

Exploding myths

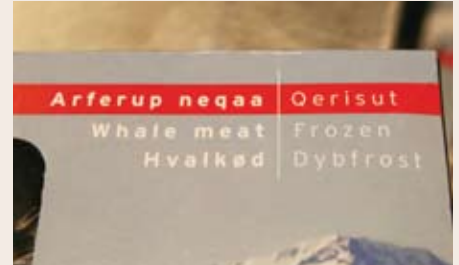
**An exposé of the commercial elements of
Greenlandic Aboriginal Subsistence Whaling**



WSPA

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Executive summary

The commercial elements of Greenlandic Aboriginal Subsistence Whaling (ASW) have been raised as a matter of concern within the International Whaling Commission (IWC) for many years. In order to provide an insight into the extent of the commercial aspects of Greenlandic whaling, WSPA commissioned a study to document and analyse the retail sale and distribution of products from large whales in Greenland.

This report documents the history and definitions of ASW within the IWC, as well as the history and nature of Greenlandic whaling. It presents the findings of a survey trip to Greenland, which took place in April 2008. Researchers visited six settlements in West Greenland, varying in size from the capital Nuuk to the tiny port of Qasigiannnguit, and documented availability of whale products for retail sale in supermarkets. In the town of Maniitsoq researchers visited the offices and whalemeat processing plant of the largest processor of whalemeat for retail sale in Greenland, Arctic Green Food. Throughout the investigation, in order to obtain as accurate a picture of Greenlandic whaling as possible, researchers posed as a film production company gathering information for a project looking at culture and traditional practices in Greenland.

The information gathered in this report offers a quantitative estimation of the extent of the commercial elements and retail profit margins in Greenlandic whaling.



Key findings from the study

- Since April 2007, approximately a quarter of the total volume of whale products available from Greenlandic hunts have been purchased, processed and sold for onward retail sale by the privately owned company Arctic Green Food.
- Commercial sale of Arctic Green Foods' products in retail outlets are estimated to earn retailers and Arctic Green Food in the region of \$1 million annually.
- Hunters generally prefer to sell their products at local markets, where the best prices of 30-40DKK/kg (\$6.30 - \$8.40) are paid. Once these markets are saturated they have the option to sell to Arctic Green Food, who purchase products for around 20DKK/kg (\$4.20/kg).
- According to its Managing Director, Arctic Green Food purchase whole whales and process them using industrialized methods. The company freezes and/or dries the products and distributes them for sale in supermarkets and stores across the country.
- Over a ten day period in April, five supermarkets in five towns in West Greenland were surveyed. All carried large volumes of Arctic Green Food processed minke whale meat, sold for an average price of 83DKK/kg (\$17.20/kg) with a range from 49.9 – 379.5DKK/kg. (\$10.30 - \$79/kg).
- At least 114 supermarkets in Greenland carry whale products for retail sale. Supermarket chains documented to sell Arctic Green Food whale products included the largest privately owned retail company in Greenland, Pisiffik, and the largest retail chain in Greenland, Pilersuisoq, owned by the Greenlandic Home Rule Government.
- Whale products were freely available for purchase to all shoppers in Greenlandic supermarkets, including foreign nationals.
- Retail sale value was found to be between 2.5 and 20 times higher than prices paid to whalers. Between 60% and 95% of retail sale price (varying depending on product) was estimated to be mark up from the processor and retailers.
- Researchers documented in excess of 500 boxes of whalemeat in Arctic Green Food's cold storage warehouse, most of which were packed in early-mid 2007. Some packages on sale in supermarkets had packaging dates of late 2006.
- According to one source in the town of Maniitsoq, humpback whales are thought to destroy fishing nets and the fishing/hunting community would welcome the opportunity to catch them for this reason.

History and recognition of Aboriginal Subsistence Whaling

Since its inception, the IWC has recognised a distinction between Aboriginal Subsistence Whaling (ASW) and commercial whaling. ASW was first formally recognised in a global international treaty in the Geneva Convention for the Regulation of Whaling, which came into effect on 16 January 1935.¹ Article 3 of the Convention included the statement that the Convention did not apply to 'coastal dwelling aborigines, provided that they used canoes, pirogues or other exclusively native craft propelled by oars or sail; they did not carry firearms; and the products were for their own use.'¹

The first Schedule to the International Convention for the Regulation of Whaling (ICRW), which superseded the Geneva Convention in 1946, echoed and simplified this premise by affording an exemption to the ban on commercial catches of gray and right whales provided that 'the meat and products are to be used exclusively for local consumption by aborigines.'²

When, in 1975, the IWC adopted the New Management Procedure (NMP) for commercial whaling, it also recognised the need for a separate management regime for ASW.³ Consequently, in 1981, an ad hoc Technical Committee Working Group on Development of Management Principles and Guidelines for Subsistence Catches of Whales by Indigenous (Aboriginal) Peoples met prior to the annual meeting of the IWC. In an attempt to describe and define ASW, the Working Group proposed the following definitions:

- Aboriginal subsistence whaling means whaling, for purposes of local aboriginal consumption carried out by or on behalf of aboriginal, indigenous or native peoples who share strong community, familial, social and cultural ties related to a continuing traditional dependence on whaling and on the use of whales.
- Local aboriginal consumption means the traditional uses of whale products by local aboriginal, indigenous or native communities in meeting their nutritional, subsistence and cultural requirements. The term includes trade in items which are by-products of subsistence catches.
- Subsistence catches are catches of whales by aboriginal subsistence whaling operations.⁴

The Commission never formally adopted these definitions but is implicitly committed to them as working definitions.⁵ Aboriginal subsistence whaling is not formally defined within either the ICRW or its associated Schedule of regulations, although Paragraph 13a of the current (2007) Schedule describes the aim of ASW as "catch limits for aboriginal whaling to satisfy aboriginal subsistence need".⁶

The IWC's agreed objectives for its management of Aboriginal Subsistence Whaling are to:

- ensure risks of extinction not seriously increased (highest priority);
- enable harvests in perpetuity appropriate to cultural and nutritional requirements;
- maintain stocks at highest net recruitment level and if below that ensure they move towards it.⁷

Use of products in ASW hunts

The IWC presently awards ASW quotas for five whale species; bowhead, gray, minke, fin and humpback. Catch limits are defined between seven whale populations (as defined by the Scientific Committee), with hunts practiced by aboriginal peoples in the Russian Federation, Greenland, the USA and St. Vincent and the Grenadines. The Schedule to the Convention uses the following language to describe limitations over use of the products:

"[the taking of whales is permitted by aborigines or by a contracting Government on behalf of aborigines] only when the meat and products are to be used exclusively for local consumption..."⁶

The inclusion of these usage criteria is the only directive in the Schedule which distinguishes the intent of ASW hunts from those of commercial operations. Adherence to the directive is therefore of paramount importance, but the ambiguity of the terms has made adherence difficult to assess and qualify. The IWC does not define the term "local consumption", a term which also features in paragraph 15 of the schedule with reference to an exemption over minimum size limits for baleen whale commercial catches. The Commission has also yet to formally define 'subsistence use', although considerable debate on the matter has occurred.

Definitions of subsistence use

A government seeking an aboriginal subsistence whaling quota must, at least in theory, submit a "needs statement" describing the claimed need for the whales to the Aboriginal Subsistence Whaling sub-committee whose terms of reference (last updated in 1997) include the consideration of: "...nutritional, subsistence and cultural needs relating to aboriginal subsistence whaling and the use of whales taken for such purposes, and to provide advice on the dependence of aboriginal communities on specific whale stocks to the Commission for its consideration and determination of appropriate management measures." However, the IWC stipulates no specification of content or terms of reference for a "needs statement". Furthermore, the IWC currently provides no definition of 'aborigines' and no requirement that they must meet any internationally agreed definition based on cultural or anthropological parameters.

In 1979 the IWC commissioned a panel of cultural anthropologists who offered the following definitions for the term 'subsistence':

'(1) The personal consumption of whale products for food, fuel, shelter, clothing, tools, or transportation by participants in the whale harvest;

(2) The barter, trade, or sharing of whale products in their harvested form with relatives of the participants in the harvest, with others in the local community or with persons in locations other than the local community with whom local residents share familial, social, cultural, or economic ties. A generalized currency is involved in this barter and trade, but the predominant portion of the products from each whale are ordinarily directly consumed or utilized in their harvested form within the local community; and

(3) The making and selling of handicraft articles from whale products, when the whale is harvested for the purposes defined in (1) and (2) above.'⁸

These definitions were not formally adopted by the IWC.

IWC views on trade, barter and sale in subsistence whaling

The IWC's 1981 ad hoc Technical Committee explored the notion and acceptability of trade in products from ASW operations, noting that trading in whale products has emerged as an alternative to traditional bartering systems.⁹ The group did not resolve an answer to the question of 'whether there is a difference in principle between the sale of whale products in order to buy other essential goods and the direct exchange of whale products for such goods.', however it did conclude that, at that time, the sale of by-products were from fisheries that were 'generally based on subsistence needs'. The group also noted that 'trade and barter *on a limited scale* by indigenous peoples are a part of their culture and are closely linked to the subsistence use of whale products.' (emphasis added).



A history of whaling in Greenland

Whaling for bowhead and humpback whales in Greenland is thought to have begun over 800 years ago and whalemeat, as kulaalimemgi (locally caught wild food), clearly carries considerable socio-cultural significance.¹⁰ However, a 1993 study commissioned by the Home Rule Government reported that much of the original inuit whaling knowledge and spiritual linkages between whaler and whale were lost in the 19th century; this was due to a range of factors, including Danish colonial influences, marginalization of traditional whaling practices due to over-hunting by Euro-American whalers, and import of new hunting technologies.¹¹ Consequently, Greenlandic whaling as recognised today is largely a modern invention, dependent upon introduced modern technology such as the harpoon cannon.⁵ Although there is some anecdotal evidence of the taking of fin and minke whales in the 19th century, historical records show these hunts to have become important largely during the 20th century.¹²

Between 1924 and 1958 (with a six year break during World War two) the Denmark based Royal Greenlandic Trade Company employed a 127 tonne pelagic catcher vessel, s/s Sonja, to attempt to revitalize Greenlandic whaling. It caught whales and delivered them to local communities, whilst the blubber was rendered as oil for sale in Denmark.¹¹ For this period the Greenlandic Home Rule Government reports average catches of 21 fin whales annually, plus smaller numbers of humpback, blue, sei, sperm and bottlenose whales.¹³ Greenlandic whaling in this guise ended in 1959 when it became unprofitable.¹⁴

With the introduction of the harpoon cannon in 1948, some fishermen in Greenland also began a revival of whaling, attaching harpoons to fishing vessels. From the 1950s several vessels practiced multi-species fisheries livelihoods, for both personal consumption and selling the meat, blubber and skin in local communities.¹¹ The increased availability of outboard motors facilitated the beginning of collective hunts for minke whales, using small boats and rifles, in the 1970s.¹⁵

IWC catch limits for Greenlandic hunts

In 1961, following concerns over sustainability of catches, the IWC introduced a catch limit of 10 humpback whales for Greenlandic hunts, to be caught from vessels less than 50 tonnes and processed onboard.¹¹ The IWC's 1965 worldwide protection for humpback whales carried an exemption for Greenlanders using these smaller vessels; this exemption remained in place until 1986.¹ Catch records show, however, that Greenlandic whaling exceeded these quotas in nine of the 13 years between 1973 and 1985, taking 24 humpback whales in 1978.¹³

Greenlandic fin and minke whaling using harpoon mounted cutter vessels also escalated during the 1960s and 70s, with between 6 and 12 fin whales and in excess of 200 minke whales taken each year. With the introduction of the New Management Procedure in 1975, the IWC first imposed ASW catch limits for Greenlandic fin and minke whale hunts.³

With the advent of the moratorium in 1986, Greenland's humpback quotas were eliminated and West Greenland minke quotas were reduced from 444 per year to 220. West Greenland minke quotas subsequently fell to their lowest level (60 per year) in 1989, although this deficit was offset by a rise in the fin whale quota from 6 in 1984 to 23 in 1989.¹¹

Greenland is responsible for almost half of all whales taken under ASW quotas since the moratorium came into effect in 1986, with total catches of 2,850 minke whales and 273 fin whales (1986-2006).¹⁶

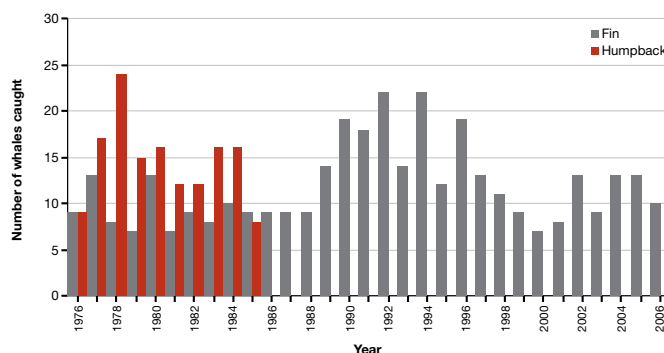
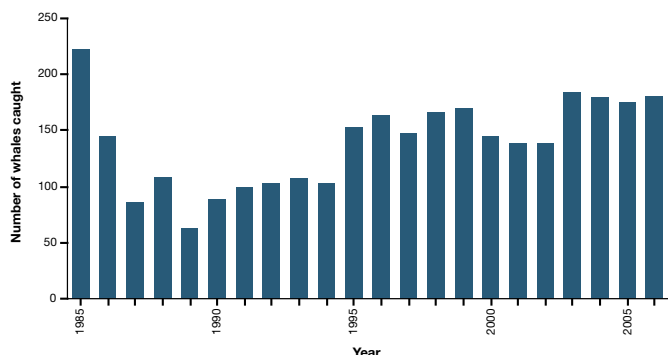


Figure 1: Catches of fin, humpback and minke whales by Greenland. Source: 1976-1985 data – White Paper on hunting of large whales in Greenland, 2007 (IWC/59/ASW 8Rev). Greenlandic Ministry of Fisheries, Hunting and Agriculture; 1986-2006 - http://www.iwcoffice.org/_documents/table_aboriginal.htm

Sale of whale products in Greenland: history

A 1982 paper to the IWC defending the aboriginal nature of Greenlandic whaling noted that trade in hunting products, including export, was introduced by colonial authorities, and that the 'minor commercial aspects' of Greenlandic hunting were 'a development of the traditional distribution system in an adaptation to modern conditions ...'¹⁴ It has previously been suggested that the importance of sharing, gift-giving and household consumption of whale products in Greenland is paramount and that cash transactions are relatively unimportant.¹⁷

A study commissioned by the Home Rule Government in 1989 supports this, noting, at that time, that whilst most whale products would be used for household consumption, hunters often sold 'limited amounts' for cash. The study went on to state that hunting and fishing products at that time were sold principally through three outlets: the Home Rule-owned processing plants (Royal Greenland, formerly KTU); the local kalaalialaq, an outdoor market where unprocessed hunting and fishing products may be sold privately; and sales directly to local institutions or other households. At that time Home Rule processing plants paid whalers approximately 50% of the prices of products sold for at the kalaalialaq.¹¹

In the early 1960s, the state owned company Royal Greenland began processing and shipping whale products for retail sale in communities across Greenland. However, it is also noted that the manager at the Royal Greenland Processing plant in

Qeqertarsuaq, West Greenland, reported that no minke or fin whale products were purchased by the plant in the late 1980s, owing to the small quotas imposed by the IWC. It is reported that 'the prestige in carrying out all aspects of whaling' restricted whalers from exploiting the possibility of selling whales as pure commodities.¹¹

According to the Home Rule Government commissioned study, in 1989 40% of households in Qeqertarsuaq obtained whalemeat through participation in hunting and flensing, whilst 35% usually purchased products from the kalaalialaq. Only 3% of households reported purchasing whalemeat from supermarkets processed and packaged by Royal Greenland.¹¹

The tradition of sharing of whalemeat in Greenlandic communities has reportedly declined significantly since the 1960s, and is now reportedly practiced chiefly between close family members. A survey in 1989 revealed that over three-quarters of all households felt that sharing had declined in the previous 20 years; the major reason cited for this decline was that more households were selling hunting and fishing products (in order to buy equipment and cover household expenses).¹¹

Several commentators have criticized the escalating development of profit maximisation and commoditisation of whalemeat in Greenland.¹⁸ In the case of Greenlandic hunts for highly sought after beluga whales, it has also been shown that there is a strong positive correlation between the prices paid for whale products and the intensity of hunting.¹⁹



Whaling in Greenland today


Whaling takes place in over 70 of Greenland's 120 towns and settlements; all whalers hunt opportunistically and are mostly engaged in other fisheries or hunting throughout the year.²⁰ Recent literature indicates that there are currently in the region of 60 boats mounted with harpoon cannons.²⁰ The whaling season in Greenland has started, in recent years, in May peaking in July and continuing through to October.

At the 59th meeting of the IWC in 2007, Greenland brought forward a schedule amendment to increase catches of large whales. This proposal incorporated West Greenland quotas of 200 minke whales, 19 fin whales, 2 bowhead whales and 10 humpback whales. Following a clear lack of support for this increase, most notably the inclusion of humpback whales, Greenland revised the proposal to remove the 10 humpbacks. The Commission then adopted a Schedule Amendment to award new 5-year (2008-2012) block quotas for Greenlandic whaling (table 1). The revised proposal narrowly achieved the $\frac{3}{4}$ majority necessary to pass (41 yes, 11 no, with 16 abstentions).

Substantiation and need: supply and demand

Greenland's subsistence need for meat and other edible products (West coast communities only and excluding edible products coming from small cetaceans) was last evaluated in 1990/1991. The quantification was based on the number of large whales caught per year prior to 1986, consisting of 232 minke whales, 9 fin whales and 14 humpback whales which they equated, using conversion figures, to 670 tonnes of meat.²³ Greenland is the only ASW applicant to make its request in tonnage, rather than number of whales. This level of need was said to have remained static from the beginning of the 20th century to the end of the 1980s and was expected to remain the same.²⁴

For hunts in 2006 the Greenlandic Home Rule Government reported a total catch (West Greenland only) of 169 minke whales and 10 fin whales, equating to 438 tonnes of meat.¹³ The Home Rule Government declared the catch to be around 232 tonnes short of their stated 1991 need. In 2007, a presentation by Greenland to IWC59 stated that the current need for whalemeat in West Greenland had increased by over 10% since the 1990 assessment to 740 tonnes, due to the approximate 10% increase in Greenlandic population since this time.²⁵



At IWC60 Denmark intends to submit a proposed schedule amendment for the hunting of humpback whales off Greenland

Welfare in Greenlandic large whale hunts

Distribution and regulation over sale

Whalers catching minke and fin whales can only sell products from the animals with a stamped license from the Home Rule Government. Prior to sale, the catch must be registered with the local authority and must show a receipt for the purchase of the harpoon grenade, along with the used grenade itself. According to Regulation no.10 of 13 on hunting of large whales (April 2005) hunters are obliged to ensure that all edible parts of the whale are 'used', including the sale of products if necessary or desired. If a whaler cannot make use or sell all edible parts then the rest must be given for free to the local community.

The Home Rule Government stated in their 2007 White Paper that there is a 'high demand' for meat from large whales in Greenland' and that as news of a fresh catch spreads through the communication network in Greenland people are keen to buy the meat and the hunters have 'no problem selling the share of the catch that is meant to be sold.'¹³ The white paper further refers to the sale of whalemeat 'via the government owned company which distributes products throughout the country.'

In 1991, the Home Rule Government decreed that the cold (non-exploding) harpoon be replaced by the Norwegian designed penthrith grenade harpoon fired from a 50mm cannon.¹³ The exploding harpoon is now the primary killing method for minke whales in West Greenland and it is also used as both a primary and secondary method for fin whales in West Greenland. For fin whale hunts the only adaptation to the harpoon grenade used for minke whales is a lengthening of the trigger cord, causing detonation deeper inside the animal.¹³ Rifles are used as a secondary killing method for minkes in West Greenland and also as the primary method in the collective hunts for minkes in both West and East Greenland. The Home Rule Government directs that rifles with a caliber of at least 7.62 mm (30.06) and pointed bullets must be used.²⁶

Between 2001 and 2006, only 20% of fin whales and 17% of minke whales taken in Greenlandic hunts died within one minute.¹³

The criteria used by hunters to assess death in whales is when the animal 'stops swimming, does not move and its flippers are still.' The 2007 White Paper on hunting large whales stresses that 'in practice it can be difficult to estimate the exact moment of death or unconsciousness because fin and minke whales tend to sink as soon as they are dead'. This lack of certainty over the length of time taken for a whale to die echoes the sentiments of Resolution 2004-3, which considered that the present IWC criteria for assessing insensibility and death are 'inadequate.' Whales are reported as being killed 'instantaneously' when they appear to have died in less than 1 minute.

Greenland reports only summary welfare data to the IWC. The 2007 White Paper reported the average time to death (TTD) for fin whale hunts (2001-2006) as 34 minutes, with a maximum TTD of 720 minutes (12 hours).¹³ The reason given for the exceptionally lengthy slaughter periods for fin whales is 'the size of the animals and their fast swimming speed.'

Collective minke whale hunts, in which five or more small boats pursue and hunt a whale with rifles, also unsurprisingly result in protracted TTD, with an average (2001-2006) of 28 minutes and a maximum TTD of 360 minutes.¹³ Hunters aim for the lungs to tire the animal and then slow it further by using hand harpoons to attach floats.¹¹ The Greenlandic government is encouraging the use of higher-powered weaponry (ie, exploding harpoons) in place of hand harpoons and rifles.



Commercial sale of whale products in Greenland

To ensure that the investigation provided a genuine insight into the Greenlandic market for whale products, WSPA staff and a commissioned film production company worked undercover, presenting themselves as a film research production company. Some of the information presented is therefore taken from interviews, filmed both openly and covertly.

According to interviews with several hunters, whalers wishing to sell their products will first choose to sell fresh meat from a catch at local markets. Here, purchase prices are highest, with whalers reportedly receiving an average price of 30-40DKK/kg (\$US 8.40)²⁷ Once this market is saturated, there is the option to sell the remainder of their catch to the privately owned company Arctic Green Food, who pay only 20DKK/kg²⁷, (\$US 4.20) for processing and onward commercial retail sale. The company is described by its Director as 'the biggest purchaser of whalemeat in Greenland – if not the only one.'

One private company – Arctic Green Food – buys around one quarter of the total Greenlandic quota for processing and commercial sale each year.

Arctic Green Food buys in the region of 70 metric tonnes of whalemeat annually; the company purchases whole whales, minus the guts and inedible parts of the head.²⁷ The company equates this to 40-50 minke whales, or approximately one quarter of the total Greenlandic quota. In 2006 Arctic Green Food purchased a larger volume of whalemeat - 160 tonnes - of which they now have approximately 10 tonnes remaining.²⁷

Arctic Green Food dries (approximately 20%) or freezes the meat, making it available in supermarkets all year round. Arctic Green Food's Director explained that the net profit from selling dried meat was higher and therefore this processing method was preferable. He added that Arctic Green Food have invested in Icelandic technology to dry the meat mechanically, not naturally, making the production process more efficient.

"We have invested in driers, Icelandic technology... we dry the meat mechanically, not naturally, so we don't depend on the weather."

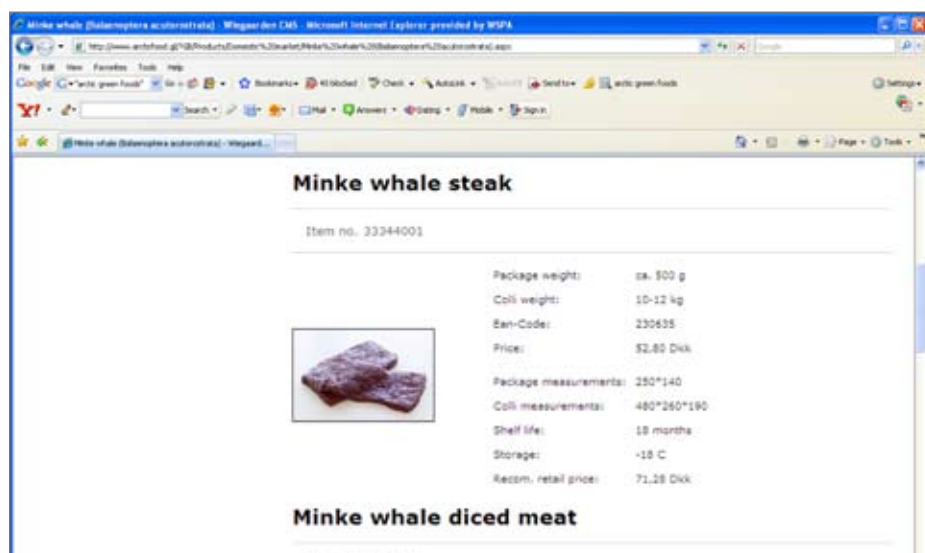
Tønnes 'Kaka' Berthelsen, Director of Arctic Green Food

Arctic Green Food is engaged in the processing and sale of a range of fisheries products (see box detailing company profile). The Home Rule Government subsidises some of Arctic Green Food's fisheries product processing plants in small settlements along the coast, but the company's Director stressed that their sale of whale products is not subsidised – 'it is commercial.'²⁷ The company's whale processing plant is in the town of Maniitsoq in West Greenland, near what is described as 'the biggest hunting site in Greenland.'²⁷

According to Arctic Green Food, the demand for whalemeat in some of the traditional whaling towns, such as Nuuk, Maniitsoq and Sisimiut, is very low and consequently there is a need for the company to ship considerable amounts of whalemeat to the remote areas in the far east and north of the country, these areas being a 'significant market.'²⁷ Arctic Green Food's Director told researchers that the company 'benefits hunters by allowing them to sell whalemeat all year round via supermarkets and not only at the local markets, which get saturated within one or two months.'

"In the past, the whalers would be able to sell it on the local markets... but because we have our freezers they can sell much more volumes of their catch."

Tønnes 'Kaka' Berthelsen, Director of Arctic Green Food



Top (L-R): Whalemeat driers in Arctic Green Foods processing plant; whalemeat stored in Arctic Green Foods warehouse; minke whale meat on sale in Greenland's capital, Nuuk; Bottom (L-R): whale meat on sale in Brugsen supermarket, Nuuk; diced minke whale meat on sale in Nuuk; whalemeat stored in Arctic Green Foods warehouse; minke whale blubber on sale in Nuuk.

Arctic Green Food's website, www.arcticfood.gl, lists product details and recommended retail prices for 10 varieties of minke whale products and one fin whale product.

According to Arctic Green Food, some whalers sell meat direct to 'one or two' supermarkets in Nuuk and that this effectively drives down the price Arctic Green Food pay to hunters. The company is considering whether to offer an incentive 'bonus' scheme to encourage loyalty from hunters, perhaps securing the purchase of all whalemeat from a particular hunter.²⁷

Arctic Green Food products and availability

Researchers found meat with package dates of December 2006 on sale in a supermarket in Kangerlussuaq. During a tour of Arctic Green Food's warehouses, researchers documented in the region of 500 boxes of whalemeat marked as having been processed in June 2007. With each box containing between 10 and 15kg of meat, this equates to in excess of 5 tonnes of whalemeat in cold storage from 2007 hunts.

Despite Greenland's request for increased quotas to meet demand, researchers documented in excess of 500 boxes of whalemeat, most packed in mid 2007, in Arctic Green Food's cold storage facility.

Minke whales

Arctic Green Food's Director told researchers that the 2003-2007 quota for minke whales (175/year) was 'too low' and that the company could 'definitely sell more whale meat and other products from whales.' Arctic Green Food only purchases harpoon caught whales. The company's website²⁸ lists details for 10 minke whale products (table 2).

Fin whales

Interviews with whalers revealed that the large size of fin whales seems to make them less attractive to Greenlandic hunters. The process of catching and killing fin whales is noted to be difficult and potentially dangerous due to their size and speed.

Arctic Green Food purchases only one or two fin whales per year – 'there is a quota of 19, but there is no demand for it, because it is very huge'.²⁷ Arctic Green Food's Director explained that for a market like Maniitsoq with a population of only 2,900 'one minke whale will be sufficient to cover the demand... a fin whale which is five times bigger is too big.'



Company profile and history: Arctic Green Food

In the early 1960s the Home Rule owned Royal Greenland Trade Department (KGH), established in 1774, began purchasing minke whale meat from Uummannaq for commercial sale in the company's stores. The company also sold some whalemeat through a shrimp-processing plant in Qeqertarsuaq.¹⁵

From 1976 Arctic Green Food was a part of the Home Rule owned Royal Greenland A/S.³⁰ In 1997 Royal Greenland A/S split into two entities – one commercial and one non-commercial. The commercial company kept the name of Royal Greenland whilst the non-commercial company was named Nuka A/S. Arctic Green Food remained within NUKA A/S, operating under Home Rule Government jurisdiction.

In January 2005 the Home Rule owned company KNI A/S (Greenland Trade) took over Nuka A/S (incorporating Arctic Green Food) but by 2007 Arctic Green Food proved to be a financial burden.³¹ In June 2007 Arctic Green Food was sold to become a privately owned company, owned jointly by the international sales office in Hobro, Denmark, DayCatch Greenland A/S and Greenland Venture.³²

The company's head office is in Maniitsoq, West Greenland and it has established itself in ten different sites along Greenland's coastline. The company's goal is to increase the number of these 'well founded settlements'.³² In an effort to raise awareness of the company and of Greenlandic products, the company has opened up European sales office in Denmark in 2006.³³ Figures from 2005 reported the company's annual turnover to be DKK 93 million.³⁴

The company employs 40 full time staff and over 200 on a seasonal basis. Products for the domestic market include minke whale, narwhal and fin whale whilst key exports are musk ox and frozen and salted fish products to Denmark, other EU countries and international markets.³²

Arctic Green Food markets itself as a high quality producer of natural raw food products catering for both Greenland's domestic and export market. Within 10 years it wishes to establish itself as a financially viable company, based in the Greenland settlements, with products to be of at least the same standard as the corresponding Faroese and Icelandic products.³⁵

AGF shareholder: Greenland Venture A/S

Greenland Venture, a venture capital company, owns a 49% share of Arctic Green Food.²⁷ In 2006 Greenland Venture invested DKK 79 million in the business life of Greenland and has stated that it expected to invest a further DKK 20 million in 2007. The vision of Greenland Venture is to contribute to the development of flexible, growth orientated capital in Greenlandic business life, particularly targeting corporates whose aim is to increase exports and decrease imports.³⁵

“Arctic Green Food's product range reflects the company's aspiration to be number one supplier to the domestic consumers of Greenland provisions.”
Arctic Green Food's website.³⁷

AGF shareholder: DayCatch Greenland A/S

DayCatch Greenland A/S also owns part of Arctic Green Food. They are a consultancy, advertising and marketing company specialising in food and food ingredients. DayCatch Greenland A/S operates the international sales office for Arctic Green Food and is engaged with marketing and sales for their fisheries and musk ox products.³⁶



Nerisassaatigut mamartut – Smagen af Grønland

Company profiles: supermarkets selling whale products in Greenland

Pisiffik

Pisiffik is the largest privately owned retail company in Greenland.³⁸ The chain consists of 36 supermarkets, local stores and specialist stores at Greenland's 6 largest towns, where about 60 % of the Greenland's population lives.³⁸ The Pisiffik company is affiliated with other brands such as Spar, Jysk, Idemøbler Pisattat and Torrak Fashion, marketing a wide range of clothing, toys, electrical goods and hunting articles.³⁸ Pisiffik's primary shareholder is the retail trade company Dagrofa and shares are also held by some employees and the Greenlandic Home Rule Government.³⁸ The company employed almost 700 people in 1995.³⁹

Pilersuisoq

Pilersuisoq is the largest retail chain and the second largest company in Greenland.⁴⁰ Wholly owned by Greenland's Home Rule Government's trade enterprise KNI, Pilersuisoq A/S is KNI's retail and wholesale division.⁴¹ The company was founded in 1992 and reportedly began making a profit in 1996.⁴⁰ There are 65 Pilersuisoq stores across Greenland along both the east and the west coasts, with a central distributing plant based in Nuuk.⁴² Pilersuisoq holds a service agreement with the Greenland Home Rule relating to the operation of shops in settlements, outlying districts and certain towns.⁴¹

Parent company KNI A/S employs over 1,000 people and achieved a profit increase of DKK 1 million from 2006 to DKK 14.8 million in 2007. In 2008, KNI A/S anticipates a pre-tax profit of around DKK 40m.⁴¹

In June 2005 it was revealed that in between December 2004 and January 2005 KNI Pilersuisoq had shipped 900kg of whale meat to Aalborg in Denmark without proper CITES notification papers; the three consignments were subsequently seized. Although personal import of packages of whalemeat weighing up to 5kg are permitted and multiple packages may be received by 'provisions clubs' for subsequent sealed non commercial distribution, these consignments were not accompanied by the correct export and import permits. KNI Pilersuisoq claimed this mistake to have arisen because they had not been fully aware of the CITES requirements for whale products.⁴³

Brugsen (Kalaallit Nunaanni Brugseni – KNB)

Founded in 1991, Brugsen KNB is a Greenlandic co-operative company owned and managed by its members, with 13 stores in 7 cities along the west coast of Greenland. Its headquarters are in Nuuk.⁴⁴ Brugsen KNB also operates an internet ordering system, though certain products, including meat, cannot be purchased through this medium.

The company describes its vision to continue to be 'the leading company in terms of profitability and ethics within the retail trade.' Brugsen – KNB describes its contribution to 'professional and committed cooperation on the production and marketing of local / Greenland products.' The company's 2005 revenue was DKK 532,000.⁴⁵



Supermarkets selling whale products

Researchers visited five supermarkets in five different towns during the 10 day survey; two were owned by Pisiffik, two by Brugsen and one by Pilersuisoq. All supermarkets were found to offer frozen and/or dried minke whale meat for sale. All products were processed by Arctic Green Food. Product prices and packaging dates were recorded (table 3). Researchers found that prices of whale meat for retail sale varied depending on location (towns), cuts (steaks, blubber or cubes) and type of processing (dried or frozen). The results from the nine products found on sale show that the average price for minke whale meat at these five supermarkets was 83DKK/kg (approximately \$17.20/kg).

Retail sale value was found to be between 2.5 and 20 times higher than prices paid to whalers. Between 60% and 95% of retail sale price was estimated to be processor and retailer margins.

Commercial profit margins

Average price mark-ups were estimated based on comparison with the typical wholesale purchase price of 20DKK/kg paid to whalers, according to the Director of Arctic Green Food. Commercial retail mark-ups for sale of whalemeat appear to be high (table 3); retail sale value was found to be between 2.5 and 20 times higher than prices paid to whalers. Between 60% and 95% of retail sale price (varying depending on product) was estimated to be mark up from processors and retailers.

Table 3 shows calculation of the average estimated percentage of proceeds destined to go to the processor and retailers (78%). From this we assume that the remaining average of 22% of proceeds from retail sale goes in payment to hunters.

Table 2 highlights that Arctic Green Food recommend that retailers should receive 26% of the proceeds of the total retail sale amount of their whale products (with the exception of minced minke whale at 20%). The amount estimated to go to Arctic Green Food is therefore 74%. Of this, 22% is estimated to be absorbed in the cost of purchasing the whale products from hunters and a further proportion will clearly be spent in processing and plant running costs; the rest may be reasonably assumed to be profit margin.

Consumer attitudes and dietary preferences

Whalemeat prices are comparatively higher than prices for other meats sold in supermarkets. Interviews with shoppers suggested that this higher price makes it more of a delicacy, not consumed on a regular basis. Several interviews with shoppers in Illulissat and Nuuk revealed a preference for purchasing cheaper whalemeat from community markets ('chop houses') instead of from supermarkets. An older consumer interviewed shared this view and added that the Greenlandic diet – especially of the younger generation – was increasingly inclined towards meats and food imported from Europe.



These consumer impressions corroborate recent estimates that the diet of Greenlanders is based on 75% of imported foods,⁴⁶ however a conversation with a local doctor suggested that the balance of local/imported foods in remote communities was closer to 50/50. Recent literature indicates a decline in the proportion of the Greenlandic diet made up from whale products.⁴⁷

Researchers enquired about the demand for humpback whale meat. An interview with a representative from a whale-watching company in Maniitsoq suggested that fishermen are willing to catch humpback whales simply because they believe that they destroy fishing nets.

Estimated breakdown of proceeds of sale of whale products sold in Greenlandic supermarkets

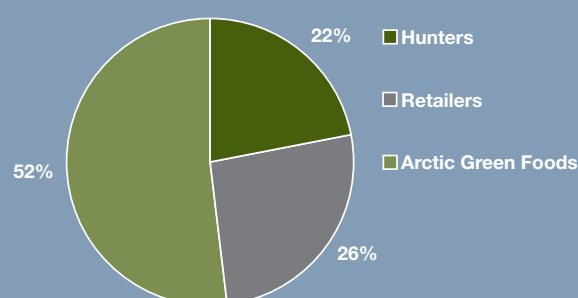


Figure 2: Estimated breakdown of proceeds from sale of minke whale products in five supermarkets in Greenland, April 2008. From estimations of processor and retailer mark-up (table 3) it is estimated that hunters receive an average of 22% of proceeds from sale. If following Arctic Green Food's suggested retail mark-up, retailers will be in receipt of 26% of proceeds from sale (table 2).

Tables

Table 1: Article 13b(3) of the Schedule to the Convention: quotas awarded for Greenlandic whaling 2008-2012. Figures in brackets indicate quotas/yields for the 2003-2007 block.⁶

Species	Quota	Meat yield (tonnes)
Fin whale	19 (19 ²¹)	190 (190)
Minke whale (central stock)	12 (12)	24 (24)
Minke whale (West Greenland stock)	200 (175)	400 (350)
Bowhead whale	2 (0)	20 ²² (0)
Total (West Greenland)	221	610 (540)
Total (East Greenland)	12	24 (24)
Total (Greenland)	233	634 (564)

Table 2: Product description and pricing details of Arctic Green Food's minke and fin whale products. All products and prices as listed on company website, May 2008²⁹. All products are frozen, with a recommended storage temperature of -18°C and a shelf life of 18 months.

Product	Pack weight	Pack price (for sale to retailers) (price per kg)		Recommended retail price (price per kg)		Recommended retailer mark up (above wholesale purchase price)		Proceeds from sale to go to retailers (if following mark-up recommendations from AGF)
		DKK	\$US	DKK	\$US	DKK	\$US	
Minke whale								
Meat	500g	126.40	26.2	170.64	35.4	44.24	9.2	26%
Meat ‘mix’	500g	70.78	14.7	95.55	19.8	24.77	5.1	26%
Steak	500g	52.8	10.9	71.28	14.8	18.48	3.9	26%
Diced meat	500g	54.36	11.3	73.39	15.2	19.03	3.9	26%
Minced meat	500g	36.74	7.6	45.94	9.5	9.20	1.9	20%
Mattak	150-600g	120.67	25.0	162.9	33.8	42.23	8.8	26%
Salted blubber	300-500	36.75	7.6	49.61	10.3	12.86	2.7	26%
‘Nature dried’ meat	100g	262.65	54.5	354.58	73.5	91.93	19.0	26%
Dried meat	100g	262.80	54.5	354.78	73.6	91.98	19.2	26%
Flipper/tail	300-500g	63.01	13.1	85.06	17.6	22.05	4.5	26%
Fin whale								
Meat	500g	123.11	25.5	166.20	34.5	43.09	9	26%

Table 3: Examples of commercial retail prices of minke whale meat on sale in four towns in Greenland recorded during an April 2008 survey of five supermarkets in West Greenland. Mark up estimates are based on comparison with average price of 20DKK/kg paid to whalers, according to Director of Arctic Green Food.

Product	Retail Price (DK per/kg)	Estimated mark-up (price)	Estimated mark-up (% of retail price)	Packed on (date)	Retail price comparison with wholesale purchase price	Town	Supermarket	Packed by
Sildepisker (frozen cubes)	80.75	60.75	75%	20.12.06	X4	Kangerlussuaq	Pilersuisoq	Arctic Green Food
Sildepisker (frozen cubes)	79.90	59.90	75%	22.06.07	X4	Ilulissat	Pisiffik	Arctic Green Food
Sildepisker (frozen cubes)	75.00	55.00	73%	06.06.07	X3.75	Sisimuit	Brugsen	Arctic Green Food
Sildepisker qiporaq (from belly)	150.00	130.00	87%	14.06.07	X7.5	Qasigiannguuit	Pisiffik	Arctic Green Food
Sildepisker spaek (blubber)	49.90	29.90	60%	07.03.08	X2.5	Nuuk	Brugsen	Arctic Green Food
Sildepisker bof (steak)	79.90	59.90	75%	18.06.07	X4	Nuuk	Brugsen	Arctic Green Food
Sildepisker torret (dried steaks)	399.50	379.50	95%	05.02.08	X20	Nuuk	Brugsen	Arctic Green Food
Sildepisker smakod (small pieces)	79.90	59.90	75%	03.07.07	X4	Nuuk	Brugsen	Arctic Green Food
Sildepisker qiporaq (from belly)	149.90	129.90	87%	19.06.07	X7.5	Nuuk	Brugsen	Arctic Green Food
Average	83		78%		X6.4			

Conclusions

“Put simply, commercial whaling is intensive, large-scale, and potentially unsustainable if mismanaged. Commercial whaling also aims to maximize profits. Subsistence whaling, on the other hand, is considered to be small-scale, sustainable and aimed at satisfying local needs. Furthermore, there is no profit incentive that drives subsistence whaling – it is inextricably linked to and underpins the culture and economy of aboriginal peoples”. ⁴⁸

This report demonstrates that the commercial sale and distribution of whale products is a key component of the whalemeat market structure in Greenland. Processing of whale products by Arctic Green Food facilitates the sale of whale products nationally, year round, instead of hunters only being able to sell fresh products locally and on a seasonal basis. This commercial component clearly does bring some economic benefit to hunters. The potential for hunters to gain economic rewards through sale of their products to a nationwide market is also likely to have the net effect of leaving less whale products available for free distribution to the local community, corroborating the findings of the 1989 public survey which highlighted the decline of gifting of whale products.¹¹

The commercial processing and retail sale of whale products in Greenlandic markets also results in profits to both Arctic Green Food and the supermarkets selling the products. To make an extremely rough estimation of the market; if we consider that the average price of whalemeat on sale in the supermarkets (83DKK/kg) is composed of in the region of 26% retailer profits, then an extrapolation to the 70 tonnes of whalemeat processed by Arctic Green Food annually indicates that supermarkets/retail outlets could be in receipt of up to DKK 1.5 million (approx \$310,000) annually from the sale of whalemeat. Similarly, by extrapolating the estimated 52% proceeds from sale which go to Arctic Green Food, the company may be in receipt of approximately 3 million DKK (approx \$650,000) from the sale of whale products annually.

The Home Rule Government's 2007 White Paper states that hunters have 'no problem selling the share of the catch that is meant to be sold.' This is demonstrably clear from this study; what remains less clear – and as yet undefined by the IWC – is what proportion of catch is meant to be sold commercially, and what level of commercial sale is acceptable under the banner of ASW.

The future for whaling in Greenland

Greenland has made no secret of its longer term aspirations to whale commercially, rather than under aboriginal license. In a 2007 letter to the Danish Parliamentary Committee on Planning and Environment (PCPE) the North Atlantic Group of Parliamentarians in the Danish Parliament wrote:

“We would rather catch the whales commercially, like we catch shrimps and halibut, than being reduced to cultural weirdos, who most gratefully are allowed to slaughter a couple of sacred cows, while we are being manipulated by the animal welfare market.”⁴⁹

Greenland has also indicated a desire to enter international commercial trade in whale meat. On 6th December 2002 the national Greenlandic Broadcasting Company KNR reported:

“Greenland is floating in unused whale meat – but is lacking blubber. Thus, NUKA A/S has reduced buying whale meat since it has proven impossible to sell the meat in the Greenlandic home market. At the same time whale blubber is in short supply on the home market.

Based on this situation, NUKA A/S has made contacts to Norway to trade whale meat for blubber. The Norwegians will get the whale meat while we will get more blubber.

However, export regulations are strict and therefore NUKA A/S and KNAPK (the Organisation of Fishermen and Hunters in Greenland) urges that a working group is formed to look at the possibilities for easing these restrictions for import and export of whale products. The group should also look at whether the agreements existing on this field is an advantage to Greenland.”⁵⁰

With the 1986 moratorium on commercial whaling and CITES appendix I listing of whales still in effect these aspirations cannot be realised. Despite this, it is clear that a significant proportion of whales killed in Greenland's hunts are sold through commercial channels, making not inconsiderable profits for privately owned companies. The volume of this commercial processing and sale – in the region of one quarter of the annual quota – makes it highly questionable whether the process can be categorised as ‘trade and barter on a limited scale’ as per the IWC 1981 ad hoc Technical Committee's advice.⁹

That anyone entering a supermarket in Greenland, including foreign nationals, can purchase whalemeat appears in contradiction to the Schedule directive that the “meat and products are to be used exclusively for local consumption.”¹⁶ Furthermore, the purchase of whole whales for processing by Arctic Green Food deviates significantly from the IWC's generally agreed principle that ‘local aboriginal consumption.... includes trade in items which are *by-products* of subsistence whaling operations.’¹⁴ (emphasis added).

Recommendations

The industrialised processes employed by Arctic Green Food for the processing of the 70 tonnes of whalemeat purchased annually also highlight the largescale and non-traditional nature of this enterprise. Finally, the existence of frozen whalemeat for sale packed in 2006 raises a question mark over the legitimacy of calls for increased quotas to supply 'need'.

It is the long standing position of WSPA to oppose whaling on the grounds that there is no humane way to kill whales at sea. This is a concern for the cruelty of all whaling, extending to commercial, scientific and aboriginal subsistence hunts. In the interests of minimising animal suffering, WSPA believes that ASW operations must be strictly limited to cases in which aboriginal hunts provide sustenance critical to the subsistence needs of ASW communities, and only where these communities are the sole consumers of the products. From the insights gathered in this report, it would seem that a significant proportion of Greenlandic whaling falls outside of this definition and that unacceptable animal suffering can therefore be directly linked to commercial profit margins.

In the light of the concerns raised in this study, WSPA urges the IWC to:

- Agree acceptable limits and definitions for the extent and nature of trade and sale of whale products in ASW operations. These should ensure that there can be no ambiguity which would allow the development of commercial profit incentives in hunts;
- Agree and implement a mechanism for Parties with ASW quotas to provide data on product usage in hunts to the Commission;
- Agree and implement a standardised directive for quantification and demonstration of subsistence need to be provided by Contracting Governments seeking ASW quotas;
- Request that Greenland presents to the Commission information and data on nature and volume of retail sale of whale products in Greenland, for consideration at IWC61;
- Instigate a freeze on current Greenlandic ASW quotas until such time that the above criteria are fulfilled.
- Develop a research/development programme focused on improving killing methods in all ASW hunts to reduce the time to death and minimize suffering, including commissioning relevant experts to undertake independent studies and provide technical advice.



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