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Reconsidering Market Development Approaches to Support Nunavut Inuit Priorities in the Seal Market

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ABSTRACT. Seal hunting is a long-standing cultural practice for Inuit, who have also long participated in the commercial seal market. Inuit were negatively impacted by anti-sealing campaigns that resulted in international trade bans and subsequent market collapses for seal products. To improve market access for Inuit seal products, the Canadian government established the Certification and Market Access Program for Seals to support export of Inuit seal products to European Union markets. In 2015, the Government of Nunavut became an Attestation Body under the EU Indigenous Communities Exemption, which enables the government to certify Nunavut seal products for export into EU markets. To date, market development efforts have largely focused on supporting the export market for Nunavut sealskins, while less attention has focused on how such efforts impact the local value chain (i.e., the sequence of value-added activities needed for product development and delivery) or meet the needs of Nunavut Inuit involved in the seal market. Focus group discussions with Inuit value chain actors in Iqaluit and Qikiqtarjuaq provide insight into the Nunavut seal value chain and explore perspectives regarding how government policies and programmes are meeting the needs of Nunavut Inuit. Findings reveal multiple gaps in the local value chain that have gone largely unaddressed because of a priority on export markets over this local value chain. These gaps limit export development opportunities and the ability for the seal market to adequately meet the needs of Nunavut Inuit and Nunavummiut alike. Collectively, the study findings demonstrate that, to support local economies and ensure Inuit priorities are met, Inuit must play a central role in economic development policies.

Keywords: Inuit; value chain; sealskin products; market development; local capacity; Canada; European Union; trade ban; provenance; self-determination

RÉSUMÉ. La chasse au phoque est une pratique culturelle de longue date chez les Inuits, ces derniers jouant également un rôle sur le marché commercial du phoque depuis longtemps. Les Inuits ont subi les incidences négatives de l'opposition à la chasse au phoque qui s'est traduite par des interdictions de commerce à l'échelle internationale et l'effondrement subséquent des marchés de produits dérivés du phoque. Dans le but d'améliorer l'accès aux marchés des produits du phoque issus des Inuits, le gouvernement du Canada a adopté le Programme de certification et d'accès aux marchés des produits du phoque afin de venir en aide à l'exportation de produits du phoque des Inuits sur les marchés de l'Union européenne. En 2015, le gouvernement du Nunavut est devenu un organisme d'attestation en vertu de l'Exemption du régime de l'UE accordée aux collectivités autochtones, ce qui permet au gouvernement d'homologuer les produits du phoque du Nunavut à des fins d'exportation sur les marchés de l'Union européenne. À ce jour, les efforts de développement des marchés ont principalement porté sur le marché d'exportation des peaux de phoque du Nunavut, tandis qu'une moins grande attention a été accordée à l'incidence de ces efforts sur la chaîne de valeur locale (c'est-à-dire le système d'activités nécessaires à la mise au point et à la livraison des produits) ou à la satisfaction des besoins des Inuits du Nunavut participant au marché du phoque. Des discussions de groupe avec des participants inuits de la chaîne de valeur à Iqaluit et à Qikiqtarjuaq ont permis d'obtenir un aperçu de la chaîne de valeur du phoque au Nunavut et d'explorer les manières dont les politiques et les programmes gouvernementaux répondent aux besoins des Inuits du Nunavut. Les constatations qui en ont découlé permettent de remarquer l'existence de plusieurs lacunes dans la chaîne de valeur locale, lacunes qui n'ont pour la plupart pas été abordées en raison de la priorité accordée aux marchés d'exportation par opposition à la chaîne de valeur locale. Ces lacunes restreignent les occasions de développement des exportations et la possibilité pour les marchés des produits du phoque de répondre adéquatement aux besoins des Inuits et des Nunavummiuts du Nunavut. Ensemble, les constatations de l'étude montrent que pour soutenir les économies locales et veiller à ce que les priorités des Inuits soient respectées, les Inuits doivent jouer un rôle central dans les politiques de développement économique.

Mots-clés : Inuit; chaîne de valeur; produits en peau de phoque; développement des marchés; capacité locale; Canada; Union européenne; interdiction de commerce; provenance; auto-détermination

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INTRODUCTION

Sealing has been an Inuit cultural practice for thousands of years and continues to provide food security and economic returns to hunters, artisans, and communities. While Inuit have always hunted, eaten, and worn seal products for their own subsistence, they have also taken part in the commercial trade of sealskins since the first trading posts were established across the Arctic by the Hudson's Bay Company (GN, n.d.a). As colonialism ensued throughout the mid-twentieth century, the trade of sealskins allowed Inuit to transition into the cash economy while still carrying out traditional and cultural activities. However, this market was disrupted when, in the 1960s, anti-sealing campaigns began protesting the commercial seal hunt off the coast of Newfoundland and Labrador. Such campaigns had a large influence in persuading many nations to ban the trade of seal products, with the US banning the trade of sealskin in 1972 through the Marine Mammal Protection Act, and subsequently, the European Union (EU) banning products derived from whitecoat pups of harp seals and hooded seals in 1983, and further expanding restrictions to all seal products in 2009 (Hossain, 2013; Routledge, 2018; GN, n.d.b). Each of these trade bans collapsed the market for sealskins and prevented Inuit from earning a livelihood from selling them. This economic loss undermined the ability of Inuit to participate in the global economy and imposed hardships across Inuit Nunangat (the collective Inuit homelands in Canada) (Lennon, 2010).

Since the seal trade bans, federal and territorial governments in Canada have been focused on rebuilding the international market for Nunavut sealskins. A large part of these efforts has centred on working with the EU to allow Inuit seal products entry into EU markets, in addition to increasing public awareness on how sealing is carried out in Nunavut. In 2015, the Government of Nunavut became an Attestation Body under the EU Indigenous Communities Exemption (hereafter, EU Exemption), which enables the territorial government to certify Nunavut seal products for export into EU markets. However, the EU Exemption requires full traceability for seal products entering EU markets. To assist Indigenous communities in meeting these traceability requirements, the Fisheries and Oceans Canada (DFO) established the Certification and Market Access Program for Seals (CMAPS) in 2015, which allocated $5.7 million CAD in funding to create certification and tracking systems for Inuit seal products in EU markets and support marketing activities in the broader seal industry (DFO, 2017). Since the 2009 ban, the local market for sealskins within Nunavut has strengthened. Still, international markets, which were the focus of government interventions, have yet to recover.

Despite efforts to rebuild the international market for Nunavut seal products, the trade of Nunavut sealskin products internationally remains a significantly small proportion of the market. From 2016 to 2018, the Government of Nunavut exported 572 Nunavut sealskins to the EU through the EU Exemption, which accounted for 12% of the total number of sealskins purchased from hunters through the Government of Nunavut's seal programs over the same period (GN, 2019). These market trends have raised questions over the extent to which efforts to assist the Nunavut seal market, such as CMAPS, have benefitted Inuit (Farquhar, 2020). Furthermore, other policies and programs related to the Nunavut seal market have largely focused on rebuilding the international market, despite little evidence that such efforts have resulted in increased trade or benefit to Inuit involved in the seal market across Nunavut (DFO, 2019). While the impacts of the market collapse from seal trade bans and anti-sealing campaigns on Inuit have been well documented (Lennon, 2010; Dauvergne and Neville, 2011; Hennig, 2018; Routledge, 2018), fewer voices have been heard on the effects of federal and territorial market development policies on the local value chain (i.e., the sequence of value-adding activities needed for product development and delivery) or how these chains currently function in Nunavut. As such, an analysis of how government policies and programs related to the seal market are serving Nunavummiut can provide insights into how approaches to market development can better support Nunavut Inuit priorities and self-determination. This study uses input from focus group discussions and ethnographic observations from community workshops and government meetings to map the local value chain for Nunavut sealskins and explore perspectives of local value chain actors. This study also focuses on how government policies and programs are meeting, or could better meet, the needs of Inuit involved in the seal market.

Nunavut Seal Market

Several key events have affected the Nunavut seal market over the past century. Table 1 provides a timeline of key events. Seal hunting has sustained Inuit for millennia. Today, highly nutritious seal meat remains an important country food in a traditional diet. Inuit turn sealskins into garments and footwear and use seal oil to light *qulliqs* (traditional oil lamps). Beyond these physical benefits, seal hunting is an important cultural activity for passing on Inuit ways of knowing through generations, referred to as Inuit Qaujimajatuqangit. In addition to the social and cultural importance of sealing, Inuit also participate in the commercial market for seal products. Since this participation began, seal harvesting has remained a vital component of the informal and formal economy in Nunavut. Inuit sell sealskins to conservation officers who then facilitate the skins' entry into commercial markets (Peter et al., 2002). In many cases, income derived from the sale of sealskins is used to offset the costs associated with harvesting (equipment and snowmobile repairs, etc.). Inuit selection of particular seal species varies across Nunavut based on community preferences for different sized and aged seals and the time of year. For example, while Inuit commonly hunt ringed seals, in some communities,

TABLE 1. Timeline of important events in the Nunavut seal market.

Year	Event	Description	Outcome
Late 1800s	Inuit begin trading sealskins at Hudson's Bay Company posts	• Inuit began participating in commercial seal industry • Sealskins became an important source of income • Dependent trading relationship is established during a time of market centralization and immense social change	Entrance of Inuit sealskins into commercial market
Pre-1990s	Government of Northwest Territories establishes the Fur Assessment and Advance Program	• Harvesters sell dried long furs (i.e., fox, wolverine, bears, wolf, etc.) to conservation officers and receive a one-time advance payment based on size and quality • Furs are sold at auction into international markets with additional proceeds directed back to the harvester	Facilitation of sealskin market by territorial government
1960s	Animal activist groups launch anti-sealing campaigns focused on the Canadian seal industry	• Societal values shift away from animal fur, particularly sealskins	Reduced demand for seal products
1983	EU bans trade of whitecoat seal products	• Council Directive 83/129/EEC bans the import of whitecoat harp seal pups	Market collapse
1988	Price and sale of sealskins in Nunavut drop	• Number of sealskins sent to market drops from 48,000 in the late 1970s to less than 1000 by 1988 (Reeves, 1998)	Market collapse
Mid-1990s	Seal market resurges	• Renewed demand in fur and sealskin results in higher prices and more Nunavut sealskins entering the commercial market	Price increase
2002	Government of Nunavut establishes the Sealskin Purchase Program to support the local seal market	• Harvesters who sell their sealskins to the Government of Nunavut receive a one-time cash advance payment (GN, 2021)	Financial support
2006	Dressed Sealskin for Nunavummiut launches	• Government of Nunavut professionally dresses or dyes sealskins for sale to Nunavummiut at cost to promote equal and easy access to Nunavut sealskins	Promotion of value-added sealskin products
2009	EU bans trade of seal products	• European Parliament and Council adopts Regulation (EC) No 1007/2009 banning the trade of seal products in the EU (EC, 2019)	Market collapse
2015	Government of Nunavut becomes an Attestation Body under the EU Indigenous Exemption	• EU formally approves the Government of Nunavut as a recognized body under the Indigenous Exemption • Government of Nunavut can certify sealskins harvested in accordance with rules of the exemption for export into EU markets	Market access
2015	Fisheries and Oceans (DFO) establishes the Certification and Market Access Program for Seals (CMAPS) program	• DFO establishes CMAPS as a $5.7 million, five-year program to fund development of certification and tracking systems of Indigenous seal products for export into EU markets	Market access support

particularly Pangnirtung and Grise Fiord, they also periodically harvest harp seals. Occasionally, Inuit harvest bearded seal, but the latter does not substantially contribute to the commercial market. Overall, the long-standing importance of seals in Inuit society promotes the sustainable economy of Nunavut, embracing both traditional and contemporary aspects.

Shifting societal values away from animal fur and the emergence of anti-sealing campaigns targeting the Canadian seal industry had a significant impact on the Nunavut seal market from the 1960s onwards. In the 1960s and 1970s, animal activist groups, such as Greenpeace and the International Fund for Animal Welfare, began protesting the commercial seal hunt in Newfoundland. The emergence of anti-sealing campaigns resulted in widespread media distribution of images of whitecoat seal pups being clubbed to death. These images were influential in shaping a socially constructed perception of seals as the victims of inhumane slaughter (Guevara et al., 2008). Highly publicized media events, such as the 1977 *Paris Match* cover featuring French actress Brigitte Bardot cuddling a whitecoat, and publication, in the British newspaper *The Mirror,* of the famous front-page photo of a whitecoat being clubbed to death, spread the message of anti-sealing campaigns across Europe and North America (Dauvergne and Neville, 2011; Fitzgerald, 2011). Such approaches mobilized the public: members of the European Parliament received over three million letters and postcards calling for a ban on the import of whitecoats (Dauvergne and Neville, 2011). This lobbying was successful and eventually resulted in numerous international bans on seal products.

Even though the 1983 EU ban targeted only one type of sealskin and included an Indigenous communities exemption, anti-sealing campaigns had ruined the reputation for all sealskin types and ultimately collapsed the market. This collapse undermined the Inuit economy and imposed hardships on communities across Inuit Nunangat (Lennon, 2010). At a time when Inuit were already living with the legacies of colonialism, hardships exacerbated poor socioeconomic conditions across the region. Prior to the 1983 ban, many Inuit were able to make a living from selling sealskins, which enabled them to continue living out on the land. Afterwards, Inuit were left with few options besides moving into centralized communities. There, cultural links to the land-based economy began to erode, and they were pushed further into the wage economy and toward increased reliance on social assistance (Routledge, 2018). Sealskin prices remained low in the years following the 1983 EU ban, until a resurgence in fur demand resulted in the price of a sealskin averaging $70 CAD, and by 2004, reaching up to $92 CAD (FHA, 2004). Yet this resurgence was temporary, with the subsequent 2009 EU ban resulting in average sealskin prices falling to $23 CAD in 2010, marking a 67% price reduction (FHA, 2010).

Government of Nunavut

Following the signing of the Nunavut Land Claim Agreement (hereafter, Nunavut Agreement) in 1993, the Northwest Territories was divided in two through the creation of the territory of Nunavut. The Government of Nunavut came into being on 1 April 1999. As a public government in an Inuit-majority population, this government represents all residents in the territory, who are referred to as Nunavummiut. However, the Nunavut Agreement did set out Inuit-specific stipulations to be implemented by the new government, including Inuit participation in government (Article 23) and procurement of goods and services from Inuit-owned companies (Article 24). The agreement also established other organizations that are responsible for coordinating and managing Inuit responsibilities and benefits. These include Nunavut Tunngavik Incorporated, which represents all Nunavut Inuit, three regional Inuit associations (Kitikmeot, Kivalliq, and Qikiqtani), and a hunters and trappers organization in each community, among others (GC, 1993). As such, Government of Nunavut policies and programs aim to support all Nunavummiut, but specific structures make Inuit Qaujimajatuqangit the starting point for market development approaches affecting hunting, including sealing.

The Government of Nunavut has an active role in managing the sealskin market. Prior to 2020, the Department of Environment (DOE) managed the sealskin file, with specific programs administered through the Wildlife Operations Division and Fisheries and Sealing Division. With the Fisheries and Sealing Division transitioning to the Department of Economic Development and Transportation (EDT) in 2020, however, policies related to the sealskin market are now under the regulatory authority of both the DOE and EDT (Fig. 1). One of the key seal product management tools the DOE and EDT use is the Seal and Fur Programs Policy. The goal of this policy is to provide "financial support for projects related to seals, sealing, fur, and access to fair-priced Nunavut harvested commercially tanned sealskins to Nunavummiut. These programs intend to support Nunavut's sealing and fur economies, including crafters and designers" (GN, 2021:1).

A number of programs operate from this policy, including the Fur Assessment and Advance Program, the Sealskin Purchase Program, and the Dressed Sealskins for Nunavummiut Program (Fig. 1). These programs have a long history of supporting the fur trade across the Canadian Arctic and remain an important tool for supporting the sealskin market in Nunavut. The programs all function to support traditional harvesting practices for Inuit and participation in the cash economy through the trade of fur and sealskins.

The Sealskin Purchase Program is the medium through which the Wildlife Operations Division manages the basic seal value chain (Fig. 1). Through this program, the Government of Nunavut is heavily involved in the sealskin commodity industry, making it the only jurisdiction in

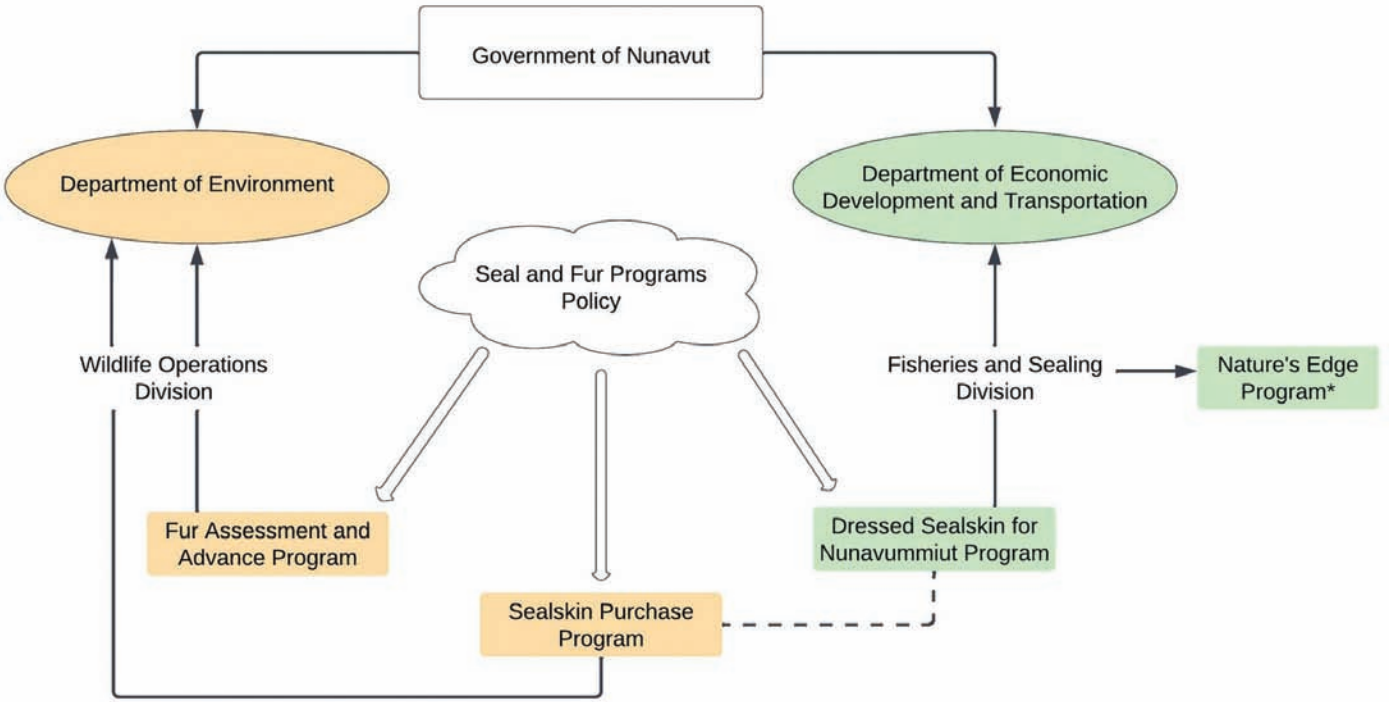

FIG. 1. Government of Nunavut policies and programs and respective governing authorities relevant to the seal market in Nunavut. Orange shapes indicate programs operating through the Department of Environment; green shapes show programs operating through the Department of Economic Development and Transportation. Dotted lines mark the connection between the Sealskin Purchase Program and the Dressed Sealskins for Nunavummiut Program. *Nature's Edge no longer exists.

Canada besides the Northwest Territories to support hunters and trappers in this manner. In other regions, government intervention occurs through a crown corporation, where trappers are responsible for getting their furs to market. As a result, the Government of Nunavut's role in supporting the seal market presents a unique example of a combined public and private value chain.

The DOE operates the Sealskin Purchase Program to recognize the importance of sealing to community food security and the traditional economy. Established in 2002 in the wake of market collapses for sealskin products, the program takes a different approach to supporting harvesters than that taken with the Fur Assessment and Advance Program. The Sealskin Purchase Program buys seal skins directly from harvesters and provides a one-time advance payment (GN, 2010). This purchase model is aimed at protecting harvesters from fluctuations in external markets. Upon sale, the sealskin becomes the property of the DOE. The conservation officer inputs information into the Sealskin Purchase Program's fur tracking system (FTS), its computerized data management system that tracks all payments, export certificates, shipments, and harvester information. Sealskins are then shipped to a processing facility in southern Canada for professional dressing (including tanning or dying), at which point they enter the Dressed Sealskins for Nunavummiut Program and become the property of the program (GN, 2021). Next, sealskins are shipped back to the Fisheries and Sealing Division and sold to Nunavummiut at cost price in an effort to encourage the use of Nunavut sealskins for the value-added sealskin industry (GN, 2021). While the Sealskin Purchase Program and the Dressed Sealskins for Nunavummiut Program are distinct, they operate in tandem.

Among the 20 communities that participated in the Sealskin Purchase Program from 2010–2018, the average annual number of sealskins purchased from harvesters was nearly 4000. This number varies greatly between communities, with some communities selling as few as 1 annual sealskin, while other communities sold more than 5500 over the same period. The professional tanning process does not result in any significant loss of sealskins, and, consequently, a comparable number were sold at cost to Nunavummiut through the Dressed Sealskins for Nunavummiut Program (GN, 2018). These numbers have not significantly changed since 2018. The Fisheries and Sealing Division donates five percent of the total number of sealskins per fiscal year, with a priority on donating sealskins to not-for-profit organizations whose activities will have a positive and demonstrable impact on Nunavut's sealing industry. Currently, dressed sealskins are sold via five distributors in Iqaluit, Taloyoak, Rankin Inlet, Arviat, and Pangnirtung. All are subsidiaries of the Nunavut Development Corporation.

While distribution partners are in place to encourage Nunavummiut access to sealskins across the territory, those in the Fisheries and Sealing Division have recognized that this distribution has not been equal amongst Nunavut Inuit. The Fisheries and Sealing Division is largely responsible for managing the sealing sector across the territory, as well as representing Nunavut's sealing interests on international,

national, provincial, and territorial levels (GN, n.d.b). As such, it has sought to revitalize the Nunavut seal market, expending numerous resources to create a marketing strategy that promotes the cultural, social, and economic significance of seal harvesting. The division has developed a number of educational materials and created the Nature's Edge Program, which included an educational booklet, Nunavut sealing website, and branding logo that identifies Nunavut sealskin products for sale in local and external markets (GN, n.d.b). This logo emphasized that the Nunavut seal hunt is humane and part of a subsistence economy to support sustainable Indigenous livelihoods. The Nature's Edge Program was a temporary government initiative that is no longer active.

Despite the longstanding territorial assistance for seals and sealing, Nunavut Inuit still face challenges in adequately benefiting from the market. This study explores local perspectives among local actors in the Nunavut seal market about efforts by federal and territorial governments to rebuild the international market for seal products and whether associated policies and programs adequately serve Nunavut Inuit.

METHODS

Primary data collection for this research consisted of in-person focus group discussions with stakeholders involved in the Nunavut seal market over a nine-week period in June, July, and August 2019. Focus group discussions took place in Iqaluit, the capital city of Nunavut, and in Qikiqtarjuaq, on Broughton Island, northeast of Iqaluit in the Davis Strait. Both communities are active in different aspects of the sealskin value chain. The focus groups covered four topics, including participants' role in the seal market, market challenges and opportunities, the effectiveness of government programs and policies, and what can be done to support the seal market (Table 2). We did not intend to use the focus groups to establish a statistical sample across Nunavut, but rather to elicit perspectives from people directly involved in different aspects of the sealskin value chain. Participants belonged to three groups: seal harvesters, women involved with preparing sealskins (artisans), and designers and retailers working with, or selling, sealskin. All participants were current Inuit residents of either Iqaluit or Qikiqtarjuaq. As such, the results of this study are specific to Qikiqtani Inuit and do not necessarily represent the perspectives or value chain structure of all of Nunavut. Due to the concentration of designers and retailers in Iqaluit, the focus group discussion in Iqaluit included these respondents, while discussions in Qikiqtarjuaq were open to harvesters, processors, and artisans.

Focus group discussions are a useful method for eliciting a multiplicity of views within a group setting and are particularly beneficial in inductive approaches to research, where the researcher has an open-ended set of questions but encourages participants to direct the discussion by exploring issues of importance to them (Kitzinger, 1995; Gibbs, 1997). Due to the inductive nature of this research, we chose focus group discussions as our data collection method to produce greater community-driven responses than could be achieved through individual semi-structured interviews. We developed a focus group script for each set of value chain actors; however, discussions were informal and largely directed by participant interests.

We invited participants to the focus group discussion by direct invitation or community advertising. We advertised (in English and Inuktitut) on Iqaluit's Facebook news group, on community posting boards, and through the local radio station in Qikiqtarjuaq. Discussions took place at the Elder's Qammaq in Iqaluit, and the council chambers in Qikiqtarjuaq. The lead researcher (Vanderkaden) conducted discussions in English or Inuktitut, with the assistance of an Inuktitut interpreter in the latter case. Immediately following each focus group discussion, we transcribed the audio recordings and performed a content analysis (Fig. 2). We coded important responses and sample statements relevant to the research question. Once we had grouped codes together into categories, we developed a list of keywords to ensure rigor and replicability. We then shared preliminary findings with participants to elicit any questions, comments, or concerns, which we incorporated into the findings.

We include direct quotes to supplement the content analysis and convey the knowledge shared by respondents in their own words. We also acknowledge that culture is captured in language, which may result in a different interpretation, or loss of meaning, in some quotations that were translated from Inuktitut to English.

We obtained ethics approval from both Dalhousie University and the Nunavut Research Institute. This research is positioned under the umbrella of current efforts on the part of the Government of Nunavut's Fisheries and Sealing Division to improve policies and programs to better support Nunavut sealing and seal products. Throughout this research, the Fisheries and Sealing Division has provided direction and guidance towards the production of meaningful and respectful research.

To gain a comprehensive understanding of the existing value chain for sealskins and the specific details of government policies and programs, in addition to the focus group discussions, we conducted reviews of public records and internal Government of Nunavut documents. Public records included the Sealing Strategy for Nunavut (GN, 2010), while internal documents included technical government reports, FTS data, meeting minutes, letters, and various sealing educational materials created by the Fisheries and Sealing Division.

RESULTS

Three key themes emerged from the focus group discussions: (a) quality and provenance trade-offs in sourcing sealskins, (b) values and drivers in the Nunavut

TABLE 2. Overview of focus group participants and the topics discussed.

Technique	Actors	Number of participants	Topic
Focus group discussion	Harvesters	8	A. Role in seal market
	Processors and artisans	12	B. Challenges and opportunities in working with, selling, or sourcing sealskins
	Designers and retailers	6	C. Thoughts and perspectives on government programs and policies
			D. Thoughts and perspectives on strategies and tools to support the seal market

seal market, and (c) the potential role of marketing strategies and tools. An additional result was a detailed account of the Nunavut sealskin value chain summarized in Figure 3. The sealskin value chain in Nunavut is managed, in part, through the Sealskin Purchase Program and the Dressed Sealskin for Nunavummiut Program. However, focus group discussions with Inuit involved in the seal market revealed that various barriers, bottlenecks, and challenges exist as a sealskin moves from an Inuk harvester to its eventual point of sale. Sealskins enter the value chain through one of two streams: the artisanal stream (orange nodes in Fig. 3), which includes sealskins that are prepared and used within the community or sold within the territory, and the government-managed stream (blue nodes), referring to sealskins that are tanned and dyed for sale in local and external markets, as facilitated by the Wildlife Operations Division and Fisheries and Sealing Division (Fig. 3).

Quality and Provenance Trade-offs

Respondents emphasized that quality and the origin (or provenance) of seal products were the most important characteristics to maintain in the preparation of a sealskin. Several respondents explained the multiple steps that go into preparing a sealskin to ensure quality. Once a harvester has killed and skinned a seal, it is usually given to a woman in the community to begin the process of preparation. Harvesters who don't prepare sealskins themselves or have anyone to prepare sealskins for them will typically give it to other women in the community, sometimes for free or at a cost of about $30 CAD. Women use a sharp ulu to remove the blubber and membrane, then wash the skin with laundry soap. Once the women have sewn the flipper cut-outs, they stretch the sealskin onto a drying frame and leave it outside to dry for two to three days, depending on weather conditions. This is the point at which a dried sealskin can be sold to a conservation officer and enter the Sealskin Purchase Program. Sealskins that are not sold to conservation officers are then typically either stored or softened for personal use. Many women emphasized the immense care that is taken during this process to ensure a high-quality sealskin. For example, one respondent described how she soaks her skins overnight to prevent any blood or oil residues from remaining on dried sealskins, a common sign of inadequate cleaning. While most sealskins are prepared with fur on one side, several respondents emphasized that there are different ways

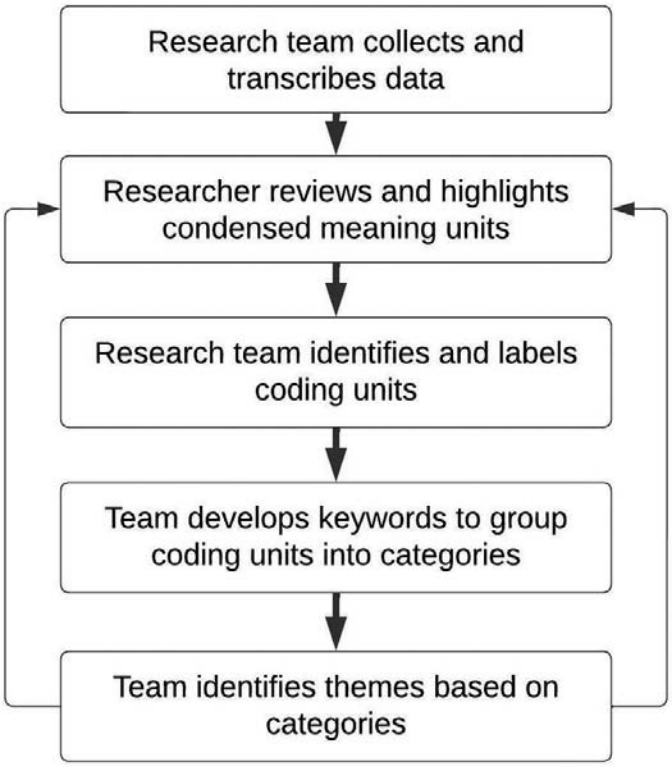

FIG. 2. Overview of qualitative content analysis.

to prepare sealskins to accommodate different uses. To prepare a *naluaq* (white sealskin) with no fur, the skin is soaked in hot water before scraping off the fur and drying the skin outside for over a month. Black sealskins with no fur are prepared similarly; however, they are not soaked in hot water. Both no-fur variations are useful for making *kamiks* (traditional boots).

Several respondents conveyed that, upon drying, women artisans or harvesters pick out the highest quality sealskin to keep for personal use and sell most of the remaining sealskins of lower quality to the conservation officer (through the Sealskin Purchase Program; see Figs. 1 and 3). But several respondents indicated that the conservation officer is not always available to purchase sealskins. For example, when the position is vacant, community members must wait until a conservation officer comes from another community. This results in community members having to stockpile sealskins and prevents timely payment, something not everyone can afford if they are in more immediate need of income. Many respondents also sell sealskins to other

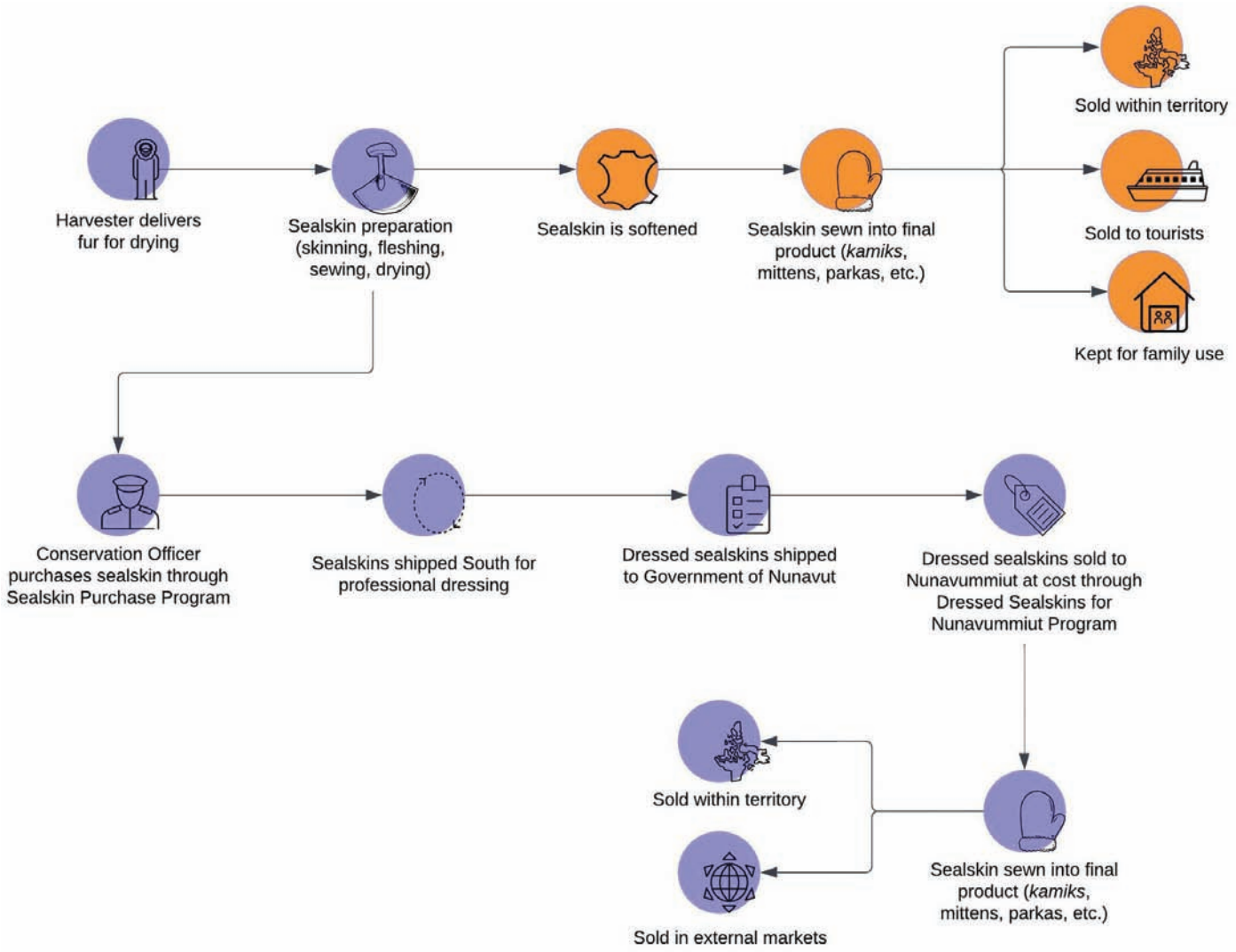

FIG. 3. Nunavut sealskin market value chain for ringed and harp sealskins harvested in Nunavut, showing all activities performed to harvest, process, market, and distribute seal products. Blue nodes indicate the government-managed stream; orange nodes show the artisanal stream.

communities, particularly to other women involved in teaching *kamik*-making. Many women said Qikiqtarjuaq sealskins are in high demand due to their good reputation as high-quality sealskins with a nice black and silver colour and as particularly useful for *kamik*-making. Just as the nicest sealskins are kept for personal use, higher-quality skins are also prioritized when selling to other communities. While the process of preparing a dried sealskin typically takes about two weeks, it takes much longer to sew a value-added product, such as parkas, mittens, or *kamiks*. These value-added products are typically sold on Facebook within Nunavut or kept for personal use. Several factors influence where sealskins are sold, such as the most efficient sale, whether the conservation officer is in town, whether ladies in other communities are looking for sealskins, and the number of available sealskins.

Harvesters and processors shared that young seals (three to four months) are the main targets of hunting due to their desirable meat and softer skin, which is easier to work with. In the Qikiqtani region, hunters most frequently harvest ringed seals; however, they also harvest some bearded seals whose skin is used for the waterproof soles of *kamiks*. Harp seals are less frequently hunted because their meat is less palatable than other seals and their thicker skins are considered more difficult to process. Through discussion of sealskin preferences, multiple comments emerged about the importance of quality and the stark differences in quality between naturally processed and professionally tanned and dyed sealskins. In Qikiqtarjuaq, many respondents prepare various sealskin products from their own sealskins that have been hunted in their community. However, some also commented on their experiences working with professionally processed sealskins. Several respondents described how the chemicals used in professional processing reduce the quality and result in a heavy, rigid sealskin, with one artisan stating, “Cleaned by government, I don’t prefer to wear them because they’re not too warm” (Qikiqtarjuaq artisan, 2019). These sealskins must be stretched out before they are sewn, since it is important for sealskins to be as thin as possible without removing the fur. One woman commented that she made

her husband a parka with professionally tanned sealskins. But due to its uneven thickness, he cannot wear it out on the land hunting because it is not warm enough. Despite this, respondents stated that while professionally processed sealskins are not useful for warm clothing, they are still used for more decorative products, such as purses, wallets, and earrings.

Artisans and retailers raised the issue of quality during the focus group discussions. Respondents agreed that the professionally processed sealskins sourced through the Dressed Sealskins for Nunavummiut Program are of low quality. They called government sealskins "horrible" and "very thick, clumsy, not classy," with some saying these have reduced durability and repellency compared to naturally processed sealskins. Artisans also commented on the high availability of chemically coloured (versus naturally tanned) sealskins. They suggested that sealskins that are shipped south for dressing may be professionally dyed to mask the sealskins' lower quality. Artisans in our study conveyed that, while Nunavut sealskins are high quality, the relatively poor quality of the skins' professional dressing carried out through the Dressed Sealskins for Nunavummiut Program forces them into a trade-off. They are compelled to choose between supporting the local economy by working with poorly dressed sealskins or sourcing sealskins that are tanned in a better way from outside the territory, namely Newfoundland or Greenland.

One respondent recalled a time when they used to think that harp and ringed sealskin process differently based on interspecies differences. However, over the years this person has found that ringed sealskins can be of the same quality as harp sealskins, depending on how they are processed. All respondents agreed it would be people's preference to support Nunavut sealskins if the quality was higher. But some people do not have the luxury to risk reducing their profit by working with low-quality sealskins. Artisans take great pride in their products, and some stated that they don't want to put their name on a product that is not of high quality. For other artisans, supporting the local economy is an important factor when deciding where to source sealskins, with one respondent stating:

> I'm the daughter of a hunter, all day long hunter, so I couldn't imagine not using Nunavut skins. I think that would be very insulting to my father and his relatives, so I try my best to use Nunavut skins. [But] yes, there's a huge difference in quality of the way [government managed skins] are processed.
>
> Iqaluit designer, 2019

This participant also highlighted the importance of understanding the provenance of sealskins:

> Part of the social understanding is that I don't think that everyone understands that there is a difference between Nunavut skins and other placed skins. Because to me, people are like, "Oh, sealskin, we're promoting sealskin, yay sealskin," but not all sealskins were hunted by a hunter [possibly commercially harvested elsewhere by non-Indigenous hunters]. So that's the difference about Nunavut skins, that they're hunted by a hunter. So that to me is the social consciousness that I carry, because to me, they're my neighbours, they're my relatives, and why would I want to try and have an economy that I take out when I can support my own community."
>
> Iqaluit designer, 2019

When asked about where artisans sell their products, every respondent selling their value-added products commented on the importance of Facebook in their business. Sales through Facebook generally occur within Nunavut, with some items shipped elsewhere in Canada and a few products shipped internationally. The Fisheries and Sealing Division has supported Nunavummiut artisans to travel to the EU to raise awareness and sell their products. In these cases, respondents recalled marking up prices by 30%–40% for value-added products (jewellery, parkas, mittens, etc.)

Several respondents agreed that they typically receive $60 CAD to $75 CAD per sealskin when selling to the conservation officer; these prices have increased since 2019, with harvesters now receiving $80 CAD to $100 CAD per sealskin. Dried sealskins are similarly priced when sold to other communities in Nunavut. One respondent described a time when they travelled to northern Quebec for a music festival with 11 *kamiks* and received enough money to purchase a snow machine. This same respondent also recalled a time when they received $1500 CAD for a pair of *kamiks*.

Values and Drivers

Throughout focus group discussions, respondents continually stressed that hunting seals and working with sealskin is integral to Inuit culture. Respondents described the numerous economic, social, and cultural contributions of sealing to their lives. Harvesters emphasized that they hunt all year round and that many harvesters are men; however, they noted that women also hunt, and in many cases hunting occurs together as a family. Several respondents also described the importance of engaging youth in hunting and working with sealskin. One respondent recalled how youth engagement has changed through their lifetime, with children having less access to traditional hunting practices than in the past. For youth who do not have access to a boat to go out on the land, participants suggested there is more available time in the community to get into trouble. Respondents highlighted the importance of teaching youth how to hunt seals, with one harvester sharing:

> I think we should teach our young people how to hunt seals properly. For example, during the wintertime, you have to stand up beside the igloo, have to know the

> wind, the direction it's coming from. If you're on the other side, they can smell you. I think we have to teach our young people how to hunt seals nowadays.
>
> Qikiqtarjuaq harvester, 2019

Seal meat was repeatedly identified as an important country food for local consumption. Several respondents emphasized that while working with and selling sealskins is important, seal meat is part of a traditional diet and important for food security. As one harvester put it: "It's not only the market, it's our number one diet" (Qikiqtarjuaq harvester, 2019). Food sharing is still strong and commonplace, where community members are invited through local radio to join with others to enjoy fresh seal meat. One respondent observed that some people prefer to solely eat country food, but that elders are increasingly eating processed foods due to the unaffordability of gas and bullets for hunting. The income from selling sealskins can help to defray hunting costs, but as stated above, delays in getting paid through some government programs can be a hindrance. In some cases, other than social assistance, profit from selling sealskin products is the only source of income for artisans and designers. In addition to feeding their family, the income from selling sealskin products allows people to stay at home and care for their children or grandchildren. For these reasons, respondents in Qikiqtarjuaq agreed that the Sealskin Purchase Program is very helpful in providing income to community members who sell their sealskins to conservation officers.

Discussions about the seal market also touched on elements of Nunavut sealing that are important to Inuit. Harvesters said that, when seal hunting, they harvest sustainably, usually one or two seals at a time: "We only catch what we need. like one or two seals at a time… We prefer to catch what we want, what size and what kind, we don't just kill, we have respect. That's how we were raised, not to just kill animals" (Qikiqtarjuaq harvester, 2019).

Seals are targeted for desired size and condition, and in many cases young and fat seals are the best for sealskins and meat quality. Several respondents also described how the whole animal is used for various purposes. The eyes, brain, liver, ears, and hands are all eaten, sealskins are used for clothing, and bones are either used for games or jewelry. Respondents indicated that another important element of the Nunavut seal harvest is the strong support it provides to Inuit harvesters. Seal hunting in Nunavut not only reaffirms the traditional and contemporary significance of hunters in Inuit society, but also serves as a vital component of Nunavut's sustainable economy. Seal hunting in Nunavut reinforces the traditional importance and long-established place of the hunter within Inuit society while also remaining a critical component of Nunavut's economic sustainability. One artisan emphasized the importance of sharing this pride with people, of celebrating seals, and revering harvesters: "Part of [the focus] for me as an Inuk, is just building that pride on people. Because when a community is happy, when a community has that pride, we can support each other… we don't always need to export things" (Iqaluit designer, 2019). Another respondent also commented on the need to find the right balance between exporting goods and keeping them within the territory:

> My husband grew up in Cape Dorset seeing art being exported. Art was not to stay in the community, art was to make a livelihood to be able to feed your homes. And so, for art to actually stay in our community, and that there are some people starting to have that comfort to be able to keep art in their family, in their homes, is like, kind of amazing."
>
> Iqaluit retailer, 2019

Marketing Strategies and Tools

Value chain actors shared their insights into the current state of the seal market, as well as their thoughts and perspectives on the suitability of marketing strategies and tools that are the focus of government programs and policies. In Iqaluit, one respondent observed that many Nunavummiut are not aware of the Government of Nunavut's programs, making it more difficult for artisans to market their product, as they are not even aware of the options. Respondents agreed it is the responsibility of the Government of Nunavut to communicate their programs and initiatives. They emphasized the importance of local capacity building and better awareness of government programs, with one participant stating: "How can I market if I don't even know these programs exist? So, I'm just going to market in my town, or the next town" (Iqaluit designer, 2019). As another designer highlighted, "The way I see it [in] Nunavut, capacity needs to start here… so people are more aware of the processes and requirements to get to something like [a certification system]."

In Qikiqtarjuaq, no respondents were familiar with the Nature's Edge program or the Dressed Sealskin for Nunavummiut Program (Fig. 1). Harvesters, processors, and artisans in Qikiqtarjuaq were also generally unaware of what happens to sealskins once they are sold to a conservation officer. However, they were interested to learn more and expressed that harvesters may benefit from greater knowledge of the process by which sealskins are shipped for professional tanning, with one processor suggesting, "Maybe it would help the hunters more if they know what [the government] is doing with the sealskin" (Qikiqtarjuaq processor, 2019).

While artisans recalled having positive sales experiences in Norway, all respondents agreed that demand for Nunavut sealskins in EU markets is low. Despite the Fisheries and Sealing Division's attempts to rebuild the EU market and have Nunavummiut artisans establish online profiles and shops, some respondents are hesitant to invest in these markets when the return on investment may not be worth it. Similarly, respondents in both Iqaluit and Qikiqtarjuaq agreed that tourists to the region do not buy sealskin

products. One respondent observed that at a gift shop in Iqaluit, the turnover rate of other animal products, such as ivory and baleen, is much higher than for sealskin, despite many of these products being subject to similar trade restrictions as seal. While the local demand for sealskin products is high, the respondent described this discrepancy as very apparent among tourists. Numerous comments about the state of the export market came up during discussions surrounding American and EU cruise-ship tourists not purchasing sealskin products, with one respondent saying: "Most of the tourists, when they come here by ship, sometimes they can't even buy the seal products. When they're Americans or Europeans, they can't buy seal products" (Qikiqtarjuaq artisan, 2019).

Respondents shared their perspectives on the history of anti-sealing campaigns and subsequent trade bans on sealskin products, with one processor sharing that: "The [European] government, back in the 70s, only heard from Greenpeace [and] animal rights groups, and they didn't hear from us, so they voted in favour of animal rights groups" (Qikiqtarjuaq processor, 2019). Participants also highlighted the lasting impacts of these anti-sealing campaigns and market collapses, with a few describing how it is not uncommon for Facebook ads selling sealskin products to get blocked and removed. Respondents who were old enough to recall the seal market prior to the 1983 EU ban commented on how they used to receive, on average, $400 CAD (the equivalent of $1400 CAD in 2022) from selling sealskins to the conservation officer.

Respondents' reactions were mixed when prompted about the potential role of marketing strategies in support of the seal market. All respondents in Qikiqtarjuaq agreed that they would like to receive a higher price from the conservation officer to account for all the hard work and time that goes into preparing a dried sealskin for sale:

> I would be more happy for people that go hunting if the skins go a little bit higher. Because everything they use, like bullets, gas, ski-doo parts when they break down, and food, they're pretty expensive up here. The money is kind of tight… I wouldn't mind seeing the skins go up higher.
>
> Qikiqtarjuaq harvester, 2019

Others agreed sealskins should show their community of origin, with one artisan stating, "I would love to see our skin with a tag, knowing that people from around will know it's coming from our community. I would love to see that, really really love to see that" (Qikiqtarjuaq artisan, 2019).

In Iqaluit, where respondents were more familiar with existing branding tags, such as "Authentic Nunavut" and the "Igloo Tag," discussions included many thoughts and perspectives on this issue. The Igloo Tag Trademark was created in 1958 and has become an internationally recognized symbol for authentic Inuit art (IAF, n.d.). Similarly, the Authentic Nunavut logo was created as a brand for the authenticity of Nunavut arts and craft products (GN, n.d.b). A retailer who sells a wide variety of arts and crafts, including sealskin products, commented that numerous tags get confusing and lose their value due to a lack of enforcement to maintain product authenticity, noting: "It's not doing what it says it is, so now you're sort of miss-marketing what is happening" (Iqaluit retailer, 2019). Others commented on the blurred cultural understanding created when marketing tools are not specific. They gave the example of the Authentic Nunavut tag, which does not specify whether a product was made by an Inuit artisan. They noted that, in the case of sealskins, skins can be deemed Authentic Nunavut, so long as they are harvested by Inuit, even if the products are designed and sold by non-Inuit Nunavummiut.

Another respondent commented that many Nunavummiut artisans don't sell their products in a retail setting and aren't exposed to the various branding tags: "We have a lot of self-producing artists who don't necessarily have their products in a store. Only storefronts really know about this [Nature's Edge] tag and this authenticity (Iqaluit designer, 2019). In response to being shown existing branding tags, another designer said: "I think definitely [branding tags] are geared for outside of our territory. Because the assumption here is that it's all sustainably caught right in our bay. We don't need those around here as much" (Iqaluit designer, 2019).

Many respondents agreed on the importance of supporting education and consumer awareness regarding Nunavut sealskins, with one respondent suggesting that tourists should be encouraged to ask questions about where products come from. Respondents related this idea to building a chain of custody (i.e., a process that tracks a product from raw material to purchase) for Nunavut sealskins to let tourists know they are supporting an Inuk harvester. This idea could work for multiple products beyond sealskins and become more popular than existing tags. But when asked to reflect on how to best build a chain of custody, respondents stated that expensive consumer-facing traceability systems would require a large investment for a small number of very conscious consumers who would be interested in using it. Rather, respondents emphasized that some problems can be addressed with the same approach; therefore, it makes sense to promote education and public awareness as a common solution to issues surrounding fake Inuit art and markets for sealskin products. One respondent argued that by promoting individual designers, enough public information will be generated about their work to prevent faking their name.

DISCUSSION

The focus group discussions and mapping of the value chain suggest that the federal and territorial governments' focus on rebuilding the international market for seal products has resulted in policies and programs that are not meeting the needs of local actors in various ways. These

findings have identified important gaps in the local value chain that both inhibit export development opportunities and undermine the ability for Inuit to adequately benefit from the seal market. Gaps in the local value chain relate to (1) differed preferences in priority markets; (2) provenance issues due to quality differences; (3) authenticity of branding tags; and (4) limitations of the government-managed tracking system. In this way, the current approach to market development for Nunavut sealskins appears to prioritize export markets over the local value chain. This investment in only one half of the market puts harvesters and artisans at the mercy of the export market and limits resilience that may be found in a more diversified set of priorities and options. Building market resilience also requires product diversification, which may involve a focus on other seal products beyond sealskin.

As described by respondents, Inuit have several important connections with the seal hunt beyond selling sealskins for income. These connections have been well documented; seals are an important source of country food and provide intergenerational knowledge exchange and sustainable clothing for the Arctic climate (Peter et al., 2002; Athens et al., 2014). Our study affirms that Inuit hunt, eat, and wear seals for reasons outside their economic value, despite the evident significance of the market. This is particularly important in a region with disproportionately high food costs (Tarasuk et al., 2019; Newell et al., 2020). Accordingly, if policies are to be effective and advance Inuit self-determination, these values must be at the forefront of all efforts to support the market. Development and prioritization of a domestic market will contribute to self-determination and a resilient local economy while still allowing exportation of seal products.

A lack of public awareness of government programs was a common theme among all focus group discussions. Not a single respondent in the Qikiqtarjuaq discussions was aware of existing Government of Nunavut programs, such as Nature's Edge or the Dressed Sealskins for Nunavummiut Program. This may largely be due to the remoteness of smaller Nunavut communities, while Iqaluit is the central hub for Government of Nunavut employees. Additionally, there are no retail shops in Qikiqtarjuaq, like in other Nunavut communities, which reduces the opportunities for designers and artisans outside of Iqaluit to be exposed to specific branding programs developed by the Fisheries and Sealing Division. As mentioned by designers and retailers in Iqaluit, the proliferation of branding tags is largely tailored to consumers from outside of Nunavut. These perspectives regarding branding tags relate to the ambiguous priority placed by marketing campaigns on the Nunavut seal market. The 2010 Sealing Strategy for Nunavut outlines the need to focus on community collaboration and programming that meets the needs of Nunavummiut, which stands in contrast to the focus of CMAPS in developing tracking systems for Inuit seal products entering EU markets (DFO, 2017). This is not to say that both markets cannot be promoted; however, the effectiveness of marketing tools will be undermined if these do not reflect Inuit priorities or address issues that have been identified in the local value chain.

Through the Dressed Sealskins for Nunavummiut Program, artisans and designers may purchase Nunavut sealskins at a discounted cost. This program aims to support the local economy and encourage artisans and designers to work with sealskins that entered the Sealskin Purchase Program and are hence Nunavut sealskins, presumably hunted by an Inuk harvester. Many respondents emphasized the poor quality of professionally dressed sealskins they acquired through this program, however. As respondents outlined, this poor quality creates a trade-off between supporting the local economy and working with poor-quality sealskins or sourcing higher-quality sealskins from outside the region. While some designers prioritize working with Nunavut sealskins regardless of quality, others end up sourcing sealskins from outside the territory, namely from Newfoundland or Greenland. The results of sourcing sealskins from outside the territory are numerous. Given that the EU Exemption enables entry of seal products sourced through an Indigenous hunt into EU markets, Inuk designers working with non-Inuit sealskins are technically not eligible for the EU Exemption. Additionally, sealskins sourced from outside Nunavut are not tracked through the Fur Tracking System and therefore do not meet traceability requirements under the EU Exemption. Beyond the EU Exemption, external sourcing of sealskins may disempower Inuit from working with sealskins harvested in their territory, a matter deemed important by all focus group respondents. As such, a priority on the distribution of high-quality Nunavut sealskins to Nunavummiut is critical for resolving provenance issues in the local value chain and building a more robust supply of sealskins that meet requirements under the EU Exemption.

Discussions with designers and retailers revealed limitations of existing branding tags on Nunavut arts and craft products, as well as opportunities for improving such marketing and branding schemes for Nunavut seal products. While the Igloo Tag is not directly used for seal products, it is a commonplace, along with the Authentic Nunavut tag; in many retail outlets across the territory, particularly in Iqaluit; and both tags are therefore exposed to many tourists. In our discussions, we heard from one seal-products retailer who pointed to the lack of enforcement or tracking system to maintain product authenticity with the Igloo Tag or Authentic Nunavut, which diminishes the value and credibility of these branding strategies. While the Fisheries and Sealing Division expended substantial resources in the creation of Nature's Edge, such a program may risk building a brand for Nunavut sealskins without first finding a market to sell those products. While the Nature's Edge logo was never used on value-added products and is no longer in existence, our results suggest there are diminishing returns in adding more branding tags to an already saturated marketplace with numerous, and sometimes confusing, labelling systems. Certification

of authenticity and provenance is not simply a matter of affixing a branding tag or logo to a product. The provenance of a product requires robust documentation, a well-established authority to ensure product authenticity and ownership, and commitment amongst international parties to record-keeping and enforcement. Our study showed the need for this high level of support for certification and revealed local artisans' ideas for how to achieve it.

Our results revealed that large parts of the sealskin value chain are not included in the government-managed stream that certifies sealskins for export under the EU Exemption. For instance, seals that are hunted and prepared into a seal product in Qikiqtarjuaq do not enter the Sealskin Purchase Program or Dressed Sealskins for Nunavummiut Program, and therefore do not receive the export certificate required for entry into EU markets. With a growing number of cruise ship tourists travelling directly to remote Nunavut communities, such as Qikiqtarjuaq, this interaction between uncertified artisan seal products and European tourists is becoming more common. Despite all respondents agreeing that cruise ship tourists, whether American or European, do not purchase sealskins products when visiting Nunavut, this lack of government administration of EU export certificates prevents any potential purchases, regardless of consumer interest. This is compounded by a lack of public awareness of the EU Exemption among respondents, and perhaps also among Europeans tourists. This situation further demonstrates how an external focus on export markets without first resolving issues in the local value chain can undermine efforts to build the export market and limit the ability for Nunavut Inuit to benefit from the market.

Advancement of Indigenous self-determination is the foundation of the Nunavut Agreement and an important tenet of the more recent passing of the federal United Nations Declaration on the Rights of Indigenous Peoples Act (GC, 1993, 2021). Self-determination is also a key factor when evaluating how well Inuit priorities and needs have been incorporated into decisions surrounding economic and social policies in Nunavut (Inutiq, 2022). Such evaluations are increasingly difficult as resource development activities have increased the non-Indigenous population of Nunavut and shifted priorities from those of traditional society to ones influenced by global economic priorities. This shift is seen in the changing value of seals and marine mammals from a source of sustenance and well-being to commercial use for tourism and export promotion (Keenan et al., 2018). In keeping with the principles of UNDRIP, the direction of policy regarding the use of seals in Nunavut should be under the direction and control of Nunavut Inuit.

Our study findings beg the question of what economic development means for Nunavut. As respondents involved in the Nunavut seal market shared, building Nunavut does not always have to result in exporting everything. Government focus has been on development of the seal export market based in part on the perception that Inuit-harvested products will be accepted into the export luxury market. But since the imposition of the EU bans, other products have filled the niche that fur once occupied, and luxury brands now command a larger luxury-market share for clothing and accessories (e.g., Louis Vuitton, Coach, Gucci, Dolce & Gabbana, Chanel) (Shin, 2019; Kleibert et al., 2020). Therefore, improving the export market for seal products is not simply a matter of changing consumer perceptions about the ethics of seal products, but also of displacing well-established public perceptions of luxury products. This does not undermine the value of advancing the use of sustainable natural resources for traditional clothing and accessories and promoting them through the development of local markets.

Supporting the local value chain can create knock-on effects that also benefit the export market through the increased quality and supply of products. However, focusing on the export market cannot adequately support the local value chain without first addressing key gaps and meeting the needs of Nunavut Inuit and Nunavummiut involved in the market. The effort that goes into developing an export development opportunity might arguably create more benefit if applied to strengthening the local value chain in a manner that reflects Nunavut Inuit needs and priorities.

The objective of this study is not to undermine the importance of export markets in providing important income to harvesters, processes, artisans, and designers. Indeed, study participants highlighted this need. While the second pillar of the CMAPS program focused on building Indigenous capacity to leverage the EU Exemption, our study suggests that increasing the priority on territorial capacity building and value-chain improvements will do as much, if not more, to support Nunavut Inuit priorities and self-determination while creating more opportunities for export markets, if that is an avenue that Nunavut Inuit wish to pursue.

Our focus groups show that despite the best of intentions, a sustained and narrow focus on international markets will not likely benefit Inuit if their needs and interests in the local economy are not prioritized. As such, territorial and federal governments must pay greater attention to development of the local Nunavut sealskin market in a manner that adequately reflects Nunavut Inuit interests and priorities and supports Inuit self-determination in Nunavut. With the recent approval of the Fisheries and Sealing Division Strategic Plan 2023–2028, there is an opportunity to address these issues in the local value chain and incorporate perspectives regarding marketing efforts into future programs and action plans (GN, 2023). Furthermore, an evaluation of the CMAPS program acknowledged that the federal government needed to make a long-term commitment to capacity building and market access in the Canadian seal industry (DFO, 2019). Findings from the present study may be incorporated into future iterations of the CMAPS program to provide support for a strong, resilient, and self-determined local economy for Nunavut sealskins.

CONCLUSION

This study asserts the importance of meaningfully including Nunavut in national policy discussions about the seal market. Our work can therefore help inform national policy surrounding seal market development initiatives. While there are opportunities for seal harvesting and marketing initiatives in other regions of Canada, the vital role of seals and sealing to Inuit culture, nutrition, clothing, and survival in the Arctic for millennia cannot be understated, and as such, must be prioritized in national policy. While efforts to support the Nunavut seal market through CMAPS and the EU Exemption present socio-economic opportunities for Nunavut Inuit, the realization of these benefits will remain limited without placing Nunavut Inuit at the centre of policy development at federal and territorial scales. Understanding the ways in which the federal government's initiatives either hinder or support access to harvesting and selling fish and mammals (marine and otherwise) is important to realizing this priority across Inuit Nunangat.

Movement towards Inuit self-determination involves recognition of Inuit sovereignty over the use and economic development of natural resources, which requires economic development that reflects Inuit priorities and needs. As the Arctic receives increasing international attention for geopolitical and economic development, it is important to develop policies and programs that acknowledge the inherent rights of Inuit to govern and manage their own territory and develop economic policies on their own terms. Development of the Nunavut seal market is an apt example. This market has been central to discussions of self-determination due to its long-standing cultural and socio-economic importance to Inuit. Unfortunately, all too often people outside Nunavut have been responsible for making decisions that affect Inuit, including about the fate of the seal harvest. While they may have good intentions, southern solutions to northern problems are not as effective as Inuit-led initiatives.

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