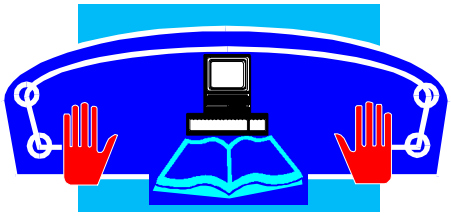

Towards A Strategy For The Development Of A Comprehensive And Sustainable Nwt Fur Industry - Parti

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TOWARDS A STRATEGY FOR TEE DEVELOPMENT OF A COMPREHENSIVE AND SUSTAINABLE NWT FUR INDUSTRY

FOR DISCUSSION PURPOSES ONLY

The observations, opinions and recommendations herein do not necessarily reflect those of the Government of the Northwest Territories.

CONTENTS

EXECUTIVE SUMMARY

INTRODUCTION

This discussion paper was prepared by the firm of Richard R. Maracle & Associates, for the NWT Department of Renewable Resources. It has been developed in response to a need for a comprehensive strategy to fully develop the potential of the NWT's fur industry.

This discussion paper, together with its appendices, is based on the following objectives:

- improve both, NWT's position in the international auction house system and the sales of NWT wild fur;
- stabilize the incomes of NWT wild fur harvesters;
- identify opportunities and options for manufacturing fur related products in the territories; and,
- identify opportunities worldwide where fur garments and accessories manufactured in the NWT can be retailed.

The discussion paper was based upon an extensive round of background research, consultations with representatives of the fur industry and relevant territorial and federal government departments, as well as a number of community based meetings and discussions with enterprises and individuals throughout the territories.

Where the context has permitted, the term “wild fur harvester” has been used throughout Part I, of the discussion paper to describe trappers. This has been done to avoid any confusion between wild fur producers and producers of fur products, arts and crafts etc..

BACKGROUND

As with most industries operating on an international basis, the fur industry is affected by changes in the global economy. Unlike most however, the international fur industry has always been prone to cyclical ups and downs. The beaver, which was the foundation of the world fur trade, has with changes in fashion become a bit player as mink has emerged as the new gold standard. Similarly, supply and demand has dramatically affected prices and sales of fur. It has emerged as a luxury item and the demand has been significantly affected by the recent recessions.

On a North American basis the value of fur at auction in 1992 was only 25% of the value at auction in 1987. The primary factor that contributed to this significant downturn was a glut of fur in world markets, predominant y ranch mink and fox. This oversupply, produced by Scandinavian fur producers, particularly Finland and Greenland (with substantial government support), had the predictable impact of reducing prices for all fur species. The impact on the Canadian fur industry was severe. Industry sources however, are now pointing to signs of a recovery.

The Government of the Northwest Territories has provided support to the fur industry for many years. While largely concentrating on the primary producer by providing financial assistance to harvest furs, the GNWT has also provided financial support to advocacy and industry groups such as Indigenous Survival International and the Fur Institute of Canada. As well, the GNWT has been at the forefront of Canadian jurisdictions in efforts to adopt humane trapping standards and systems. Similarly, the GNWT has also been active in defending the image of the wild fur industry by hosting visits of Europeans to NWT trap lines and by supporting NWT wild fur harvesters in attending national meetings.

This discussion paper outlines the next steps required by the Government of the Northwest Territories, in strengthening the NWT and Canadian wild fur industry. Key among these steps, is the development of a marketing and promotion strategy for NWT wild fur.

MAJOR FINDINGS

Consultations with key manufacturers, buyers and brokers and retailers within the fur industry have revealed the following:

- due to the high quality of the fur combined with excellent pelt preparation and handling, the NWT wild fur collection is considered by many in the industry to be one of the best in the world;
- the “image” of the Northwest Territories (the environment, northern wilderness, native peoples) will be a major asset in the marketing and promotion of NWT wild fur and products in a number of world markets;
- there already exists a strong ‘demand among Canadian and international manufacturers, exporters and retailers for NWT wild fur;

- international brokers and Canadian retailers have expressed considerable interest in obtaining traditional crafts and other fur trimmed products from the NWT;

- an opportunity exists to produce unique products from fur in the NWT based on northern/native designs for Canadian and export fur markets;

- the practise of auction houses to mix NWT wild fur with fur from other jurisdictions has served to lessen the value of NWT fur and the incomes of NWT wild fur harvesters;

- current production of products -using fur in the NWT suffers from a lack of a consistent supply/price of good quality dressed fur;

- there is a strong desire and interest within the Canadian industry to provide assistance to NWT producers and to establish mutually beneficial commercial arrangements;

- the cyclical and unpredictable nature of the fur industry makes it difficult to stabilize the incomes of wild fur harvesters without direct subsidies or other income support measures; and,

- the position of the NWT in the industry would be enhanced by strengthening producer and manufacturing representation in national industry forums.

This discussion paper also identifies a number of challenges that will have to be tackled in developing an NWT fur industry. They include:

- the need to increase knowledge of the business and value added processes of the fur industry within the NWT, contributing to a lessening dependence on outsiders;

- the need to increase transfer of fur technology from fur grading to product design, production, processing, promotion and marketing; and,

- the need to establish co-ordinated mechanisms to support and promote the value of the NWT fur collection in local, domestic and international markets.

In addition to the above challenges, detailed consideration will need to be given to:

- refining research and management systems for optimizing the production cycle for wild fur; and,

- striking a balance between enhancing benefits to NWT residents while maintaining the vigour of the national industry.

STRATEGIC INITIATIVES

A three-part approach is proposed:

i) An investment in the development of fur grading and marketing skills, technology and capacity (staff and facilities) in the NWT combined with the establishment of a co-ordinated fur collection and grading system;

ii) An investment in fur product design, development and training for territorial residents to maximize value added opportunities within the territories; and,

iii) The development of a marketing plan - promotional program initiatives designed to support the marketing of NWT wild fur and NWT products made from wild fur in international and domestic markets.

Part I of the proposed approach, which involves the operation of a NWT Fur Centre and a co-ordinated fur collection system, is designed to:

- protect the incomes of NWT wild fur harvesters from the marketing practices of existing auction houses;

- create a savings in auction house commissions for NWT wild fur harvesters;

- generate revenues for the NWT fur centre from wild fur harvesters outside the NWT;

- provide the NWT with the control required for the effective marketing and promotion of the NWT fur collection (Part III of the strategy);

- to transfer fur grading technology and skills to the NWT; and,

- create some highly skilled jobs for NWT residents, in addition to supporting the needs of producers of crafts and fur products for reasonably priced raw furs.

Part II of the proposed approach will contribute to:

- the incomes of NWT wild fur harvesters by stimulating demand within the NWT, for underutilized fur resources such as beaver and muskrat;

- opportunities for individuals and businesses to expand their production and sales of products using fur.

Part III of the proposed approach, marketing and promotion, is designed to:

- increase the incomes of wild fur harvesters, by positioning NWT fur such as Marten, Mink, Lynx etc.. at the top end of the international fur market, in terms of price and demand; and,

- contribute to the marketing and promotion of NWT fur products.

COSTS

Implementation of the proposed initiatives will require a major commitment from the government of the Northwest Territories. The discussion paper foresees a capital expenditure of some $1,110,000 for the construction of a territorial based fur grading and collection centre. Additional expenditures of $400,000 will be required to support the operation of the centre and it's staff during the first year of operation. Other development costs for product design and development, training and marketing plan development could amount to some $1,000,000 during the implementation phase of the proposed initiatives.

Successful implementation of these initiatives will also require a co-ordinated approach on the part of a number of territorial government departments and agencies. Support from the larger Canadian fur industry is also required, who for the most part, will react favorably to the proposed initiatives.

COSTS VS BENEFITS

The value to NWT residents of a strengthened fur industry goes beyond the economic picture presented by fur production figures. Therefore, if one looks at the overall benefits in context, it should be clear that these initiatives support the cultural, social and economic wellbeing of many territorial residents, lessening their dependence on others. The proposed initiatives are designed to both, protect and enhance the value of the NWT fur resource for territorial residents. In doing so, they support the economic value of other activities of the traditional economy.

Implementation of the proposed initiatives should result in increased values in the NUT wild fur harvest of between 10 and 20 percent ($200,000 to $400,0000) in its first full year of operation. As well, implementation of the proposed initiatives (construction of a fur centre) will provide immediate benefits to NWT residents who work in the construction industry. NWT businesses will benefit through the provision of services (transportation) and supplies to the centre. Two full time and two casual jobs will be created for territorial residents. The initiatives support the creation of NWT jobs and businesses within the value added sectors of the fur industry. In addition, the territorial government will benefit through increased tax revenues.

I Introduction

BACKGROUND

In March 1991, a workshop was held with representatives of the Department of Indian and Northern Affairs Canada, the Northwest Territories Department of Renewable Resources and the Fur Institute of Canada to review the GNWT involvement in the fur industry. Participants concluded that there was a need for a comprehensive strategy to fully develop the NWT's fur industry. Important considerations for the development of the strategy were outlined as follows:

- Like the rest of Canada, over the past six years NWT records have shown a decline in both revenue generated from wild fur harvesting and in the number of people harvesting and selling fur. The annual value of furs harvested decreased from a high of $6.1 million in 1988 to a low of $1.8 million in 1991, a drop of over 70%. During the same 5 year period the number of wild fur harvesters selling fur decreased by 47%. However, the NWT's share of the total wild fur harvest in Canada increased from approximately 4% to almost 12% over the same 5 year period. Thus, the Northwest Territories can now be considered as a major Canadian supplier of high quality wild fur with an opportunity to influence other sectors of the industry;

- Productive furbearer populations within natural limits and the unique characteristics such as colour, size and quality of northern fur provide an excellent opportunity for the NWT to promote their fur collection in world markets; 'and,

- The Government of the Northwest Territories has provided support to the fur industry for many years. While largely concentrating on the primary producer by providing financial assistance to harvest furs, the GNWT has also provided financial support to advocacy and industry groups such as Indigenous Survival International and the Fur Institute of Canada. As well, the GNWT has been at the forefront of Canadian jurisdictions in efforts to adopt humane trapping standards and systems. Similarly, the GNWT has also been active in defending the image of the wild fur industry by hosting visits of Europeans to NWT trap lines and by supporting NWT wild fur harvesters in attending national meetings.

PURPOSE

To develop a discussion paper to guide the NWT in the development a sustainable NWT fur industry. The objectives are:

- to maximize income and employment opportunities in the NWT;

- to promote the sustainable development of NWT fur resources; and,

- to promote industry competitiveness and self-sufficiency for northern residents.

More specifically, the purpose of this discussion paper is to outline the required tasks, timeframes and resources necessary to develop part of a comprehensive strategy for a sustainable NWT fur industry relating to trapper income stabilization, raw fur sales, processing and manufacturing, and retail sales. In that regard, this document will focus on 'the following four topics:

1. Wild Fur Sales:

   To determine how the NWT can improve its position within the international auction house system. The report will identify the advantages and disadvantages of the international auction house system and its history in Canada and abroad; current owners; financing available and potential funding sources in the NWT; possible options including partnerships with existing businesses, or the creation of a new territorial based facility.

2. Trapper Income Stabilization:

   To determine ways and means of stabilizing fluctuating fur prices.

3. Manufacturing

   Identify viable fur and leather manufacturing options and facilities or expertise required to produce garments and accessories (e.g. tannery, fashion designs) manufactured through cottage industry initiatives or from larger commercial operations.

4. Retai 1

   Review the current retail situation for fur and leather garments and accessories manufactured in the NWT and identify possible geographic locations where new retail ventures could be started for Territorial goods worldwide.

This discussion paper also provides a profile of the NWT wild fur harvesting sector by community and region.

Finally, this document has been designed to stimulate and support consultations among all key stakeholders of the NWT fur industry, including:

- wild fur harvesters and their families;
- community/aboriginal/crafts societies and organizations;
- entrepreneurs, enterprises/businesses and economic institutions;
- territorial and federal departments and agencies with responsibilities, interests and/or impacts on the development of a sustainable NWT fur industry: and,
- members of the NWT Legislative Assembly.

In addition to formal research, this discussion paper has been developed on the basis of informal research-oriented consultations with an extensive range of fur industry representatives (Canadian and international), federal and GNWT officials, and NWT wild fur harvesters and craft producers. This was undertaken to develop a good understanding of basic facts and perspectives regarding the Canadian and international fur trade, and the prospects for the NWT to participate more fully in this global industry.

RATIONALE

The development of a comprehensive strategy for a sustainable and integrated NWT fur industry is important and timely for several reasons:

- the fur industry, both domestically and internationally, is undergoing significant restructuring in response to social, economic, environmental and fashion considerations;
- the GNWT is concerned with the prospects of continued high levels of unemployment and few other economic opportunities, in most NWT communities; and
- wild fur harvesting remains an important social, cultural and economic activity in the majority of NWT communities

METHODOLOGY

The research, consultations, analysis and writing related to the development of this discussion paper took place over the period November 1, 1992 to April 30, 1993. The work was guided by a Project Review/Steering Committee, the members of which, are listed in Appendix G.

The first phase of the work focussed on background research aimed at developing a profile of the international and Canadian fur trade, NWT wild fur harvesters, and the NWT fur harvest and related activities. The work involved the following activities:

- analysis of Industry Science and Technology Canada, Statistics Canada and NWT fur harvest and export data;
- review of numerous planning studies, evaluation reports and other data from various federal/territorial departments including the Canadian Fur Industry Adjustment **Committee;**
- **review** potential sources of financing to support NWT fur industry initiatives; and,
- the development of a comprehensive profile of the NWT wild fur harvesting community.

The second phase of the work involved an extensive round of contacts and consultations with a number of fur industry representatives and officials of relevant territorial and federal government departments and NUT native organizations (Appendix A). These consultation were undertaken to obtain basic information on trends and forecasts in the fur trade, to identify business opportunities and to assess the prospects for strengthening **NWT's** position in the trade.

The third phase of the work involved a number of meetings and consultations with wild fur harvesters and craft producers in the NWT to identify the interests and priorities of wild fur harvesters and communities with respect to the fur industry. I'n addition to discussions with businesses and individuals in a number of communities, formal meetings were held with the following groups.

- **Gwich'in** Hunters and Trappers Association at Fort McPherson;
- **Inuvialuit** Game Council at **Inuvik;**
- Fort Hope Hunters and Trappers Association, Fort Hope
- **Lac** La Martre, Rae, Snare Lake and Rae Lakes band councils at Lac La Martre;
- **Baffin** Region Hunters and Trappers Association at **Iqaluit;** .
- Fort Resolution (meeting **cancelled)** met with Ervin Nom;

Meetings were also scheduled in Fort Simpson and Arviat, but **cancelled** at the last moment due to logistical and other problems.

II context

INTRODUCTION

The circumstances, conditions and prospects influencing the development of a comprehensive strategy for a sustainable NWT fur industry can only properly be understood within the broader context of the international fur industry. Although there are numerous factors which have and will continue to influence the development of the NWT fur industry, several of the more" notable contextual factors are highlighted in this chapter:

- historic relationship of the fur trade to aboriginal people;
- the international fur industry;
- changing fur markets;
- promotion and marketing;
- implications of the 1995, European Community Ban on the trade of wild fur harvested with the leg hold trap;
- the animal rights debate;
- the Canadian fur industry (manufacturing, processing, retailing, auction houses and public opinion); and,
- current involvement of the Northwest Territories in the fur industry.

HISTORIC RELATIONSHIP OF THE FUR TRADE TO ABORIGINAL PEOPLE

The harvesting of wild furs was an integral part of aboriginal subsistence economies from earliest times, and the trading of furs between aboriginal nations was well established prior to European contact with North America.

The trading of furs between aboriginal peoples and Europeans was initially an activity of minor importance, being essentially an irregular exchange at chance meetings between aboriginal peoples and European fisherman in the Gulf of the St. Lawrence. However, European demand for furs grew quickly, resulting in a fairly rapid rise in the importance of the fur trade. This led to European exploration and domination of North America and to the subsequent waves of European colonization and exploitation.

The fur trade was extended into the Northwest Territories by the Hudson's Bay Company in 1780, with the establishment of trading posts in the MacKenzie Valley area. This company enjoyed almost complete monopoly control of the fur trade in this area until 1887, when competition to the Hudson's Bay Company established permanent posts at **Old** Fort Rae, Fort Providence and Fort Good Hope. Indian trappers made periodic visits to these and other posts to trade and the major companies also employed country collectors to buy fur at the various Indian camps.

Today, the vast majority of wild fur harvesters in the Northwest Territories continue to be aboriginal people. The importance of the wild fur harvest and thus, the importance of the fur industry to most communities in the Northwest Territories cannot be overstated. More specifically, the importance of a healthy fur industry to the NWT can be measured by the following:

- it provides a cash income to thousands of NWT wild fur harvesters (a cumulative total of 5,287 individuals reported fur income in one year or more between 1987 and 1992);
- it decreases dependence on store-bought food and clothing - the replacement value of country food consumed in the NWT 1982-83 was estimated to be approximately $80 million[1];
- it provides a concrete, practical link with aboriginal traditions and cultures;

[1] Information North, The Arctic Institute of North America, Winter 1985 - Nellie **Cournoyea**, Minister, NWT Renewable Resources.

- it reinforces social cohesion in aboriginal communities through sharing the fruits of land based activities; and,

- in many NWT communities, the harvesting of wild fur is one of the few opportunities to generate cash.

AN INTERNATIONAL INDUSTRY

From earliest times the fur trade operated on an international basis with furs harvested in North America to supply the fashion industry in Europe. The first fur auction house was established in London in the 17th century and the pattern was established that fur producing countries would sell their products as a commodity on a world market open to all buyers.

The business cycle of the fur industry follows the natural cycle of the seasons. Fur pelts, whether wild or ranched, become prime in late fall and through the winter months. Auction sales are held regularly from mid-December through June. The season's first pelts are forwarded for dressing, dyeing and finishing and, by the beginning of March, manufacturers present their new collections of finished garments at the major international fur fairs - Frankfurt, Milan, Paris, Hong Kong, New York, and increasingly at the International Fur Fair held each May, in Montreal. About half of the Canadian production of fur garments are sold at the Montreal Fur Fair. Garments are manufactured over the summer months, and reach the retail stores by fall. This coincides with the beginning of another production cycle for wild fur harvesters and ranchers.

Operating on an international basis, the fur industry has always been prone to cycles. The beaver, which was the foundation of the world fur trade, has with changes in fashion become a minor player as mink has emerged as the new gold standard in the trade. Similarly, supply and demand has dramatically affected prices and sales of fur. It has emerged as a luxury item and the demand has been significantly affected by the current economic recession.

Since 1988 exports of Canadian raw furs have experienced a severe down cycle, as demonstrated by Table 1. In 1991, 68% of the total value of Canadian raw fur exports consisted of ranched mink and fox.

There are a number of factors that have contributed to this significant downturn. First, 1987 was the fifth year of sustained growth in the trade. This sustained prosperity inspired some producers, particularly Finland and Denmark, with substantial government support to drastically increase their fur production resulting in a glut of fur, predominantly ranched mink and fox, on the world market (see Appendix B).

TABLE I
CANADIAN EXPORT STATISTICS - RAW FURS
Thousands of Dollars

COUNTRY	1988	1989	1990	1991
U.S.A.	40677	45727	45884	32969
U.K.	12563	5080	2978	2169
France	3117	2782	1839	580
Germany west	15989	5718	4964	4017
Italy	7611	7699	3776	3135
Switzerland	37084	24571	29807	17854
Hong Kong	6207	5214	9106	7982
Japan	3244	4180	3294	4917
Korea South	6650	2892	4547	6672
Total Above	132242	102963	97195	80295
Other Countries	9739	4999	5508	5271
Total Countries	141981	107962	102703	85566

SOURCE: ISTC Data Based on Statistics Canada Tapes derived from Statistics Canada Fur Production Records. Catalogue 23-207. April 1992

As can be seen from Appendix B, over supply had the predictable impact of reducing prices. In the fur industry mink is the preferred choice and attracts a premium price. As the price of mink falls it drives all other fur prices down. The results of the North American auctions in the 1992/93 season have not been encouraging. However, there is reason to believe that as the supply of fur is balanced with demand, prices will begin to improve. Most of the large inventories of finished goods and raw pelts created by during the period 1988-90, have been depleted. As well, world wide production of ranched mink has fallen from 42 million pelts in 1989 to 19 million pelts in 1992.

TEE FUTURE MARKET FOR FUR PRODUCTS

Fur remains a fashionable, saleable product to many consumers around the world. Markets once thought to be lost to the "Green Movement" are beginning to resurface, for example, West Germany is re-emerges into the fur market. While hit hard by the economic recession, Italy has in recent years been a major market for North American furs. Eastern Europe and China are emerging as enormous potential markets, closely followed by an increasingly affluent Korea. Japanese fur purchases are a very close second to the U.S.A. the world's largest market for fur (most of the fur consumed in the U.S. and Japanese markets is ranched mink, which can be attributed in part, to the success of the marketing and promotion programs operated by U.S. and European producers of ranched mink).

With the elimination of the Korean luxury tax on fur garments, Korea becomes potentially as large a market as Japan.

Table 2 demonstrates recent changes in markets over the periods January - March 1991 and January - March 1992. Italy has significantly reduced it imports of Canadian raw fur as indicated by the export data for Italy and Switzerland (the bulk of fur shipped to Italy, is shipped via Switzerland). This decline however, has been partly offset by increasing demand in the U.S.A., West Germany and Japan.

TABLE 2
CHANGE IN CANADIAN EXPORTS - RAW FURS
Thousands of Dollars

COUNTRY	JAN - MAR 1991	JAN - MAR 1992	% CHANGE
U.S.A.	12160	15143	24.53
U.K.	1065	360	-66,20
France	423	522	23.40
Germany west	2065	2257	9.30
Italy	1562	1573	0.70
Switzerland	8693	5304	-38.99
Hong Kong	3094	1152	-62.77
Japan	626	691	10.38
Korea South	467	1201	157.17
Total Above	30155	28203	-6.47
Other Countries	1835	1551	-15.48
Total Countries	31990	29754	-6.99

Source: ISTC Data Based on Statistics Canada Tapes, derived from 1990-91 Fur Production Records. Statistics Canada. Catalogue 23-207. April 1992.

The use of fur exclusively in garments is a recent phenomena that ignores its roots in the cloaking and trimming trade. Today very little wild fur is used in collars, hats or trimming. This can be partially attributed to the fact that with the industry's profitability in garments, it did not seek to develop this market to any great extent. Moreover, with the high prices that fur demands, it was not economic for mass clothing merchandisers to use fur in production. Consequently, a whole generation of fashion designers neither knew or were interested in fur. Those who have taken the time to be educated have in fact developed highly successful lines of their own, e.g. Alfred Sung.

Industry promotions must seek out ***fi*** - like ***Mondi*** or ***Roots or Nygard that produce outerwear where fur trimming woul d be appropriate.***

The change in urban lifestyles around the world calls for outerwear that **is** "environment friendly", appropriately casual, light weight and flattering. As more and more women drive to work to the shopping **centres,** to **daycare,** outerwear has taken on a more utilitarian and functional aspect. Fur, especially many varieties of long haired furs, are seen as **too** dressy, too **big** and too warm.

This problem can only be addressed by working with designers, dressing plants, and advertising firms to create a new image for wild fur and new products.

FUR **PROMOTION** AND **MARKETING**

Until very recently, little had been done to promote wild fur in world markets. The international ranch fur **groups** on the other hand, all maintain their ***own*** marketing and promotion programs funded from the sale of their pelts at auction. Scandinavian mink and fox breeders market and promote their product under the "SAGA" label which is sold through the Danish and Finnish Fur Auctions. American producers market their product under the **"BLACKGLAMA"** label which is sold through Seattle or under the **AMERICA** ULTRA label which is handled by North American Fur Producer's Marketing Inc., Toronto. Canadian mink and fox ranchers market their product under the "CANADIAN MAJESTIC" label which is also sold through North American Fur Producer's Marketing Inc., Toronto. These programs, which are generally well funded have contributed to the emergence of mink as the "gold standard" in international markets.

Public perception of wild fur has altered substantially over past decades. Once the only fur available, wild fur now faces a number of problems as a result of changing markets and the number of alternative fur choices.

The challenge now facing promoters of wild fur is to ensure that consumers are educated to distinguish the difference between wild and ranched fur, and then value the wild fur product for its social, environmental and economic benefits.

An important part of this message has to be the importance of the fur trade to aboriginal people.

This type of promotional activity has been taken on by the newly established **Wildfur** Council of North America, which is developing a marketing and promotion program using the 'NORTHERN SUPREME" label. This organization is supported **by** Canadian and American wild fur producers who market their product through North American Fur Producers Marketing Inc., of Toronto, and Western Canadian Fur

Sales of Vancouver. The sales of NWT fur supports this program and the NWT has been invited by the Wildfur Council to seek representation on the "Council's" Board.

ANIMAL RIGHTS DEBATE

Wild fur, has to deal with the issues of "animal rights" and "animal welfare". "Animal rights" activists are opposed to any animal use, while the "animal welfare" issue is focussed on the humane use of animals (e.g. the use of quick kill traps). These two issues are part of a much larger problem that all animal user groups face. In the case of the wild fur industry, it is vital that it makes its case based on facts, humane trapping systems and the sustainable use of resources. An integral part of this message is traditional aboriginal rights and way of life. This case is now being made by organizations such as the Fur Council of Canada, the Fur Institute of Canada and the Wild Fur Council of North America.

The animal rights debate focuses on generating public sympathy. European consumers accept that the harvesting of wild fur is an important part of the traditional aboriginal lifestyle and this perception goes a long way towards balancing concern about the leg hold trap. It will be important that aboriginal wild fur harvesters and organizations such as Indigenous Survival International continue to make this case as other non-native organizations in the industry risk being perceived as self-serving.

TEE 1995 EC BAN ON FUR EARVESTED WITH THE LEG HOLD TRAP

In recent years about 70% of all wild fur harvested in Canada has been exported to Europe. Recently, the European Economic Community (EC) passed a law that wil 1 prohibit the import of furs from 12, species of Canadian furbearers unless Canada bans the leghold trap or adopts humane trapping standards for those species. In the future it will be important that there is appropriate administrative procedures in place to ensure that the fur being exported to the EC meets their legislation.

The annual fur harvest is well regulated in the Northwest Territories. The territorial government has already passed humane, trapping regulations and they have implemented trap replacement and trapper education programs. As a result, the NWT is probably better prepared than other Canadian jurisdictions, to meet the criteria established under the EC regulations respecting the trade in wild fur. These facts can only aid in the marketing and promotion of NWT fur.

THE ROLE OF THE AUCTION HOUSE

Whether ranched or wild, most fur is sold at public auction. The basic function of the auction house is to accept furs on consignment from ranchers or wild fur harvesters, to grade them to international standards, and to arrange them in lots suitable for sale (a description of the general business operations of a fur auction business is attached as Appendix C). In addition to preparing and running the auction, auction houses generally provide:

- livestock loans for fur ranchers to raise their product;
- credit to buyers;
- guaranteed payment to producers within fourteen days after the auction sale regardless of whether the buyer has paid;
- promotion of the product in world markets through international agents and direct visits;
- insurance on pelts while in transit from producer locations and while at the auction facility.

The rationalization that has taken place in the global fur industry has not spared the auction houses. In early 1991, North Bay Fur Sales owned by the Ontario Trapper's Association, was placed into receivership, leaving Hudson's Bay Fur Sales as the only remaining major Canadian auction house. Hudson's Bay Fur Sales, which is now called North American Fur Producer's Marketing Inc, is majority owned by Canadian mink and fox ranchers (1991-92 sales were reported to be approximately $85 million which, includes domestic sales and the sale of fur from other countries and should not be confused with Canadian export data provided in this discussion paper) .

Other, smaller Canadian auction houses include Western Canada Fur Sales of Vancouver owned by Mr. Teddy Pappas and the newly formed Fur Harvesters Auction Inc., North Bay, which is 50% owned by the Union of Ontario Indians. These auction houses reported sales of approximately $6 million each for the 1991-92 season.

On a worldwide basis there are four other auction houses of consequence:

- Danish Fur Sales which is owned and controlled by the Danish Fur Breeder's Association and which works closely with the Danish government's agricultural department;

. Finnish Fur Sales which is owned and controlled by the Finnish Fur Breeders' Association and is supported by the Finnish government;

. **Sojuzpushnina** (St. Petersburg) the government-owned fur marketing agency of the former Soviet Union; and,

• The Seattle Fur Exchange, owned by the American Legend Group, the United States Mink Breeders' Co-operative.

With the exception of the St. Petersburg auction for which little is known, Canadian auction houses are the only auction houses in the world that handle wild fur. As a result, the expertise in grading and preparing wild fur for auction is found primarily in Canada. Not surprisingly, much of the wild fur handled by Canadian auction houses comes from the U.S.A.

The advantage to wild **fur harvesters** in shipping furs directly to an auction house is that they avoid the **commissions** charged by skin dealers, northern stores (Northwest Company, Community **Co-ops** etc.). In some cases, the commission charged by independent skin dealers can be as much as 50% of the price paid at auction. For the most part, individual wild fur harvesters also benefit in having their pelts included in large inter-sorts of pelts which are of the same grade and attractive to international buyers. This maximizes the return to individual fur harvesters such as **those** from the **NWT,** however, this **practise** may serve to lesson the **value** of larger collections of exceptionally high qualities of wild fur such as that found in the **NWT.**

THE CANADIAN FUR INDUSTRY

The importance of the fur trade to Canada continues to this day. However, over one half of the value of current Canadian production of furs is ranched. Today, it is estimated that 100LO.O.O **Canadians** are employed in the fur industry.[2] **Of these approximately** 85,000 were involved in harvesting wild fur, 5,000 are on family fur farms, and 10,000 were employed in auction houses, in the pelt processing industry, in producing finished fur garments, or in a variety of other skilled crafts related to supplying raw, dressed, and made-up furs for domestic and international markets. After reaching record levels in 1987, industry revenues declined significantly. As noted above, a major factor in this decline was falling prices, sparked by European overproduction of farmed furs. Surplus production has been reduced and ranched mink prices are again rising. However, the downturn eroded financial and human resources in the trade, which could hinder the Canadian industry's recovery.

[2] Fur Council of Canada

Canadian Manufacturing:

Canadian manufacturers within the fur garment industry (and the garment industry generally) face increasing foreign competition, particularly from countries such as mainland China which is able to produce mink garments at even lower costs than those produced by Hong Kong. Table 3 compares wages in the needle-trade (garment) industries in a number of countries which provides the basis for production costs.

In 1987 Canada had a thriving fur garment production industry. Total production for that year rose to more than $390 million, of which $229 million was exported -- a 450% increase in ten years. Since that time, however, lower production costs off-shore, reduced consumer confidence and disposable income due to the recession, and the increased costs and market restrictions associated with animal activists campaigns, have taken their toll on the industry. Current revenues have fallen back to 1983 levels and employment in this sector of the industry has declined sharply.

TABLE 3
COMPARISON OF SOME WORLD NEEDLE-TRADE WAGES

1/2 Cent/minute in	China
1 " " "	Korea
2 " " "	Hong Kong
8 " " "	Japan
10-13 " " "	Canada

SOURCE: L. Werner, Hudson's Bay Fur Sales of Canada

Canadian fur garment manufacturers now consider wild fur as their only hope for producing competitive, distinct garments... The production of wild fur garments is a field where the Orient is not competitive because the product (wild fur) is not uniform or easily standardized.

Processing (Dressing & Dyeing):

This sector of the industry, which is vital for the maintenance of a viable Canadian fur-garment industry has been severely reduced over the past few years. While one new plant has been established in North Bay, a number of major dressing businesses have been forced out of business. In 1987, there were 20 major

dressing establishments in Canada employing some 700 people and generating $50 million in annual revenues. Currently, there is only one plant in Canada where furs can be both, dressed and dyed.

This downturn has reduced the investments in research and product development for this sector of the industry at a time when research and development are needed to stimulate new designs, products, retail sales and to ensure that Canada remains internationally competitive.

Retailing:

Though Canadian consumer demand for fur garments (units sold)has continued to increase over the past few years, low prices have eroded retailers' inventories, their gross margins and their profits.

New fur designs, products and approaches to fur retailing are required to attract young consumers and to address emerging fashion and lifestyle trends.

Retailers are on the "frontlines" of anti-fur activism, and feel strongly that the trade must intensify its consumer education and media relations efforts. Incidents of harassment of consumers are of particular concern, as is a new Canadian Advertising Council policy of exempting "advocacy advertising" from regulation (currently under review).

Canadian Auctions:

Low prices and smaller fur harvests have weakened the Canadian auction facilities. Financial costs of administering the new GST are an added burden, and may serve as an incentive to move auctions to the USA. Without a solid Canadian auction business, it will be difficult to promote Canadian wild furs, and the competitiveness of Canadian garment manufacturing would be weakened.

The majority of international fur buyers and manufacturers and auction house representatives interviewed, believe that given the current state of the industry, Canadian wild fur harvesters would be best served by one large auction house, where all international buyers have to compete against the available supply of wild fur at the same time. Having a number of smaller auction houses only serves the interest of some buyers. Generally, smaller auction houses do not have the financial strength to withhold goods for sale even at artificially low prices. They are forced to sell their goods for whatever price they get and in doing so they inadvertently establish the season's price structure for other auction houses. It could be

argued, that this has contributed to this current season's low prices for wild fur.

Currently, there is considerable speculation in the industry', that only one major North American Auction house will survive the ongoing rationalization of this sector of the industry. The results could be one large North American auction located in the U.S.A. This could have some serious implications for Canadian wild fur producers and manufacturers should American fur ranchers gain majority ownership; Canadian wild fur producers would lose control over the marketing and promotion of their product in international markets. Such a development would also erode Canada's ability to- demonstrate to the European Community that Canadian wild fur meets the EC trade regulations after 1995.

Fur Farming:

Farmed furs now account for over one half of the value of total fur production in Canada. Ranchers received $27 million for their furs in 1991.

Canadian fur farmers are particularly vulnerable to strong fluctuations in world fur supplies and prices because of the relatively small size of the Canadian industry. Agriculture Canada has provided fur farmers with subsidies in recent years, but the effectiveness of these subsidies was reduced by the failure of most provinces to participate financially in this program.

Wild Fur Harvesting:

In recent years, it has been estimated that approximately 85,000 Canadians are engaged in the harvest of wild furs. It is also estimated that roughly one half of these wild fur harvesters are aboriginal people. Total income to Canadian trappers in 1991! amounted to $15.2 million compared to $85 million in 1987. Auction prices for wild furs in December 1992 were down from the previous year, due primarily to economic situations in Italy and Japan, and a level of uncertainty in the trade over the free flow of Russian sable. Large numbers of Russian sable however, did not materialize during the auctions held in early 1993, and this has served to diminish the level of uncertainty in the international sable market. The problem has been attributed to the ongoing privatization of the fur industry in the former Soviet Union. ***This situation deserves ongoing monitoring however, as the diversion of Russian sable from the Sojuzpushnia auction to other channels, including barter deals for industrial equipment, drugs and food, could have an impact on the demand and price for NWT sable.***

The combination of low prices and smaller harvests has reduced revenues to wild fur harvesters -- i.e. just as they are being called upon to adopt new harvesting equipment and methods, in response to public opinion. Current conditions pose special, problems for aboriginal wild fur harvesters: (i) reduced fur income cannot easily be replaced in remote regions, jeopardizing, a subsistence lifestyle, and, (ii) the introduction of new harvesting systems may fail to respect the social, cultural, linguistic and geographical distinctiveness of northern regions.

O"f the twenty different furbearing species harvested in Canada, none is considered threatened or endangered on a country wide basis.

Public Opinion

The Fur Council of Canada recently concluded a national survey, to gauge consumer attitudes about fur. Some key findings included:

- a large number of Canadian women wear fur: One-quarter of Canadian women (19 to 59 years of age)own a fur coat or jacket. One-in-three women over 35 years of age wears fur. Fur is most popular in Quebec.

- the practicality of fur is an important selling point: Three-quarters of those considering buying a fur garment cite "warmth, durability and practicality" as the prime motivations.

- consumers want more information about how the fur trade is regulated. One quarter of all women surveyed -- and over one-half of those actually planning to buy a fur garment -- say they would be more interested in wearing fur if they knew that: no endangered species were used; husbandry and harvesting methods are humane; wild fur harvesters help to manage wildlife populations; the fur trade supports livelihoods and cultures; and, fur is a renewable, environmentally -friendly product.

- Canadian consumers overwhelmingly reject extreme anti-fur tactics; 93% of all women say it is "unacceptable" for activists to publicly criticize *or* harass people who chose to wear fur.

NWT's CURRENT POSITION IN TEE FUR TRADE

The Northwest Territories has been blessed with a wild fur resource which is considered to be one of the best in the world.[3] Almost all international fur buyers and manufacturers interviewed over the course of this study indicated that they can almost always distinguish NWT wild fur for its high quality and its handling by the producers. As well, most industry sources believe that there is an image associated with the name "Northwest Territories" (the environment, northern wilderness, native peoples etc.), an image that can be used to market good quality products in world markets.

While the harvesting of wild fur is an important economic activity and a traditional way of life for many NWT residents, a much more aggressive approach is required in the marketing and promotion of NWT fur. This is critical in order to maximize the economic potential of the NWT fur harvest and lesson the NWT's vulnerability to the cyclical ups and downs of international fur markets, the price manipulations of auction houses and the European anti-fur campaign.

For the NWT as a whole, wild fur production for the 6 year period, 1987-92 was dominated by a high point in 1988, a subsequent decline and a slight recovery in 1992. This pattern is reflected in Table 4, both in the numbers of active trappers (wild fur harvesters) and their income,

TABLE 4
ACTIVE TRAPPERS WITH THEIR TOTAL AND AVERAGE PRODUCTION 1987-92

YEAR	NUMBER OF ACTIVE TRAPPERS	TOTAL PRODUCTION $	AVERAGE PRODUCTION $
1987	2,914	5,640,983	1,936
1988	2,942	6,086,751	2,069
1989	2,341	4,436,341	1,895
1990	1,971	2,831,784	1,437
1991	1,558	1,885,118	1,210
1992	1,857	2,257,442	1,216

Between 1987 and 1992, a total of 5,287 wild fur harvesters reported income in one year or more. However during any one of those years, the number of active wild fur harvesters varied between 1,558 and 2,942. During the period of decline, the percentage decrease in the number of wild fur harvesters was

[3] See comments of Oscar Carbonal, International Fur Buyer and others - Appendix F.

smaller than the drop in revenues, indicating a probable lack of other economic opportunities or a willingness to persist with wild fur harvesting despite market changes.

The NWT's annual fur harvest is also important to an active, native arts and crafts industry. In 1988, it was estimated that 5,507 residents in the NWT were involved in traditional crafts; production.[4] In 1985, Resource Management Consultants estimated an annual demand of some 4,535 fur pelts of various species amongst arts and crafts producers in the territories.[5]

The marketing process for NWT wild fur is illustrated in Appendix D.

[4] 1989 NWT Labour Force Survey, Report No. 3, Northwest Territories Bureau of Statistics.

[5] Resource Management Consultants (NWT) Ltd.: Tanning Hides and Furs in the NWT. October 1986. GNWT Department of Economic Development & Tourism.

III STRENGTHS AND WEAKNESSES

As discussed in Chapter II, the Northwest Territories has been blessed with a wild fur resource which is considered to be one of the best in the world. As well, most industry sources believe that there is an image associated with the name "Northwest Territories" (the environment, northern wilderness, native peoples etc.), an image they believe can be used to market good quality produc-ts in world markets. A sustainable NWT fur industry must build on these and other strengths. It must also address some serious weaknesses.

STRENGTHS

In addition to the strengths discussed above, a sustainable NWT fur industry will benefit from the following:

- the harvesting of the NWT fur resource is well regulated and managed allowing for increased and sustainable fur production;
- the position of NWT fur in international markets and in Europe particularly, will be strengthened by the substantial progress the Government of the Northwest Territories has made in introducing humane trapping regulations, replacement of leg hold traps and, in the provision of training to wild fur harvesters in fur management, harvesting and pelt handling. As well, the significant involvement of aboriginal peoples in the NWT fur industry will aid an NWT fur strategy in balancing concerns raised by "animal rights" activists.
- the existence of government programs to provide support and assistance to wild fur harvesters;
- the traditional artistic, design and crafts skills inherent in many NWT residents;
- the continued support of the Government of the Northwest Territories combined with likely support from NWT communities.

WEAKNESSES

The Northwest Territories can produce good quantities of wild furs and hides. Yet, some NWT craft producers and retailers of fur products find it necessary due to the lack of availability of local products, to import raw materials and finished goods from outside the territories. This has become essential for some, just to satisfy the demands of the local and tourist market.

The lack of an organized and coordinated fur collection system in the territories allows auction houses to manipulate the real value of NWT fur. It also leaves the traditional markets for NWT fur vulnerable to the anti-fur campaign and the impact of EEC

regulations. It does not lend itself to the effective marketing and promotion of the NWT fur collection in international markets, nor does it protect the NWT trapper from the longer term effects of anticipated changes to the structure of the international auction house business. Such a system could aid NWT craft producers in overcoming their supply problems.

More specifically, the major weaknesses of the existing NWT fur industry can be characterized by:

- wild fur harvesters in the NWT are not organized to represent their interests outside of the territories and this may reduce their abilities to influence the international marketing and promotion of wild fur;
- no mechanisms exist to protect the NWT fur harvest from the price manipulations of auction houses;
- the marketing and promotional programs necessary to capitalize on the inherent strengths of the NWT wild fur collection and the "image" of the NWT in international markets has not been undertaken to maximize NWT fur prices and stimulate other economic activity and tourism in the NWT;
- the limited knowledge of the business and value added processes of the fur industry which exists within the NUT, contributes to a continued dependence on outsiders for advice which in many cases have produced questionable results;
- the transfer of fur technology from grading to product design, production, promotion and marketing has been haphazard at best; and,
- the non-existence of the infrastructure, organization and training programs necessary to support an integrated NWT fur industry including collection, processing, manufacturing, marketing, promotion and distribution.

Iv OPTIONS

INTRODUCTION

This chapter provides an overview and assessment of the options which are known to be available to the NUT, to strengthen its position within the fur industry. In some cases, the options (Opportunities) are directly related to the capacity of individuals, communities or existing commercial operations. In other cases, the options are more broadly related to the development of the infrastructure necessary to support a sustainable NWT fur industry in which case territorial government support and involvement will be required.

Many of the options (opportunities) that have been identified can only meaningfully be carried out with the direct consultation, involvement, input and support of communities, wild fur harvesters and arts and crafts producers. This will be important to ensure that their values, priorities and aspirations are respected.

As discussed in Chapter III, there are several factors which will influence the options (opportunities) available to the NWT in strengthening its position in the fur industry.

WILD FUR SALES

As discussed in Chapter II, this sector of the Fur Industry is undergoing a major process of rationalization, which has seen the demise of one major Canadian auction house in 1991, followed by attempts on the part of Ontario based trapper groups to establish new auction businesses as a means of competing with the dominant North American Fur Producers Marketing Inc., of Toronto and New York. Currently, there are only three auction houses in Canada down from six in the late 1970s, that attract international buyers. Each of the three remaining auction houses feel that all of the wild fur should be sold under one roof. This was also the opinion of a number of representatives from other sectors of the Canadian industry. This was also seen as the best way to protect this sector of the Canadian industry, given the uncertainty surrounding the possible dominance of the North American auction business by U.S. Fur Ranchers.

In responding to the question of how the NWT could strengthen its position in the international auction house business, almost all of the industry representatives consulted (including representatives of Fur Harvester's Auction Inc. , of North Bay), were of the same opinion: NWT fur should be shipped in bulk and handled as a single and unique collection of top quality wild fur by one auction house. Fur garment manufacturers also agreed with this assessment, but went further in suggesting that NWT fur could be supported by its own marketing and promotion programs (including a label) as a means of increasing its value and acceptance among consumers, particularly in Europe. Other industry sources were of the opinion that a special NWT label would be a waste of money i.e. , the consumer is interested in a good product, and does not care where it comes from. The president of North American Fur Producers Marketing Inc., also shared this latter opinion. However, he also expressed the belief, that if the intention is to use the label on speciality fur products made in the NWT, in addition to promoting **NWT wild** fur, then the idea of a special **NWT** label makes sense.

A number of fur garment manufacturers were also of the opinion that the current practise of the auction houses of mixing NWT fur with fur from other jurisdictions to create larger inter-sorts hurts NWT producers by reducing the value of their furs.

Each of the above factors has been considered in assessing the following options:

- the creation of a territorial based auction house;
- partnership with an existing auction house; or

.the creation of a territorial fur collection and grading centre.

The Creation of a Territorial Based Auction House

For the time being, the establishment of a territorial based auction house should be considered a risky venture. Currently, there are too many small auction houses handling wild fur in Canada which only satisfies the interest of buyers - low prices. While NWT wild fur is considered to be of the highest quality, the low quantities currently produced combined with the high cost of travel would not attract the number of 'international buyers 'required to obtain the best price. Further, the NWT does not have the necessary expertise nor an established reputation in grading furs. In that regard, the grading of wild furs is a highly specialized process with only a handful of qualified people in Canada.

While the creation of a territorial auction is not recommended at' this time, it is an option that should not be dismissed entirely. Continued rationalization of the international auction business and other market factors may eventually lead to the need for a modified territorial auction to protect the interests of NWT wild fur harvesters. Improved prices may increase production and thus increase the economic viability of such a decision in the future.

Partnership with An Existing Auction

Only those auction houses that handle wild fur were approached to discuss their interest in a partnership. These included North American Fur Producer's Marketing Inc., of Toronto, Western Canadian Fur Sales of Vancouver and Fur Harvester's Auction Inc., of North Bay. All of these auction houses are currently losing money. Two are in need of operating capital.

Initially, all of these auction houses were interested in making a deal . The owner of Western Canadian Fur Sales of Vancouver stated an interest in selling his business outright, but no price was ever mentioned.

The president of Fur Harvester's Auction Inc., indicated that the Union of Ontario Indians would be interested in selling part of their 50% interest to an entity representing NWT producers.

When first approached, the executive of North American Fur Producers Marketing inc., were most interested in discussing this prospect however, after a period of several weeks they stated that the timing was probably not good given the current process of rationalization going on in the auction house business of North America. Moreove-r, t-he American Fur Council had just purchased an interest in their business. For some time now, they have wanted to create a wild fur division with a broad base of ownership among native and non-native wild fur harvesters and this may be attempted

this year'. This could be done through a co-operative in which NWT harvesters could participate on an individual basis.

It is not recommended that the NWT make an investment in an auction house outside the territories. Such an investment would provide no guarantees that the NWT's position would be strengthened in the international auction house business and the prospects for a good commercial return are not good given current market factors. At present, there is no vehicle in the territories (e.g. NWT Trapper's Association) to allow NWT wild fur harvesters to have input into the management of an auction business. Further, an investment in an auction house will not contribute to the objectives of maximizing income and employment opportunities for NWT residents. Finally, this option would not result in the transfer to the NWT of the fur grading technology, which is an essential factor in the development of an integrated NWT fur industry.

A Territorial Fur Grading and Collection Centre

The establishment of a Territorial Fur Grading Collection Centre, is an option that has been discussed with industry sources as a means of improving the NWT's position in the international auction business. In particular, this and other options were discussed at length with the president of North American Fur Producers Marketing Inc., of Toronto.

This option would entail the construction or rental of a 10,000 to 12,000 Sq. ft. facility, the engagement of a professional fur grader on the staff of the NWT Department of Renewable Resources and the establishment of a coordinated fur collection system.

The facility would employ some territorial residents on both a full and part time basis who would be trained by an experienced grader with a good knowledge of the fur business and international fur markets. The longer term objective here, would be to make the NWT totally self-sufficient with respect to fur grading technology and skills through the training of NWT residents.

Initially, the centre would pre-sort and seal (stamp) all of the fur harvested in the territories prior to shipment to auction. Sealing/stamping, will add to the cost of handling the NWT fur collection however, these costs should be weighed against the risk of losing access to the European market after 1995. This will be a measure that will attract international buyers as it will provide them with an assurance that the fur they purchase can be exported to Europe after 1995. Buyers may also pay a premium for these furs as there will likely be wild fur (U.S. and possibly Russian) on the market that cannot be exported to Europe after 1995.

The territorial centre would negotiate a discount in auction house commissions of three and four percent for the above service, which provides NWT wild fur harvesters with an immediate cash benefit (e.g. on the sale of $2 million in fur, $60,000 to $80,000 in auction house commissions will be saved). The largest North American fur auction house is prepared to negotiate such an arrangement. It is likely, that other auction houses would be interested in a similar arrangement.

The NWT government fur grader would safe guard the arrangements with auction houses by visiting the auction house prior to the sale of the NWT fur collection. In that regard, the NWT fur grader would inspect the auction house's catalogues to verify the prices given to the NWT fur collection, prior to sale. He/she would have the authority to withhold goods from sale if any evidence of unfair pricing was found.

Over the longer term, centre staff will become more skilled in the sorting and grading of furs and as this happens the NWT centre should establish a reputation in wild fur grading. At that point, the centre will be in a position to catalogue its own fur collection for distribution directly to international buyers. If in the future it is found necessary, the capacity will have been developed to operate an NWT auction house.

All of the services provided by the centre would be of interest to other wild fur producers (i.e. Yukon, Alaska, northern B.C./Alta.). This represents another potential source of income for the centre (e.g. approximately $4 million in wild fur was produced in these areas in 1991-92). Wild fur production from these areas and the NWT is currently sold through Western Canadian Raw Fur Sales of Vancouver, which may cease operations in the near future, due to the possible retirement of the owner.

The establishment of such a centre could also overcome some of the problems that NWT craft producers experience in obtaining raw fur pelts. For example, the NWT Native Arts and Crafts Society has a mandate to provide raw materials to NWT producers. If they could estimate these needs a year in advance, the territorial fur centre could actually tender the harvest of these furs well enough in advance to meet all of the producers' needs. Both NWT arts and craft producers and wild fur harvesters would benefit. Such an approach may also serve to use NWT fur resources which are currently under utilized such as arctic fox, beaver and muskrat. This approach might also contribute to the viability of larger commercial operations which could be established in the NWT over the longer term.

During the off season, the centre staff could be employed in developing and delivering trapper education and training in improved pelt handling techniques etc. . The centre itself, could be

used as a training facility offering programs to NWT residents in fur technology and all of the value added activities of the industry.

The question of controlling fur sold to other buyers in the territories such as country buyers, Northern Stores, Co-ops etc., is a matter that may be resolved by simple market factors. In that regard, only fur that goes through the NWT fur centre would be stamped. International buyers will want some assurance that this is the case to avoid problems with EC regulators. Secondly, it is probable that furs sold outside of the system will suffer in value compared to pelts sold through the territorial fur centre. In that regard, producers who ship to the territorial fur centre will benefit financially in terms of price maximization brought about by the creation of one large inter-sort (collection) of NWT fur and by having their pelts stamped by the GNWT. They will also benefit from a savings in auction house commissions. Furs sold outside this system will not enjoy these benefits.

This is the preferred option for strengthening the NWT's position in the international auction house business. It will provide the following benefits:

- it contributes to the price maximization of furs harvested by NWT wild fur harvesters;
- it protects the NWT fur collection from the unfair price manipulations and practices of existing auction houses (difficult to asses or quantify past loses to NWT wild fur harvesters);
- it will maximize income and employment opportunities for NWT residents;
- it will maximize territorial control of the marketing and pricing of the NWT fur resource;
- it will facilitate the export of NWT wild fur to Europe after 1995;
- it will facilitate the marketing and promotion of NWT fur in international markets;
- it will contribute to the regulation and management of the NWT furs;
- it will contribute to the development within the NWT of fur technology and expertise; and,
- it will serve to strengthen the NWT's arts and crafts industry and the development of other value added activities.

As discussed, the sealing/stamping of the NWT wild fur collection will be an added expenditure for the NWT Department of Renewable Resources. These costs however, may be unavoidable, even if it is decided not to proceed with this option. In that regard, it is most likely that auction houses will have to sort, document and certify the origin of pelts after 1995, to meet EC trade requirements. This will result in added costs to the auction houses which will be passed on' to NWT wild fur harvesters.

TRAPPER INCOME STABILIZATION

As outlined in this discussion paper, certain measures such as marketing and promotion programs can be developed and implemented to protect and enhance the price of NWT fur and thus the incomes of wild fur harvesters. The cyclical and unpredictable nature of the fur industry however, makes it difficult if not impossible to stabilize the incomes of wild fur harvesters without direct subsidies or other income support measures. .

The" preferred option discussed under the previous section on Wild Fur Sales will contribute to increased incomes for NWT wild fur harvesters. Other options that have been reviewed include:

- promotion and advertising;
- income supports and subsidies to wild fur harvesters;
- resource management;
- value added activities; and,
- other activities including tourism and outfitting.

Promotion of NWT Fur

As noted previously, the Northwest Territories is recognized by international fur buyers as having one of the best wild fur collections in the world. As well, the mystique and the image associated with the Northwest Territories is an image that the industry believes is marketable in international fur markets.

Canadian Fur Garment Manufacturers (who specialize in wild fur) and a number of international retailers consulted over the course of this study were of the opinion that the quality of the NWT fur combined with the image of the territories justify its own promotional program and label. They also recognize the work that the NWT has done in the area of implementing humane trapping systems and the contribution this will make to the marketing of fur garments and accessories using NWT fur in Europe. They have recommended that the development of cooperative promotional and advertising programs (supported by NWT producers, Canadian Manufacturers and International Retailers), that build upon the image of the "Territories" and the high quality of NWT fur, could serve to establish a niche for NWT fur in the upper end of international fur retail markets. They also indicated that such a program using an NWT label would also serve to strengthen markets for arts and crafts and other products produced in the NWT.

Generally, Canadian manufacturers were of the opinion that international buyers and retailers would pay a premium for the use

of an NWT label in their fur collections, providing it was backed up by a sound promotional program.

Canadian Manufacturers also see the benefits of the development of the "Northern Supreme Label" under the Wild Fur Council of North America. In that regard, they believe that any money spent on wild fur promotion is of benefit to everyone in the Canadian wild fur industry. However, they expressed some concern that the "Northern Supreme Label" may not be effective in European markets, given the impending EC ban on furs harvested with a leg hold trap and the involvement of U.S. wild fur harvesters in the Wild Fur Council. Generally, U.S. wild fur harvesters have done very little to adopt the humane trapping systems that will satisfy European regulations. A number of canadian manufacturers also expressed the opinion that the Wild Fur Council of North America follows the agenda of North American Fur Producers Marketing "--Inc., which is currently controlled by Canadian fur farmers and may soon be controlled by U.S. fur farmers.

Other industry sources consulted, especially those perceived to be aligned with North American Fur Producers Marketing Inc., and Western Canadian Raw Fur Sales, were of the opinion that the NWT need not develop their own promotional program and label but, simply support the newly established Wild Fur Council of North America. Their rationale was that all or mostly all of the NWT fur was of sufficient quality to qualify for use of the "NORTHERN SUPREME" label, which is given to the top 25% of the North American wild fur harvest handled by the auction houses involved.

The Executive Director of the Wild Fur Council has extended an invitation to have NWT producers represented on their Board of Directors. Interestingly, the Wild Fur Council also agrees that the NWT furs should have its own label but, they see an NWT label being used as a sub label to the "Northern Supreme" label. Potentially, this could work providing appropriate measures were taken by the auction houses to ensure that NWT fur was not devalued in the process. It would not however, provide any assurance that NWT fur would establish a market niche in the upper end of the price structure for wild fur. As one advertising executive put it - General Motors doesn't promote its Cadillacs with its Chevs - if NWT fur is of better quality then most other wild fur, it should be promoted as such.

There are some risks involved in the development of a label to promote NWT wild fur. Firstly, support for this measure from the garment and retail sectors of the industry may be based on an assumption that there is an endless pot of government money available. This risk can be reduced by developing cooperative arrangements with well established businesses who are prepared to risk their own money. Secondly, the use of an NWT label in an auction house will require the cooperation and support of the

auction house owners, particularly if the auction house in question, has invested in their own wild fur label and promotional programs i.e., the "Northern Supreme Label". This risk can be reduced by working cooperatively with all industry stakeholders, to ensure that a NWT label and promotional program is complimentary to other wild fur promotional initiatives. As noted previously, there will be greater support within the auction house business for an NWT label, if the intention is to promote NWT products in addition to wild fur.

Canada's top manufacturer of wild-fur garments, together with one of the world's most prestigious retail fur chains, have expressed an interest in developing a cooperative advertising and promotional program with the NWT. These interests obviously see an opportunity for profit in such a venture. At the same time, however, such a program may very well serve to establish NWT fur as the first choice amongst retailers and wild fur consumers - a benefit to NWT wild fur harvesters. Th'e proposed program would involve the production of a unique collection (26 coats) of fur garments using NWT fur and an NWT label. The idea is to have 2 of the coats made in the territories using unique northern and native designs. The remainder of the collection would be manufactured in Montreal. All of the catalogues and advertising materials would be based on photography taken in the territories. The collection would be shown and promoted in world fur centres and would be sold through stores such as Sak's Fifth Avenue in New York. The overall costs for a promotional program of this nature and the specific costs for NWT's participation are outlined in Chapter IV.

A long standing problem in the marketing and promotion of wild fur has been the lack of unity among wild fur harvesters. For example, the wild fur harvesters who support the North Bay auction do not participate nor support the Wild Fur Council of North America even though they stand to benefit from the promotional activities of the "Council". Another problem has been the lack of representation by aboriginal wild fur harvesters in organizations such as the Wild Fur Council of North America.

Trapper Income Supplements & Subsidies

The high costs, high rates of unemployment and low incomes in Canada's northern communities, combined with low fur prices in recent years, has created undoubted hardship for wild fur harvesters. Many wild fur harvesters can no longer cover their production costs from the sale of the fur harvested. Moreover, because fur prices are set outside the communities according to supply and demand at the auction house, the return to the harvesters are not based on their labour and production costs. This situation creates special problems for aboriginal communities by forcing people to give up a traditional way of life to find other ways of sustaining themselves - as is currently the case with

increasing numbers of people (especially young people).

Aboriginal harvesters generally, have long advocated for a system of income stabilization for traditional harvesters in the form of guaranteed incomes, 'direct subsidies or a combination of both, subsidies and income support. Within Canada, a number of measures, at various times, have been adopted to stabilize the incomes of aboriginal harvesters. They would include the income support program of the James Bay Cree (Quebec), the current NWT program of subsidies and various other forms of subsidies provided for under past Rural Development Agreements (Special A.R.D.A.) or outright grants from the Department of Indian Affairs and Northern Development. While government subsidies are provided to other primary producers (e.g. agriculture and fisheries), no universal program of income support has been developed for traditional harvesters, even as an alternative to social assistance. The reluctance of governments to fund programs of this nature can be attributed to the costs but, it may also stem in part from a poor understanding of the real value of the traditional economy. In that regard, Robert Reed[6], in a 1984 study completed for the Nishnawbe Aski Nation, concluded that "when the imputed value of the food harvest is added to the value of the fur harvest, then the importance of the traditional economy exceeds that of General Welfare and Family Benefits combined. Of course, the traditional economy has an incalculable value to the social, cultural and psychological well-being of the communities".

The Government of the Northwest Territories has long recognized the hardship for wild fur harvesters created by rising costs and fluctuating fur prices and does provide a subsidy to wild fur harvesters based on the previous year's fur production. To be considered for a subsidy, wild fur harvesters must have sold a minimum of $600 worth of fur. They are then entitled to receive an amount based on a percentage of total sales - a sliding scale which provides a bonus of 25% on the first $2,000 which is gradually reduced to 5% on sales over $8,000. The program can be used to encourage the harvest of underutilized species such as Beaver. The cost of trap replacement is also subsidized by the territorial government.

Wild fur harvesting is an important activity for many territorial residents and some would argue, as they have, that there is a need for additional subsidies or an income security program to stabilize the incomes of fur harvesters. Clearly, decisions of this nature, will be based on the costs and the level of importance attached to traditional land-based activities and of the role that traditional

[6] Reed, Robert. 1984. An Income Support Program for Traditional Harvesters: An Alternative To Social Assistance. Nishnawbe/Aski Nation.

harvesting has to play in NWT society. These decisions however, should be based on a careful examination of the following:

- the costs and earnings of wild fur harvesters;
- the real value of the traditional economy; and,
- the relationship of social assistance as an economic subsidy.

Other considerations for income support or subsidy programs for wild fur harvesters are provided hereunder. They assume that changes will be required to alter the allocation of limited financial resources in support of- the NWT wild fur harvesters. These comments based on the statistical analysis derived from the Trapper Profile provided in Part 2 of this discussion paper, refer to options for delivering economic strategies to the NWT wild fur harvesters based either upon an industry orientation, individual performance, community situations or age groups.

- Economic vs Cultural Significance Of The Wild Fur Harvest: For all individuals, the harvesting of wild fur is no doubt perceived to be both economically and culturally important but the statistical summaries indicate their comparative weight as motivators. At one end of the economic scale, less than 2% of wild fur harvesters earned 25% of their total income from fur. With an average annual harvesting income of close to $10,000, wild fur harvesting is clearly economically significant for this group of 100 wild fur harvesters. At the other end of the scale, 40% of wild fur harvesters earned less than 5% of their total income from harvesting wild fur. It seems a fairly safe assumption that an average income of less than $100 per year from fur for these 2,000 wild fur harvesters indicates a cultural rather than economic motivation for wild fur harvesting.

- Strategies With An Economic/Individual Focus: Assuming scarce resources, and a consequent need to target a strategic support program, this suggests a decision between reinforcing wild fur harvesting as an economic or as a cultural activity. While it may seem more appropriate for government to concentrate upon the economic dimension, this may be perceived as discriminatory and might therefore prove politically unacceptable.

  Deciding upon an economic dimension opens further strategic considerations. Should the top 100 wild fur producers be offered further incentives, or should' these be dedicated to raising the productivity of the next 400, whose average annual income is about $3,400.

- Strategies With An Economic/Community Focus: Further strategic options emerge in deciding whether to allocate scarce resources

to the industry, community, or domestic level. An industry orientation would be represented by an investment in a territorial fur collection and grading centre or processing facility. The domestic level strategy mentioned above would target individuals on the basis of performance and expectations, categories. The statistical analysis suggest several points to consider regarding options in terms of communities.

The analysis gave numerical expression to an expected pattern: a continuum stretching between **small,** remote and highly productive communities and the larger, less productive administrative centres. The demographic tables show that these small **communities** typically have a high proportion **of** their populations as active and highly productive wild fur harvesters. This suggests a further strategic **option:** to direct support to such smaller communities where there is clearly a high motivation to continue harvesting wild fur, combined with an absence of alternative sources of income when fur revenues decline.

However, this gradient between large and small communities is not consistent. It is interrupted by a few exceptions in the form of medium-sized communities with high production, which could give rise to questions if such a strategy was adopted. For example, 16 of the 100 most productive wild fur harvesters come from the tiny community of Trout Lake, 61 people, but the next highest group, 11, come from Fort Simpson, with a population of 1,006. A programme limited to smaller communities would discriminate against these productive families in Fort Simpson.

- Strategies Aimed At Specific Age Groups: The statistical records show a consistent response across all age groups to the decline in prices. Therefore, there does not seem to be any urgent call for supporting a specific age group. However, while wild fur harvesters in their 20's are the highest proportion, 25% of all wild fur harvesters, their overall production could be increased by a program targeted at young people below the age of 25. The high cost of outfitting a trapper (i.e. traps, equipment etc.) was identified in a number of communities as a major obstacle for young people who want to begin harvesting wild fur.

It is recommended that the current program of providing subsidies and new traps to wild fur harvesters be continued. The only exception is the need to address the special circumstances of younger people under the age of 25, who want to participate in the wild fur harvest. Failure to address the needs of these younger people may serve to hinder the development of a sustainable NWT fur industry in future years. Consideration should be given to the development of a revolving loan fund or similar mechanism designed to assist first time harvesters in purchasing equipment necessary

for harvesting wild fur.

The consideration of additional subsidies or other income stabilization measures should be based on reliable data on the costs of harvesting, which will vary between communities. As discussed, other important considerations should include the real value of the traditional economy and the role that social assistance has *or* could play as an economic subsidy to harvesters.

The resources required to implement a comprehensive strategy for a sustainable NWT fur industry should in themselves be considered as an income support measure to NWT wild fur harvesters.

Resource Management

The initiatives proposed in this discussion paper are designed to increase the value of the current NWT fur harvest and at the same time, stimulate the use within the NWT of underutilized fur species. If successful, these initiatives will place increased demands on the NUT fur resource. Consequently, there will be a need to strengthen the capacity of the NWT Department of Renewable Resources to undertake the management and monitoring activities necessary to ensure that annual harvests can be sustained.

Individual harvesters, communities and Hunter and Trapper Associations also have an important role to play in managing the resource and to ensure that local populations of fur bearers are not over harvested. In some communities, the increased demand on the fur resource may warrant the creation of Community Fur Managers to assist the NWT Department of Renewable Resources in communicating with harvesters and their associations. They could also play an important role in a coordinated fur collection system. Other responsibilities of a Community Fur Manager could include: issuing licences; consultations with local harvesters on harvest quotas and seasons; sealing/stamping fur; trapper education and training; monitoring furbearers and assisting with biological studies; trap testing; nuisance animal control, etc. .

Due to the activities of animal rights and animal welfare groups, combined with a change in social values generally, trapping often suffers from a negative image. It will be important therefore, to enhance the public visibility (primarily in large urban areas) of those activities which are associated with the management of this resource. This should also constitute an important element of wild fur marketing and promotion programs.

Value Added Activities

Education, training and skills development programs in fur business and technology should be made available to interested family members of wild fur harvesters to enable them to develop and

participate in value added activities such as tanning (Processing furs), fur garment and accessories, crafts production etc.. This issue was raised as a priority by the women in most of the communities visited.

Tourism and Outfitting

Given the “image of the territories and a growing interest among Europeans and North Americans in the environment, the north and native peoples, there is an opportunity for NWT wild fur harvesters to become more involved in the tourism and outfitting businesses. Eco-Tourism has become a growth industry and has already being established in the territories. Tourism requires infrastructure and attractions such as cross-country trails, canoe routes etc. . Wild fur harvesters could be contracted to_construct and maintain these attractions. These and other opportunities should be more fully explored and developed with those individuals and groups who are interested. Plans should be developed that will ensure that wild fur harvesting is part of the whole NWT tourism package, in order to promote wild fur harvesting as a healthy and environmentally sound activity of NWT residents.

Aboriginal wild fur harvesters and communities in other areas of Canada have organized themselves to more fully develop opportunities in the areas of tourism and outfitting (e.g. Lac La Croix Guiding Association and Northern Ontario Na’tive Tourism Association) .

MANUFACTURING

There are a number of opportunities available to the NWT to produce fur and related products for export markets. These opportunities are directly attributable to the image of the **NWT** and native peoples in export markets, particularly in Europe. A number of Canadian manufacturers and retailers have already requested these products or have offered their assistance in helping NWT producers to develop the same. In this regard, their only advice has been that the NWT production of Fur garments and accessories should not attempt to compete with products made for the high fashion market which is very competitive. They believe there is an opportunity to establish a niche in international markets for NWT products, providing that they are based on unique designs depicting the art, culture and traditions of northern and native peoples. The products must be of high quality and should be supported by a distinctive NWT label and promotional program.

Canadian retailers have also expressed an interest in obtaining information on fur trimmed parkas, fur lined slippers and native arts and crafts from the territories. NWT producers should seek out the assistance of **the** Fur Council of Canada, the Fur **Retail** Guild of Canada etc., to fully explore these opportunities. Producers should also attend trade shows and international fur fairs such as the Montreal Fur Fair to display and promote their products.

More specifically, some Montreal Manufacturers have identified immediate opportunities for the NWT to produce products for which they have an interest in acquiring for export. Each of the products can be made from Muskrat or Beaver, which are currently underutilized fur resources in the NWT. A Yellowknife based producer who has been formally trained as a furrier and who knows the fur business, has expressed an interest in assisting and training people in communities to produce these products. Two of these products include:

Fur Blankets:

There is a demand in Europe for blankets made from fur and trimmed with a skirt incorporating authentic native needle crafts which depict traditional native design and art forms. This demand has come about by the release in Europe of films such as “Dances With Wolves” “Black Robe” etc.. As well, because of the activities of “animal activists” a number of potential consumers are reluctant to wear fur on the street. The alternative for these consumers is to have their furs in their homes and on their beds (out of sight).

A blanket made from muskrat would require approximately 120 pelts of commercially dressed fur. The estimated costs of

producing such a blanket in the NWT is approximately $2,000 (a significant part of this cost is labour and the art work). These blankets could be made from fur plates and skirts made in a number of communities and assembled in one central location to control costs and quality control. The blankets would be marketed as "art collectibles" to maximize price.

Reversible Fur Lined Parkas

Montreal Manufacturers have also provided an example of a fashionable, reversible fur lined parka that could be made in the NWT from muskrat and micro-fibres at a cost of about $1,100. As with the blankets, the parkas would be distinguished by traditional native designs and art work. Again, this is another opportunity to add value to NWT fur.

Exploitation of the above opportunities by NWT producers has the potential of generating several million dollars in value added activity in the territories. As with most commercial opportunities however, "the window of opportunity" is usually only open for a given period of time. To that end, if there is an interest in producing these products it should be expressed to the manufacturers in question before they seek out other native producers. Initially, NWT's interest in exploiting these opportunities could be expressed through the development of a number of prototypes (blankets & parkas) in conjunction with the manufacturers in question.

While there are several opportunities in this sector, there are also a number of problems unique to NWT producers which must be overcome before these opportunities can be fully exploited. From discussions with producers in the communities and from information provided by the Department of Economic Development and Tourism, past and existing attempts to produce products using fur in the NWT have encountered problems. For example, some of the producers consulted, indicated that they had difficulty in obtaining good quality/reasonably priced fur to work with. Many of their products require commercially tanned fur which is expensive ($90 for a large beaver) and is only available from outside the territories. These producers reported that they can't meet orders because of the general lack of reasonably priced fur. Similarly, NWT retailers have difficulty in obtaining a dependable supply of NWT fur products for local and tourist markets. When they do obtain products, there is no consistent quality.

The above problem was highlighted by a visit to one major NWT arts and crafts retailer. The majority of muskrat hats in their inventory were manufactured in Manitoba.

Women in a number of communities expressed an interest in fur development workshops, training and fur Sewing machines. A

workshop held this past winter in Fort Smith demonstrated how a fur sewing machine and training could increase productivity.

The establishment of a territorial fur centre could support the production of fur garments and accessories in the NWT by assisting in the development and delivery of community based training initiatives in all areas of the fur industry. The emphasis could be placed on design and product development, manufacturing, entrepreneurship, marketing, promotion and distribution. As well, an NWT Fur Centre would be in a position to assist in planning and stabilizing the production of raw materials for producers even on a large scale commercial basis. In addition, a Professional and experienced fur grader will come with a network of contacts throughout the international trade which can be used to support the marketing of NWT products.

Tanning of Furs

A pilot fur tanning project was undertaken in Rae Edzo last winter using a process developed in the Yukon which blends both traditional and commercial tanning techniques. It is our understanding that this process produces a good quality product, lends itself to small scale community based production and is environmentally safe. Samples of tanned fur using this process have been examined by industry professionals. While they do not consider the product to be of commercial quality, they were impressed with the overall results which they believe is suitable for the crafts industry. They were also of the opinion that the current process could be improved and would not entail any great trade secrets or technology. They have offered to work with NWT producers in this regard, at no profit to themselves.

Certain products produced by NWT craft producers require good quality, commercially tanned furs which have to be obtained outside of the NWT. Commercially tanned furs are of a quality suitable for use in the high fashion fur garment industry. Traditionally tanned furs are not. Commercial tanning operations use complicated processes, on as large a scale as possible to achieve economies (processing thousands of individual pelts at the same time) and remain viable and competitive. These commercial tanneries produce large amounts of liquid and chemical wastes that are difficult to treat. The costs of meeting environmental standards have led to the closure of a number of Canadian tanning businesses in recent years. The cost of the recently constructed plant in North Bay, Ontario was estimated to be approximately $5 million, much of this expended on meeting environmental standards.

A review has been made of a number of studies on the tanning of hides and furs in the NWT which were provided by the NWT Department of Economic Development and Tourism. One study prepared in 1986 by Resource Management Consultants (NWT) Ltd., on Tanning Hides and

Furs in the NWT, is worth discussing. This study provides an assessment of the demand for hides and furs in the NWT by region, identifies the required inputs, start up and operating costs and profitability for a number of scenarios based on demand and volume of production. The consultants investigated the economics of a medium small fur dressing plant with a capacity of 4,500 pelts which would show a profit if operated at 80% capacity year round with a minimum of spoilage. The operation would employ one part time and three full time employees. In 1986, the capital cost of setting up a medium small fur dressing plant was $200,000 and the annual operating costs was approximately $150,000. They also recommended that such a plant be located in a community with an established industrial base and good road access to Alberta to minimize production costs. They also concluded however, that the demand by NWT crafts producers would not be enough to absorb the output of the operation and it would be necessary to access larger markets.

It would be extremely risky to invest in a territorial fur processing plant that is dependent on accessing larger markets. It would have to compete with southern based fur processors with lower production costs. This is particularly true in today's highly competitive and "cut throat" fur dressing market. As discussed above, there are a number of opportunities to increase the use of territorial fur in the production of a number of products. As the use of fur in the territories increases so does the viability of a small commercial dressing plant. In that regard, consideration of investing in a small scale dressing operation should be deferred until such time as all of its production and its viability can be assured by demand within the NWT. As well, the pilot project discussed above may eventually be perfected and satisfy the need among producers for commercial quality dressed furs. In the meantime, a territorial fur collection and grading centre could also help in reducing cost to NWT producers for commercially dressed furs. In this regard, furs to be used by producers in the NWT could be shipped to a commercial dresser in bulk lots at reduced prices based o-n volume.

RETAIL

As discussed in the previous section of this report, some NUT retailers often have to import fur related products from outside the territories due to supply problems within the territories. Also discussed was the international retail potential for products produced in the NWT. A retail store owner in Vancouver who caters to Japanese tourists has expressed an interest in obtaining fur products made in the NWT. As well, most Canadian fur retailers consulted have expressed an interest in obtaining products such as fur lined or trimmed parkas, moccasins and slippers, arts and crafts, etc..

Overall the retail situation for fur related NWT products both within and outside the NWT suffers from a supply problem. Obviously, demand is greater then the supply. This is a major problem, which will require a balanced approach to ensure that no market opportunities are lost.

As discussed, a planned and organized collection of furs from the wild fur harvesters to the crafts producers would help. The development and delivery of training to producers in all aspects of the fur business and the development of skills in value added activities would also help. Measures designed to increase the productivity of producers are required to make the pricing of NWT products more competitive. Product development and design initiatives are also required as well as a sound promotional program.

V STRATEGIC INITIATIVES

Responding to the options (opportunities) available to fully develop the NWT fur industry, enhancing its position within the international auction house business, stabilizing income to wild fur harvesters and assisting NWT producers and retailers of fur products in overcoming specific obstacles to realize their full market potential will require a strategic, comprehensive and coordinated approach on the part of the Government of the Northwest Territories.

A three-part approach is proposed to guide the Government of the Northwest Territories in developing it's fur industry:

I The development of fur grading and marketing skills, technology and capacity in the NWT combined with a coordinated fur collection system;

II An investment in fur product design and development and, training for territorial residents to maximize the opportunities for adding value to NWT fur within the territories; and

III The development of a marketing plan - promotional programs and aids designed to support the marketing of NWT fur and value added products in international and domestic markets.

The overall objective of these initiatives are to protect and enhance the incomes of NWT wild fur harvesters. Part I of the recommended approach, which recommends the operation of a NWT Fur Centre and a coordinated fur collection system, is designed to: protect the incomes of wild fur harvesters from the marketing practices of existing auction houses; create a savings in auction house commissions for NWT wild fur harvesters; generate revenues for the NWT fur centre from other wild fur harvesters; provide the NWT with the control required for the effective marketing and promotion of the NWT fur collection (Part III of the strategy); and, transfer fur grading technology and skills to the NWT. Part I of the strategy will also create some highly skilled jobs for NWT residents, in addition to supporting the needs of producers of crafts and fur products for reasonably priced raw furs.

Part II of the recommended approach will contribute to the incomes of NWT wild fur harvesters by stimulating demand within the NWT, for underutilized fur resources such as beaver and muskrat. It also provides opportunities for individuals and businesses to expand their production and sales of products using fur.

Part III, marketing and promotion, is designed to increase the incomes of wild fur harvesters, by positioning NWT fur such as Marten, Mink, Lynx etc.. at the top end of the international fur

Marten, Mink, Lynx etc. . at the top end of the international fur market, in terms of price and demand. This initiative will also contribute to the marketing and promotion of NWT fur products.

I The development of fur grading and marketing skills, technology and capacity

The development of fur grading and marketing skills, technology and capacity within the territories is necessary to provide direction and support for the development of NWT's fur industry potential. It will help lessen the vulnerability of NWT wild fur harvesters to the cyclical ups and downs of international fur markets and the price manipulations of auction houses. It will aid in the development of the value added activities that are required to maximize the full economic potential of the NWT fur resource.

As discussed in greater detail in pages 21 to 25 of Chapter IV, this initiative would involve the construction or rental of a 10,000 to 12,000 Sq. ft. facility with built in cold storage to be located in the NWT. The choice of location for the facility should take into account good road access to Alberta and other cost reducing factors. A centre with a good industrial infrastructure would be ideal as it may be desirable and necessary in future years to incorporate a small scale commercial dressing operation as part of the facility.

The facility would employ a professional fur grader who would have to be recruited from outside of the territories. Additional staff requirements will include one full time assistant grader, one full time secretary/admin assistant and two casuals, all of whom can be recruited in the NWT.

The establishment of a NWT fur centre will enable the NWT to exercise some control over the marketing and promotion of their own fur collection. Without this element of control, the third part of the recommended approach, which is designed to improve the incomes of wild fur harvesters - Wild Fur Marketing and Promotion, will be difficult and less effective. It is the marketing and promotion elements of the proposed approach that can contribute the most, to improving wild fur harvesters' incomes. This must be an important consideration in assessing the benefits of making an investment in an NWT fur centre and in subsidizing its operations on behalf of NWT wild fur harvesters.

Over the period 1987 to 1992, it is estimated that NWT wild fur harvesters paid $2,000,000 to auction houses, as commissions on the sale of their fur. If this fur (production over 1987 to 1992) had been pre-sorted in the NWT as this discussion paper suggests, the cumulative savings in commissions to NWT harvesters would have been approximately $900,000.

In addition to creating some immediate savings in auction house commissions, an NWT fur centre over the longer term, could generate commissions from the sales of its services to wild fur harvesters in Alaska, Yukon, northern British Columbia and Alberta. The sales of these services could contribute to the centre's self sufficiency and eventual privatization.

The loss of incomes to NWT wild fur harvesters through the marketing practises of auction houses, should be another important consideration. If these loses amounted to even 5%, the lost income to NWT wild fur harvesters over the period 1987-1992 would amount to $1,200,000. The NWT fur centre would eliminate this problem.

An investment in a fur centre also creates jobs for NWT residents and it allows for the transfer of fur technology and expertise. Finally, it lessens the risk to NWT harvesters of the potential loss of Canada's fur auction business to U.S. fur farmers.

Initially, the centre should be operated by the NWT Department of Renewable Resources. In addition to their grading and marketing function, "centre" staff can also play an important role in the general management and regulation of the NWT fur resource. It will be important for international buyers and the public to perceive that this is the case, given EC actions and the development of International Standards for humane trapping.

During the first five years of operation some of the essential services of the centre and its staff should include:

- the cleaning and pre-sorting of the NWT fur collection;
- negotiation of discounts in auction house commissions;
- shipment of the NWT fur collection to auction house;
- inspection of auction house catalogues to verify values given to NWT fur;
- communications with international fur buyers and the provision of market information to wild fur harvesters and Renewable Resources Officers;
- trapper education and training - certification of instructors;
- continual development of improved pelt handling techniques in response to market requirements; .
- purchasing, sale and distribution of new traps;

- in conjunction with NWT Arts & Crafts Society, estimate on an annual basis the next year's demand for dressed fur pelts by NWT producers;
- retain (in cold storage) sufficient numbers and species of fur pelts to meet the needs of NWT producers;
- ship pelts for use in the territories to commercial processors for resale to NWT producers; and,
- marketing the centre's services to wild fur producers outside the NWT.

After year five, the centre should be in a position to grade and catalogue all NWT fur. Catalogues can then be sent directly to buyers allowing for telemarketing of the fur collection. A stand alone auction facility should exist at this time if required by industry and market circumstances. At this point in time, a review could be made of the potential privatization of the centre.

It should be noted, that during the first year of operation it will be necessary to obtain assistance in sorting and grading furs. With the exception of the fur grader, other centre staff will not have the skills necessary to sort and grade large numbers of furs within a short specified time frame. North American Fur Producers Marketing Inc., has offered to loan staff temporarily at cost, to meet this one time need. This arrangement would also contribute to the training of centre staff. These costs would include the wages of two individuals over 2 - two week periods ($8,000), 2 return trips each from Toronto ($8,000) and living expenses ($7,200) for a total of $23,200.

II An investment in product design, development and training

An investment in product design, development and training will help NWT residents to add value to the fur resource in order to maximize income and employment opportunities. As discussed in Chapter IV, there is a tremendous interest in products made with distinctive designs depicting the traditions, cultures and art of native and northern peoples. Support for these activities will be important in establishing a niche for territorial fur products in international fur markets.

It is difficult to quantify an investment in this area as both, the products and designs should be based on the interests, ideas and priorities of NWT residents. At the very least however, an investment should be made in developing prototypes for the parkas and blankets discussed in Chapter IV. While the ideas come from Montreal manufacturers they have been outlined to the communities visited over the course of this study and there was considerable interest. Moreover, this is an excellent opportunity to begin

developing partnership arrangements and other contacts in the larger fur industry. These kinds of arrangements and contacts will contribute to the success of these initiatives.

III The development of a marketing plan - promotional programs and aids

The development of a marketing plan - promotional programs and aids is necessary to reinforce all other investments made to strengthen the position of NWT fur and value added products in international and domestic markets.

The development of a comprehensive advertising and promotion program designed to heighten the visibility of NWT wild fur and value added products in international markets should be undertaken by a professional advertising or communications firm, preferably with past experience in the fur industry. This can be an expensive process but it does not have to be implemented all at once. It can be developed and implemented in various stages over a longer period of time. The goal of such a program should be to create an international awareness of the Northwest Territories' name and a demand for NWT wild fur and products made from NWT wild fur. The basic elements of such a program should include:

- product labelling
- product image and creation
- auction house and fur sales promotion
- institutional advertising campaign; and,
- co-op advertising.

The marketing objectives should be:

- to position the Northwest Territories as a major and significant player in the international fur business; and,
- to create an awareness of the unique qualities of NWT wild fur and products and their recognition as possibly the best in the world.

Communication objectives of the marketing plan should include:

- To create a labelling program which will position the Northwest Territories as the world's best supplier of wild fur and unique wild fur products; and,

- To create a communications program which will introduce the Northwest Territories fur label to domestic, Canadian and international fur markets.

VI IMPLEMENTATION AND TIMING

Implementation of the recommended initiatives and the timing of commitments should respect the normal business cycle of the industry which is discussed in Chapter II (page 7). This is particularly true for the development of a territorial fur centre. This is also true for the product development and promotional opportunities extended by Montreal interests, whose business decisions are also dictated by this cycle and their own understanding of market conditions. Given the many variables surrounding decision making processes, the schedules provided hereunder should only be considered as an example.

I A Territorial Fur Centre

It is anticipated that any decision to proceed with the development of a territorial fur centre will require time, given cost and location considerations. To have a facility fully operational for the 1994/95 fur season, it will be necessary to allow time for planning, contracting the facilities rental and/or design and construction and the hiring and training of centre staff. Timing will be critical as demonstrated by the following schedule of required events, which is provided as an example and assumes that a decision will be made by June 30, 1993 and that construction can be undertaken during winter months:

TASK	TIMING
All preliminary planning, site selection, funding and administrative arrangements are completed including the development and approval of a project management plan;	September, 1993
Facility design has been tendered and approved;	September, 1993
Begin search for a professional fur grader etc., within industry;	October, 1993
Construction of the facility has been tendered and contracted;	November, 1993
Construction of the facility commences';	December, 1993
Selection of a fur grader, negotiations regarding compensation, benefits and moving are completed;	January, 1994

Construction of facility is completed;	April, 1994
Fur grader commences work;	April, 1994
Fur grader completes operational/business plan for fur centre;	Hay, 1994
Furniture, office equipment, sorting tables, fur cleaning machines etc. have been purchased;	May, 1994
Centre staff have been hired;	June, 1994
Centre staff have been trained; ---	October, 1994
A centralized fur collection system has been developed and is in place;	October, 1994
Fur Centre is fully operational;	November, 1994
An estimate of the demand for commercially dressed furs by producers in the NWT is completed and decisions are made regarding the need for a medium small fur processing facility;	December, 1997
All centre staff are proficient in fur grading; and,	December, 1998
Catalogues are sent directly to international buyers.	December, 1998

II Product Design Development and Training

Much of the timing for implementing this initiative will be guided by the level of interest and commitment on the part of territorial residents to participate. This should be assessed more fully and quantified to the extent possible as one of the first steps. Equally important is the need to fully explore the existing product development opportunities discussed previously in this report. While the commercial importance of these opportunities have not been proven they could be lost to others through inaction.

The following schedule is suggested to guide implementation of this proposed initiative and assumes a decision to proceed will be made by September, 1993.

TASK	TIMING
Complete meetings with Montreal Manufacturers to obtain specifications, design concepts and ideas for production techniques (blankets & parkas);	October, 1993
Tender the production of prototypes to NWT producers (production techniques should be documented and assessed. for use in training, cottage industry or commercial applications);	November, 1993
Prototypes are completed for review by Montreal manufacturers;	December, 1993
Complete community consultations and assessment of interest in training, product and business development etc.,	December, 1993
Based on discussions with Montreal manufacturers complete production, marketing and business plans;	January, 1994
Complete assessment of delivery approaches, nature and level of support to communities, businesses and individuals to support the development of value added sectors in the NWT fur industry;	February, 1994
Finalize commercial arrangements with Montreal Manufacturers;	February, 1994
Begin production (blankets/parkas);	February, 1994
Develop a program of support and implement plans for training, product development and design, funding support etc., based on results of community consultations and assessment;	March, 1994
Producers attend international fur fairs and similar trade shows.	Spring, 1994

III Development of NWT Fur Industry Marketing Plan - Promotional Programs and Aids

To the extent possible, implementation of this initiative should be timed to reinforce other elements of the recommended approach, particularly those initiatives undertaken with industry. As well, the development of NWT fur products and their presentation at an international fur fair or trade show should be supported by NWT labelling and promotional programs.

The following schedule is only suggested as a guide to the immediate next steps. It assumes that a professional advertising firm/executive with experience in the garment/fur garment market will be enagaged to guide the development of these initiatives.

TASK	TIMING
Contact Montreal manufacturer regarding decision on developing a collection of NWT wild fur garments and co-operative advertising arrangements with manufacturer and international retailer;	as soon as possible
If a decision is made to proceed with the development of a collection of NWT fur garments, it is doubtful that such a collection could be assembled for the 1993 fall sales season. The 1994 sales season would be a more realistic time frame;	fall 1994
Confirm arrangements, scheduling and commitments with manufacturers and retailers for the development of fur collection and co-operative program;	September, 1993
Tender the development of a multi phased and costed marketing plan and strategy(much of the additional work, the key steps and timing will be based on the advise of this contractor);	November, 1993
Assemble high quality collection of NWT fur as per specification of manufacturer;	December, 1993
Promotional programs should be in place to support producers/manufacturers at fur fairs or trade shows.	Spring 1994

VII COSTS

These cost estimates do not assume the availability of a building for lease, that would be suitable for a fur grading centre. With the exception of land costs all costs are based on NWT standards.

I Territorial Fur Centre

A - Capital Costs

Land purchase if necessary	30,000
Design and construction of a 12,000 sq. ft. facility at $85/sq. ft..	1,020,000
Office and warehouse equipment, sorting tables, cleaning machines, vehicle etc.,	50,000
other costs (legal etc.)	10,000
Total capital costs	$1,110,000

B - Annual Operating Costs

Utilities & refrigeration	50,000
Operating and maintenance (cleaning, insurance etc.)	25,000
Packaging materials, shipping etc.,	20,000
Total O&M	$95,000

c - Staff Costs

Professional Fur Grader	75,000
Assistant Grader	35,000
Secretary	34,000
Casuals ($18/hr x 1900 hours.)	34,000
Benefits @ 15%	27,000
Housing Allowance	22,000
Relocation of Fur Grader	12,000
Total staff costs	$239,000

	D - Start up Costs	
	Technical assistance in sorting first year's harvest (Purchase of services from an existing auction house).	$23,000
II	Product Design Development and Training	
	A - Development of Product Prototypes	
	Contract for design & development 3 blankets & 5 parkas (NWT furrier or craft producer)	15,000
	Two trips to Montreal to meet - with manufacturer	5,000
	700 prime high quality muskrat pelts	2,800
	costs for commercial dressing	2,000
	other materials (e.g. micro fibres)	2,000
	Art and other inputs (needle work Delta Lace etc.)	2,400
	Total	29,200
	B - Community Consultations & Assessment	
	Tender community consultations, assessment , development of delivery approaches, program outline and costing	$100,000
	c - Support Program Multi-Year	
	Delivery of support for product design, development and training	$100,000
	D - International Fur Fairs/Trade Shows	
	Support to value added fur producers	$50,000
	Total of above costs:	$279,000

III Marketing Plan - Promotional Programs and Aids

A.- Marketing Plan Development - Promotional Programs & Aids

The estimates provided here should only be considered as a guide for establishing reasonable cost estimates from industry.

Phase 1, would include all aspects of market plan development including the preparation of strategies and materials to support trade advertising - institutional (international), co-op advertising, media, promotions (shipper promotion materials, sponsoring of co-op furriers at fairs for introduction of label, PR projects) and production of all materials.

Phase 2, would involve advertising costs in subsequent years.

Total 1993-94 costs (Marketing Plan Development) $450,000

B - Co-operative Programs with Industry

There are two elements to this part of the recommended approach. The first involves the potential for the NWT to exploit an existing opportunity with industry, that could serve to establish NWT wild fur as the premier product in international fur markets. The results, could be an immediate improvement in the demand and price for NWT wild fur. It involves a co-operative program with Canada's leading fur garment manufacturer and the world's leading fur retail chain. The current timing for exploiting this opportunity is excellent, given that 1993 is the United Nations' "International Year of Indigenous Peoples". The second element of the program involves the costs of providing support to similar industry arrangements in subsequent years.

The existing opportunity could involve the following costs for the NWT .

The costs of high quality NWT fur pelts of various species necessary to produce 26 garments (costs would be recuperated when garments are sold)	70,000
Manufacturer to cover the costs ($70,000) of producing garments including design, dressing of pelts etc..	
Advertising and promotion including ' photography in the territories and production of catalogue $150,000, 2 page add in "W" (Women's Wear Daily Fashion supplement - September fur special issue) $30,000. Special fashions events/promotions	120,000

in 12 key Revillon stores (e.g. Sak's New York, Dallas etc) 12 x $5,000 - $60,000. Total promotional costs would be $240,000. NWT's share would be $120,000. NWT may also want to take out a one page add in the New York Times to promote tourism at a cost of $20,000. The add would be placed to coincide the opening of the NWT fur collection in New York.

1993/94 costs ***$190,000**

* $70,000 to be recovered from sale of garments

MULTI YEAR COSTS

The estimated costs over the first five years are detailed in the cost schedule and notes provided in Appendix H.

FINANCING

Implementation of the recommended initiatives will require a major financial commitment on the part of the territorial government. The proposed approach has a single industry orientation. Each of the three parts must be seen as the building blocks for an NWT fur industry, one reinforcing the other.

The proposed initiatives are designed to maximize value added opportunities in the fur industry for individuals, communities and businesses. A number of Native and Regional Development Corporations as well as a Territorial Development Corporation exist to support viable individual or group initiatives. Similarly, the NWT Department of Economic Development and Tourism has a Business Development Fund and a program of support to Arts and Crafts Producers. The federal government can provide support for the proposed initiatives through the Department of Indian Affairs and Northern Development (DIAND), Canada Employment and Immigration Commission (CEIC), Industry Science & Technology Canada (Aboriginal Economic Development Programs) and through External Affair's Program for Market Export and Development (PEMD). Finally, joint territorial and federal government support is available through the existing Economic Development Agreement.

VIII IMPLICATIONS

The adoption of a relevant, comprehensive and coordinated government approach" for the implementation of the proposed initiatives should consider the following:

A. Obstacles and Barriers Specific To Individuals, Communities and Businesses

- Education;
- Business Skills and Experience;
- Investment Capital;
- Access to Markets;
- Community and Commercial Infrastructure; and,
- Access to Technology.

B. Implications for NWT Government Departments

Adoption of the initiatives proposed in this discussion paper by the government of the Northwest Territories will require that NWT Government Departments and Agencies review their programs and delivery mechanisms to better respond to opportunities and the development needs and circumstances of individuals and communities. In particular, implementation of the proposed initiatives will require a concerted and co-ordinated approach on the part of the Department of Renewable Resources, who has responsibility for managing the fur resource and the Department of Economic Development and Tourism, who has responsibility for guiding economic development in the territories.

c. Implications Specific to the NWT Department of Renewable Resources

Implementation of the proposed initiatives will also place significantly increased demands on the Department's human resources, over and above those required for the establishment of a territorial fur centre. At the very least, the project management activities associated with the implementation of the recommended approach will require the full time attention of a senior staff person with appropriate support. Similarly, there will be a requirement for ongoing management, support and evaluation functions to maintain program effectiveness and efficiencies. It can also be anticipated that professional assistance will be required to assist in the development of commercial arrangements with industry.

The initiatives proposed in this discussion paper will also place increased demands on the NWT fur resource. Consequently, there will be a need to strengthen the capacity of the NUT Department of Renewable Resources to undertake the management and monitoring activities necessary to ensure that annual harvests can be sustained.

D. Industry

It can be anticipated that the majority of the Canadian Fur Industry who are committed-to wild fur, will welcome the initiatives outlined in this discussion paper. Some however, may be resentful for NWT government involvement in essentially a commercial environment. The fact remains however, that NWT wild fur harvesters have not fared well in this environment and almost all of the world's major auction houses are owned by producer groups who receive subsidies from their governments . This is also true for Canadian fur farmers.

F. Assessing the Benefits

Implementation of the proposed initiatives will require ongoing and periodic evaluations to determine its effectiveness and cost benefits. The development of targets to measure real improvements in trapper incomes (determined by production and price) , resulting from the recommended initiatives is difficult given fluctuations in furbearer populations and weather conditions which affect production, and other unpredictable events that have an impact on international fur markets. It should not be unreasonable however, to target a 20% increase in the value received by NWT wild fur harvesters for their fur, in the first year following implementation of the proposed initiatives. These increases should be over and above price increases attributable to general improvements in wild fur markets, which are anticipated. This will be achieved by preventing further losses to NWT wild fur harvesters through the sales practises of auction houses, through a savings in auction house commissions and through the marketing and promotion of the NWT wild fur collection.

Other benefits attributable to these initiatives, such as the number of jobs created or the number of successful business ventures realized in the value added areas of the fur industry can be more easily measured.

Finally, the value to NWT residents of a strengthened fur industry goes beyond the economic picture presented by fur production figures.

NWT FUR STRATEGY - PART I

APPENDICES

Canadian Fur Manufacturers Interviewed

1.	Tom Nacos	Global Fur Canada (Montreal)
2.	Ron Pinchevski	Pines Furs (Montreal)
3.	Jerry Jacob	Amsel & Amsel (Montreal.)
4.	Ralph Caminski	Riviera-Furs (Montreal)
5.	A. Grosvenor	Grosvenor Furs (Montreal)
6.	Chris Anthopoulis	Yukon Furs (Toronto)
7.	Irving Camelot	Natural Furs (Montreal)
8.	Andy Toth	Toth Furs (Montreal)
9.	Kristine Bourque	Just Furs (Yellowknife)

Canadian Skin Dealers Interviewed

1.	Sam Trager	Gil lick Fur Trading Inc
2.	Jeff Melnick	Silberman Canada Inc
3.	Trujic Mandelcorn	Philip Mandelcorn Inc

Canadian Auction Houses Interviewed

1.	Herman Jansen	North American Fur Producers Toronto
2.	Doug Fizzel	"
3.	Tina Jagros	"
4.	L. Werner	"
5.	Ted Pappas	Western Canadian Fur Sales (Vancouver)
6.	Fred Glover	Northern Fur Producers
7.	Bob Watt	(North Bay)

Canadian Dressers/Dyers Interviewed

1.	Walter Mudry	Mudry Fur Inc (Montreal)
2.	Phil Potash	Splendor Fur Processing (Montreal)
3.	Bernard Guimont	Miranda & Lebreque (Quebec)
4.	Marty Cohn	D. Cohn Trans-Canada Ltd (Winnipeg)

Canadian Retailers Interviewed

1.	Rene Robitaille	Fourrures Jos Robitaille (Quebec)
2.	Raymond Bouchard	Fourrures McComber (Montreal)
3.	Jean-Guy Belzile	Fourrures Labelle (Montreal)
4.	Michael Bell	Bell Furs (Toronto)
6.	Moyer Hurtig	A & M Hurtig Furs (Winnipeg),
7.	Harry Reiss	Winnipeg
8.	Greg Leonard	Leonard Furs (Toronto)
9.	Dorothy Martin	Hill's (Vancouver)

Fur Buyers/Brokers Interviewed

1.	Bill Evans	American Ultra (New York)
2.	Oscar Carbonell	Oscarbon Furs Ltd. (Toronto)
3.	Thomas Lenhardt	Rosenburgh Lenhardt (Frankfurt)

Fur Trade Associations Interviewed

1.	Del Haylock	Fur Council of Canada (Montreal)
	Rosemarie Ojalvo	" " " " "
2.	David Sebben	Wildfur Council (Toronto)
3.	Sandy Blye	American Fur Industry(New York City)
4.	Bruno Tessorieri	Italian Fur---Trade Federation
5.	Linda Jagros-May	Furriers Guild of Canada

Advertising/Design Firms (fur)Interviewed

1.	Leonard Gorski	Leonard Gorski Inc. Marketing (Montreal)
2.	D'Arty Moses	Gilles Allard
3.	Nicolette Calderola	P.D.A. Studios (Milan, Italy)

Other Trade Associations Interviewed

1.	Carol Outran	Canadian Apparel Federation (Toronto)
2.	Patrick Hough	NWT Arts & Crafts Society (Yellowknife)

Federal Government Departments

1.	Brian Roberts	Indian & Northern Affairs Canada (Ottawa)
2.	Louis "Smokey" Bruyere	" "
3.	Brian Wilkin	External Affairs Canada
4.	Jerry Huebner	Aboriginal Economic Programs Industry, Science & Technology Canada, (Sudbury)
5.	Mona Fox	Industry Science & Technology (Ottawa)
6.	Neil Jotham	Canadian Wildlife Service (Ottawa)

Government of the Northwest Territories

1.	Ian Ross	Renewable Resources
2.	Doug Stewart	"
3.	Cindy Gilday	"
4.	Jim Bourque	"
5.	Robin Aitken	"
6.	Joe Neigo	"
7.	Andy McMullen	"
8.	Mark Hoppe	"

9.	Ross Hagen	Renewable Resources
10.	**Baffin** Region Staff	"
11.	John **Colford**	Economic Development & Tourism
12.	**Dorris Egers**	"
13.	Chuck **Ennis**	
14.	Craig Hall	

Native Organizations "

1.	Bill Erasmus	Dene Nation
2.	Bill Carpenter	Metis Nation

APPENDIX B

WORLD MINK PRODUCTION
1985 - 1990 (Thousands)

	1985	1986	1987	1988	1989	1990
Denmark	8,600	10,000	10,800	12,800	14,500	10,500
Finland	4,000	3,700	3,700	3,800	3,500	1,500
Sweden	1,700	1,900	2,000	2,200	2,200	1,500
Norway	500	500	500	490	500	300
Holland	1,400	1,650	1,800	1,700	2,000	1,700
U.K/Ireland	350	350	400	465	500	250
Fra/Ital/Spain	800	1,200	1,300	1,690	1,900	1,000
Rest of Europe	800	1,000	1,100	800	1,200	500
East Block	800	1,000	1,100	800	1,200	500
U.S.S.R.	3,750	4,000	4,000	4,000	4,500	4,500
China	2,700	3,000	3,200	5,500	3,000	1,200
U.S.A.	4,400	4,100	4,400	4,500	4,500	3,000
Canada	1,400	1,300	1,500	1,400	1,300	875
Japan	800	800	800	800	800	425
Total	32,000	34,500	36,000	40,945	41,600	28,050
EXCESS BREEDING STOCK PELTED FOR SALE					1,300	
					42,900	

SOURCE.: NORTH AMERICAN FUR PRODUCERS MARKETING INC.

APPEND IX C

DESCRIPTION OF GENERAL BUSINESS OPERATIONS OF A FUR AUCTION

GENERAL

Fur auction companies solicit raw fur pelts from mink ranchers, fox ranchers and wild fur trappers and dealers. Pelts are received on consignment by the auction company rather than purchased. These fur consignments are then sorted according to size, shade, colour and quality, and are offered for sale at large fur auctions.

-- Auctions are held four or five times each year, usually in February, April, June, October and December. The auction calendar reflects the incidence of fur harvesting in the Northern Hemisphere, which is most intensive between late November and January. Consequently, the primary auction selling months are January to April, with over 80% of the business done in this period.

Customer support is drawn from the fur manufacturing and merchandising communities, who may be represented by brokers or agents. Attendance at auctions is international, with representation from North America, Europe and the Far East. Over 80% of the Canadian product sold is exported.

SOURCES OF REVENUE AND PAYMENT OF CONSIGNORS

As previously indicated, the auction companies handle pelts on a consignment basis. Ownership and risk in the merchandise passes from the consignor or the buyer at the time of sale, although the auction company retains title and custody until payment and delivery is effected.

Operating income derives mainly from fees and commission levied on sale proceeds. The current rates are as follows:

Consignors	- Ranched Fur	6 1/2%
	Wild Fur	9%
Buyers	- Ranched Fur	5 1/2%
	- Wild Fur	7%

Average sales commissions are, therefore, approximately 12% to 16% of sales turnover. Minimum charges per pelt are applied to ranch mink and fox pelts.

Charges are also levied for other customer services, such as packing, storage and insurance for buyers, and insurance and drumming (i.e. cleaning) of goods for consignors. Guaranteed payment of the net proceeds of each auction sale to consignors is made on a designated date(the "prompt day") , fourteen days after each auction sale. The "prompt day" is also the date that the buyers payment legally falls "due".

FINANCIAL SERVICES

Financing both the buyer group and consignor group is a major service provided by the auction company. Loans are made to mink and fox -- ranchers on the basis of a chattel mortgage on the livestock, or through an advance on physical receipt of the pelts ("pelt advances") against the future sale proceeds. Pelt advances are also made to wild fur trappers and dealers on physical receipt of the merchandise. Interest is charged on these loans and advances. Loans are progressively recovered as the goods are sold throughout the season.

Many buyers do not request the delivery of their goods at prompt day, choosing to deposit 35% of the value of their purchases with the auction company and then have the auction house store their goods and finance the purchase until deliver is required.

After prompt day, buyers are charged for storage and insurance on uncleared merchandise and are also charged interest on their outstanding account balance.

A fur auction company will not release custody of the goods until it has received payment covering their full value, including outstanding interest and warehousing costs. The auction company will also not hold goods longer than 120 days from purchase.

Where the customer fails to pay the full amount due within 120 days or is otherwise in breach of the conditions of Sale, the auction company can exercise its right to **re-sell** the merchandise.

EXPENSE STRUCTURE

An auction company's business is based on the cultivation of personal contacts between staff and customers (both consignors and buyers). Furthermore, fur grading remains a predominantly manual process in which individual skill attracts a premium. Consequently, most of the operating expense relates to payroll costs, and solicitation, promotion and communications costs required to service customers.

The remaining expenses are attributable to direct costs relating to the volume of business (freight, warehouse, supplies, etc.), while the balance comprises data processing and general administration costs.

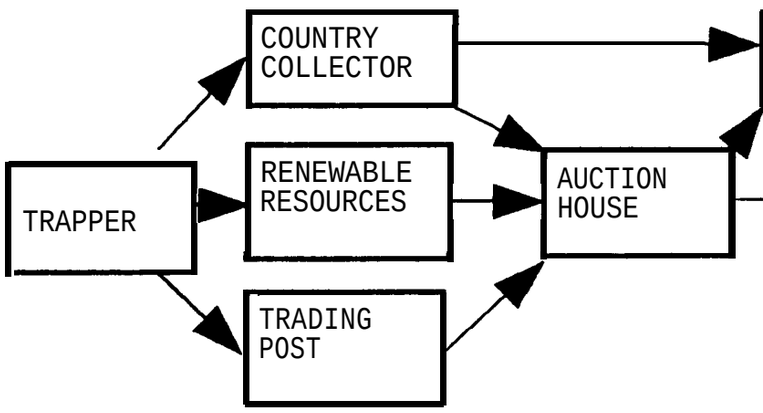
ASSET STRUCTURE

The principal assets are consignor loans/advances and buyer receivables. Fixed asset investment is minimal in relation to the volume of sales turnover if premises are leased rather than owned.

WILD FUR MARKETING PROCE

PRODUCT FLOW →

PLAERS



Trapper: Harvesting & manging resource, skinning & intial pelt preparation, transport of raw skins to point of sale, sale of raw skins.

ROLES

Country Collector: Cash payment for raw skins.

Renewable Resources NWT: Cash advances to trappers, trap replacement, shipping service to auction house, price maximization, market information, management of resource, trapper education & training.

Trading Post: Cash payment or credit for raw skins, trapper supplies and equipment, trading goods, shipping service.

APPENDIX E

HIGHLIGHTS OF NWT TRAPPER PROFILE

THE DOMINANT TREND

For the NWT as whole the 6 year period, 1987-92 was dominated by a high point in 1988, a subsequent decline and a slight recovery in 1992. This pattern is reflected both in the numbers of active trappers and their income.

DIFFERENCES SOUTH/NORTH OF THE TREE-LINE

But this pattern is not echoed when communities north and south of the tree-line are compared. To the north, trends in the numbers of trappers and their revenues certainly did follow the pattern, but the average productivity of trappers rose to a peak in 1990 and has in fact stayed above 1988 levels since then. As a result, the proportion of total NWT income flowing into northern communities actually rose, from 10% to 25%, during this period. This served to mask what was actually a steeper decline amongst southern communities than is suggested by the figures for total NWT production.

NUMBERS OF TRAPPERS

Between 1987 and 1992, a total of 5,287 trappers reported income in one year or more. However during any one of those years, the number of active trappers varied between 1,558 and 2,942. During the period of decline, the percentage decrease in the number of trappers was smaller than the drop in revenues, indicating a willingness to persist with trapping despite market changes.

TRAPPERS' AGES AND PRODUCTIVITY

The records shows that trappers maintain a consistent level of average productivity between the ages of 20 and 60, after which this falls off but 'remains significant. Trappers in their 50's tend to be individually the most productive but trappers in their 20's are the highest in number, making this age category the highest in terms of total volume. Comparisons across the tree-line show a more pronounced tendency for residents of southern communities to persist with trapping into old age.

RESPONSE BY AGE GROUP TO MARKET CHANGES

The NWT response was reflected consistently throughout all age groups. The proportion of trappers in their 20's did not fall more steeply than any other group; in fact their 1992 recovery was slightly stronger than that for other groups.

COMPARISON FOR THE MOST AND LEAST PRODUCTIVE TRAPPERS

Of the 5,287 reporting trappers, the 500 most productive accounted for 60% of total revenues - with the 100 most productive earning 25% of the total. At the lower end of the scale, 40% (2,115) of reporting trappers earned less than 5% of total production.

HIGHEST AND LOWEST INCOMES

The leading group of 100 trappers earned an average of about $10,000 per annum. At the other end of the scale, 82% had an average annual income of less than $1,000 and 40% earned less than $100.

MOST PRODUCTIVE TRAPPERS IN RELATION TO AGE

Of the 100 most productive trappers, 25 fall into the over 50's age group and 21 are in their 20's. Representation actually declines through the 30's and 40's and picks up in the 50's.

NUMBER OF TRAPPERS BY COMMUNITY

By and large, the statistics reveal a continuum between small, remote and highly productive communities and the larger, less-productive administrative centres. However, south of the tree-line, there are significant exceptions to this pattern, such as Rae, a community of 1443, which contains the highest number of reporting trappers, 383, in spite of its size. The variation is not so wide north of the tree-line, where the greatest number of trappers, 151, reside in Coppermine.

PROPORTION OF COMMUNITY POPULATIONS AS TRAPPERS

South of the tree-line percentages range between 1% for Yellowknife and 69% for Colville Lake. The 3 leading communities have between 59% and 69% reporting as trappers and their combined population is 123. North of the tree-line, the gap is narrower, between 3% of Iqaluit residents reporting as trappers and 38% of Bathurst Inlet.

PRODUCTION BY **COMMUNITY**

At this level, the larger communities which combine an active trapping sector with other occupational groups have an obvious advantage. South of the tree-line, the average population of the top 10 producing communities is. **833.** Their production varies between $304,232 (Rae) and $137,044 (Ft. Resolution). Exceptional here, is the 6th, Trout Lake, with a population of 61. At this community level, production north of the tree-line tends to be lower. The top 10 ranges between $64,113 **(Coppermine)** and $28,564 (Repulse Bay) .

TRAPPER PRODUCTIVITY

When productivity is tabulated on the basis of individual productivity or productivity per capita, the small communities again possess an advantage. South of the tree-line, the leading 4 communities have less than 87 residents. The smallest community of all, Fort reliance, 10 has an average production of $11,625 far ahead of the second ranking (Trout Lake $2,855). This tendency is reinforced when production is ranked on a per capita basis with the first 4 communities having populations below 61. North of the tree-line average productivity ($888) and per capita production ($333) is highest in Bathurst Inlet.

APPENDIX F, contains information of a confidential nature and has been submitted separately.

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Five Year Costs - NWT Fur Strategy - APPENDIX H

	1993-94	1994-95	1995-96	1996-97	1997-98	Total
PART I						
CAPITAL COSTS	1,110,000,00					1,110,000.00
0631 COSTS						
Utilities	50,000.00	52,000.00	51,080,00	56,243,00	58,492,00	270,815.00
Maintenance &	25,000.00	26,000,00	27,040.00	28,121.00	29,245.00	135, 406.00
Insurance						
Packaging/Shipping	20,000.00	22,000.00	24,200.00	26,620,00	29,282.00	122,102.00
STAFF COSTS						
Fur Grader	75,000,00	18,000.00	81,120.00	83,553.00	86,059.00	403,732.00
Assisant Graders	35,000,00	36, 400.00	37,856.00	38,991,00	80,318,00	228,565,00
Secretary	34,000,00	35,360,00	37,128.00	38,241.00	39,388.00	184,117,00
Casuals	34,000.00	35,568,00	36,990,00	38,099.00	39,241,00	184,098.00
Benefits @ 15%	27,000.00	27,799,00	28,964,00	29,832.00	36,750.00	150,045.00
Housing	22,000,00	22,464.00	23,362.00	24,062,00	31,228.00	122,716.00
Relocat ion	12,000,00					12,000.00
OTHER COSTS (Start up)	23,000.00					23,200.00
SUB TOTAL	1,467,000.00	335,591,00	350,740,00	363,762.00	430,003.00	2,947,096.00
PART I I						
PRODUCT DEVELOPMENT	29,200,00	25,000,00	25,000,00	25,000.00	25,000.00	129,200.00
COMMUNITY CONSULTATIONS	100,000.00				50,000,00	150,000.00
SUPPORT PROGRAMS	100,000,00	100,000,00	100,000.00	100,000,00	100,000,00	500,000,00
FUR FAIRS/TRADE SHOWS	50,000,00	50,000,00	50,000.00	50,000.00	50,000.00	250,000,00
SUB TOTAL	279,200,00	175,000.00	175,000.00	175,000,00	225,000,00	1,029,200.00
PAR? III						
MARKETING PROGRAM						
MARKETING PLAN DEVELOPMENT	450,000,00					450,000,00
CO-OP/PROGRAMS	190,000,00	150,000.00	150,000.00	150,000,00	150,000.00	790,000.00
ADVERTISING		150,000,00	150,000,00	150,000.00	150,000.00	600,000,00
SUB TOTAL	640,000.00	300,000,00	300,000,00	300,000,00	300,000.00	1,840,000,00
TOTAL	2,386,200.00	810,591.00	825,7 40.00	835,762,00	955,003.00	5,816,296,00

PART I NWT FUR CENTRE

A. Capital Costs

Capital costs are based on a "construction cost quote" of $85/sq. ft., provided from within the territories. Capital costs could be reduced significantly if a suitable building in an appropriate location, could be rented and retrofitted to accommodate cold storage.

Capital costs would also be reduced, if a new facility was constructed on an Indian Reserve (e.g. Hay River), using federal funds and leased to the Department of Renewable Resources.

B. O&M COSTS

The five year cost estimates for utilities, maintenance and insurance for the NWT fur centre allow for an annual increase of 4%.

The five year cost estimates for packaging and shipping provide for an annual increase of 10%, to allow for both, increased costs and increased expenses in handling increasingly larger volumes of fur.

C. STAFF COSTS

Staff costs including benefits and housing allowance are shown as increasing at a rate of 4% over the period 1993-94 to 1995-96 and at a rate of 3% over the period 1996-97 to 1997-98. Provision has also been made to hire an additional Assistant Fur Grader in 1997-98, based on the assumption that increased volumes of fur will warrant this additional position.

D. OTHER COSTS

An amount of $23,200 has been budgeted in the first year to cover the cost of obtaining professional assistance from an existing auction house in the sorting and grading of wild fur received during the Fur Centre's first operating season.

PART II PRODUCT DEVELOPMENT

A. The 29,200 budgeted for product development activities in 1993-94, is based on cost estimates for the production within the NWT of prototypes for fur blankets and fur lined parkas. $25,000 is budgeted in each of the subsequent years to support the production of prototypes- for other products in the NWT.

B. COMMUNITY CONSULTATIONS

$100,000 has been budgeted in the first year of the strategy to cover the costs of information dissemination and consultations with communities regarding implementation of the NWT fur strategy. An additional $50,000 has been budgeted for 1997-98, to cover the costs of evaluating the impacts and effects of the NWT fur strategy.

c. Support Program

$100,000 has been budgeted in each of the five years to support training initiatives in the areas of product design, manufacturing, processing etc..

D. International Fur Fairs/Trade Shows

$50,000 has been budgeted in each of the five years to provide assistance for NWT producers of fur garments, accessories and other products to attend International Fur Fairs and Trade Shows.

PART III DEVELOPMENT OF MARKETING PLAN

A. Marketing Plan

$450,000 has been budgeted in the first year of the strategy to cover the costs of developing all aspects of an international and domestic-marketing plan for NWT wild fur. This estimate is based on kn-own costs of undertaking similar marketing initiatives in the fur industry.

$150,000 has been budgeted in each of the subsequent years to support advertising costs. . . .

B: Co-operative Programs with Industry

$190,000 has been budgeted in the first year of the strategy to cover the costs of a co-operative program which currently exists.

$150,000 has been budgeted in each of the subsequent years to support this activity.

TOWARDS A STRATEGY FOR THE DEVELOPMENT OF A COMPREHENSIVE AND SUSTAINABLE NWT FUR INDUSTRY

A Discussion Paper
Prepared For:

Department of Renewable Resources
Government of the Northwest Territories

By

Richard R Maracle & Associates

Part II

1993

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1.0 INTRODUCTION

1.1 SOURCES

The principal source of data for this profile is the statistical summary containing data on trappers' home communities, their age and their productivity over a 6 year period, 1987-1992 (NWT Department of Renewable Resources). This was supplemented with a review of several studies that have been made on the costs of trapping. These studies treat trapping as a component of a land-based livelihood and tend to be specific to certain communities and periods of time. There is no comprehensive analysis of the domestic economy of trapping in the Northwest Territories.

A more typical and meaningful "Trappers' Profile" would be based on a careful examination and comparison of the costs and earnings of NWT trappers, data which was not available. Such a profile however, would be difficult if not cost prohibitive to develop, due to the varying circumstances among trappers and communities. For example, it is possible due to geographic and other circumstances, for trappers from one community to produce a greater value of fur than trappers from another community, at less cost and within a shorter period of time. To be meaningful therefore, the development of a typical "Trapper Profile" would have to be done on a community by community basis.

In the statistical summaries reviewed, "productivity" is expressed in terms of income rather than numbers of animals taken. This leads to difficulties in interpretation. For example, when there is an evident decline in productivity, as expressed in income, 'this may reflect either lower prices or fewer animals taken. Presumably both factors play a role. The inability to separate these two factors however, limits the utility of the data.

1.2 ORGANIZATION

The statistical summary is contained in a Q&A database file. Since the summary was originally designed to fit the parameters of the Q&A database, there are limits to the degree to which data can be extracted and cross-tabulated and it does not lend itself to immediate graphical presentation. As a result, the tables and diagrams in this profile had to be compiled manually. A basic set of tables is presented in Appendix A. The summary tables and diagrams in the main body of the report are drawn mainly from this set.

1.3 ACTIVE vs REPORTING TRAPPERS

The 6 year records list all the trappers who reported income in one year or more. This total, of 5,287, is referred to as "reporting trappers" when discussing the entire trapping community over the 6 year period. In any one year however, less than 50% of this total reported income. The group of trappers reporting income is referred to as "active trappers" when making comparisons over time.

1.4 COMPARISONS NORTH-SOUTH OF TEE TREE-LINE

The trappers records list 66 'trapping" communities. Of these, 6 report only a single trapper or no trappers. Of the remaining 60, 32 are located north of the tree-line and 28 to the south.

All records were compared to determine if there were any significant differences in recent production trends (north vs south) and the response of trappers to changes in market conditions.

2.0 ACTIVE TRAPPERS' PRODUCTION 1987-1992

2.1 NORTHWEST TERRITORIES

During this 6 year period, there was a total of 5,287 reporting trappers but less than half this total was active in any one year.

TABLE 1
ACTIVE TRAPPERS WITH THEIR TOTAL AND AVERAGE PRODUCTIVE 1987-92

YEAR	NUMBER OF ACTIVE TRAPPERS	TOTAL PRODUCTION $	AVERAGE PRODUCTION $
1987	2,914	5,640,983	1,936
1988	2,942	6,086,751	2,069
1989	2,341	4,436,341	1,895
1990	1,971,	2,831,118	1,437
1991	1,558	1,885,118	1,210
1992	1,857	2,257,442	1,216

It should be noted that the figures presented in Table 1, for average trapper production are both higher and more realistic than figures that would be derived by calculating the average

on the basis of reporting rather than active trappers. If all 5,287 trappers are included, their average production for the period 1987 to 1992 falls to $732 (see Table 5).

The trend reflected in Table 1 is the dominant pattern, discernible through much of the following data sets. A high figurein 1988, for income and trapping intensity, followed by a steep decline and a slight recovery in 1992.

2.2 SOUTH OF THE TREE-LINE

South of the tree-line (Table 2), the number of active trappers peaked in 1987 (2,027) 'and then declined to a low of 1,043 in 1991, with a slight increase in 1992 with 1,246 active trappers. Total production and total average production of trappers south of the tree-line peaked in 1988 and declined steadily until 1991 with a marginal recovery in 1992.

TABLE 2
ACTIVE TRAPPERS SOUTH OF THE TREE LINE, WITH THEIR TOTAL AND AVERAGE PRODUCTION, 1987-92

YEAR	NUMBER OF ACTIVE TRAPPERS	TOTAL PRODUCTION $	AVERAGE PRODUCTION $
1987	2,027	5,049,922	2,491
1988	1,922	5,341,406	2,779
1989	1,650	3,804,152	2,306
1990	1,343	2,137,567	1,592
1991	1,043	1,389,749	1,332
1992	1,246	1,684,849	1,352

2.3 NORTH OF THE TREE-LINE

Trapping north of the tree-line only partially followed the pattern for the Northwest Territories as a whole. Table 3 shows that, while total production and numbers of trappers peaked in 1988 and then declined, the average production per trapper continued to rise until 1990, when it peaked at $1,105 and has in fact remained over the 1988 figure of $731 ever since. This may be due to increased demand for Hair Seals.

Statistics Canada, Fur Production Reports, 1990-91 (Catalogue 23-207) reveal both, increases in exports and prices for Hair Seal since 1988-89.

TABLE 3
ACTIVE TRAPPERS NORTH OF THE TREE-LINE, WITH THEIR TOTAL AND AVERAGE PRODUCTION, 1987-1992

YEAR	NUMBER OF ACTIVE TRAPPERS	TOTAL PRODUCTION $	AVERAGE PRODUCTION $
1987	887	591,061	666
1988	1,020	745,345	731
1989	691	632,189	915
1990	628	694,217	1,105
1991	515	495,369	962
99	611	572,593	937

2.4 NORTH AND SOUTH COMPARISONS

The data in Tables 1, 2 and 3 are illustrated in Figure 1.

There is a correspondence between the curves but in fact the decline in total production was proportionately steeper than the decline in numbers of active trappers and average production per trapper. The decline in total production was 69%. By comparison, the percentage drop between the highest and lowest numbers of trappers was 46 % and the corresponding drop in average production per trapper was 42%. Without data on the actual volume of production, we cannot assume that this fall primarily reflects a decrease in volume or in prices.

It is interesting to note that, over the period 1987-1992, changes in production north and south of the tree-line were disproportionate. The decrease in production south of the tree-line was in fact more severe than suggested by the NWT figures as a whole, but the steepness of the decline was to a degree masked by a smaller decline north of the tree-line. As the decline preceded, production in the north came to assume a larger proportion of total production, rising from 10.5% in 1987 to 25.4% by 1992.

TABLE 4
COMPARATIVE TRENDS IN PRODUCTION BETWEEN COMMUNITIES NORTH AND SOUTH OF THE TREE-LINE, 1987-92

YEAR	TOTAL PRODUCTION	PERCENTAGE NORTH OF THE TREE-LINE	PERCENTAGE SOUTH OF THE TREE-LINE
1987	5,640,983	10. 5%	89.5%
1988	6,086,983	12. 2%	87.5%
1989	4,436,341	14. 3%	85. 7%
1990	2,831,784	24.5%	75. 5%
1991	1,885,118	26.3%	73. 7%
1992	2,257,442	25. 4%	74.6%

3. AGE PROFILE OF THE TRAPPING COMMUNITY 1987-1992

3.1 NORTHWEST TERRITORIES

To obtain as accurate a picture as possible of variations by age the total population was divided into 19 5-year age classes. Table 5 shows these against the total average production and production per trapper for each class:

Table 5, is represented in Figure 2. These data suggest that trappers maintain a consistent level of production between the ages of 20-64, with a smaller but significant number continuing to trap into their 80's and higher. The records show that the oldest trapper was 104; the youngest 11. The histogram for average production shows the most productive age bracket to be 95-99. This is an anomaly however, reflecting the productivity of a single trapper, who averaged an income of $4,590 between 1987 and 1992.

Table 5 is based on a 6 year average total production of $3,871,794 and accounts for the full list of 5,287 trappers, even though less than half this number actively trapped in any one year. This has the effect of depressing the figures for average production per trapper. Column 4 however, remains a useful index of productivity and enables a comparison to be made between age classes.

TABLE 5
AVERAGE PRODUCTION OVER A SIX YEAR PERIOD, 1987-92,
BY FIVE-YEAR AGE CLASS

AGE CLASS	NUMBER IN AGE CLASS	TOTAL AVERAGE PRODUCTION $	AVERAGE PROD. PER TRAPPER $
10-14	3	1,035	345
15-19	54	6,131	114
20-24	525	293,718	559
25-29	754	465,529	617
30-34	552	442,978	802
35-39	497	377,200	759
40-44	528	414,150	784
45-49	477	351,596	737
50-54	403	384,557	954
55-59	396	381,812	964
60-64	337	304,721	904
65-69	237	173,362	731
70-74	142	67,354	474
75-79	88	34,882	396
80-84	36	15,754	438
85-89	26	6,926	266
90-94	9	1,658	184
95-100	1	4,590	4,590
100-105	1	65	1,181
NO AGE	123	145,281	732
TOTAL	5,287	3,871,794	1,181

NOTES: The ages listed in Table 5 are for 1992. Other tables in this report which deal with earlier years show more trappers in the younger age groups. For those tables, the trappers' ages were back-dated to give a more accurate picture for those years.

3.2 CHANGES IN AGE PROFILE 1987-1992

Tables 7, 8, & 9 show the changes in age profile and associated production levels over this 6 year period. These data are illustrated in Figures 3,4 & 5 respectively. Table 6 is extracted from Table 7 to show the changes within age groups in response to the decline in trapping generally.

TABLE 6
PERCENTAGE OF TRAPPERS IN MAJOR AGE GROUPS
DURING THE PERIOD 1987 TO 1992

YEAR	% in 20's	% in 30's	% in 40's	% in 50's	% in 60's	TOTAL
1987	25	20	18	17	9	2,914
1988	25	20	18	17	10	2,942
1989	25	20	18	17	9	2,341
1990	25	19	19	17	10	1,971
1991	23	20	20	18	12	1,558
1992	25	21	18	16	12	1; 857

TABLE 7
NUMBER OF ACTIVE TRAPPERS IN THE NORTHWEST TERRITORIES
BY AGE GROUP, 1987-92

Age	1987	1988	1989	1990	1991	1992
no-age	67	53	57	35	30	28
10-14	2			1		
15-19	156	152	151	67	33	43
20-24	384	403	307	259	171	211
25-29	354	343	281	241	185	250
30-34	265	322	232	169	163	224
35-39	304	268	215	195	156	165
40-44	275	269	228	202	161	168
45-49	252	258	219	169	153	175
50-54	264	263	197	175	147	147
55-59	234	238	195	164	132	159
60-64	157	195	147	141	115	137
65-69	102	96	60	68	48	77
70-74	52	60	54	39	36	40
75-79	24	30	20	15	12	21
80-84	20	15	9	9	5	9
85-89	5	4	4	2	1	2
90-94	1	2	2	2	1	1
95-99	1					
Total	2,914	2,942	2,341	1,971	1,558	1,857

3.3 PRODUCTIVITY BY AGE CLASS 1987-1992

Table 8 illustrated in Figure 4 shows average production by trappers over the period 1987-1992. This again reveals a consistency between the age classes that persists despite the changes in overall productivity.

There are slight departures from this pattern by the youngest (20-24) and oldest (60-64) groups. Set against this however, is a strong consistent performance by the group of trappers in their 50's.

TABLE 8
AVERAGE TRAPPER PRODUCTION BY AGE GROUP, NORTHWEST TERRITORIES, 1987-92

Age	1987	1988	1989	1990	1991	1992
no age	3,015	3,736	2,614	2,403	**3,604**	4,506
10-14	510			15		
15-19	1,656	1,632	1,419	1,255	**1,079**	1,072
20-24	1,675	1,834	2,077	1,338	**1,079**	1,072
25-29	1,905	1,786	1,772	1,575	**1,221**	1,213
30-34	1,950	**1,943**	1,752	1,867	**1,172**	**1,120**
35-39	1,687	2,424	2,025	**1,454**	**1,413**	1,226
40-44	1,950	2,161	1,897	1,518	**1,309**	1,679
45-49	2,065	2,119	1,868	1,389	**1,122**	1,038
50-54	1,960	2,463	1,688	1,949	**1,374**	**1,544**
55-59	2,114	2,387	1,843	1,398	**1,324**	1,377
60-64	2,393	1,513	1,140	920	**918**	952
65-69	**1,441**	1,517	1,142	685	**662**	574
70-74	908	1,540	1,425	641	**597**	611
75-79	1,419	733	931	843	**469**	335
80-84	949	825	396	823	**323**	888
85-89	882	460	1,333	1,146	**650**	33
90-94	9,464	3,033	2,381	1,317	**3,837**	1,767
95-99	392					
TOTAL	1,396	2,069	1,895	1,437	**1,210**	1.216

Table 9 illustrated in figure 5 isolates total production of age groups. This reveals an interesting comparison between the 20's and 50's age groups. Figure 4 indicates that trappers in their 50's tend to be individually more productive than trappers in their 20's. Their numbers tend to be smaller however: 17% as opposed to 25% for those in their 20's. But

when total production is taken into account, Figure 5 indicates that the 20's age class consistently produces the highest volume. Production among the 50's age group however, remains high compared with the 30's and 40's, especially over the last 3 years.

3.4 RESPONSES BY AGE CLASSES: NORTH AND SOUTH OF TREE-LINE

Table 9 shows the changes in active trappers by age class over the period 1987-1993. This data indicates that the response to changing market conditions was not specific to any age group:

TABLE 9
TOTAL PRODUCTION BY AGE GROUP
NORTHWEST TERRITORIES, 1987-92

Age	1987	1988	1989	1990	1991	1992
no age	202023	198025	149054	84113	108136	126185
10-14	1021			15		
15-19	258401	248017	165553	84097	25254	23015
20-24	643318	738608	637615	346623	184484	226243
25-29	674265	612730	497877	379677	225961	303303
30-34	516750	625554	406443	315567	191066	250959
35-39	512723	649630	435413	283562	220360	202337
40-44	536203	581409	432439	306711	210727	282085
45-49	520265	546639	409077	234718	171710	181583
50-54	517557	647786	332636	341069	201978	226990
55-59	494581	568003	359429	229296	174802	218954
60-64	375749	421166	218982	129708	105617	130441
65-69	146973	145226	68418	46579	31768	44195
70-74	47226	92418	76967	25009	21509	24456
75-79	35986	22002	18622	12641	5630	7033
80-84	18975	12372	3568	7408	1617	7989
85-89	4408	1842	5333	2292	650	65
90-94	9468	665	4763	2634	3837	1767
95-1oo	392					
TOTAL	5640983	6086751	4436341	2831784	1885118	2257422

TABLE 10
PERCENTAGE OF TRAPPERS IN MAJOR AGE GROUPS
NORTH OF TEE TREE-LINE, 1987-1992

YEAR	% in 20's	% in 30's	% in 40's	% in 50's	% in 60's	TOTAL
1987	24	21	20	19	8	887
1988	26	16	20	19	9	1020
1989	24	18	23	19	8	691
1990	22	21	23	18	8	628
1991	22	21	23	18	9	515
1992	25	21	21'	19	9	937

TABLE 11
PERCENTAGE OF TRAPPERS IN MAJOR AGE GROUPS
SOUTH OF THE TREE-LINE, 1987-1992

YEAR	% in 20's	% in 30's	% in 40's	% in 50's	% in 60's	Total
1987	26	19	17	16	14	2027
1988	24	22	17	16	10	1922
1989	26	19	18	16	9	1650
1990	27	20	18	17	11	1343
1991	23	20	18	17	11	1043
1992	25	21	17	15	13	1246

Both north and south of the tree-line, the response by different age groups reflects that of the Northwest Territories as a whole. The only consistent difference appears to be a tendency for trappers south of the tree-line to continue their working lives as trappers further into old age than do trappers north of the tree-line.

The supporting tables for Tables 10 & 11 are provided in Annex A.

4. TEE LEAST AND MOST PRODUCTIVE TRAPPERS COMPARED

Of the 500 most productive of the reporting trappers (Table 12), less than 10% of the total, accounted for 60% of total production. The 100 most productive trappers accounted for 25% of the total.

TABLE 12
TOTAL AVERAGE PRODUCTION FOR THE 500 MOST PRODUCTIVE TRAPPERS

GROUP	TOTAL AVE. PROD. 87/92	% of TOTAL PRODUCTION	AVE. PROD. PER. TRAPPER
0-50	629,951	16.3	12,599
51-100	328,180	8.5	6,563
101-150	262,886	6.8	5,258
151-200	221,948	5.7	4,439
200-250	189,833	4.9	3,797
251-300	163,979	4.2	3,276
300-350	147,057	3.8	2,941,
351-400	132,690	3.4	2,653
401-450	121,319	3.1	2,426
451-500	108,717	2.8	2,174
TOTAL	2,306,560	59.6	4, 613

Of the 100 most productive trappers (Table 13) 25 were in the 50-59 age group with 21 in the 20-29 age group. The age distribution of the most productive trappers reflects the greatest percentage in the 50-59 group.

TABLE 13
AGE DISTRIBUTION OF THE 100 MOST PRODUCTIVE TRAPPERS

AGE	NUMBER
20-29	21
30-39	18
40-49	17
50-59	25
60-69	10
70-79	1
no age	8

Of the total 5,287 reporting trappers, 82% (4,327) earned an average of less than $1,000 between 1987 and 1992 and 40% of reporting trappers earned an average of less than $100 (Table 14).

TABLE 14
NUMBERS OF TRAPPERS WITH AVERAGE PRODUCTION BELOW $1,000

PRODUCTION	NUMBER
900-1000	94
800-900	96
700-800	105
600-700	1.24
500-600	177
400-500	224
300-400	'308
200-300	451
100-200	649
0-1oo	2099
Total	4327

5. DEMOGRAPHIC PROFILE OF TEE NWT TRAPPING COMMUNITY

5.1 COMMUNITIES OF TEE MOST PRODUCTIVE TRAPPERS

The 100 most productive trappers listed in Table 13 were also analyzed in terms of their community of origin. Table 15 shows the results. The leading community, Trout Lake, has 16 trappers among the leading 100 trappers, out of a population of 61; Colville Lake has 11 leading trappers from a population of 52. Only 2 of the most productive trappers live north of the tree-line, one each, in Holman Island and Coppermine.

TABLE 15
HOME COMMUNITIES OF THE 100 MOST PRODUCTIVE TRAPPERS

COMMUNITY	NO. OF TRAPPERS
Trout Lake	16
Ft. Simpson	11
Ft. Liard	9
Colville Lake	9
Ft. Good Hope	8
Ft. McPherson	5
Ft. Franklin	4
Rae	4
Wrigley	3
Inuvik	3
Fort Smith	3
Ft. Norman	3
Nahani Butte	2
Ft. Resolution	2
Ft. Providence	2
Aklavik	2
Arctic Red River	2
Lac La Marte	1
Rae Lakes	1
Snare Lakes	1
Holman Island	1
Coppermine	1
Hay River	1

5.2 RELATIONSHIP BETWEEN TRAPPING INTENSITY AND COMMUNITY SIZE, SOUTH OF THE TREE-LINE (see Annex A)

If the number of reporting trappers can be regarded as an indicator of trapping intensity then this appears to run in inverse proportion to community population. Tables Al and A2 illustrate this.

The 4 largest communities (Yellowknife, Hay River, Inuvik, Fort Smith) have a combined population of 21,293 but only 3% of community members (713) have reported as trappers. By comparison, the 4 smallest communities (Trout Lake, Colville Lake, Kakisa Lake and Fort Reliance) with a combined population of 170, have 58% (98) reporting as trappers.

Table A2, which ranks the communities according to the percentage of the population reporting as trappers, follows this pattern. Three communities (Colville Lake 69%, Fort Reliance 60%, Trout Lake 59%) all have more than half of their populations registered as trappers but their combined populations are only 123. Ten more communities have between 30% and 50% of their population registered as trappers. The 3 largest of these are Fort Providence (577), Fort Resolution (475), and Fort Liard (398).

5.2.1 DISTRIBUTION OF TRAPPERS BY COMMUNITY

As Table A3 shows 50% of reporting trappers live in 7 of the 28 communities located south of the tree-line. These communities have a combined population of 7,512, 25% of the total population.

With 383, Rae has the highest number of registered trappers, followed by 6 communities between 191-220; Fort Providence, Fort Simpson, Fort Smith, Fort Resolution, Fort McPherson and Aklavik.

5.2.2 TRAPPER PRODUCTIVITY BY COWUNITY

Tables A4, AS & A6 look at trapper productivity from three Perspectives: production per community, production per trapper and production per capita.

Table A4 shows that 4 communities produce 30% of the total production south of the tree-line: Rae, Fort Simpson, Fort Liard, Fort Good Hope. All of the top 10 producing communities have a population of more than 398, with the exception of the 6th, Trout Lake (population 60).

Table A5 ranks communities by trapper productivity and again the smaller communities are in the lead. The leading group of four have a combined population of 210 and an average production of more than $2,627.

Table A6 ranks communities by the per capita production of trappers. Not surprisingly, this ranking resembles that in Table AS, for the percentage of community population as trappers. This tends to elevate the smaller communities especially the first 4 communities all populations below 61: Fort Reliance 10, Trout Lake 61, Colville Lake 52, Kakisa Lake 47.

5.3 RELATIONSHIP BETWEEN TRAPPING INTENSITY AND COMMUNITY SIZE, NORTH OF TEE TREE-LINE

Tables A7 And A8 indicate a similar relationship between community size and the percentage of the population registered as trappers to that occurring south of the tree-line. North of the tree-line however, this correlation is less pronounced, perhaps because there is less variation in community size north of the tree-line.

Of the total population of 19,633, north of the tree-line, 10% (2,065) have reported as trappers. Half the 30 communities report higher percentages as trappers, with the leading community Bathurst Inlet, having 38% reporting as trappers.

The 10 communities reporting the highest numbers of trappers (Table A9) account for 56% (1,148) of the total number of trappers north of the tree-line. These communities are dispersed throughout the Arctic with no particular pattern. They include 4 of the larger communities, including Iqaluit, which ranks 7th in terms of the number of reporting trappers.

5.3.1 COMMUNITIES IN ORDER OF PRODUCTIVITY

The leading 10 communities accounted for 66% of total average production-between 1987 and 1992, while the top 4 of these accounted for 36%.

5.3.2 COMMUNITIES IN ORDER OF TRAPPER PRODUCTIVITY

Table All shows the community with the highest trapper productivity to be Bathurst Inlet, with an average of $888. Comparable figures for the other 10 leading communities range from $357 to $637. There are now sharp changes in levels of trapper productivity; instead of a gradual decline amongst the reporting communities.

5.3.3 COMMUNITIES INCORDER OF PER CAPITA PRODUCTION

This ranking closely follows the ranking based upon percentage of community population working as trappers. The leading 10 communities include a strong representation of the smaller communities and exclude all the six communities with populations over 1,000.

FIGURE 1

Total Production, Average Production & Number of Active Trappers For The Northwest Territories, North & South of Tree Line

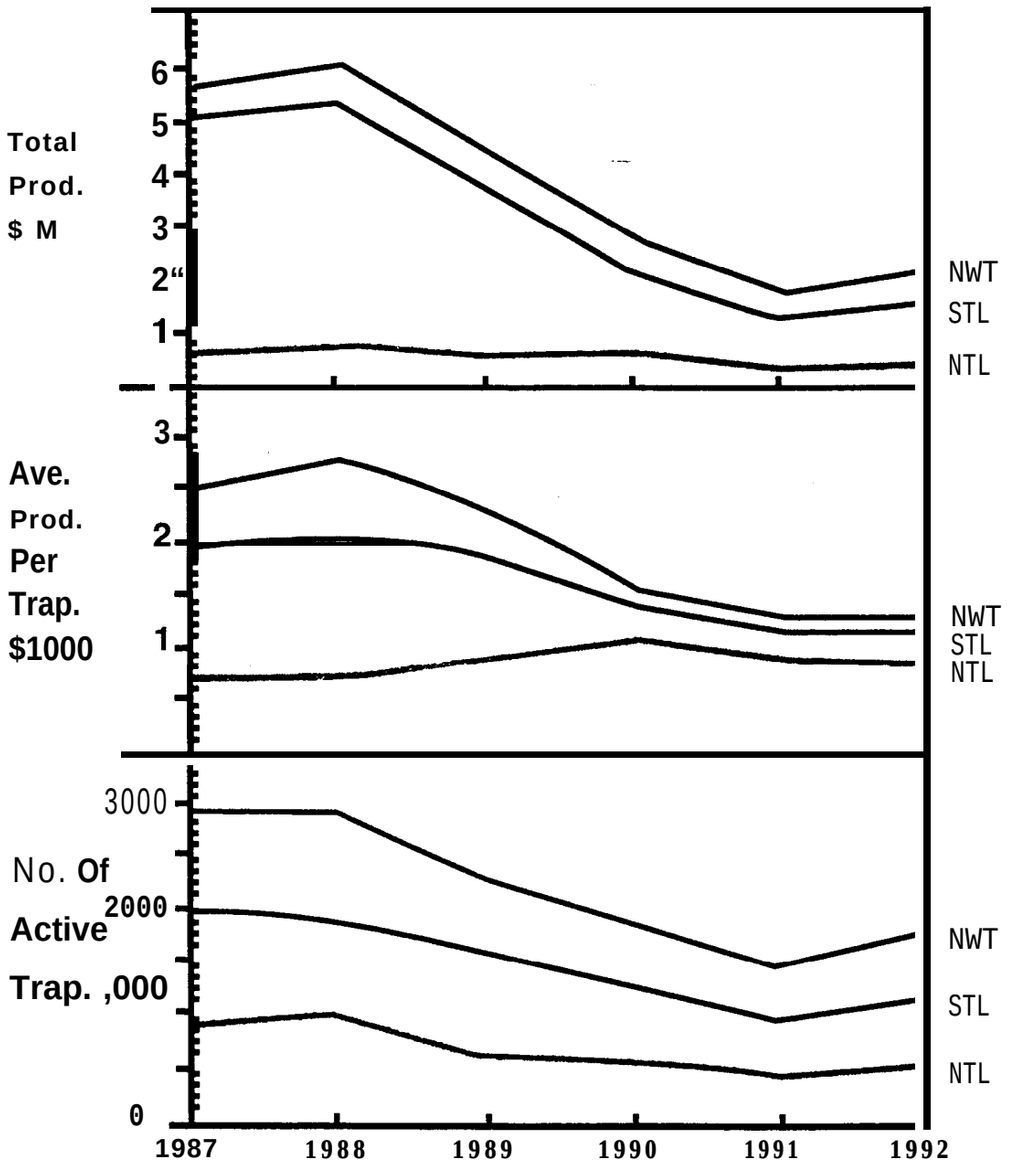
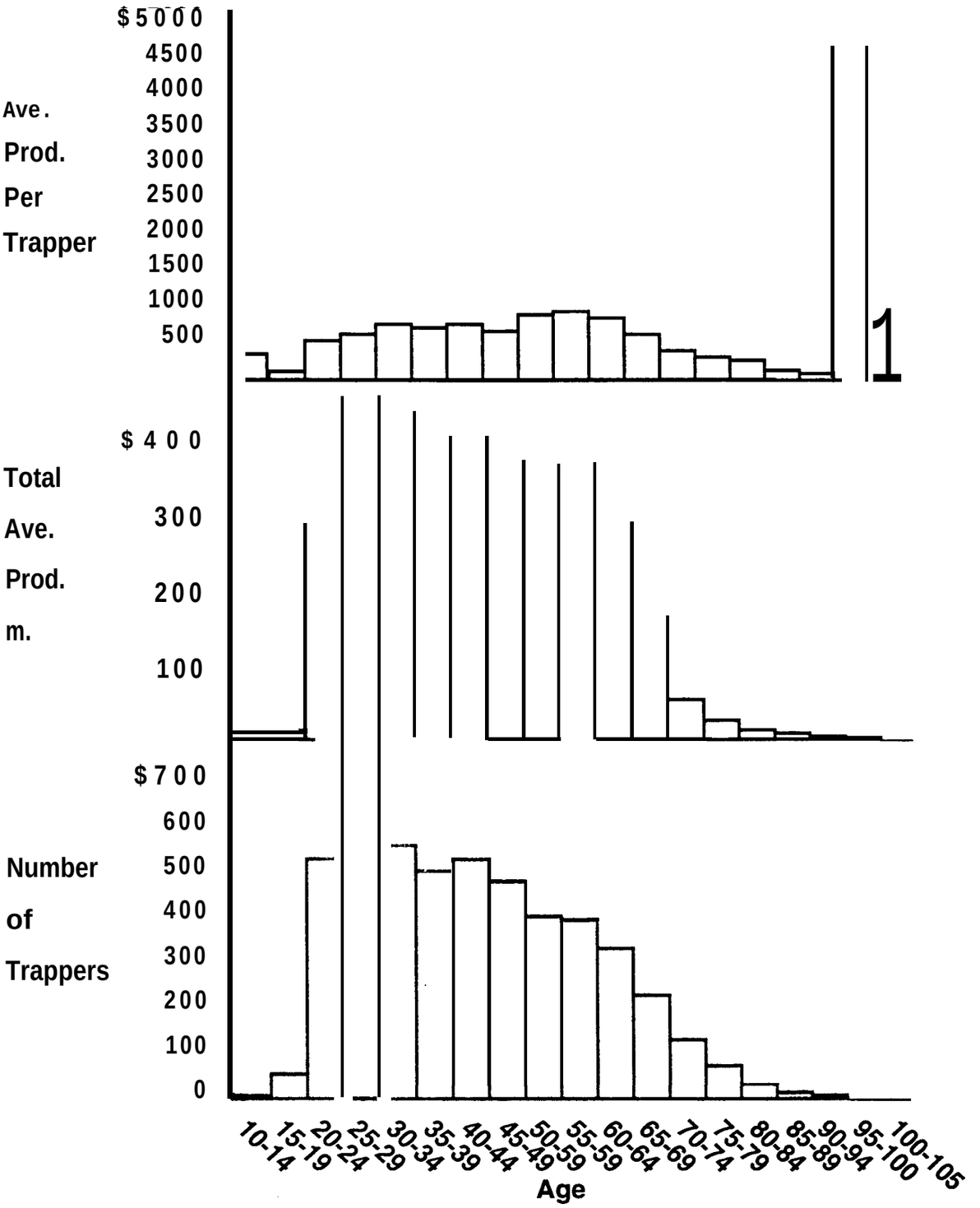


FIGURE 2


Ave. Prod. Per Trapper
$5000
4500
4000
3500
3000
2500
2000
1500
1000
500
Total Ave. Prod. m.
$400
300
200
100
Number of Trappers
$700
600
500
400
300
200
100
0
10-14
15-19
20-24
25-29
30-34
35-39
40-44
45-49
50-59
55-59
60-64
65-69
70-74
75-79
80-84
85-89
90-94
95-100
100-105
Age

Trappers

FIGURE 3

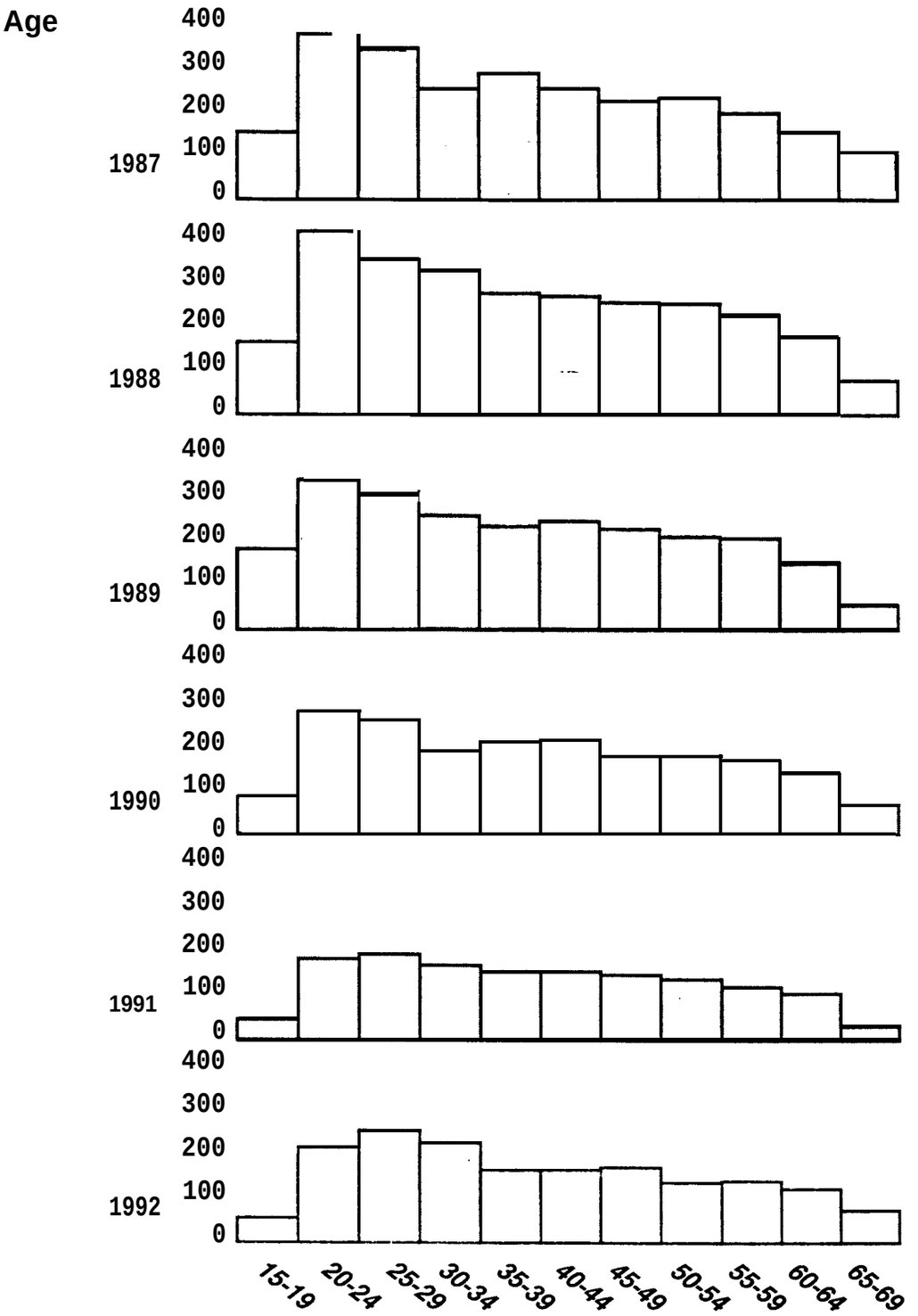
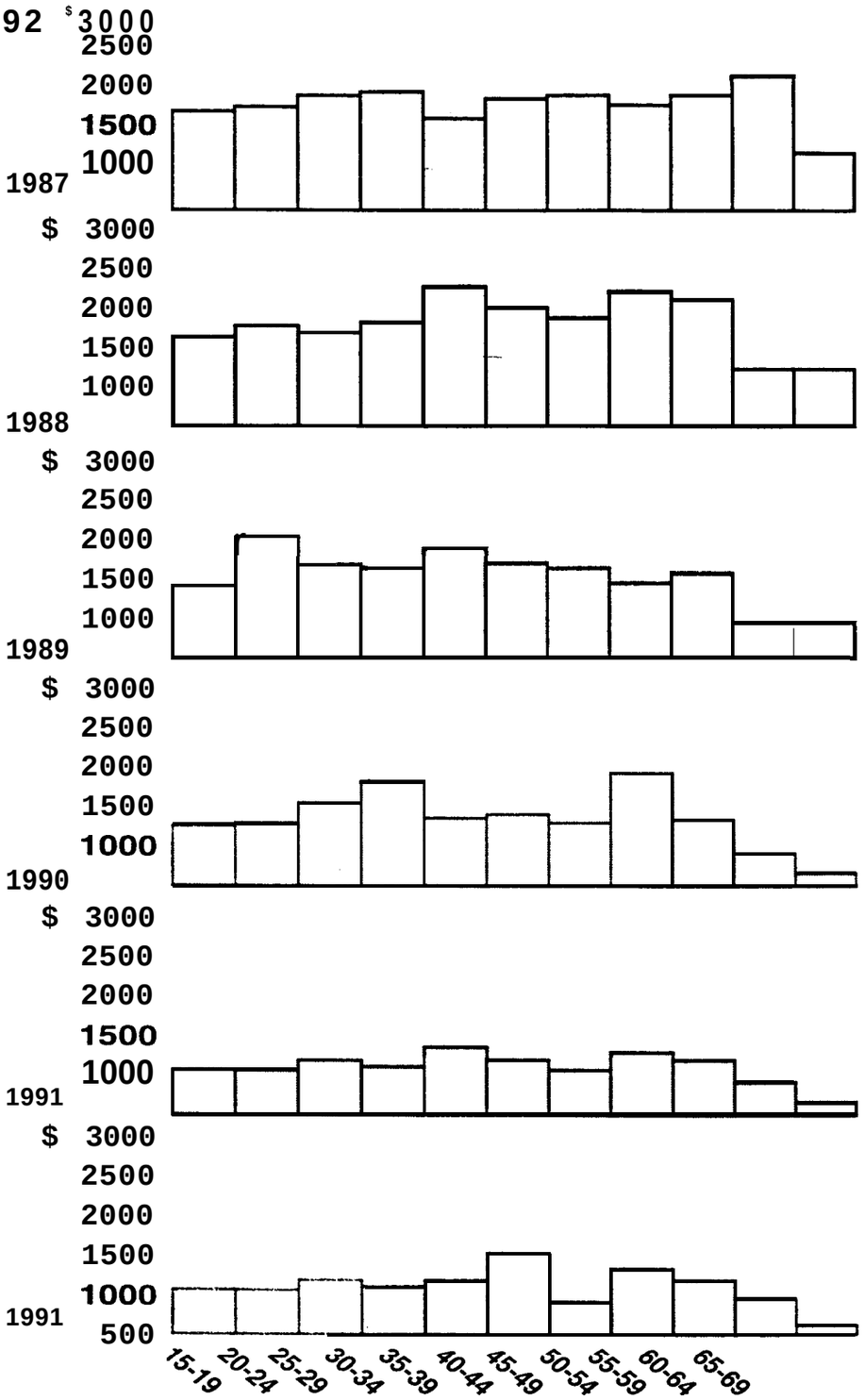


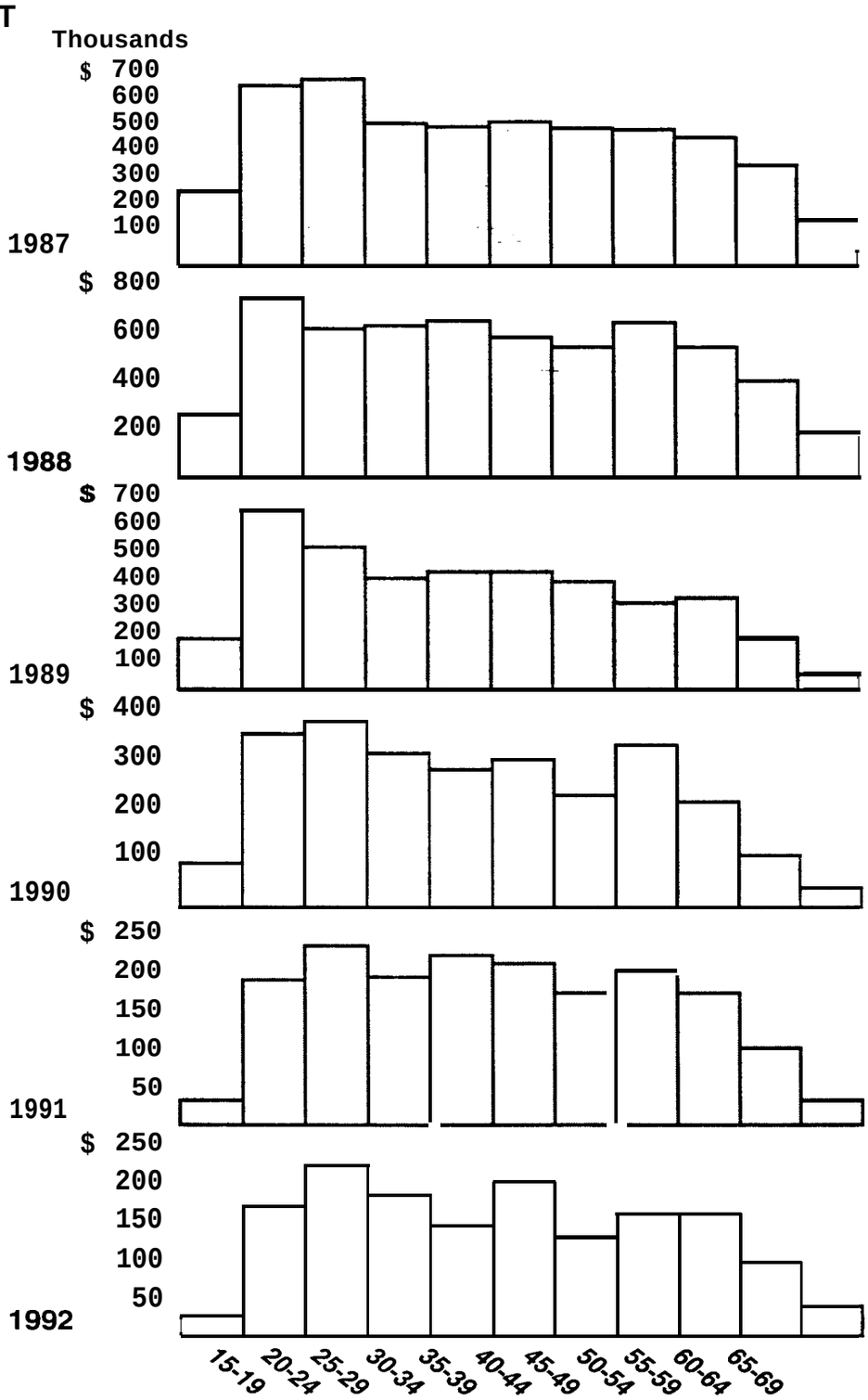
FIGURE 4

Ave. Trappers Prod. By Age 1987-92



Total Prod. By Age NWT

FIGURE 5



ANNEX A

STATISTICAL -TABLES

PROFILE OF NWT TRAPPING COMMUNITY

TABLE A 1
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
SOUTH OF THE TREE-LINE
Ordered by Population of Community

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod. $	Ave. Prod. Per Trap 87-92 $	Ave Prod. Per Cap. 87-92 $	Trap as a % of Pop.
L05	Yellowknife	13011	173	85,710	495	7	1
L09	Hay River	3098	155	86,273	557	28	5
400	Inuvik	2679	177	111,860	632	42	7
L00	Fort Smith	2505	208	173,168	832	69	8
L06	Rae	1443	383	304,232	794	210	27
200	Ft Simpson	1006	212	247,057	1165	246	21
401	Aklavik	777	191	83,035	435	106	25
300	Norman Wells	749	18	9,800	544	13	2
402	Ft McPherson	729	194	150,382	775	206	27
302	Ft Good Hope	586	154	212,998	1383	363	26
110	Ft providence	577	220	155,308	706	269	38
303	Ft Franklin	550	133	176,190	1325	320	24
101	Ft Resolution	475	205	137,044	669	288	43
114	Lac La Martre	413	88	85,448	971	207	21
203	Ft Liard	398	151	220,416	1460	554	38
301	Ft Norman	360	68	117,439	1727	326	19
103	Snowdrift	270	93	87,998	946	324	34
120	Rae Lakes	188	76	124,571	1639	663	40
204	Wrigley	156	72	110,784	1539	710	48
104	Dettah	131	30	17,973	599	137	23
403	Arctic Red River	106	33	48,725	1477	460	31
202	Nahani Butte	87	17	44,663	2627	513	19
135	Snare Lakes	80	28	38,099	1361	476	35
201	Jean Marie River	66	20	14,151	707	214	30
206	Trout Lake	61	36	174,144	4837	2855	59
304	Colville Lake	52	36	127,141	3532	2445	69
208	Kakisa Lake	47	20	34,278	1714	729	42
113	Ft Reliance	10	6	69,748	11625	6975	60

NOTES :

The principal source of data for these tables are the statistical summary containing data on trappers' bane communities, their age and their productivity over a 6 year period, 1987-1992 (NWT Department of Renewable Resources). This has been supplemented with a review of other GNWT records (1989 NWT Labour Force Survey, NWT Bureau of Statistics) and in some cases by information provided by NWT Renewable Resources field staff.

TABLE A 2
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
SOUTH OF THE TREE-LINE
Ordered by Percentage of Populations as Trappers

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod. $	Ave. Prod. Per Trap 87-92 $	Ave Prod. Per Cap. 87-92 $	Trap as a % of Pop.
304	Colville Lake	52	36	127,141	3532	2445	69
113	Ft Reliance	10	6	69,748	11625	6975	60
204	Wrigley	156	72	110,784	1539	710	48
206	Trout Lake	61	36	174,144	4837	2855	59
101	Ft Resolution	475	205	137,044	669	288	43
208	Kakisa Lake	47	20	34,278	1714	729	42
120	Rae Lakes	188	76	124,571	1639	663	40
110	Ft Providence	577	220	155,308	706	269	38
203	Ft Liard	398	151	220,416	1460	554	38
135	Snare Lakes	80	28	38,099	1361	476	35
103	Snowdrift	270	93	87,998	946	324	34
403	Arctic Red River	106	33	48,725	1477	460	31
201	Jean Marie River	66	20	14,151	707	214	30
106	Rae	1443	383	304,232	794	210	27
402	Ft McPherson	729	194	150,382	775	206	27
302	Ft Good Hope	586	154	212,998	1383	363	26
401	Aklavik	777	191	83,035	435	106	25
303	Ft Franklin	550	133	176,190	1325	320	24
104	Dettah	131	30	17,973	599	137	23
200	Ft Simpson	1006	212	247,057	1165	246	21
114	Lac La Martre	413	88	85,448	971	207	21
202	Nahanni Butte	87	17	44,663	2627	513	19
301	Ft Norman	360	68	117,439	1727	326	19
100	Ft Smith	2505	208	173,168	832	69	8
400	Inuvuk	2679	177	111,860	632	42	7
109	Hay River	3098	155	86,273	557	28	5
300	Norman Wells	749	18	9,800	544	13	2
105	Yellowknife	13011	173	85,710	495	7	1

NOTES :

Community 108 Pine Point is no longer inhabited. Trapping records have been merged with Hay River. There are no official estimates for the population of Kakisa Lake, but the local Renewable Resources officer estimates 47 people. A local estimate of 10 persons was also given for Fort Reliance.

TABLE A3
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY **COMMUNITY**
SOUTH OF TEE TREE-LINE
Ordered **by** Percentage Number of Trappers

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod. $	Ave. Prod. Per Trap 87-92 $	Ave Prod. Per Cap. 87-92	Trap as a % of $ Pop.
106	***Rae***	***1443***	***383***	***304,232***	***794***	***210***	***27***
110	Ft Providence	577	220	155,308	706	269	38
200	**Ft Simpson**	1006	212	247,057	1165	246	21
100	**Ft Smith**	2505	208	173,168	832	69	8
101	**Ft Resolution**	475	205	137,044	669	288	43
402	Ft McPherson	729,	194	150,382	775	206	27
401	**Aklavik**	777	191	83,035	435	106	25
400	**Inuvik**	2679	177	111,860	632	42	7
105	**Yellowknife**	13011	173	85,710	495	7	1
109	Hay River	3098	155	86,273	557	28	5
302	Ft Good Hope	586	154	212,998	1383	363	26
203	**Ft Liard**	398	151	220,416	1460	554	38
303	Ft Franklin	550	133	176,190	1325	320	24
103	Snowdrift	270	93	87,998	946	324	34
114	Lac La **Martre**	413	88	85,448	971	207	21
120	Rae Lakes	188	76	124,571	1639	663	40
204	Wrigley	156	72	110,784	1539	710	48
301	**Ft Norman**	360	68	117,439	1727	326	19
206	Trout Lake	61	36	174,144	4837	2855	59
304	**Colville** Lake	52	36	127,141	3532	2445	69
403	Arctic Red River	106	33	48,725	1477	460	31
104	**Dettah**	131	30	17,973	599	137	23
135	Snare Lakes	80	28	38,099	1361	476	35
201	Jean Marie River	66	20	14,151	707	214	30
208	Kakisa Lake	47	20	34,278	1714	729	42
300	Norman Wells	749	18	9,800	544	13	2
202	**Nahanni** Butte	87	17	44,663	2627	513	19
113	Ft Reliance	10	6	69,748	11625	6975	60

TABLE A4
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
SOUTH OF THE TREE-LINE
ordered by Total Average production Per Community

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod. $	Ave. Prod. Per Trap 87-92 $	Ave Prod. Per Cap. 87-92 $	Trap as a % of Pop.
106	Rae	1443	383	304,232	794	210	27
200	Ft Simpson	1006	212	247,057	1165	246	21
203	Ft Liard	398	151	220,416	1460	554	38
302	Ft Good Hope	586	154	212,998	1383	363	26
303	Ft Franklin	550	133	176,190	1325	320	24
206	Trout Lake	61	36	174,144	4837	2855	59
100	Ft Smith	2505	208	173,168	832	69	8
110	Ft Providence	577	220	155,308	706	269	38
402	Ft McPherson	729	194	150,382	775	206	27
101	Ft Resolution	475	205	137,044	669	288	43
304	Colville Lake	52	36	127,141	3532	2445	69
120	Rae Lakes	188	76	124,571	1639	663	40
301	Ft Norman	360	68	117,439	1727	326	19
400	Inuvik	2679	177	111,860	632	42	7
204	Wrigley	156	72	110,784	1539	710	48
103	Snowdrift	270	93	87,998	946	324	34
109	Hay River	3098	155	86,273	557	28	5
105	Yel 1 owknife	13011	173	85,710	495	7	1
114	Lac La Martre	413	88	85,448	971	207	21
401	Aklavik	777	191	83,035	435	106	25
113	Ft Reliance	10	6	69,748	11625	6975	60
403	Arctic Red River	106	33	48,725	1477	460	31
202	Nahanni Butte	87	17	44,663	2627	513	19
135	Snare Lakes	80	28	38,099	1361	476	35
208	Kakisa Lake	47	20	34,278	1714	729	42
104	Dettah	131	30	17,973	599	137	23
201	Jean Marie River	66	20	14,151	707	137	23
300	Norman Wells	749	18	9,800	544	13	2

TABLE AS
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY **COMMUNITY**
SOUTH OF TEE TREE-LINE
Ordered by Average Production Per Trapper

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod.	Ave. Prod. $ Per Trap 87-92 $	Ave Prod. Per Cap. 87-92 $	Trap as a % of Pop.
1.13	Ft Reliance	10	6	69,748	11625	6975	60
206	Trout Lake	61	36	174,144	4837	2855	59
304	Colville Lake	52	36	127,141	3532	2445	69
202	Nahanni Butte	87	17	44,663	2627	513	19
301	Ft Norman	360	68	117,439	1727	326	19
208	Kakisa Lake	47	20	34,278	1714	729	42
120	Rae Lakes	188	76	124,571	1639	663	40
204	Wrigley	156	72	110,784	1539	710	48
403	Arctic Red River	106	33	48,725	1477	460	31
203	Ft Liard	398	151	220,416	1460	554	38
302	Ft Good Hope	586	154	212,998	1383	363	26
135	Snare Lakes	80	28	38,099	1361	476	35
303	Ft Franklin	550	133	176,190	1325	320	24
200	Ft Simpson	1006	212	247,057	1165	246	21
114	Lac La Martre	413	88	85,448	971	207	21
103	Snowdrift	270	93	87,998	946	324	34
100	Fort Smith	2505	208	173,168	832	69	8
106	Rae	1443	383	304,232	794	210	27
402	Ft. McPherson	729	194	150,382	775	206	27
201	Jean Marie River	66	20	14,151	707	214	30
110	Ft Providence	577	220	155,308	706	269	38
101	Ft Resolution	475	205	137,044	669	288	43
400	Inuvik	2679	177	111,860	632	42	7
104	Dettah	131	30	17,973	599	137	23
109	Hay River	3098	155	86,273	557	28	5
300	Norman Wells	749	18	9,800	544	13	2
105	Yel 1 owknife	13011	173	85,710	495	7	1
401	Aklavik	777	191	83,035	435	106	25

TABLE A6
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
SOUTH OF TEE TREE-LIME
ordered by Average Production Per Capita for Each Community

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod.	$ Ave. Prod. Per Trap 87-92 $	Ave. Per Cap. 87-92$	as a % of Pop.
113	Ft Reliance	10	6	69,748	11625	6975	60
206	Trout Lake	61	36	174,144	4837	2445	59
304	Colville Lake	52	36	127,141	3532	2445	69
208	Kakisa Lake	47	20	34,278	1714	729	42
204	Wrigley	156	72	110,784	1539	710	48
120	Rae Lakes	188	76	124,571	1639	663	40
203	Ft Liard	398	151	220,416	1460	554	38
202	Nahanni Butte	87	17	44,663	2627	513	19
135	Snare Lakes	80	28	38,099	1361	476	35
403	Arctic Red River	106	33	48,725	1477	460	31
302	Ft Good Hope	586	154	212,998	1383	363	26
301	Ft Norman	360	68	117,439	1727	326	19
103	Snowdrift	270	93	87,998	946	324	34
303	Ft Franklin	550	133	176,190	1325	320	24
101	Ft Resolution	475	205	137,044	669	288	43
110	Ft Providence	577	220	155,308	706	269	38
200	Ft Simpson	1006	212	247,057	1165	246	21
201	Jean Marie River	66	20	14,151	707	214	30
106	Rae	1443	383	304,232	794	210	27
114	Lac La Martre	413	88	85,448	971	207	21
402	Ft McPherson	729	194	150,382	775	206	27
104	Dettah	131	30	17,973	599	137	23
401	Aklavik	777	191	83,035	435	106	25
100	Fort Smith	2505	208	173,168	832	69	8
400	Inuvik	2679	177	1.13.,860	632	42	7
109	Hay River	3098	155	86,273	557	28	5
300	Norman Wells	749	18	9,800	544	13	2
105	Yel 1 owknife	13011	173	85,710	495	7	1

TABLE A7
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
NORTH OF THE TREE-LINE
ordered by of Community

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod.	Ave. Prod. $ Per Trap 87-92 $	Ave Prod. Per Cap. 87-92$	Trap as a % of Pop.
300	Iqaluit	3039	103	8,861	86	3	3
501	Arviut	1255	137	30,390	222	24	10
500	Rankin Inlet	1109	40	14,292	357	13	4
603	Baker Lake	1049	95	29,252	308	28	9
500	Cambridge Bay	1027	90	30,063	334	29	9
304	Pangnirtung	1022	69	7,649	110	7	7
303	Cape Dorset	970	39	6,278	161	6	4
501	Coppermine	956	151	64,113	425	67	16
609	Igloolik	922	58	10,994	190	12	6
405	Tuktoyaktuk	882	110	53,350	485	60	12
700	Pond Inlet	808	82	15,185	185	19	10
503	Gjoa Haven	706	84	16,579	197	23	12
703	Arctic Bay	535	39	7,700	197	14	7
506	coral Harbour	522	141	62,977	447	120	27
510	Hal 1 Beach	476	43	2,370	55	5	9
701	Clyde River	474	97	12,617	130	27	20
504	Spence Bay	452	121	34,736	287	77	27
306	Broughton Island	451	103	11,870	115	26	23
901	Sanikiluag	426	30	16,727	558	39	7
607	Repulse Bay	402	81	28,564	353	71	20
301	Lake Harbour	341	38	9,586	252	28	11
505	Pelly Bay	327	46	29,313	637	90	14
407	Holman Island	316	87	42,977	494	136	28
602	Chesterfield Inl	284	31	7,983	257	28	10
408	Paulatuk	200	37	11,055	299	55	18
608	Whale Cove	199	13	4,995	384	25	7
704	Resolute Bay	166	34	12,432	366	75	20
406	Sachs Harbour	161	14	3,269	233	20	9
506	Bathurst Inlet	80	30	26,650	888	333	38
705	Grise Fiord	76	19	3,914	206	51	25

TABLE A8
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
NORTH OF TEE TREE-LINE
Ordered by Percentage of Populations as Trappers

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod.	Ave. $	Prod. Per Trap 87-92	Ave Prod. Per Cap. $87-92	Trap as a % of Pop.
506	Bathurst Inlet	80	30	26,650	888	333		38
407	Holman Island	316	87	42,977	494	136		28
504	Spence Bay	452	121	34,736	287	77		27
606	Coral Harbour	522	141	62,977	447	120		27
705	Grise Fiord	76	19	3,914	206	51		25
806	Broughton Island	451	103	11,870	115	26		23
607	Repulse Bay	402	81	28,564	353	71		20
701	Clyde River	474	97	12,617	130	27		20
704	Resolute Bay	166	34	12,432	366	75		20
408	Paulatuk	200	37	11,055	299	55		18
501	Coppermine	956	151	64,113	425	67		16
505	Pelly Bay	327	46	29,313	637	90		14
405	Tuktoyaktuk	882	110	53,350	485	60		12
503	Gjoa Haven	706	84	16,579	197	23		12
801	Lake Harbour	341	38	9,586	252	28		11
700	Pond Inlet	808	82	15,185	185	19		10
601	Arviut	1255	137	30,390	222	24		10
602	Chesterfield Inl	284	31	7,983	257	28		10
406	Sachs Harbour	161	14	3,269	233	20		9
500	Cambridge Bay	1027	90	30,063	334	29		9
603	Baker Lake	1049	95	29,252	308	28		9
610	Hall Beach	476	43	2,370	55	5		9
608	Whale Cove	199	13	4,995	384	25		7
703	Arctic Bay	535	39	7,700	197	14		7
804	Pangnirtung	1022	69	7,649	110	7		7
901	Saniki luag	426	30	16,727	558	39		7
609	Igloolik	922	58	10,994	190	7		7
600	Rankin Inlet	1109	40	14,292	357	13		4
803	Cape Dorset	970	39	6,278	161	6		4
800	Iqaluit	3039	103	8,861	86	3		3

TABLE A9
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
NORTH OF TEE TREE-LINE
Ordered by Number of Trappers Per Community

NO.	COMMUNITY	Pop.	No. of Trap	Ave. Prod.	Ave. Prod. Per Trap 87-92 $	Ave Prod. Per Cap. 87-92 $	Trap as a % of Pop.
501	Coppermine	956	151	64,113	425	67	16
606	Coral Harbour	522	141	62,977	447	120	27
501	Arviut	1255	1.37	30,390	222	24	10
504	~ -	452	121	34,736	287	77	27
405	Tuktoyaktuk	882	110	53,350	485	60	12
306	Broughton Island	451	103	11,870	115	26	23
300	Iqaluit	3039	103	8,861	86	3	3
701	Clyde River	474	97	12,617	130	27	20
603	Baker Lake	1049	95	29,252	308	28	9
500	Cambridge Bay	1027	90	30,063	334	29	9
407	Holman Island	316	87	42,977	494	136	28
503	Gjoa Haven	706	84	16,579	197	23	12
700	Pond Inlet	808	82	15,185	185	19	10
607	Repulse Bay	402	81	28,564	353	71	20
804	- - -	1022	69	7,649	110	7	7
609	Igloolik	922	58	10,994	190	12	6
505	Pelly Bay	327	46	29,31.3	637	90	14
610	Hall Beach	476	43	2,370	55	5	9
600	Rankin Inlet	1109	40	14,292	357	13	4
803	cape Dorset	970	39	6,2'78	161	6	4
703	Arctic Bay	535	39	7,700	197	14	7
801	Lake Harbour	341	38	9,586	252	28	11
408	Paulatuk	200	37	11,055	299	55	18
704	Resolute Bay	166	34	12,432	366	75	20
602	Chesterfield Inl	284	31	7,983	257	28	10
901	Sanikiluaq	426	30	16,727	558	39	7
506	Bathurst Inlet	80	30	26,650	888	333	38
705	Grise Fiord	76	19	3,914	206	51	25
406	Sachs BarbOur	161	14	3,269	233	20	9
608	Whale Cove	199	13	4,995	384	25	7

TABLE A1O
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
NORTH OF TEE TREE-LINE
Ordered by productivity Per Community

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod. $	Ave. Prod. Per Trap 87-92 $	Ave Prod. Per Cap. 87-92 $	Trap as a % of Pop.
501	Coppermine	956	151	64,113	425	67	16
606	Coral Harbour	522	141	62,977	447	120	27
405	Tuktoyaktuk	882	110	53,350	485	60	12
407	Holman Island	316	87	42,977	494	1.36	28
504	Spence Bay	452	121	34,736	287	77	27
601	Arviut	1.255	1.37	30,390	222	24	10
500	Cambridge Bay	1027	90	30,063	334	29	9
505	Pelly Bay	327	46	29,31.3	637	90	14
603	Baker Lake	1049	95	29,252	308	28	9
607	Repulse Bay	402	81	28,564	353	71	20
506	Bathurst Inlet	80	30	26,650	888	333	38
901	Sanikiluaq	426	30	16,727	558	39	7
503	Gjoa Eav-	706	84	16,579	197	23	12
700	Pond Inlet	808	82	1.5,185	185	19	10
600	Rankin Inlet	11o9	40	14,292	357	13	4
701	Clyde River	474	97	12,617	130	27	20
704	Resolute Bay	166	34	12,432	366	75	20
806	Broughton Island	451	103	11,870	115	26	23
408	Paulatuk	200	37	11,055	299	55	18
609	Igloolik	922	58	10,994	190	12	6
800	Iqaluit	3039	103	8,661	86	3	3
801	Lake Harbour	341	38	9,586	252	28	11
703	Arctic Bay	535	39	7,700	197	14	7
804	- r t -	1022	69	7,649	110	7	7
602	Chesterfield Inl	284	31	7,983	257	28	10
803	cape Dorset	970	39	6,278	161	6	4
608	Whale Cove	199	13	4,995	384	25	7
705	Grise Fiord	76	19	3,914	206	51	25
406	Sachs Harbour	161	14	3,269	366	20	9
610	Hall Beach	476	43	2,370	55	5	9

TABLE All
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
NORTH OF TEE TREE-LINE
Ordered by Average Productivity of Trappers

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod.	Ave. Prod. $ Per Trap 87-92 $	Ave Prod. Per Cap. 87-92 $	Trap as a % of Pop.
506	Bathurst Inlet	80	30	26,650	888	333	38
505	Pelly Bay	327	46	29,313	637	90	14
901	Sanikiluaq	426	30	16,727	558	39	7
407	Holman Island	316	87	42,977	494	136	28
405	Tuktoyaktuk	882	110	53,350	485	60	12
606	Coral Harbour	522	141	62,977	447	120	27
501	Coppermine	956	151	64,113	425	67	16
608	Whale Cove	199	13	4,995	384	25	7
704	Resolute Bay	166	34	12,432	366	75	20
600	Rankin Inlet	1109	40	14,292	357	13	4
607	Repulse Bay	402	81	28,564	353	71	m
500	Cambridge Bay	1027	90	30,063	334	29	9
603	Baker Lake	1049	95	29,252	308	28	9
408	Paulatuk	200	37	11,055	299	55	18
504	Spence Bay	452	121	34,736	287	n	27
602	Chesterfield Inl	284	31	7,983	257	28	10
801	Lake Harbour	341	38	9,586	252	28	11
406	Sachs Harbour	161	14	3,269	233	m	9
601	Arviut	1255	1.37	30,390	222	24	10
705	Grise Fiord	76	19	3,914	m6	51	25
503	Gjoa Haven	706	84	16,579	197	23	12
703	Arctic Bay	535	39	7,700	197	14	7
609	Igloolik	922	58	10,994	190	12	6
700	Pond Inlet	808	82	1.5,185	185	19	10
803	cape Dorset	970	39	6,278	161	6	4
701	Clyde River	474	97	Ii?, 617	130	27	m
806	Broughton Island	451	103	11,870	115	26	23
804	t i r t -	1022	69	7,649	110	7	7
800	Iqaluit	3039	103	8,861	86	3	3
610	Nail Beach	476	43	2,370	55	5	9

TABLE A12
NUMBERS AND PRODUCTIVITY OF TRAPPERS BY COMMUNITY
NORTH OF TEE TREE-LINE
Ordered by Average Per Capita for Each Community

No.	COMMUNITY	Pop.	No. of Trap	Ave. Prod.	Ave. Prod. $ Per Trap 87- 92 $	Ave Prod. Per Cap. 87-92$	Trap as a % of Pop.
506	Bathurst Inlet	80	30	26,650	888	333	38
407	Holman Island	316	87	42,977	494	1.36	28
506	Coral Harbour	522	141	62.977	447	120	27
505	Pelly Bay	327	46	29,31.3	637	90	14
504	Spence Bay	452	121	34,736	287	77	27
?04	Resolute Bay	166	34	3.2,432	366	75	20
507	Repulse Bay	402	81	28,564	353	71	20
501	Coppermine	956	3.51	64,113	425	67	16
405	Tuktoyaktuk	882	110	53,350	485	60	12
408	Paulatuk	200	37	11,055	299	55	18
705	Grise Fiord	76	19	3,914	206	51	25
901	Sanikiluaq	426	30	16,727	558	39	7
500	Cambridge Bay	1027	90	30,063	334	29	9
603	Baker Lake	1049	95	29,252	308	28	9
602	Chesterfield Inl	284	31	7,983	257	28	10
601	Lake Harbour	341	38	9,586	252	28	11
701	Clyde River	474	97	12,617	130	27	20
806	Broughton Island	451	103	11,870	115	26	23
608	Whale Cove	199	13	4,995	384	25	7
601	Arviut	1255	3.37	30,390	222	24	10
503	Gjoa Haven	706	84	16,579	197	23	3.2
406	Sachs Harbour	161	14	3,269	366	20	9
700	Pond Inlet	808	82	15,185	185	19	10
703	Arctic Bay	535	39	7,700	197	14	7
600	Rankin Inlet	11o9	40	14,292	357	13	4
609	Igloolik	922	58	10,994	190	12	6
804	t i f i -	1022	69	7,649	110	7	7
803	cape Dorset	970	39	6,278	161	6	4
610	Hall Beach	476	43	2,370	55	5	9
800	Iqaluit	3039	103	8,861	86	3	3

TABLE A13
NUMBER OF ACTIVE TRAPPERS SOUTH OF THE TREE-LINE BY AGE GROUP, 1987-92

Age	1987	1988	1989	1990	1991	1992
No age	44	39	44	3	25	22
10-14	1					
15-19	127	106	85	8	26	27
20-24	266	263	222	191	127	154
25-29	258	222	210	172	116	153
30-34	187	248	167	106	115	154
35-39	197	175	147	324	97	106
40-44	180	156	149	116	98	111
45-49	172	163	141	110	87	103
50-54	163	158	133	111	87	90
55-59	169	145	129	113	94	102
60-64	109	130	106	108	87	112
65-69	76	79	43	45	24	55
70-74	42	40	44	30	28	22
75-79	20	23	20	10	8	15
80-84	15	10	7	8	5	8
85-89	5	4	3	2		1
90-94	1	2	2	2	1	1
95-99	1					
Total	2027	1922	1650	1.343	1043	1.246

TABLE A14
AVERAGE TRAPPER PRODUCTION BY AGE GROUP
SOUTH OF THE TREE-LINE

Age	1987	1988	1989	1990	1991	1992
No age	3967	5490	3042	2748	4141	4495
10-14	171					
1.5-19	1926	2170	1637	1492	635	415
20-24	2199	2551	2530	1450	1161	1111
25-29	2428	2414	2169	1766	1435	1480
30-34	2255	2209	1939	2308	1234	1.274
35-39	2287	3369	2463	1537	1500	1091
40-44	2536	3056	2401	1697	1388	1764
45-49	2740	2846	2368	1.596	1107	1.260
50-54	2818	3565	2098	2371	1804	1949
55-59	2646	3396	2448	1598	1500	1782
60-64	3140	2954	1637	1048	1005	1031
65-69	1791	1737	1217	633	1006	641
70-74	1036	2065	1646	749	644	495
75-79	1765	878	931	884	489	431
80-84	1098	770	378	932	323	998
85-89	882	460	1771	1146		40
90-94	9468	3033	2381	1317	3837	1767
95-99	392					
TOTAL	2491	2779	2306	1592	3332	1352

TABLE A15
TOTAL PRODUCTION BY AGE GROUP
SOUTH OF THE TREE-LINE

Age	1987	1988	1989	1990	1991	1992
No age	174581	179029	1.33835	8244	103534	98890
10-14	171					
15-19	244574	230065	139115	11933	16517	11204
20-24	58481.8	670913	561678	277025	147467	171105
25-29	626526	535907	435910	303694	166431	226403
30-34	421768	54791.3	232767	244645	141791	196248
35-39	450491	589642	362038	190621	145470	115624
40-44	456554	476737	357806	196890	1.35279	195811
45-49	471276	463911	333943	175604	%295	1.29757
50-54	459296	563345	279056	263229	156991	175453
55-59	447150	492365	31.5730	180553	140986	181741
60-64	342306	384069	173484	113225	87457	115459
65-69	136154	119874	52145	28594	24130	35229
70-74	43525	82605	7241.8	22466	1.8034	1.5834
75-79	35305	20183	1.8622	8840	3912	6460
80-84	16472	7679	2647	7384	1617	7981
85-89	4408	1842	531.3	2292		40
90-94	9468	6065	4763	2634	3837	1767
95-99	392					
TOTAL	5049922	5341406	3804152	21.37565	1389749	1684849

TABLE A16
NUMBER OF ACTIVE TRAPPERS NORTH OF THE TREE-LINE BY AGE GROUP, 1987-92

Age	1987	1988	1989	1990	1991	1992
No age	23	14	13	8	5	6
LO-14	1		-	1		
1.5-19	29	44	26	1.5	7	16
20-24	118	140	85	68	44	57
25-29	96	121	m -	69	69	97
30-34	79	74	65	63	48	70
35-39	107	93	62	71	59	59
40-44	95	113	79	86	63	57
45-49	80	95	78	59	76	52
50-54	101	105	64	64	56	57
55-59	65	93	56	51	38	57
60-64	48	65	u	33	28	25
65-69	26	27	17	23	20	22
70-74	10	24	10	9	7	8
75-79	4	7		5	4	6
80-04	5	5	2	1		1
85-89			1		1	1
90-94						
95-99						
TOTAL	887	1020	691	628	51.5	611

TABLE A17
AVERAGE TRAPPER PRODUCTION BY AGE GROUP
NORTH OF THE TREE-LINE, 1987-92

Age	1987	1988	1989	1990	1991	1992
No age	1193	1.359	1171	1605	920	4549
10-14	850			1.5		
1.5-19	477	408	1017	1.376	1248	738
20-24	496	484	893	1023	841	967
25-29	497	635	775	1101	863	793
30-34	1.21.8	1049	1272	1126	1027	782
35-39	582	645	1183	1309	1269	1470
40-44	838	926	945	1277	1198	1514
45-49	612	871	963	1002	1147	720
50-54	577	804	833	1.21.6	803	904
55-59	730	813	662	956	890	653
60-64	697	571	1110	499	649	599
65-69	41.6	939	957	786	382	408
70-74	370	409	450	283	4%	1.077
75-79	170	260		762	430	95
80-84	501	935	461	24		8
85-89			20		650	25
90-94						
95-99						
TOTAL	666	731	915	1105	962	937

TABLE A18
TOTAL PRODUCTION BY AGE GROUP
NORTH OF THE TREE-LINE, 1987-92

Age	1987	1988	1989	1990	1991	1992
No age	27442	18996	15219	12846	4602	27295
10-14	850			15		
15-19	13827	17954	26438	20670	8737	11811
20-24	58500	67695	75937	69598	37017	55138
25-29	47739	76823	61967	75983	59530	76900
30-34	49482	77641	82676	70922	49275	54711
35-39	62232	59988	73375	92941	74890	86713
40-44	79649	104672	74633	109821	75448	86274
45-49	48989	82728	75134	59114	75415	51826
50-54	58261	84441	53307	77840	44987	51537
55-59	47431	75638	43699	48743	33816	37213
60-64	33443	37097	45498	16483	18160	14982
65-69	10819	25352	16273	18081	7638	8966
70-74	3701	9813	4549	2543	3475	8622
75-79	681	1819		3810	1718	573
80-84	2503	4677	921	24		8
85-89			20	650		25
90-94						
95-99						
TOTAL	591061	745345	632189	694217	495369	572593

ANNEX B

NUT TRAPPERS AND BIODIVERSITY CONSERVATION

TRAPPERS AND **BIODIVERSITY** CONSERVATION

Both actually and potentially, trappers have a specific contribution to make towards biodiversity conservation. This has received only limited recognition, possibly because of trapping's negative image within the conservation community, but also perhaps because this contribution cannot readily be translated into a source of revenue. It assumes two forms.

INTERNATIONAL CONSERVATION INSTRUMENTS AND STRATEGIES

First, trappers have a vested interest in the perpetuation of undisturbed natural habitat. It was the testimony of Mackenzie Valley trapping communities that was the major factor behind the decision of the Berger Inquiry against the proposal for a pipeline from the Beaufort Sea. Delegates to a recent conference of indigenous resource users in Saskatoon called for urgent action to control the clear-cutting of fur-bearer habitat by the logging industry. Throughout the boreal forest region, indigenous communities are actively campaigning against clear-cutting as a form of forest utilisation - either independently or in alliances with environmental groups. This support from the environmental community however, tends to be issue-specific and has not precipitated any enduring institutional associations.

There is a striking parallel between the predicament of trappers in the north and rubber tappers in the Amazon. Both have experienced the effects of wild market fluctuations, the introduction of substitutes and the disadvantages of being remote raw material producers with virtually no bargaining power in comparison to the buyers. Both are witnessing radical reductions in the biodiversity upon which their way of life depends.

In the Amazon, the rubber tappers have mobilised to defend the forests they utilize and, with external support from environmental groups, have successfully pressed for the establishment of a new kind of conservation area, the extractive reserve, which will enable them to combine forest protection with utilisation.

It is at this point that the resemblance between trappers and tappers begins to fade. Although Indigenous Survival International (ISI), and allied groups, have been effective in responding to political/regulatory attempts to ban trapping and the fur trade, this issue has not elicited a comparable degree of support from the environmental community. This seems partly to be a result of the

negative image assigned to trapping but it also reflects the current status of the Amazon as- one of the more glamorous environmental issues.

There are trends in the global environmental debate however, which may in the longer run shift the--climate of opinion towards a greater appreciation of the role of the trapping community in biodiversity conservation. One is the current preoccupation with indigenous knowledge and practice as a distinct approach to conservation which demands respect and support. Increasingly, this is being expressed in terms of support–for projects which entail a broad spectrum of resource uses, often including animal utilisation.

Another is the debate over animal utilisation within the International Union for the Conservation and Nature (IUCN) and similar organizations. As the elephant issue has clearly shown, support for sustainable animal use is growing in those southern countries in need of economic development while sentiments against animal use are largely confined to wealthy northern countries. As more developing countries increase national capacities for conservation, we can expect stronger recognition of the positive contribution that sustainable animal use can make to both domestic and national economies.

1S1 is actively engaging this issue at the international level, firstly by undertaking to coordinate for the IUCN and Inter-Commission Task force on Indigenous Peoples and Conservation, secondly by working with the Biodiversity Convention Office on a consultation strategy designed to engage Indigenous communities in the implementation of the Convention. These are proactive strategies which advance the case of the northern trapping community - simply as one of a complex of activities qualifying as sustainable development.

BIODIVERSITY INVENTORY AND MONITORING

Trappers are also in a position to contribute towards biodiversity conservation at the local level, through their own environmental knowledge and presence on the land. This again is a contribution that is difficult to translate into a source of revenue for individual trappers. It is also one which is more apparent within the complex of traditional resource uses: hunting and fishing as well as trapping.

Its benefits may be more cultural and political than monetary and, as such, would have a role to play within a total strategy. This role is worth exploring further. Some indirect examples illustrate the range of possibilities.

Manitoba Keewatinawi Okimakanak (MKO) is a resource management secretariat representing the interest of 23 Cree communities in Manitoba. Over the last few years, MKO has gathered detailed material on traditional land use and entered it on a geographic information system. This data base now covers two thirds of Manitoba and is being used authoritatively in studies of the projected impacts of industrial development schemes, as well as in regulating such large-scale developments. MKO, which depends upon information from Cree trappers, hunters and fishermen was started without dedicated government support and continues as a self-sufficient economic operation.

Traditional land users are beginning to undertake greater responsibilities for environmental monitoring at the local level. In Sanikiluaq, the Weasels Hunters and Trappers Association has developed procedures for making accurate reindeer counts from snowmobiles. In the Mackenzie Delta, young people act as "beluga whale monitors", taking samples and measurements of beluga taken by hunters and sending these south for analysis. On the Alaskan North Slope, the observations of bowhead whale hunters are regularly taken into account in annual censuses.

Although none of these activities have major economic promise, they may represent small opportunities for increasing income to traditional land users. Perhaps more importantly, they have the potential to express and reinforce at the grassroots level the kinds of international strategies described above.