



Welcome to the Virtual Invasive Carp Forum August 9, 2022

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- Everyone will be muted on the call during the course of the meeting.
- Please type your name and affiliation in the CHAT button.
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- If you are calling in from a phone, during the Q&A session at the end of all presentations, press *6 to unmute your phone to ask your question. Please state your name.



AGENDA



Welcome and Opening Remarks

- U.S. Fish and Wildlife Service Region 3
- Illinois Department of Natural Resources

Invasive Carp Forum Purpose and Desired Outcomes

USFWS

IDNR Invasive Carp Business Process Analysis

IDNR/Tetra Tech

State Agency Use of Commercial Harvest for Invasive Carp Control

- Illinois Department of Natural Resources
- Kentucky Department of Fish and Wildlife Resources
- Tennessee Wildlife Resources Agency

Opportunities for Increased Use of Invasive Carp Harvested through Control Actions

 Facilitated discussion to identify opportunities and challenges for increased use of harvested invasive carp for product use.

Meeting Wrap-Up and Next Steps

Meeting adjourns @4:00PM CT





BUSINESS PROCESS ANALYSIS AND GROWTH OF AN INDUSTRY

August 9, 2022

Presenters

Kevin Irons

Assistant Chief
Fisheries Division
Illinois Department of Natural Resources

Gina Behnfeldt

Program Manager
VP Economic Development Services
Tetra Tech



BUSINESS PROCESS ANALYSIS AND GROWTH OF AN INDUSTRY

OVERVIEW

- Business Process Analysis
 - Premise/Purpose, Key Findings, Recommendations
- Implementation
 - Fishers' and Processors Programs
 - Marketing Strategy
- What's Next





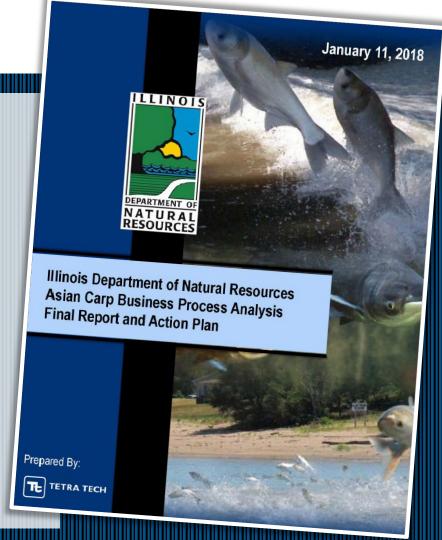
BUSINESS PROCESS ANALYSIS AND GROWTH OF AN INDUSTRY

PREMISE:

- Enormous biomass of invasive carp
- Yet few businesses WHY?

PURPOSE OF STUDY:

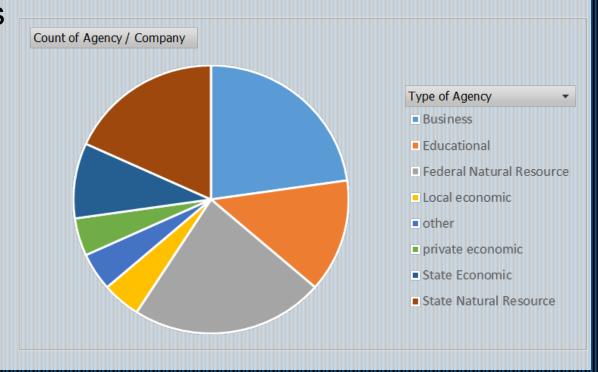
- Identify the "sticking points" for why more businesses are not taking advantage of these fish
- Recommend ways to encourage business growth
- IN SERVICE OF REMOVAL GOALS





STUDY INVOLVED

- Research reviewed over 40 studies, articles and papers
- Conducted 35 Stakeholder Interviews
 - Federal, State and local departments and agencies
 - Members of ICRCC (then ACRCC)
 - Universities
 - Other States
 - Advocacy groups
 - Fishers
 - Fish Processors & End-Users







NUMBER OF PRODUCTS ALREADY AVAILABLE

- Fine Dining
- Smoked Fish
- Nutritional Suppl.
- Surimi
- Fish Paste
- Fish Meal/Powder
- Pet Treats
- Fertilizer
- Leather
- Bait









KEY FINDINGS

Invasive Carp Products

Clear markets for these fish

The Fish

- Misguided perception as "trash fish"
- Yet favorable results at tasting events

Fishers

- Significant decline of the industry
- Low price of invasive carp sale to buyers

Processors

- Lack of consistent supply
- Quality (freshness)
- Processing infrastructure
- Reflected misguided perceptions of the fish

Transportation

- Cost
- Fishers largely responsible for delivery to processors





KEY FINDINGS (CONT'D.)

Information Sharing

No central point for businesses to go for opportunities

Regulatory

- Transport across state lines, environmental regulations, use of certain nets/equipment
- But general willingness on part of regulatory agencies to work to clear challenges

Chinese & Other International Markets

- Many inquiries, few viable opportunities
- Volume requested beyond current capacity
- Experienced China exporter needed





RECOMMENDATIONS



Create an Incentive Program

- Connect Fishers and Processors
- Provide Current, Reliable Information on Fish Populations
- Improve
 Transportation
 Infrastructure



Create Dialogue about Regulatory Considerations



Provide Ice to Fishers



Develop Brand and Marketing Strategy



Engage SMEs in Chinese and Other International Markets









Create an Incentive Program

- Connect Fishers and Processors
- Provide Current, Reliable Information on Fish Populations
- Improve Transportation Infrastructure

Create Dialogue about Regulatory Considerations

Enhanced Contract Fishing Program

- IL Licensed Commercial Fishers
- 10¢ per lb for Invasive Carp
- Caught in Peoria Pool of Illinois River
 - Expanded to LaGrange and Alton Pools
- If sold to processor for minimum price
 - 7¢ per lb

Program Results

- Nearly 9.4 M lbs removed since inception, Oct 2019
- 19 fishers currently under contract
- Increased sale price





Create an Incentive Program

- Connect Fishers and Processors
- Provide Current, Reliable Information on Fish Populations
- Improve Transportation Infrastructure

Create Dialogue about Regulatory Considerations



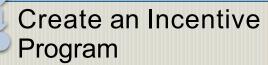
- Licensed Commercial Fishers
- 10¢ per lb for Invasive Carp
- Caught in Wabash River or IL Tributaries
- If sold to processor for minimum price
 - 7¢ per lb

Program Results

- Nearly 650,000 lbs removed since inception, March 2022
- 7 fishers currently under contract
- 1significant fisher additional funds make the difference in fishing this area







- Connect Fishers and Processors
- Provide Current, Reliable Information on Fish Populations
- Improve Transportation Infrastructure

Create Dialogue about Regulatory Considerations



Contracted Facilitation for Processors

- Processors picking up waterside, or delivery to facilities within 10 miles of designated waters' edge
- 5 designated waters Peoria Pool, IL River; Wabash River; Mississippi River, Pools 19, 20, 21; Kentucky & Barkley Lakes
- 5¢ per lb for Invasive Carp bought for minimum price

Program Results

- Over 4M lbs removed since inception, April 2022
- 8 processors currently under contract
- 1new processor picking up waterside
- Processors reporting investment in equipment





Develop Brand and Marketing Strategy

Design Team















Rebranding

Human Consumption Focus

- Design Team Researched
 - Other successful re-naming efforts
 - Consumption trends & preferences
 - Positive attributes of Invasive Carp
- 3 Intercept Surveys
- 2 Focus Groups

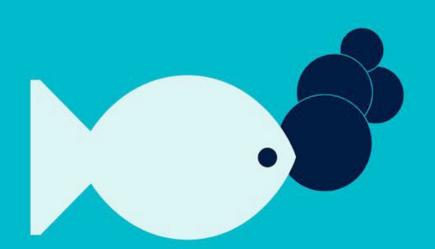


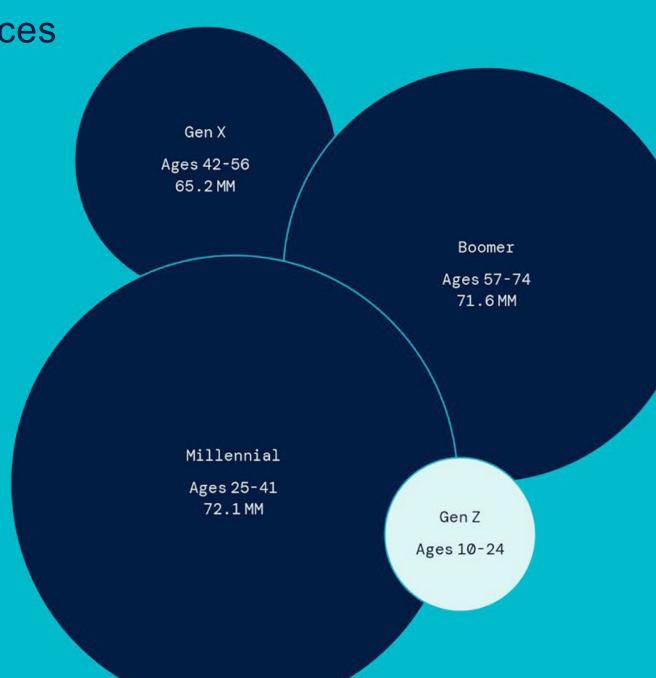
- Name change led consumption levels to spike to nearly 19 million lb. per year
- Orange Roughy is now on the Monterey Bay Aquarium Seafood Watch "Avoid" List as methods used to catch these fish are very damaging to ancient, deep-sea corals.

Consumption Trends & Preferences

Demographics

Millennials Boomers Gen X





Consumption Trends & Preferences

Food awareness has become a popular trend to the point that it now has become a value system that drives cultural and food purchase behavior.

"The Secret Sauce for a Modern Brand: Food Marketing Secrets for Millennial Brand Success" (Barkely, 2014)

Eat well, do good.

"Millennials believe in brands ... in powerful ideas that align with their values. There is a tipping point where brands that are winning in the marketplace are standing for more than just their bottom line in ways that are more transparent and authentic than ever before."

"Millennials are a generation that builds stronger connections to brands that promote sustainability in addition to corporate responsibility. The trend is to now purchase brands and products that make it easier to maintain this sustainable lifestyle."

"The movement to buy locally grown products has created a food-smart Millennial consumer. Millennials want to better understand where their food is coming from, who is making it and where the ingredients are sourced. Brands that can bring food knowledge into their product experience could be big winners in the race for transparency."

"Millennials are especially interested in the story behind their food and looking to learn more about what's in it and how it's made: 8 in 10 said they like 'behind the scenes' commercials for foods they consume, they want to know more about how their food is produced, and they think brands don't disclose enough about their food products."

...and it should taste delicious too.

Positive Attributes of Invasive Carp

Wild-caught

Great alternative to farmed raised or over-fished fish.

Locally sourced

Fresh from Illinois and Midwest waterways.

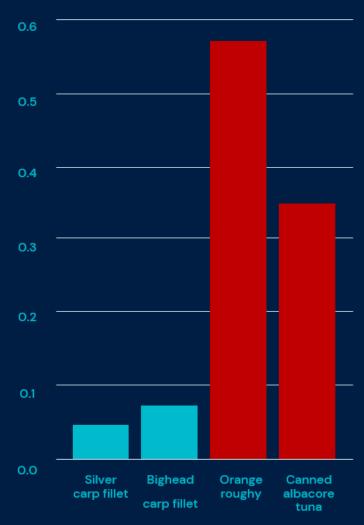
Responsible

Recommended as a Good* choice by the Monterey Bay Aquarium Seafood Watch. * Seafoodwatch.org

Healthful

Invasive carp is a clean, top-feeding freshwater fish, very low in contaminants* and heavy metals* that compares favorably to Tuna, Cod and Orange Roughy.

Invasive carp is a nutritious fish, and a great source of protein and omega-3 and -6 fatty acids.



Total Mercury mg/kg

Data Source: Southern Illinois University

^{*} Well below US Food and Drug Administration (FDA) limits.

Invasive Carp is Delicious

Flavor, texture, color.

Invasive carp is a mildly flavored, firm, flaky, freshwater fish. Its place is among the most popular white fish — more savory than Tilapia, cleaner tasting than Catfish, less flaky than Cod.

Invasive carp has a clean, mild flavor profile that marries well with a range of seasonings. It's a chef's blank canvas for creativity — pan fry, steam, broil, bake, roast, or grill. Invasive carp can be ground for burgers, fish cakes, dumplings and tacos.



Positive Attributes of Invasive Carp

Doing good by eating Invasive carp

Contributing to solution of a dire ecological problem

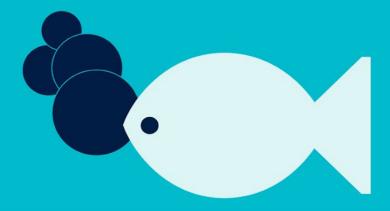
Helping small-scale, local fishermen Bringing back a traditional industry Growing the regional food hub

Helping to Address Food Insecurity

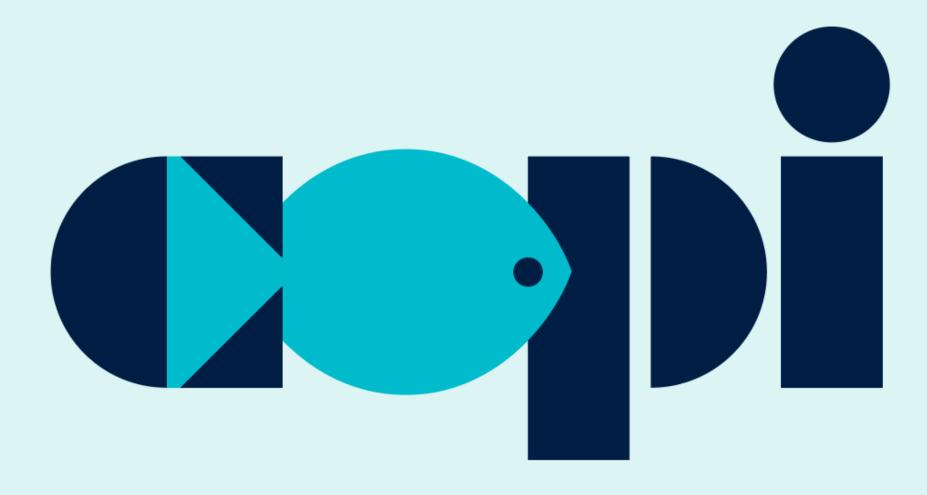
Domestically Internationally

After exploring ...

- other successful renaming efforts
- demographic trends and buying preferences
- and how well the positive attibutes of Invasive carp sync with those trends
 - ...the team generated hundreds of names.



...and narrowed them down to one:



Derived from the word *copious*, meaning *abundant*...

Launched on June 22, 2022

Virtual Launch Event

 Featuring two professionally produced videos and celebrity chef spokespeople

> https://www.youtube.com/user/TheIllinoisDNR, "A new name for Asian carp by IDNR"

Broad, Extensive Media Coverage

- Very Positive
- Associated Press, Reuters, Chicago Tribune, Washington Post, Food & Wine Magazine,
 The Economist, and many others
- Multiple local and regional television stations as well as national documentary interest by PBS
- National radio including NPR, Science Friday

Launch Results Cont'd.

Social Media

— Significant engagement on Facebook, Instagram, Twitter, LinkedIn

Social Media Advertising

— 4X increse in demand

Website – ChooseCopi.com

Significant visits and direct searches - Copi Near Me

Weekly new, viable opportunities

Copi Offered in 7 states

Removal

— Approximately 1.1 M lbs have been sold since launch

Launch Results Cont'd.

Product Offerings – current

- Boneless strips
- Minced (ground) boneless
- Boneless & bone-in fillets
- Smoked
- Whole headed, gutted
- Bouillon
- Fish Paste

- Baked
- Breaded/fried
- Tacos, sliders
- Dumplings, fish rolls
- Dip
- Soups and stews
- Flavoring

Growth in process

- Interest of national food distributors
- Supermarket chains
- Private product labels

...stay tuned, we'll be in the news, again!

WHAT'S NEXT - LOOK AHEAD

- Increasing Number of Fishers
 - Overcoming barriers to entry
 - One processor offered a "loan" to allow a fisher to buy needed equipment, loan paid back by fishing for the processor
- Increasing Investment in Icing on Board
- -Take Home Point
 - Put funding in the hands of those who know what to do with it





WHAT'S NEXT - LOOK AHEAD

- Processor Equipment Investment
- Creating a Cohesive, Cooperative Industry
 - Copi Collaborative
- Coordinated Government
 - On the business side



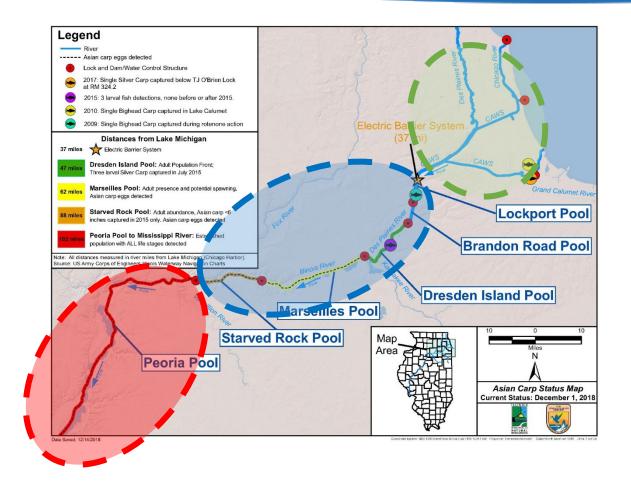




Kevin S. Irons
Assistant Chief
Fisheries Division

Forum on Invasive Carp
Contract Fishing and
Product Utilization

Protecting the Great Lakes AND Illinois waters









Monitoring and Response Plan

(since 2010 supported by Multiple Agency Strategy)



1) Detection:

Determine the <u>distribution and abundance</u> of invasive carp to guide response and control actions

2) Manage and Control:

Prevent upstream passage of invasive carp towards Lake Michigan via <u>use of barriers, mass removal, and understanding best methods</u> for preventing passage

3) Response:

Establish comprehensive <u>procedures</u> for responding to changes in invasive carp population status, test these procedures through exercises, and implement as necessary

Approximately 27 projects coordinated under this plan, presenting just a few of the results.





Monitoring and Response Plan

(since 2010 supported by Multiple Agency Strategy)

Contract fishing

- Contract fishers for fish removal (UPPER IWW)
- > 10 million pounds removed to date (1.3 M lbs 2020)
- Use gill/trammel nets, hoop nets, Great Lakes pound nets, and commercial seine hauls, Unified
- Little impact to native fishes (< 1% of total catch is game fish, mostly catfishes and put back into waters immediately)

Enhanced Contract fishing

- 7.2 M lbs removed from PEORIA POOL
 - 2019 518,132 (launched fall 2019)
 - 2020 3+ M lbs (YTD)
 - 2021 3+ M lbs
 - 2022 38ok lbs (YTD)
 - Provide contracted incentive for existing commercial fishing to best manage and control spread (GL)
 - Build IL ability to harvest, process, remove, develop business

Goals: Prevent spread and reduce impacts to native species



Great Lakes
RESTORATION

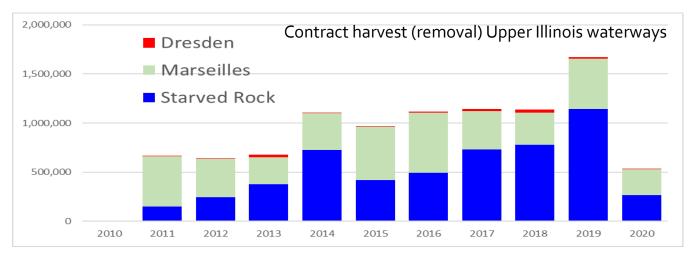


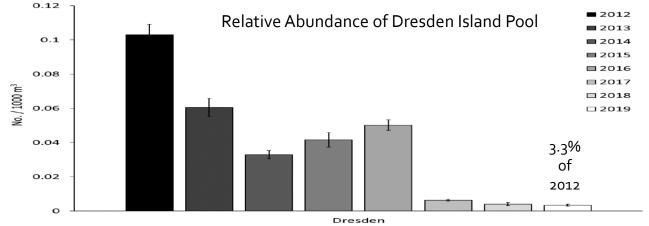
Monitoring and Response Plan

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RESULTS



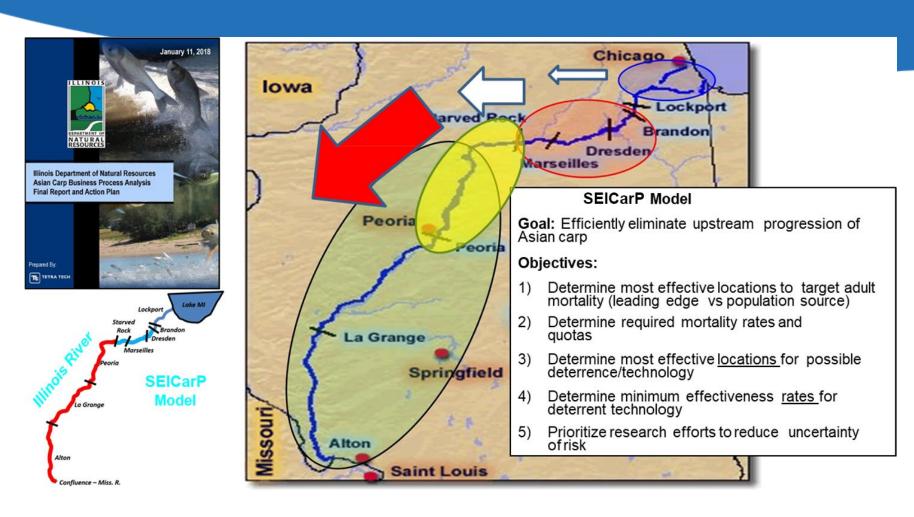


Overall strategy



Enhanced Contract Fishing

increased focus on lower waterway/Peoria Pool, expanding removal and opportunities, further reducing upstream expansion, reducing population (recommended by modeling)



Only by coordinating across Agencies and geography do we anticipate success in managing these species to our best ability across the basin

Illinois and partners efforts are necessary:

<u>Great Lakes</u>

<u>Mississippi River</u>

Ohio River

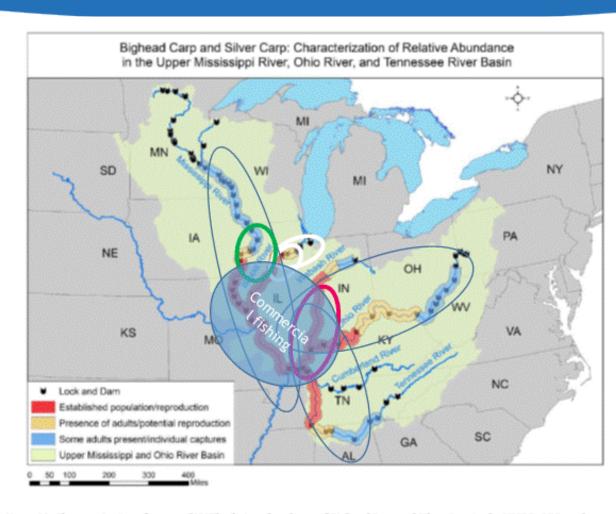


Figure 11. Characterization of current (2017) relative abundance of Bighead Carp and Silver Carp in the UMRB, ORB, and IWW/CAWS

Spatially explicit invasive Carp population (SEICarP) model



Lake MI

SEICarP model

Dresden Island pool

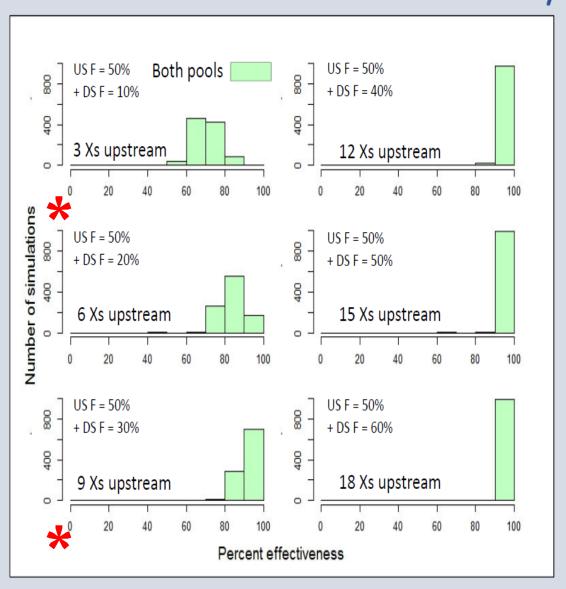
Control variables

- Decrease upstream movement
 - Dresden L&D, Marseilles L&D, or Starved Rock L&D
- Increase adult mortality

Evaluate response

 Percent reduction in Dresden Island pool over 25 years relative to no action

Results: increase adult mortality



Considering harvest as a major contributor to mortality expressed in SEiCarP modeling

- Probability of preventing arrival at control point (upstream extent) when DS is 4-6 times upstream (actual harvest is ~ 4x DS:US)
- Achieving
 management
 Goals of 10-20 M
 lbs removed could
 predict the
 prevention of
 arrival at the
 upstream extent
 as more likely
 than not

Illinois River A marketing summit in 2010 echoed recent findings

Commercial harvest Incentives Market development









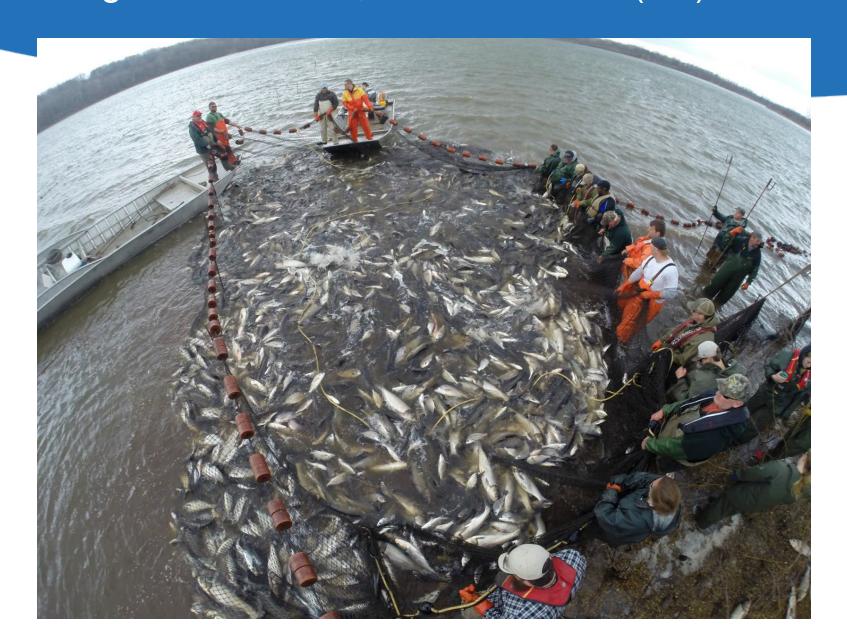


http://www.bombayharbor.com/Product/10959/The_Fish_Meal.html





Unified fishing and coordination with the most successful fishers e.g Illinois fishers, Wade Robbins (KY)



Unified Method Results

- Over 80% of carp have been removed from waters during these events
- Labor intensive thus cooperation and receptive market is necessary for large catches







Only through vibrant economic support can these tools be used to protect our waters throughout the basin, to the benefit of our rivers. Many agricultural programs have reached the same conclusion. (100% fish)

We have partners around the world to increase valuation of this fishery ICELAND OCEAN CLUSTER

FEBRUARY 2021

100% ASIAN CARP





PREPARED AND PRESENTED BY

DR THOR SIGRUSSON / FOUNDER BERTA DANIELS DOTTIR / CEO ICELAND OCEAN CLUSTER GRANDAGARDUR 16, 101 REYKKJAVÍK, ICELAND WWW.SJAVARKLASINN.IS/EN



CONTENTS



02-04

ALTEDNATIVES FOR UTILIZING THE SILVER CARP INTESTINES METHODS RESULTS & NEXT STEPS

DRYING THE SILVER CARP METHODS RESULTS & NEXT STEPS

FILLETING THE SILVER METHODS RESULTS & NEXT STEPS

MINCING THE SILVER NEXT STEPS

09-11

POSSIBLE SILVER CARP BY-PRODUCT UTILIZATION FISH SILAGE COLLAGEN

12-13

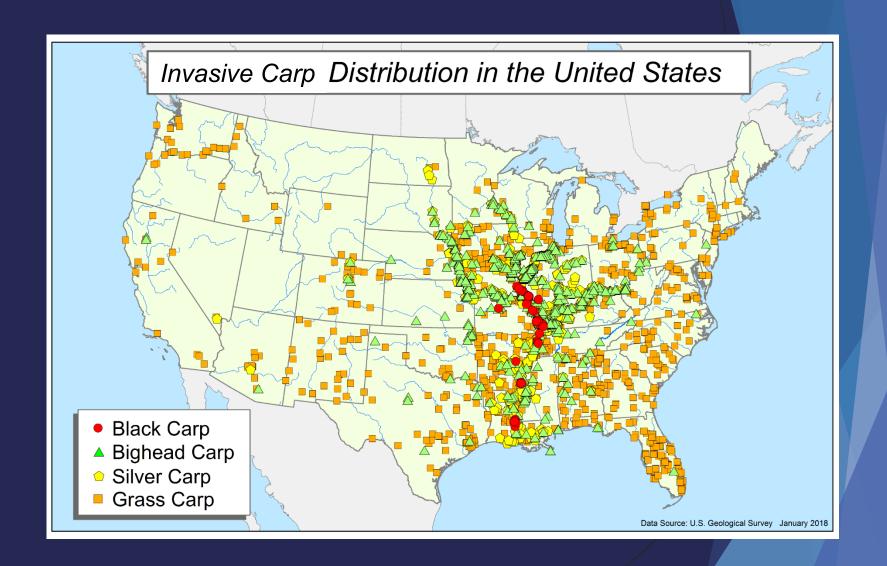
CONCLUSION NEXT STEPS

REFERENCES









Invasive Carp Management in Kentucky

Joshua Tompkins

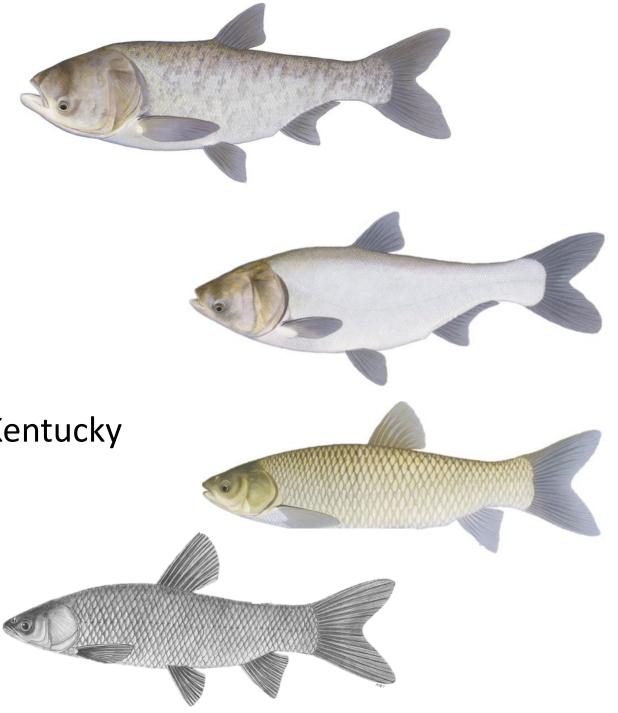
Fisheries Biologist

Kentucky Department of Fish and Wildlife Resources (KDFWR)



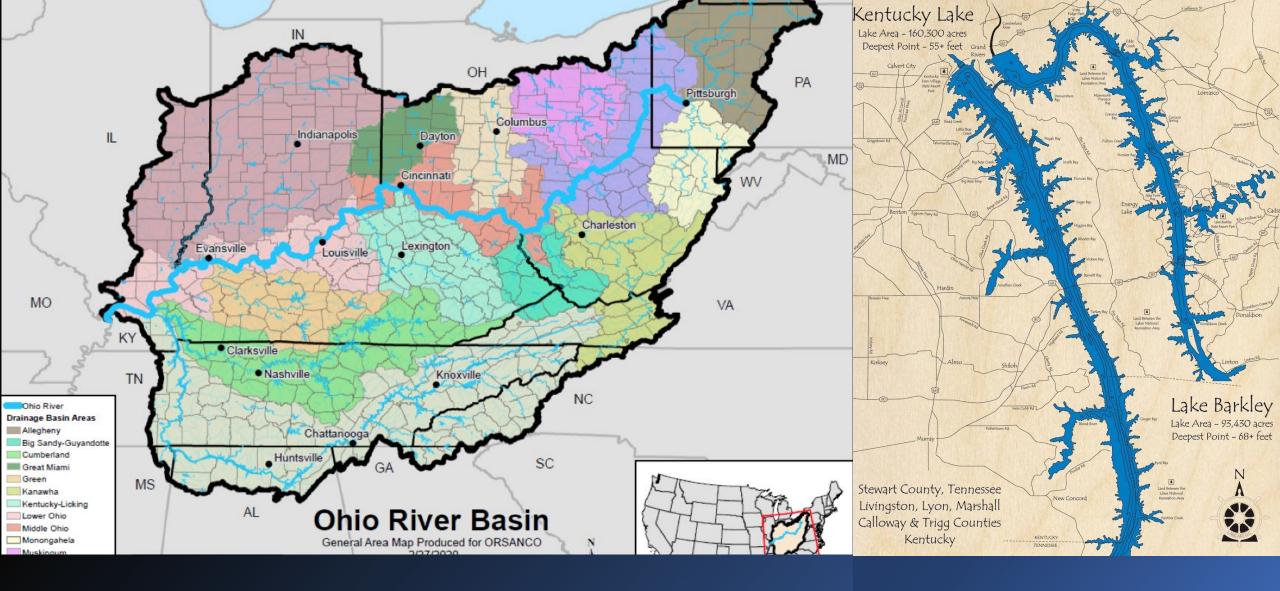
Overview:

- KFW Invasive Carp Goals
- Area of Focus
- Background
- Status as of 2021
- Future of Commercial Fishing in Kentucky
- Lessons Learned



KFW Invasive Carp Goals

- Eradication
- Prevent them from invading new waters or areas where carp have not been detected
- Reduce Invasive Carp populations in areas where they are present to minimize impacts to native fish species and other users of the waterways

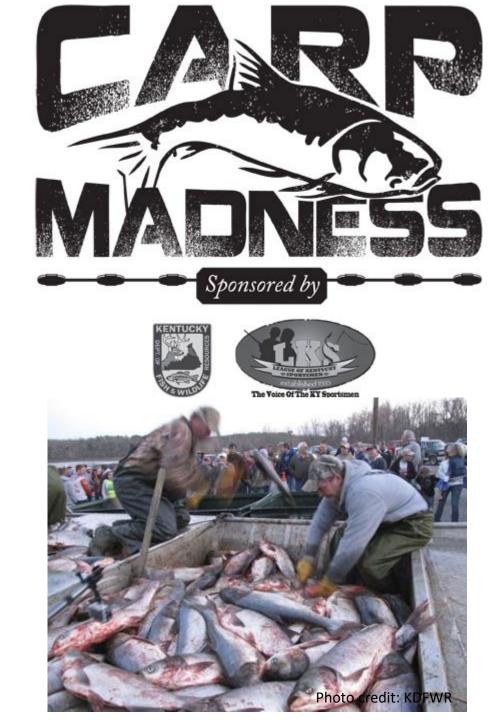


Area of Focus

Carp Madness

- 2 day tournament
- \$20,000 prize money
- 15 commercial fishers
- 83,000lbs bigheaded carp harvested

- 1. Publicity of issue
- 2. Awareness of commercial industry potential
- 3. Buy-in/support of recreational fishers



Commercial Harvest Since 2013

KDFWR

- Continue to update and adapt ACHP regulations
- Subsidy
- Free license
- Free ice
- Public-Private-Partnership

Commercial Fishers

- Increase in number
- Increase in effort
- Adaptation to improve efficiency
- Improved equipment

Commercial Processors

- Increase in number
- Market diversification

Bowfishing

- Regulation change in 2019 to allow sale of invasive carp harvested by any legal fishing method
- Over 300,000 lbs harvested and sold in 2021
- Used for Fertilizer or Fish Meal products



Contract Fishing

- Areas with low or no commercial fishing
 - Alternative to agency removal
- Tap into existing commercial fishing resources
 - Recruiting from other areas
- Benchmark for past season 250,00lbs
 - 337,000lbs removed

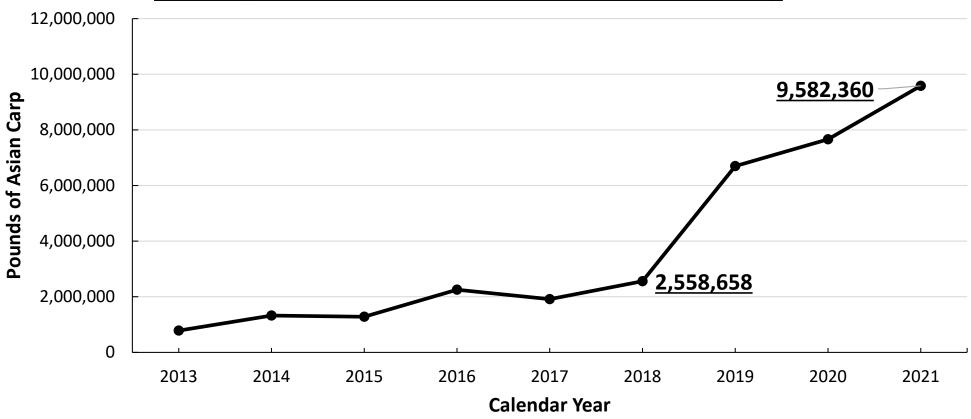
2021

- 9.58 million pounds harvested (statewide)
 - ~\$646,000 of subsidy paid out
- 43 commercial fishers on ACHP
- 3,534 Days of Effort
- 9 processors buying KY caught Invasive carp
- KY Invasive carp being used for a wide variety of products and marketed both domestically and exported





Kentucky Statewide Commercial Harvest of Invasive Carp



Future of Commercial Fishing in Kentucky

- Continue our partnership with commercial fishers
 - Update ACHP regulation as warranted
- Continue Subsidy program
- Partnering with Murray State University's Center for Economic and Entrepreneurial Development
- Experimental Methods Contract Program

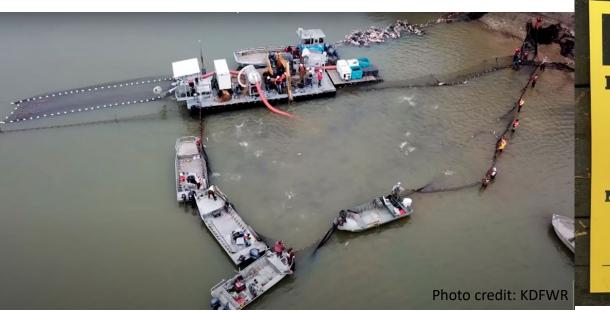




Photo credit: KDFWR

Experimental Gears project

- One active participant, Robbins Construction
 - Removal from TNCR
 - 238,351 lbs. over 16 days (14,896 lbs./day)
 - Removal from Ohio River
 - 56,271 lbs. over 4 days (14,067 lbs./day)
 - Removal from Mississippi River
 - 501,637 lbs. over 20 days (25,081 lbs./day)



Lessons Learned / Take Aways

- Open communication and strong partnership between state agency and commercial fishers
- Approval / Buy-in from the public
- Development of processing facilities or transportation to processors
- Other incentives often required to entice commercial fishers
- Consider what neighboring states are doing
- State agency must remain flexible



Questions?



Joshua Tompkins

Phone: 270-226-4192

Email: joshua.tompkins@ky.gov

TCHIP

Tennessee Carp Harvest Incentive Program





Eric Ganus, Commercial Fishing Coordinator Tennessee Wildlife Resources Agency

Program History:

- In December 2017, I was asked to create a way for the Tennessee Wildlife Resources
 Agency (TWRA) to purchase carp through an incentive-based program.
- I contacted the Department of General Services Central Procurement Office (CPO)
 for guidance on contracts. The Delegated Authority (DA) process was selected
 because of both its flexibility and ease of use.
- For our State, a Delegated Authority authorizes a State Agency to purchase goods or services or execute contracts for the specified program within the limits, guidelines, and conditions specified within the approved Delegated Authority.
- The program was created and implemented in September 2018 (FY19).



Scope of Services: limits, guidelines, and conditions

- A.1. The Contractor shall be a resident wholesale fish dealer providing all goods or services and deliverables as required, described, and detailed below and shall meet all service and delivery timelines as specified by this Contract.
- A.2. The Contractor shall solicit licensed commercial fisherman to enroll in the Tennessee Carp Harvest Incentive Program (TCHIP). The contractor shall provide ice to commercial fishermen participating in the TCHIP.
- A.3. The Contractor shall provide each newly enrolled commercial fisherman's TWRA ID #, name, address and telephone number to the State by close of business at the end of week.



Scope:

- A.4. The Contractor shall only partner with commercial fishermen that have a valid resident or nonresident commercial fishing license from Tennessee.
- A.5. The Contractor must pay a minimum price of \$0.18 per pound for fish greater than eight pounds (8 lbs.) to commercial fishermen for carp purchased for TCHIP. The Contractor must pay a minimum price of \$0.15 per pound for fish less than eight pounds (8 lbs.) to commercial fishermen for carp purchased for TCHIP.



Scope:

- A.6. The Contractor shall provide invoices from purchases of silver, bighead, black, and grass carp every thirty (30) days. The contractor shall only submit reimbursements from silver, bighead, black, and grass carp purchased by the contractor that were:
 - a. Harvested from Kentucky, Pickwick, Barkley, Cheatham, and Old Hickory reservoirs;
 - b. Received by the Contractor at the Contractor's place of business located within the State of Tennessee; and
 - c. Weighed by the Contractor at the Contractor's place of business located within the State of Tennessee.



Scope:

- A.7. Upon request, the Contractor must provide all records of purchases submitted to TCHIP for reimbursement as well as all financial records of payments pertaining to such purchases.
- A.8. <u>Warranty</u>. Contractor represents and warrants that the term of the
 warranty ("Warranty Period") shall be the greater of the Term of this Contract or
 any other warranty generally offered by Contractor, its suppliers, or
 manufacturers to customers of its goods or services. The goods or services
 provided under this Contract shall conform to the terms and conditions of this
 Contract throughout the Warranty Period.
- A.9. <u>Inspection and Acceptance</u>. The State shall have the right to inspect all goods or services provided by Contractor under this Contract.



Capacity Building

First Year (\$75,000)

Gillnets, rope, floats

Year 2.5 (\$400,000)

 Freezer/Cooler, forklifts, totes (regular/insulated)





Market Inspections

Receiving

 Fish are sorted and weighed as described by contract

Market Check

TWRA staff can inspect anytime

Invoices

Used to verify daily weights and payments



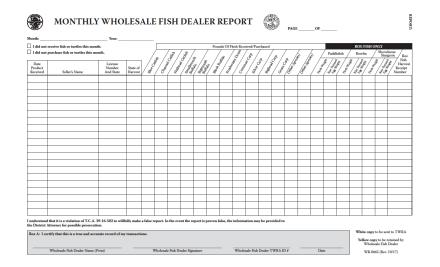
State Reporting

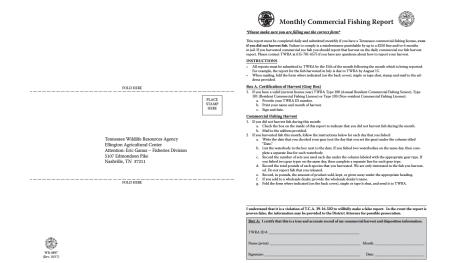
Commercial Fishermen

 Monthly Commercial Fishing Report

Wholesale Fish Dealers

 Monthly Wholesale Fish Dealer Report



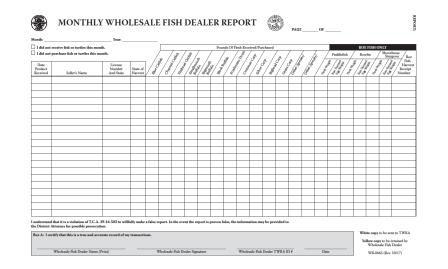


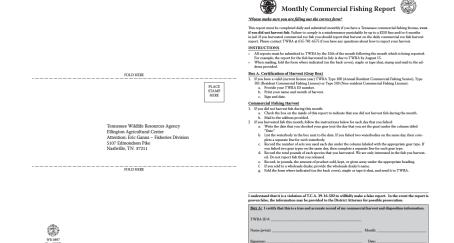


Monthly Reimbursements

Vendors Requirements

- Monthly TCHIP Invoice
- Bill of Lading (Daily Receipt)
- Monthly Wholesale Fish Dealer Report







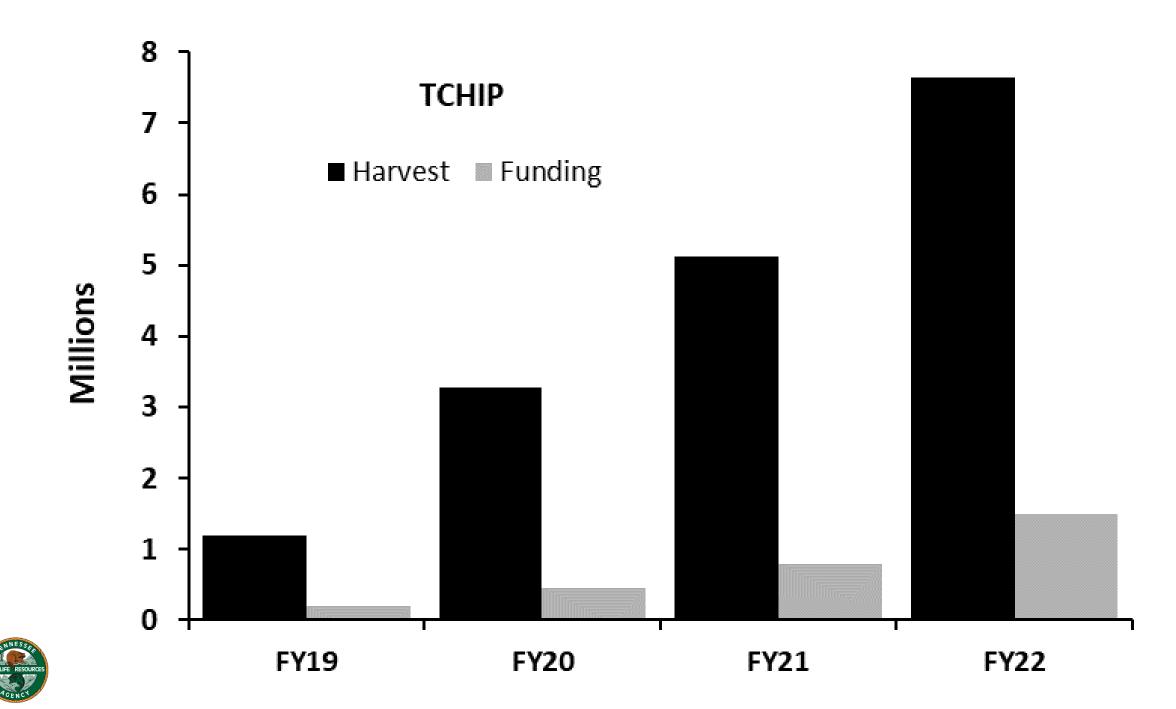
Market Uses and Products

- Bait
- Bone Meal
- Fresh/Frozen









Questions?

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DISCUSSION

- I. What are the current opportunities for increased use of invasive carp?
- 2. What are the challenges to expeditiously shipping sufficient product from commercial fishers to processors?
- 3. What are the operational and logistical challenges to ensuring consistent supply of high-quality fish for human and non-human consumption?
- 4. What programs or opportunities exist to address food security needs that can be supported with invasive carp harvest?