing in **climate resilient operations and energy saving technologies** to be better positioned to adapt to the impacts of climate change, while reducing operational costs.
- Investing in **labour skills development** to maximize labour productivity and capacity.
- Investing in new technology and husbandry techniques to maximize aquaculture production from existing aquaculture sites.



Measures of Success

Key indicators that Government will track to measure success for enabling industry growth and innovation will include:

- Launch of the Innovation Hub and number of companies assisted
- Number and value of funded innovation and technology adoption projects
- Number and funding for new product development and food safety programs
- Number of funded/supported value-added products developed and commercialized
- Number and value of energy efficiency projects funded, and associated emissions and cost savings
- Area of ocean waters made available for industry to conduct commercial aquaculture
- Production volume per hectare on existing aquaculture sites
- Number and value of loans provided by the Fisheries and Aquaculture Loan Board in support of sector growth and innovation

Pillar 1 creates the foundation for higher value, resilience and long-term growth across the seafood sector. With stronger capacity in place, the next area of focus is how that value shows up in the marketplace.





REDFISH



LOBSTER



ATLANTIC SALMON



SWORDFISH



SILVER HAKE



SNOW CRAB

PILLAR 2

MARKET AND PRODUCT DIVERSIFICATION

Objective: Strengthening the resilience of Nova Scotia’s seafood sector by expanding its presence in national and international markets through diversified sales distribution channels, expanded product offerings, and destination markets.

Context and Evidence

Pillar 2 focuses on the markets and earnings generated by Nova Scotia’s high-quality seafood exports.

Nova Scotia is Canada’s leading seafood exporter, with exports valued at about \$2.2 billion in 2025—roughly 36% of total provincial exports. Seafood remains the province’s largest source of export earnings.

Nova Scotia’s export profile remains highly concentrated, leaving the sector exposed when market conditions shift. In 2024, about 78% of seafood exports went to the United States or China; preliminary 2025 data indicates concentration remained high at about 74%. Recent tariff threats, geopolitical tensions, and changing trade policies have reinforced the need to diversify into alternative markets, including selected European Union countries, the Indo-Pacific region, and the Middle East.

Nova Scotia’s export mix is also heavily concentrated in lobster, which accounted for 51.5% of seafood exports in 2025 (\$1.14 billion). Most lobster exports were live product, representing 76% of lobster exports and 39% of all seafood exports, with a value of \$868 million. While live lobster remains in strong demand, this concentration increases exposure to shifts in market conditions, consumer preferences, and transportation disruptions. In 2025, live lobster exports declined by 19%. In addition to the decline in live lobster exports, industry has been met with challenges of fluctuations in both lobster pricing and quality. We heard industry’s concerns. There is no single answer to the complexities of the live lobster business but there are ways the sector can adapt to be resilient for the future.

Exporting to new and emerging markets, and product mix, are opportunities for the seafood sector to better diversify. In addition, industry and market intelligence point to a major opportunity to increase export value by shifting from bulk commodity products to value-added, consumer-ready, and differentiated products made in Nova Scotia. This involves identifying new product offerings, delivered in different formats, and with innovative packaging driven by consumer demands. In addition, global buyers increasingly expect consistent supply, mixed-product shipments, strong traceability, sustainability credentials, and formats suited to modern retail and foodservice channels. Nova Scotia’s reputation for quality provides a strong foundation, but capturing more value will require closer alignment among product development, processing capacity, and market demand.

Government Actions To-Date

Market and product diversification are critical to the success of Nova Scotia's seafood sector.

Under this pillar, Government's role is to act as a market enabler and connector, providing intelligence, coordination, and targeted supports to help companies reduce risk, grow sales in new and existing markets, and capture higher value per unit exported.

Government has already taken steps to strengthen its market development capacity by supporting trade missions, engaging in-market expertise, and working with partners including Invest Nova Scotia and federal agencies to help companies determine new markets, identify go-to-market strategies, and access international buyers.

Key achievements to-date include:

- **Executed trade missions** in 12 countries in 2025-2026 spanning Europe, Asia and the Middle East, and **attended the largest annual trade shows:** Seafood Expo Global in Barcelona, Spain, and Seafood Expo North America in Boston, U.S. and the China Fisheries and Seafood show in Qingdao, China.
- **44 companies joined the Province on trade missions in 2025**, and they estimate the missions will help generate \$61.8 million in short-term sales and \$182 million in long-term sales.
- **Engaged in-market consultants in strategic markets** in the EU (Italy, France, Spain, Netherlands), South Korea and Vietnam, Singapore and Malaysia to assist with business facilitation, market research and market development efforts.
- **Integrated the seafood and agrifood market development teams** to create a stronger, more unified approach to advance Nova Scotia's position in local, national and international markets.

While strong progress is being made, industry feedback highlighted gaps in market intelligence, export readiness, particularly for small and mid-sized firms, and follow through after missions.

Diversifying Markets and Sales Distribution Channels

To support year-round consumption of Nova Scotia seafood in Spain, Nova Scotia partnered with the Canadian Embassy and a leading frozen food retailer with 275+ stores on a year-long campaign combining digital, in-store, and influencer-led promotions. Early results are strong, with \$2.2 million of product procured from Nova Scotia seafood suppliers, over 1.4 million impressions and tens of thousands of engagements, signalling rising awareness and demand by Spanish consumers.

This partnership highlights the opportunity that new sales distribution channels present to the growth of our seafood sector.

Government Actions 2026–2029

Sustained growth in Nova Scotia’s seafood sector depends on strong market intelligence, effective promotion, and the ability of firms to navigate increasingly complex and competitive global markets.

These actions are designed to support stronger export earnings, improve resilience to external shocks, and reinforce the seafood sector’s contribution to provincial GDP growth.

Building on the actions taken to-date, Government will focus on the following actions to strengthen market and product diversification:

1. Expand Market Diversification Funding and Supports

- Implement expanded seafood and agrifood market diversification initiatives supported by the new \$4 million provincial investment over three years.
- Use programming to increase activities such as market entry, buyer engagement, market promotions, in-market expertise, and export readiness supports for small and mid-sized firms.
- Improve communication with industry to track market pipelines, share market insights, intelligence and mission outcomes, improve sector export readiness, to better target recruitment and export development efforts.

Expanding Market Opportunities for Seafood Exporters

Nova Scotia is investing \$4 million over three years to help seafood and agrifood exporters reach new markets and grow their businesses. Funding supports market research, building sector export capacity, exploring new opportunities, and covering market entry costs like product sample shipping. The program strengthens government-led efforts where it has the most impact, connecting buyers with Nova Scotia companies, providing in-market support, and promoting our seafood through targeted campaigns and showcases.

Together, this work is opening new opportunities and supporting growth for Nova Scotia seafood exporters.

2. Deliver Focused, Intelligence Driven Global Trade Development

- Develop and execute targeted export missions, inbound buyer delegations, and promotional activities in priority and emerging markets, including selected EU countries, Indo-Pacific markets, and the Middle East.
- Use robust market research and intelligence, assessments of company export readiness, product availability, and production capacity to inform mission planning and maximize outcomes.
- Strengthen post mission follow up to support long-term buyer relationships, and repeat market entry.
- Increase participation of Nova Scotia companies in trade missions by enhancing access to market intelligence, implementing export readiness programs to build sector capacity and facilitating direct engagement with buyers to help businesses enter new international markets.
- Increase emphasis on telling a consistent Nova Scotia seafood story that reflects quality, sustainability, origin, innovation, and reliability of supply.
- Leverage partnerships with Invest Nova Scotia and federal agencies to ensure wrap around services and supports are available for Nova Scotian businesses that want to expand their efforts in new and growing markets.

3. Advance Strategic Domestic Seafood Market Development

- Drive sustained domestic growth by strengthening participation in local institutional procurement channels.
- Expand market access within key retail, foodservice and e-commerce sales distribution networks across Canada.
- Capitalize on *Buy Canadian* momentum to increase demand and market share for Nova Scotia seafood products nationwide.
- Elevate the visibility, recognition, and preference for Nova Scotia seafood through coordinated branding and promotional activities across domestic markets.
- Foster strong industry networks and partnerships that support collaboration, shared intelligence, and collective success for Nova Scotia companies in the domestic marketplace.

These actions are designed to support stronger export earnings, improve resilience to external shocks, and reinforce the seafood sector's contribution to provincial GDP growth.

Industry Opportunities

Industry priorities identified through engagement include continuing work on export market expansion and developing value-added products to meet market demand, leveraging market intelligence, national and international market penetration, and improving collaboration to de-risk supply chains.

Industry can contribute by:

- Participating in provincial and federal programs and trade missions that support product and market diversification.
- Leveraging international partnerships for market access and investment.
- Developing business processes and sales skills necessary to maximize market opportunities.
- Pursuing new markets informed by market intelligence reports and provincial missions.
- Aligning products with global buyer needs and expectations, including value-added offerings and diverse product forms.
- Ensuring products meet international standards for quality, sustainability and certifications.
- Collaborating within industry on consolidated shipments and on co-packing opportunities that can reduce costs and expand offerings into new and existing markets.
- Focusing on consistency of supply and quality so international buyers can be confident in the timelines for delivery and the quality of the product.
- Increasing consistent presence in international markets to build and maintain relationships.
- Leveraging the technical expertise of the Seafood Sector Innovation Hub to inform product development and packaging needs for international markets.
- Being export ready.

What we heard at the Gulfood Expo Seafood Mission

Bringing insights back from international seafood missions provides valuable lessons learned for both the Department and sector exporters. When Department staff and sector representatives visited international buyers in Dubai, they emphasized that they need clear information on the product offerings and volumes companies have, when it can be supplied, and how consistently.

Being export ready is key to success in expanding into new and emerging markets.

Measures of Success

Key performance indicators for Market and Product Diversification will include:

- Increased mix in Nova Scotia seafood export product forms
- Increase in seafood sales in non-U.S./China markets
- Number of new export markets entered by Nova Scotia seafood companies
- Growth in the number of companies using DFA market development tools, including export readiness services and in-market support
- Annual growth in Nova Scotia seafood sales across Canada
- Number of targeted trade missions and inbound delegations delivered over the Strategy period, and documented outcomes (e.g., estimated sales, new buyers)





PILLAR 3

OPERATIONAL
EFFICIENCY

Objective: Optimizing processes, tools, workflows, and services to support efficiency, traceability, compliance, and growth in the seafood sector.

Context and Evidence

Operational efficiency is a critical determinant of competitiveness in the seafood sector. Rising input costs, labour constraints, climate impacts, and increasing global competition mean that businesses must be able to respond quickly to market opportunities, invest with confidence, and operate efficiently within predictable regulatory systems. Pillar 3 focuses on the actions for predictable systems and processes and underpins the success of Pillars 1 and 2.

The *State of the Nova Scotia Seafood Sector Analysis* highlights the strength of Nova Scotia's regulatory foundations, while also pointing to opportunities to enhance process clarity, consistency, and system responsiveness. Industry engagement noted concerns related to decision timelines, access to licences, data availability, and regulatory alignment, as well as the impacts of illegal, unreported, and unregulated activity on sustainability and fair competition.

Stakeholders underscored that maintaining strong regulatory oversight and public confidence, particularly in aquaculture development, traceability, and resource management, is essential to sustaining market access and supporting long-term sector growth.



Government Actions To-Date

Robust yet efficient regulatory frameworks are essential to support orderly sector growth and development.

Government's role is to ensure that its regulations and processes are clear, predictable and aligned with sector needs so businesses can plan, invest and adapt with greater confidence. A strong and clear regulatory environment also increases public confidence in resource development.

Government has already taken steps to modernize and strengthen the regulatory systems for the seafood sector. These include:

- **Modernizing the licensing framework for fish buyers and processors** by completing a licensing policy review, lifting long standing moratoria on fish buyer and processor licences and implementing a modern qualified entry framework. These changes, announced in May 2025, led to the Department accepting new fish buying and processing applications under a new, qualified-entry framework to enable the orderly development of the sector. Providing access to new licences means that current and new industry entrants can make businesses decisions to invest and grow their seafood operations in Nova Scotia.
- **Amending aquaculture legislation, regulations, and policy** to improve efficiency and clarity. New regulations came into effect in December 2025 that support growth in the aquaculture industry with faster, clearer rules. New shellfish and marine plant applications no longer need to go through the Aquaculture Review Board making the decision process better matched to the scope of the shellfish aquaculture projects. In addition, the Aquaculture Review Board has updated procedures to streamline hearing processes and timelines. In June 2025, the Department implemented a Farm Management Plan Audit Pilot Program to ensure operators are compliant. These changes are intended to better balance efficiency, transparency, and public confidence.

Modernizing the Province's regulatory frameworks laid the foundation for the actions taken to-date under Pillar 1, and those that follow. These actions are focused on ensuring Government processes and systems actively support growth rather than constrain it.



Government Actions 2026–2029

Under this pillar, Government's focus is on reducing unnecessary friction, improving predictability and service delivery, strengthening enforcement and traceability, and ensuring existing licences, sites, and financing tools are used productively. Together, these actions are designed to increase investor and operator confidence, unlock underutilized capacity, and enable responsible growth across fisheries and aquaculture, while safeguarding sustainability, community interests, and market integrity.

Building on the actions taken to-date, Government will focus on the following:

1. Accelerate Aquaculture Development through Efficient and Timely Decisions

- Implement the recently amended aquaculture licensing framework to improve efficiency while maintaining rigorous operational requirements, public input processes and transparency.
- Restructuring the Farm Management Program for aquaculture operations by establishing standardized policies. The Farm Management Plan is a requirement for aquaculture operators in Nova Scotia and includes information on fish health management, environmental monitoring, farm operations and containment management. This restructuring of the program will reduce operator documentation and improve program transparency.
- Work with relevant provincial and federal partners to implement process efficiencies in partner reviews of aquaculture applications to reduce the administrative burden on applicants and improve application review timelines.

2. Modernized Licensing System for Fish Buying and Processing

- Implement the modernized qualified entry framework for fish buyers and processors.
- Enable orderly entry, competition, and diversification, including value-added and new business models, while maintaining system integrity and fair access.
- Work with fish buyers and processors to enable active and optimal utilization of licenses.

3. Fisheries Regulatory Compliance Unit

- Implement a dedicated Regulatory Compliance Unit to improve oversight, accountability, and consistency across fisheries and aquaculture.
- Strengthen coordination with federal and provincial enforcement partners to combat illegal fisheries related criminal activities that undermine sustainability, market trust, and compliant operators.

4. Facilitate Digital Traceability and Data Integration

- Improve data collection, integration, and analysis across licensing, compliance, and sector monitoring to support better decision making and more efficient oversight.
- Facilitate industry led adoption of digital traceability systems that meet regulatory requirements and international buyer and retailer expectations, leveraging commercially available tools and platforms.

5. Business Development Products and Services

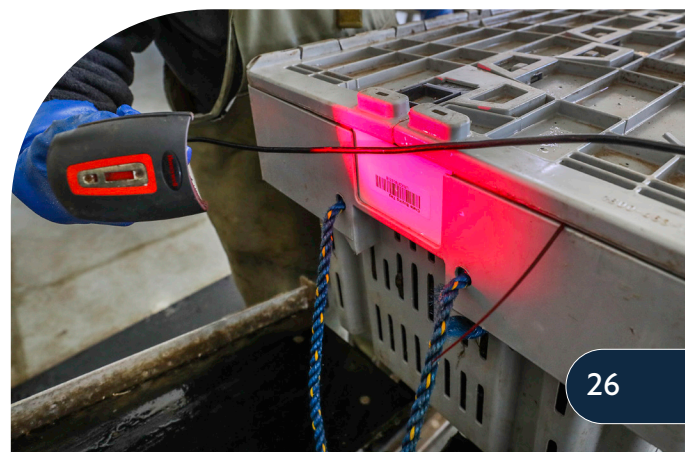
- Refocus departmental business development and economic growth functions to provide clearer navigation and business development support for companies engaging with regulatory processes, financing tools, and government programs.
- Improve alignment with partners such as Invest Nova Scotia, Perennia, and federal agencies to ensure coordinated and responsive support for seafood businesses.
- Implement recent regulatory and policy improvements to the Fisheries and Aquaculture Loan Board and deliver financing products aligned with sector needs, including innovation, energy efficiency, value-added processing, and transition financing.
- Use Loan Board tools to help de-risk investment and improve the productive use of licences, sites, and infrastructure.

Digital Traceability for Nova Scotia Seafood Operators

Nova Scotia is working with industry to modernize traceability in seafood processing. Digital systems help operators capture production data electronically, reduce paperwork, and improve visibility into plant operations.

Tested with four processors, Ka'Le Bay Seafoods, Woods Harbour Seafoods, IMO Foods, and Yarmouth Bar Fisheries, the system proved it can produce accurate traceability records quickly, with less manual work and fewer errors.

This work shows digital traceability can be adopted without disrupting production, helping businesses improve efficiency, meet requirements, and stay competitive.



Industry Opportunities

Industry is being called upon to actively support the objectives of this pillar by implementing more efficient operations, improving compliance, adopting shared digital tools, and working with government.

Industry can contribute by:

- Improving quality of license and funding applications, and business plans to enable more timely evaluation and efficient processing of decisions.
- Optimizing utilization of fish buyer/processor licences and facilities (e.g. year-round use of processing facility; modular processing facilities to enable processors to transition between seasons, species, products, etc.).
- Implementing traceability systems for greater regulatory accountability and expanded market access opportunities.
- Operating in compliance with regulatory requirements thereby ensuring fair competition within the sector and long-term sustainability of the resources.
- Increasing awareness of and prepare for changing international import requirements.

Measures of Success

Key performance indicators for Operational Efficiency will include:

- Reduction in average department licensing decision time for complete applications
- Increased annual DFA Compliance Unit inspections and site visits
- Implementation of inter-agency data-sharing agreements and report on programs that incentivize the adoption of digital traceability systems
- Growth in annual uptake of FALB lending products and portfolio in priority segments, such as innovation, productivity, energy efficiency, and value-added projects





PILLAR 4

COMMUNICATIONS & COLLABORATION

Objective: Improving communication and collaboration within the sector and with other marine users, while elevating the profile of Nova Scotia seafood globally.

Context and Evidence

A competitive and growing seafood sector depends not only on innovation, markets, and efficient regulation, but also on public confidence, clear communication, and effective collaboration across the value chain and with other marine users.

As the sector grows and modernizes, strengthening communication within the seafood sector and maintaining positive public opinion and understanding becomes increasingly important to enable timely decisions, attract investment, and support growth.

The *State of the Nova Scotia Seafood Sector Analysis* highlighted that while public support for the seafood sector and aquaculture is generally strong, outdated perceptions and localized opposition can still create friction, delays, and uncertainty for operators. Public opinion research conducted in 2025 shows that most Nova Scotians recognize the seafood sector as a major economic driver and job creator, with growing support for aquaculture across species. However, industry and communities continue to call for more consistent, fact-based, and science informed communication about sector practices, environmental performance, and economic benefits, particularly at the local level.

At the same time, engagement identified gaps in coordination and communication within the sector itself. Companies, associations, and service providers pointed to misalignment across parts of the value chain, limited visibility into market and capacity information, and fragmented advocacy as factors that weaken competitiveness and slow collective responses to shared challenges such as trade risk, climate impacts, workforce shortages, and marine spatial conflicts.

Government Actions To-Date

A strong, informed, and resilient seafood sector depends on clear communication, positive public perception, effective engagement, and coordinated advocacy.

Government has already taken steps to engage with industry, deliver education and outreach initiatives, and advocate for sector interests across multiple forums.

Key achievements to-date include:

- Delivered the **Coast to Classroom education program** in schools to educate youth about the seafood sector (<https://coasttoclassroom.ca>).
- Delivered **sector webinars** to share intelligence and opportunities with industry, including to share lessons learned from the mission to China and market insights on opportunities in Italy, France, Spain and the Netherlands as part of export market capacity development.
- Continued **advocacy** for the interests of Nova Scotia's seafood industry.
- Implemented measures to **enhance communication, transparency, and public engagement in aquaculture licensing reviews**, including an additional 30-day public comment period for applications for new and expanding marine aquaculture sites, direct notification letters to adjacent property owners, and an automated email notification service for application updates.
- Completed **climate change vulnerability assessments** across the sector to inform adaptation action.
- Delivered a new **Fisheries and Aquaculture Climate Change Portal** that serves as a one-stop resource to access information about how to adapt, mitigate and prepare for the impacts of climate change (<https://dfa-climate-change.novascotia.ca>).



Government Actions 2026–2029

Pillar 4 is focused on clearer communication, better coordination and stronger collaboration across the sector – all areas that reinforce the other pillars of the Strategy.

Building on the foundation of actions taken to-date, Government will focus on the following actions to strengthen communications and collaboration in support of sector growth:

1. Improve Communication of Services and Supports for the Seafood Sector

- Communicate proactively and clearly with industry on available services and supports, including licensing processes, business navigation, funding programs, and technical assistance.
- Continued delivery of industry webinars on trade mission results and market opportunities as part of export market capacity development.
- Coordinate with Invest Nova Scotia, Growth and Development, Labour Skills and Immigration, the Fisheries and Aquaculture Loan Board, Perennia, the Centre for Marine Applied Research, the federal government, and other partners to provide simpler entry points and clearer pathways for seafood businesses accessing government support.
- Develop, publish and regularly update a “**placemat**” **summary of provincial, federal and other supports** available to industry to support sector modernization and growth.

Other funding supports for the seafood sector include a range of programs offered by **Invest Nova Scotia** to help the seafood sector make the jump into new markets as feasible and effective as possible.

The **Innovation Rebate Program** supports businesses investing in new technology and processes, especially those boosting product value and meeting global sustainability trends.

The **Export Development Program** provides financial assistance to support market entry activities like travel to new markets or hiring expert consultants.

2. Build Public Confidence and Tell the Nova Scotia Seafood Story

- Continue to deliver and expand sector outreach and education initiatives, including the *Coast to Classroom* program.
- Implement an aquaculture communications approach grounded in science, local experience, and transparency, focused on environmental performance, community benefits, and economic contribution.
- Build broader public awareness and pride in the seafood sector as a cornerstone of Nova Scotia’s economy and an opportunity for sustainable growth and global food security.

Nova Scotia Seafood Brand

The Nova Scotia Seafood Brand represents Nova Scotia's high-quality fish and shellfish, harvested responsibly and sustainably from the cold, clean waters of the North Atlantic. Under the Nova Scotia Seafood Brand, the Department has developed a video with high-quality imagery and a compelling narrative about Nova Scotia's seafood, available here: <https://nsseafood.com>.

Our Nova Scotia Seafood logo, branded materials and video are examples of ways that we are telling the Nova Scotia seafood story at home and around the globe.



3. Strengthen Sector Engagement and Knowledge Mobilization

- Expand regular, structured engagement with industry through webinars, briefings, and sector insight products focused on markets, policy developments, and emerging risks and opportunities.
- Develop a coordinated knowledge mobilization function linked to the Seafood Sector Innovation Hub to share market intelligence, buyer expectations, product trends, and opportunities for collaboration across the value chain.

4. Enable Climate Resilience through Information and Planning

- Deliver a seafood sector climate change action plan informed by vulnerability assessments to support adaptation and long-term resilience.
- Provide practical tools, data, and guidance through DFA's climate information resources to help industry plan, invest, and adapt to climate related risks.

5. Advocate for Seafood Sector Interests

- Continue to advocate for Nova Scotia's seafood sector at regional, national, and international tables on industry priorities. Focus on key issues such as access to fisheries resources, trade, labour, regulatory red tape, marine spatial planning, infrastructure, and federal funding.
- Targeted engagement with partners, including Labour Skills and Immigration, the Fisheries Sector Council and the federal government, on labour challenges faced by the seafood sector to identify pathways and solutions.
- Work with industry and associations to strengthen how we advance shared economic and policy objectives.

Industry Opportunities

Industry has opportunities to help tell the Nova Scotia seafood story, contribute to public trust, and participate actively in sector-wide knowledge sharing and coordination. The *State of the Seafood Sector Analysis* highlights industry priorities to ‘Transform’ through storytelling to change perception and to ‘Reduce’ workforce shortages and marine spatial conflicts through stronger collaboration.

Industry can contribute by:

- Supporting industry-led storytelling and public education campaigns that highlight the economic, social and environmental value of the seafood sector, including its role in rural communities, sustainable practices, and innovation successes.
- Actively participating in feedback loops with government to communicate challenges and opportunities.
- Working together across the industry to share best practices and deliver practical solutions to shared challenges, including new standards, regulatory requirements, and efficiencies such as co-packing and consolidated shipments.
- Sharing experiences in adopting energy efficient and climate resilient technologies, and solutions to adapt to climate change.
- Leveraging industry associations to play an important role in representing the interests of the subsectors and bringing forward unified positions to inform government actions and decisions.
- Taking a more proactive role in unified advocacy, workforce promotion, and dialogue with other ocean users.
- Strengthen coordination and information-sharing between the commercial fishing and aquaculture sectors to build mutual understanding, reduce conflicts, and identify collaborative opportunities that support sustainable growth and competitiveness across the seafood industry.

Measures of Success

Key performance indicators for Communications & Collaboration will include:

- Number of industry touch points (i.e., webinars, briefings and insight reports delivered) annually starting in 2026
- Engage in regular public perception polling to track changes in understanding and confidence in Nova Scotia’s seafood and aquaculture sectors by 2029
- Growth in subscribers and followers for Department seafood sector communications channels by 2029

CROSS-CUTTING RISKS AND MITIGATION APPROACHES

The seafood sector operates in a dynamic global environment where external and internal factors can significantly impact competitiveness and sustainability. The Strategy's risk and mitigation approach is informed both by DFA analysis and the *State of the Nova Scotia Seafood Sector Analysis*.

KEY RISKS INCLUDE:

- potential tariffs and shifting trade policies and priorities
- non-tariff barriers that can slow or prevent trade
- market concentration in a small number of export destinations
- currency volatility and cost inflation
- climate-related events disrupting production, infrastructure and supply chains
- workforce shortages and succession challenges
- community concerns, particularly for aquaculture
- supply chain disruptions and cold-storage constraints
- illegal fisheries activities and the negative impacts on fish stocks
- access to, or changes in, fisheries resources
- access to capital to finance necessary activities in product/market diversification and automation

MITIGATION APPROACHES EMBEDDED IN THIS STRATEGY INCLUDE:

- diversification of markets and products
- national growth strategies and brand building
- climate adaptation and energy-efficiency investments
- strengthened enforcement partnerships against illegal fisheries activities
- workforce development and attraction strategies in collaboration with labour and skills partners
- improved communication and engagement with communities and other marine users
- better market intelligence with an improved understanding of opportunities and risks
- identification and communication of investment opportunities and support programs

SIGNS OF SUCCESS

The Strategy's goals and indicators point to progress at different stages along the pathway toward the desired future state for the seafood sector. Some reflect the outcomes of Government's actions, while others depend on industry action. Taken together, this Strategy looks to enable system level changes to advance the sector for a strong and prosperous future.

HOW WILL WE KNOW WE ARE HEADING IN THE RIGHT DIRECTION?

As a result of our collective action and to know we are making progress towards the Vision set out in this Strategy, we want to see:

- measurable growth in the seafood sector's contribution to the economy
- increased export value driven by value-added processing and diversified markets
- increased private capital investment leveraged by provincial programs
- growth in provincial revenues associated with seafood sector expansion
- faster and more predictable decision making
- decrease in illegal and unreported sales of seafood products
- increased innovation capacity and adoption of new technologies
- lower greenhouse gas emissions and improved energy efficiency
- a broader range of export products and species reaching more diversified markets
- expanded public awareness and sustained public support for the sector
- stronger seafood sector sales

SUMMARY

This Strategy establishes a clear framework for strengthening the seafood sector's contribution to Nova Scotia's economy over the 2026–2029 period. Its early focus will be on operationalizing the most critical enablers of growth, including the launch of the Seafood Sector Innovation Hub, advancing process and service improvements, and expanding market development capacity.

Implementation will depend on close collaboration with industry, associations, research partners, and other levels of government to ensure that new tools, investments, and reforms translate into measurable improvements in productivity, export performance, and sector resilience.

Ultimately, the success of this Strategy will be reflected in tangible economic outcomes: stronger private investment, increased value-added production, diversified markets, improved efficiency, and a growing contribution of the seafood sector to provincial GDP, employment, exports, and public revenues.

Our success in achieving these outcomes depends on Government and industry embracing a shared vision of growth and modernization for Nova Scotia's seafood sector and working together to implement the path forward.

