



Pêches et Océans
Canada

Fisheries and Oceans
Canada

QUEBEC FISHING RESULTS

2004 Season

SUMMARY

- ❖ **Trends in Quebec landings, 1988 - 2004 (p)**
- ❖ **Landed value and volume by sector, 1988 - 2004 (p)**
- ❖ **Results for each of the following species:**
 - ❖ **Snow crab, lobster, Gulf shrimp**
 - ❖ **Scallops**
 - ❖ **Cod, turbot, Atlantic halibut, other flatfish**
 - ❖ **Herring, mackerel**

PRELIMINARY COMMENTS

❖ **Volume and value**

2003: final data / 2004: preliminary data

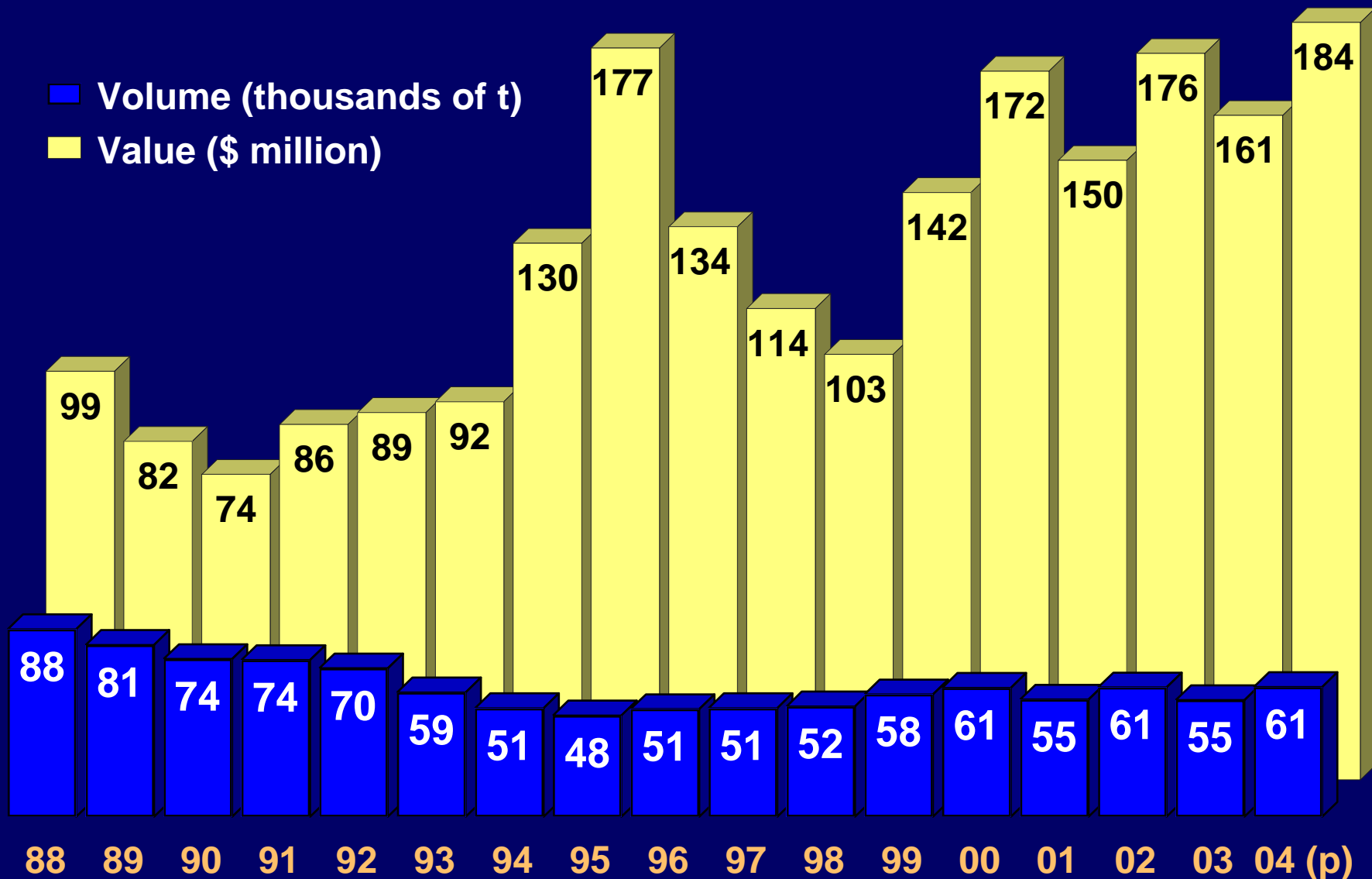
❖ **Average landed price**

2003: final data / 2004: preliminary data

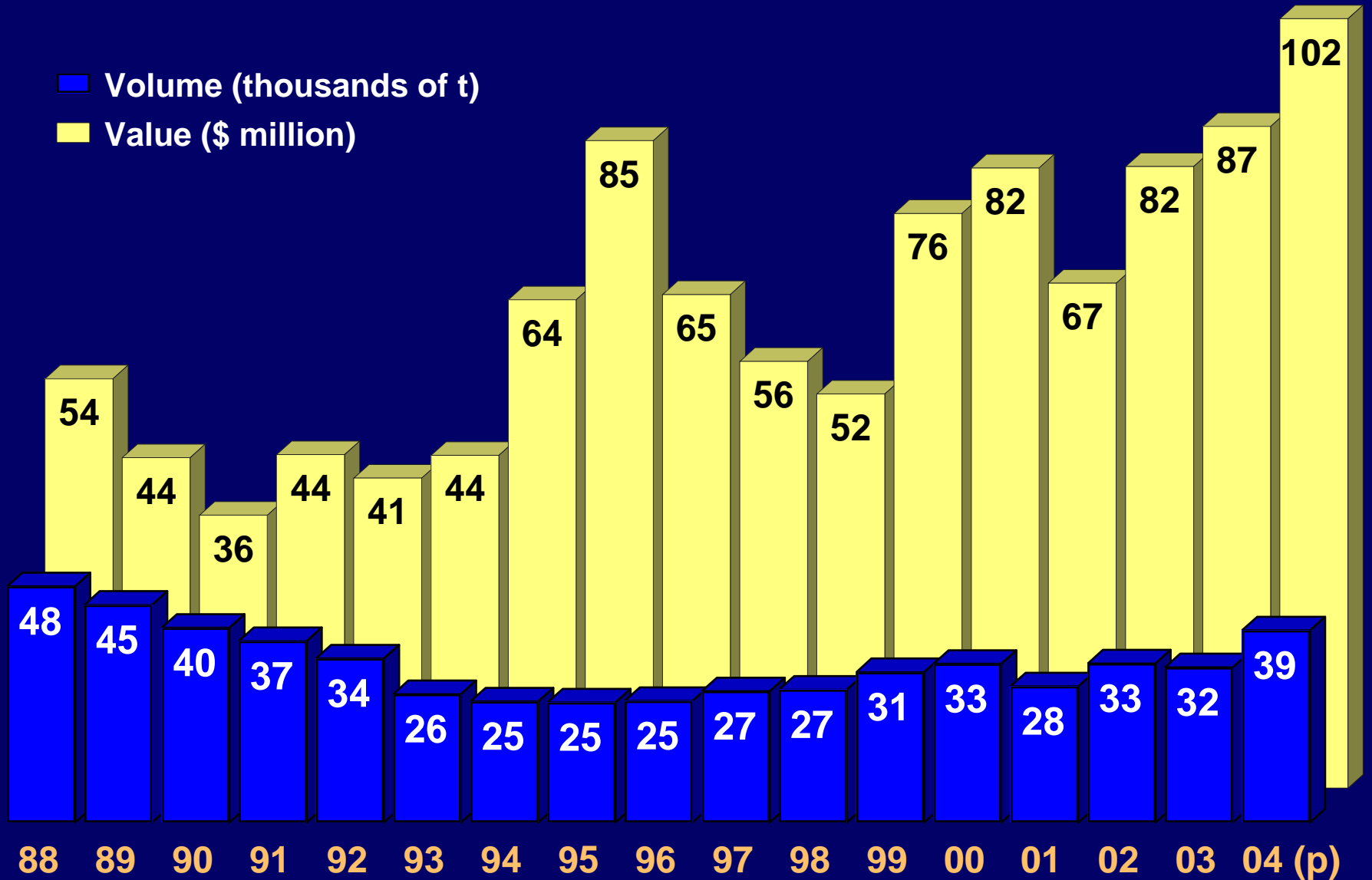
❖ **Resource status**

Data for 2003 or 2004 (p) depending on species

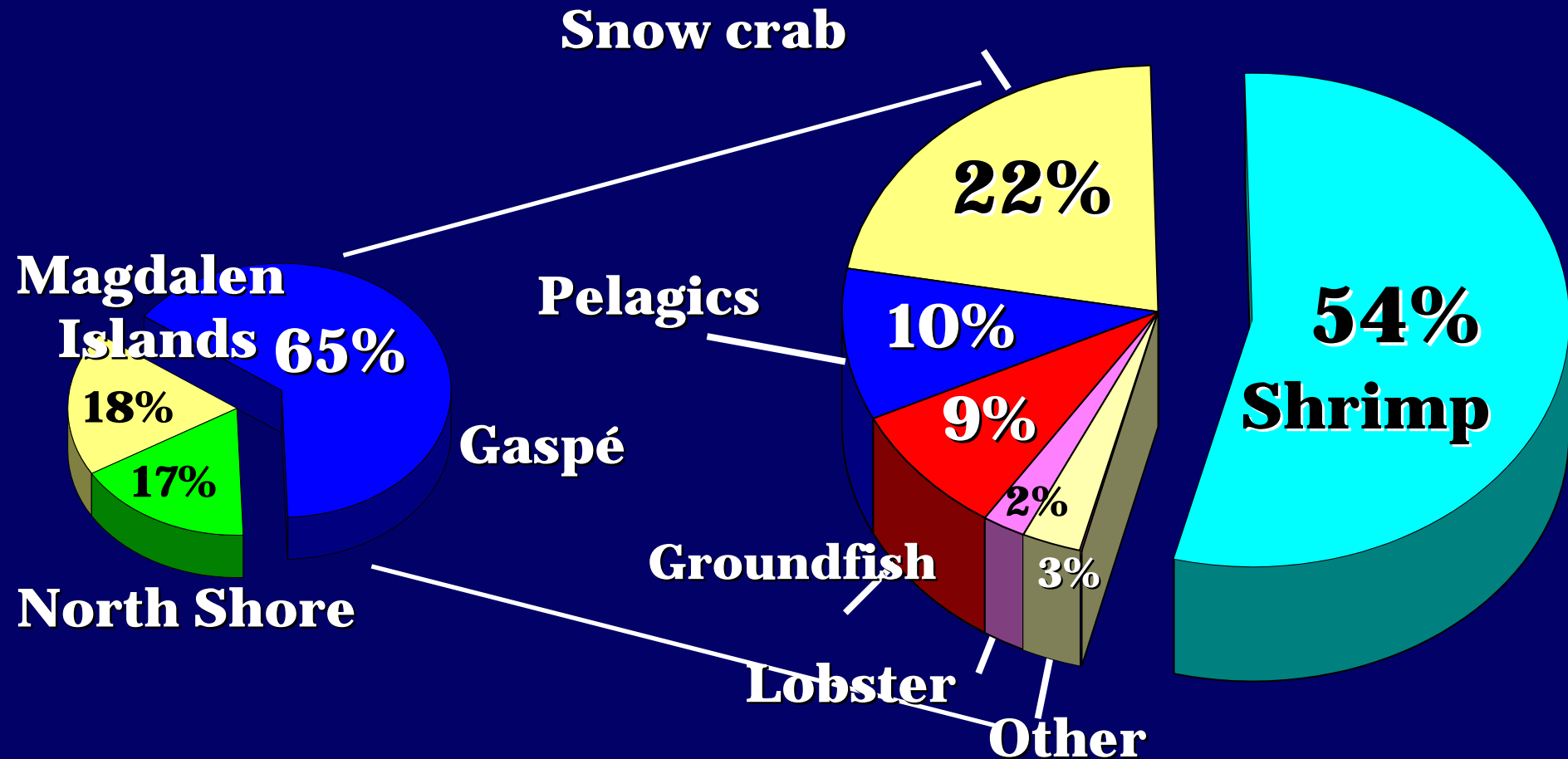
Trends in Quebec landings - 1988 to 2004 (p)



Trends in Gaspé landings - 1988 to 2004 (p)



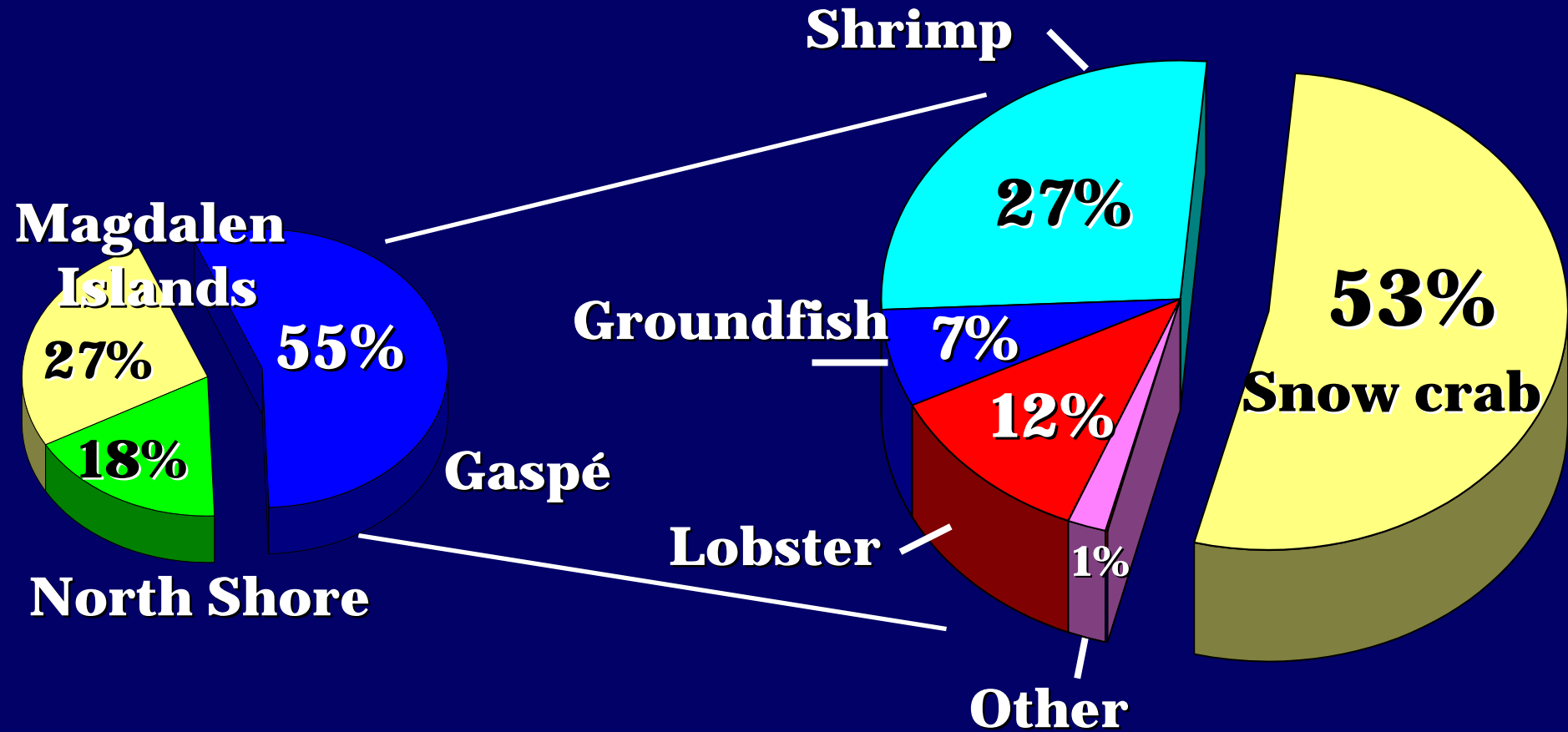
Breakdown of landed volume Gaspé - 2004 (p)



Quebec total: 61,203 t

Gaspé total: 39,448 t

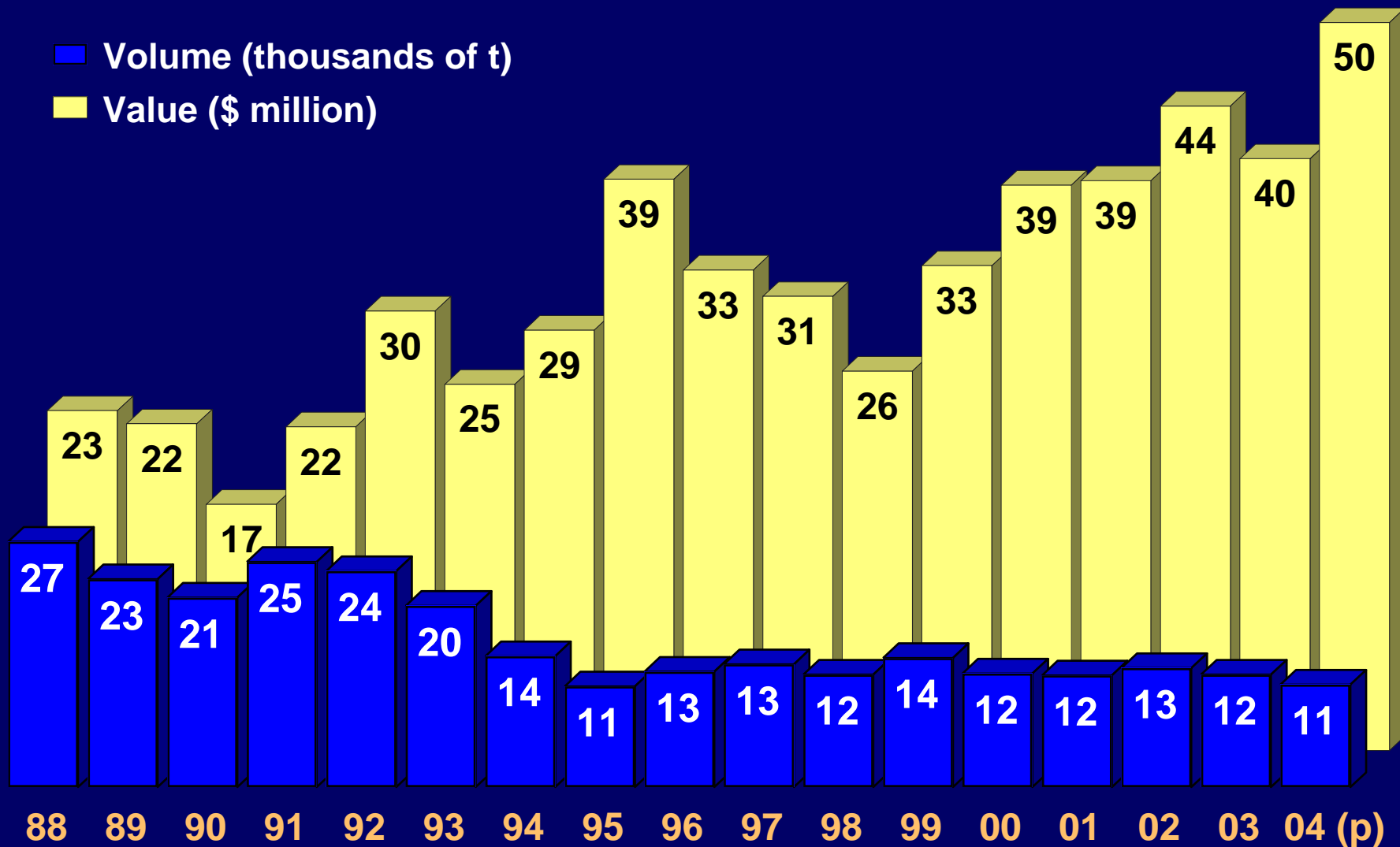
Breakdown of landed value Gaspé - 2004 (p)



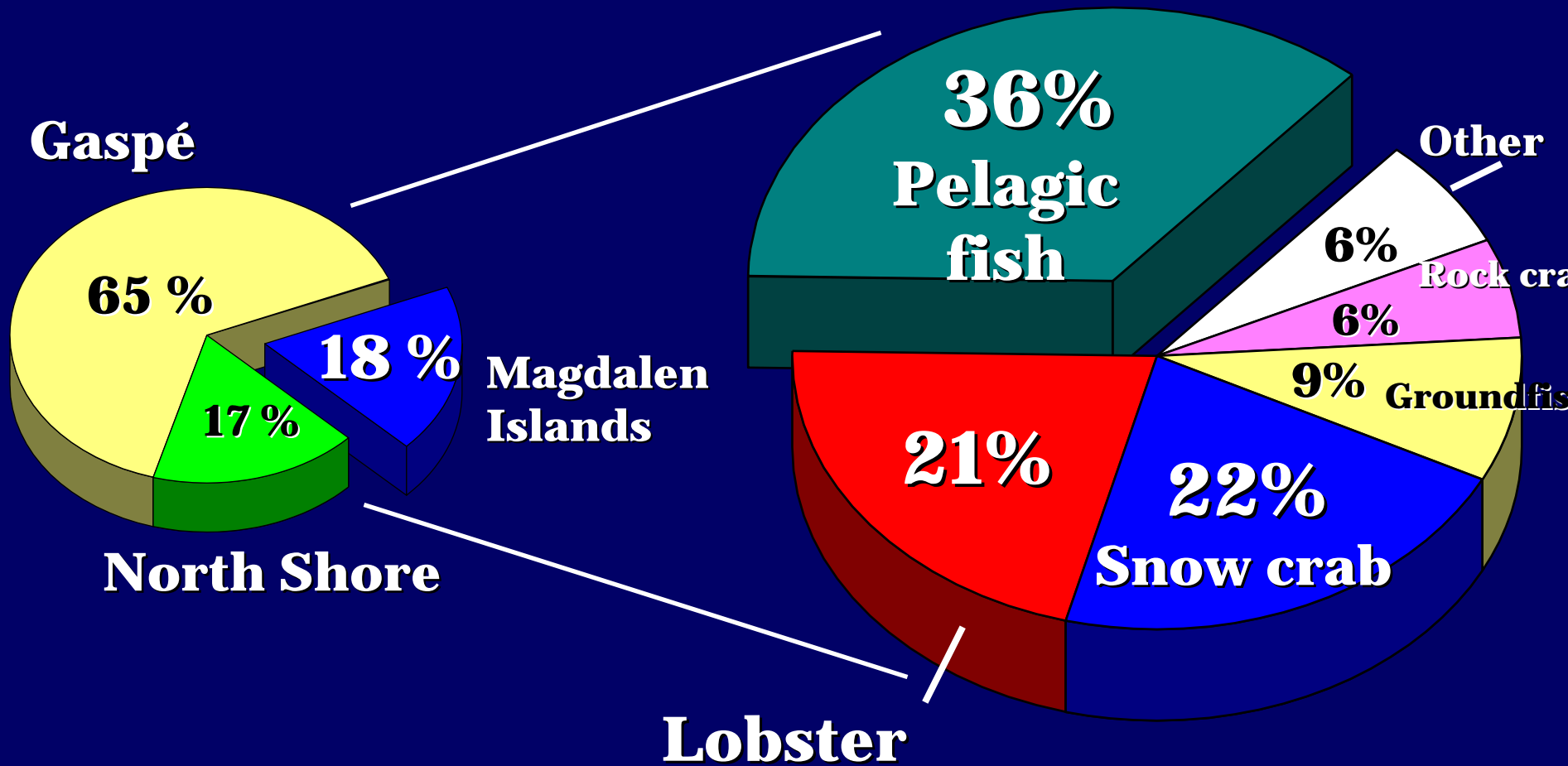
Quebec total: \$183.5 M

Gaspé total: \$101.6 M

Trends in Magdalen Islands landings 1988 to 2004 (p)



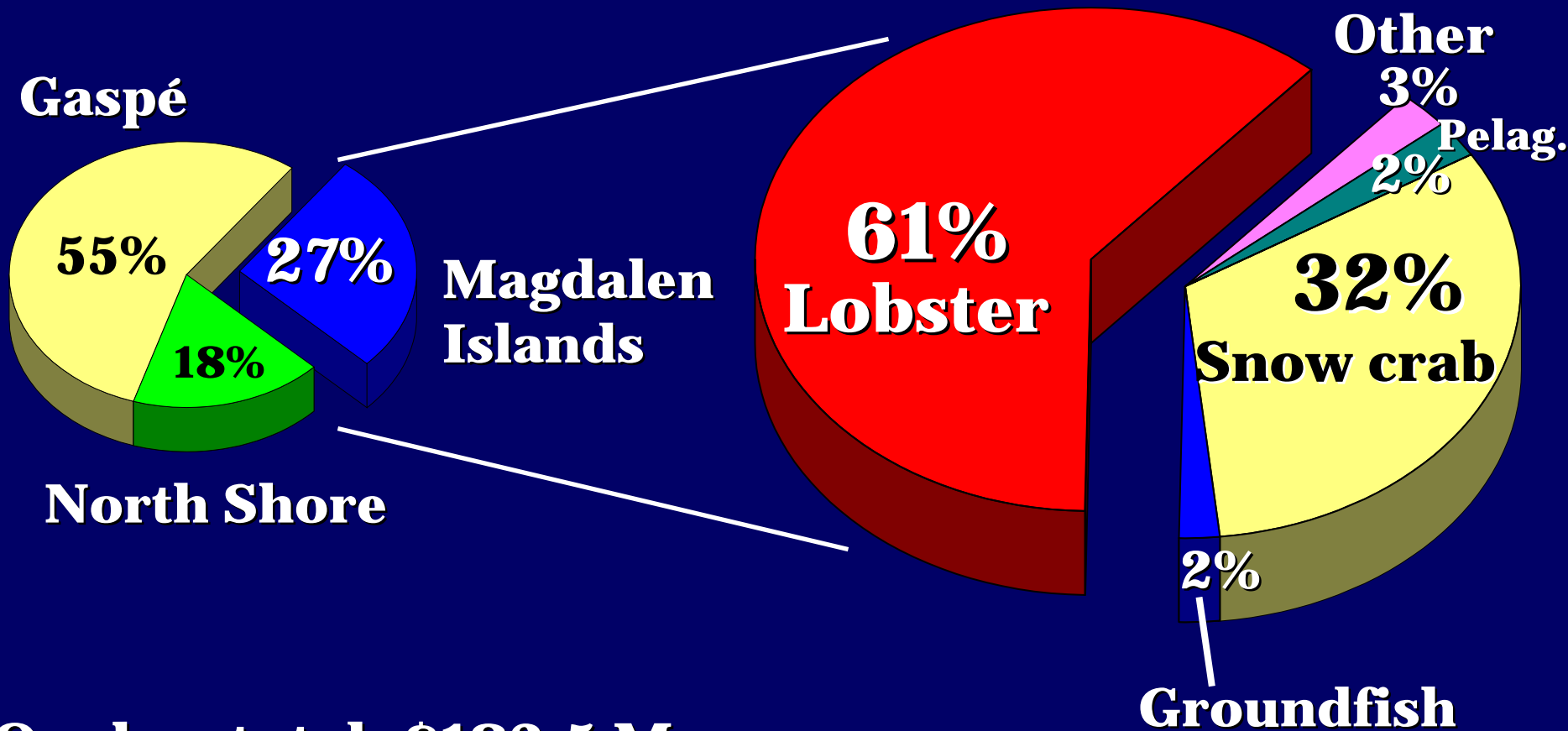
Breakdown of landed volume Magdalen Islands - 2004 (p)



Quebec total: 61,203 t

Islands total: 11,190 t

Breakdown of landed value Magdalen Islands - 2004 (p)



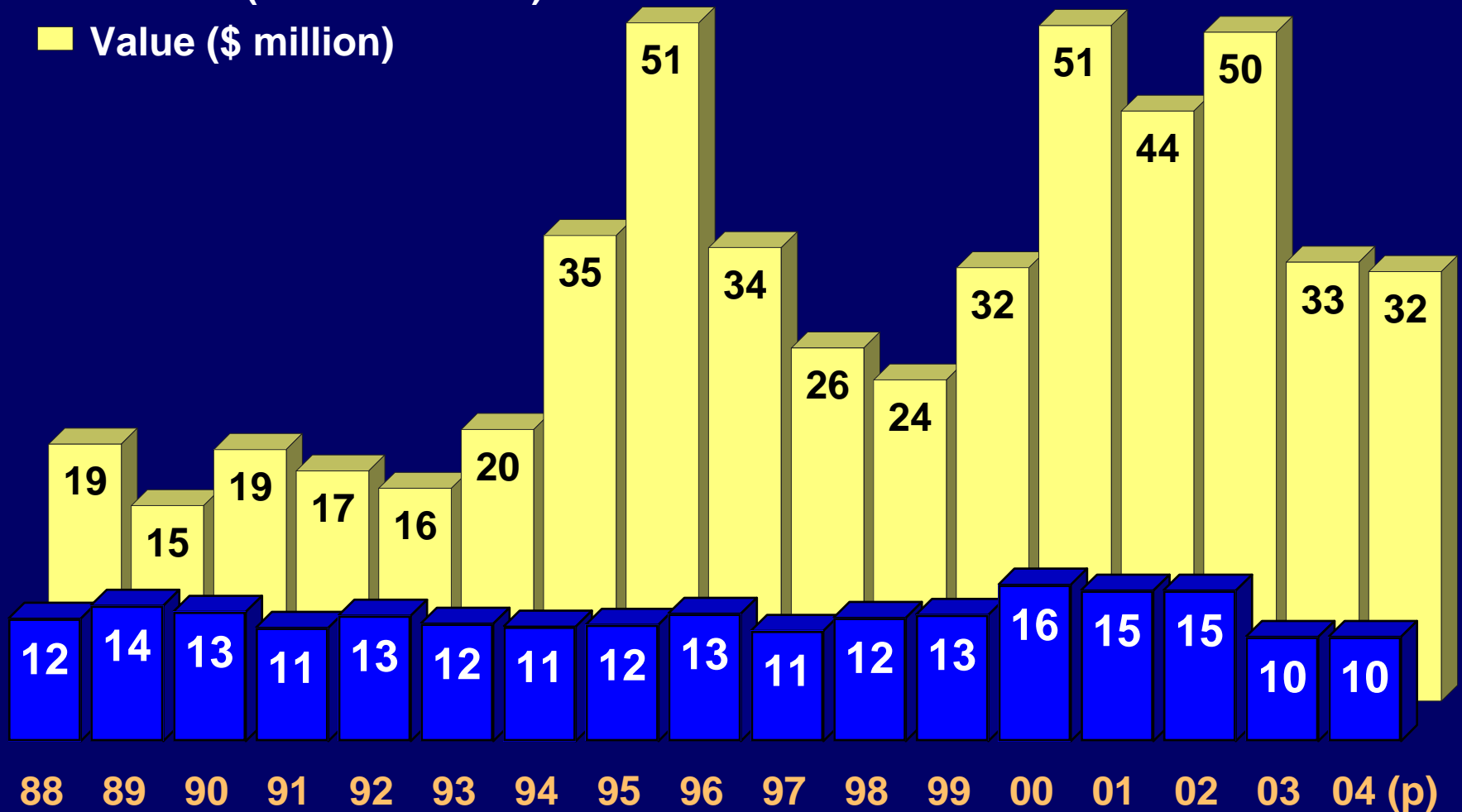
Quebec total: \$183.5 M

Islands total: \$49.7 M

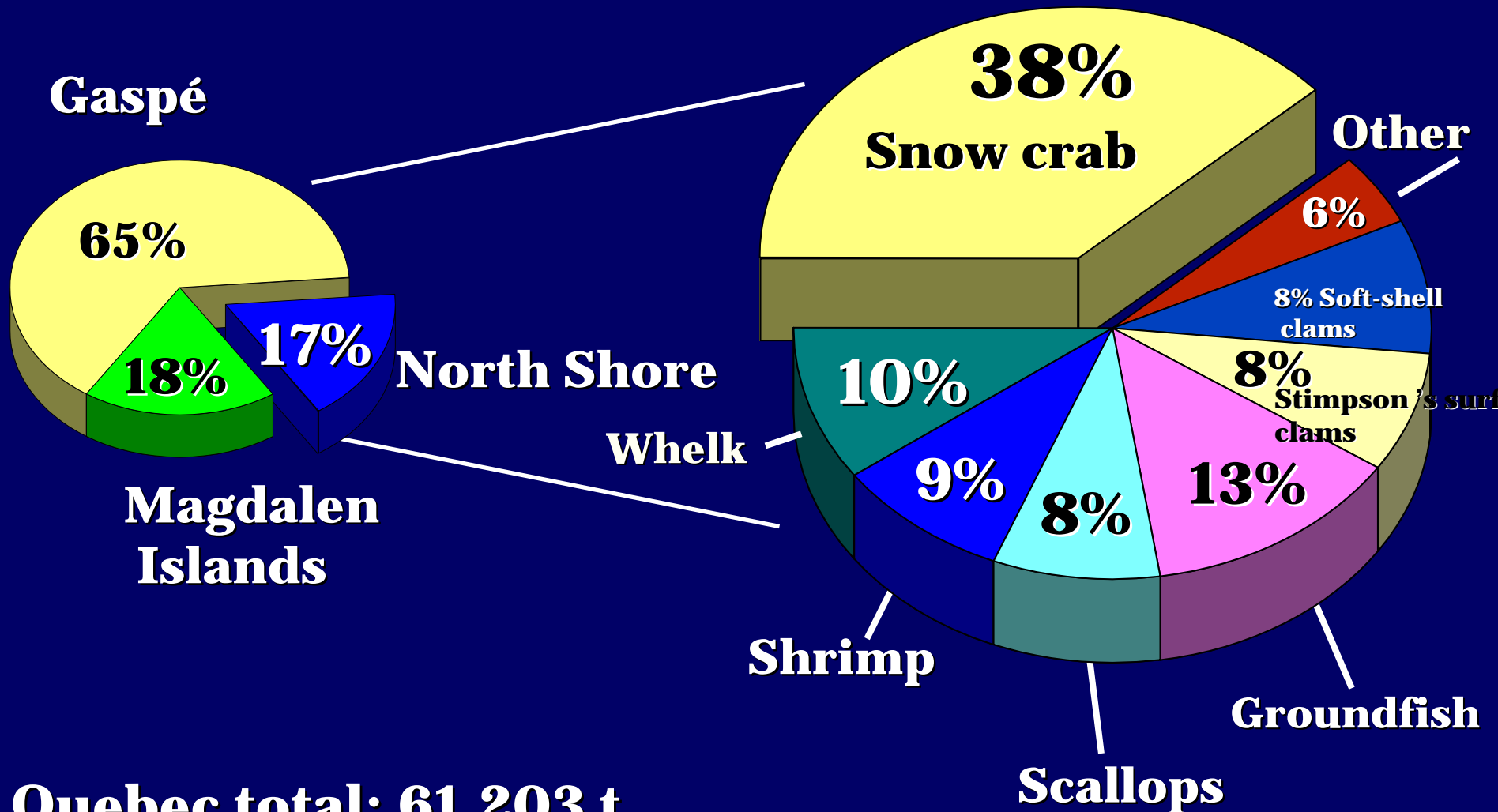
Trends in North Shore landings - 1988 to 2004 (p)

■ Volume (thousands of t)

■ Value (\$ million)



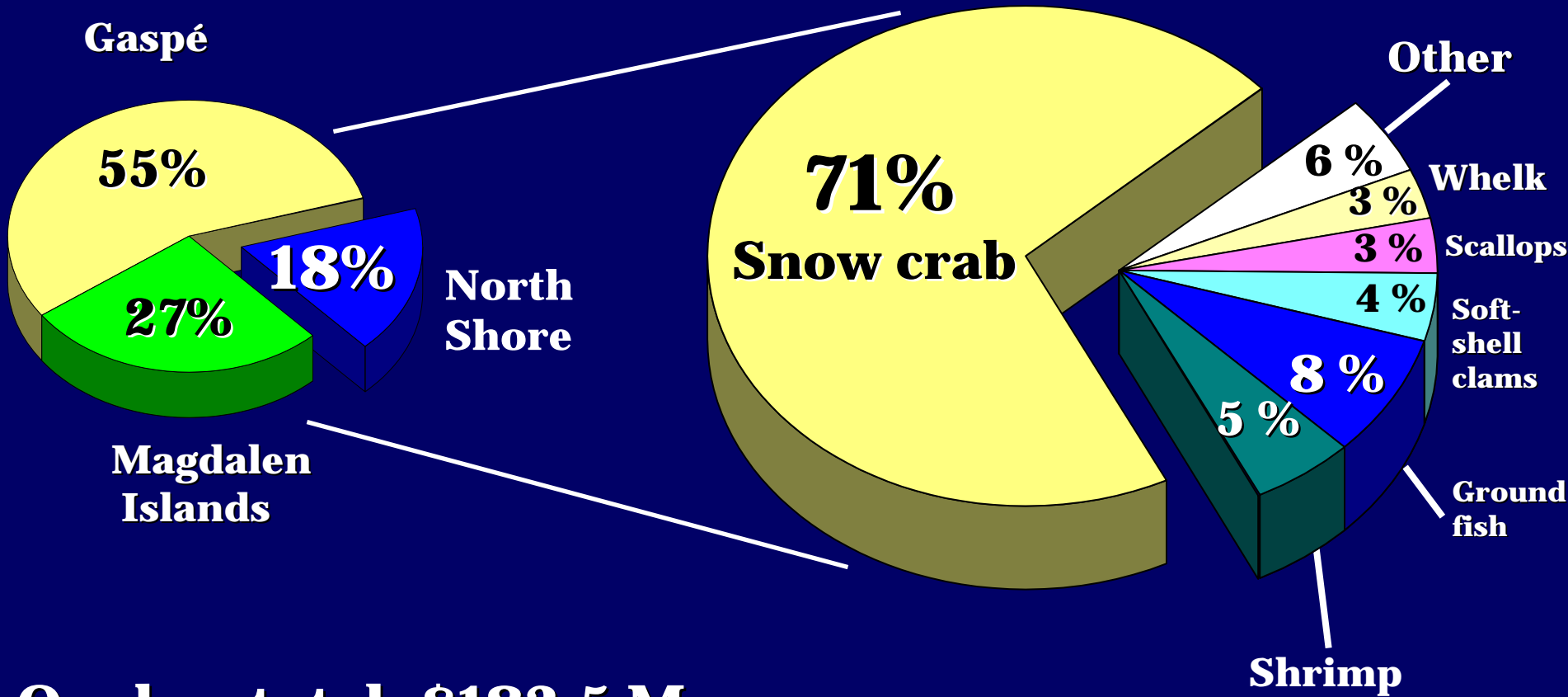
Breakdown of landed volume North Shore - 2004 (p)



Quebec total: 61,203 t

North Shore total: 10,441 t

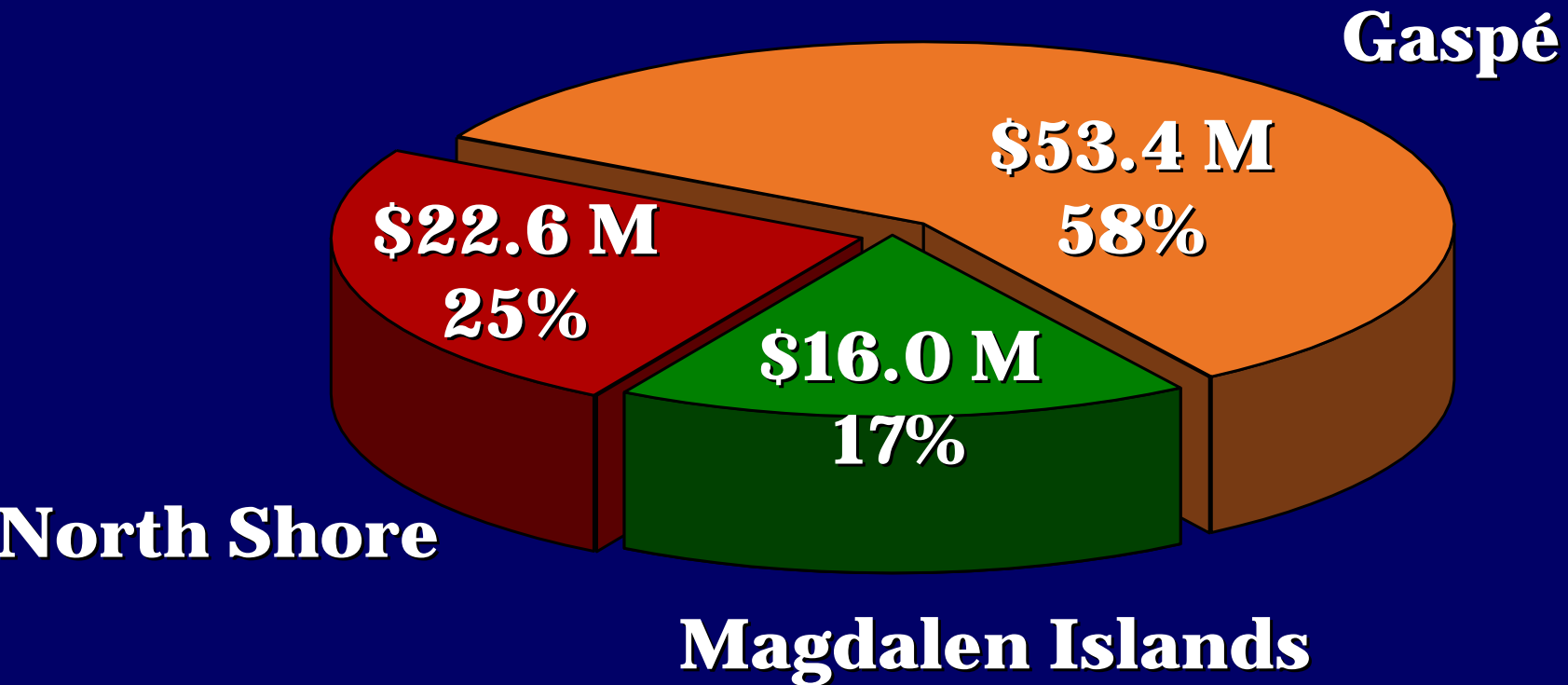
Breakdown of landed value North Shore - 2004 (p)



Quebec total: \$183.5 M

North Shore total: \$32.1 M

VALUE OF SNOW CRAB LANDINGS BY SECTOR - 2004 (p)



Quebec total: \$91.9 M

SNOW CRAB

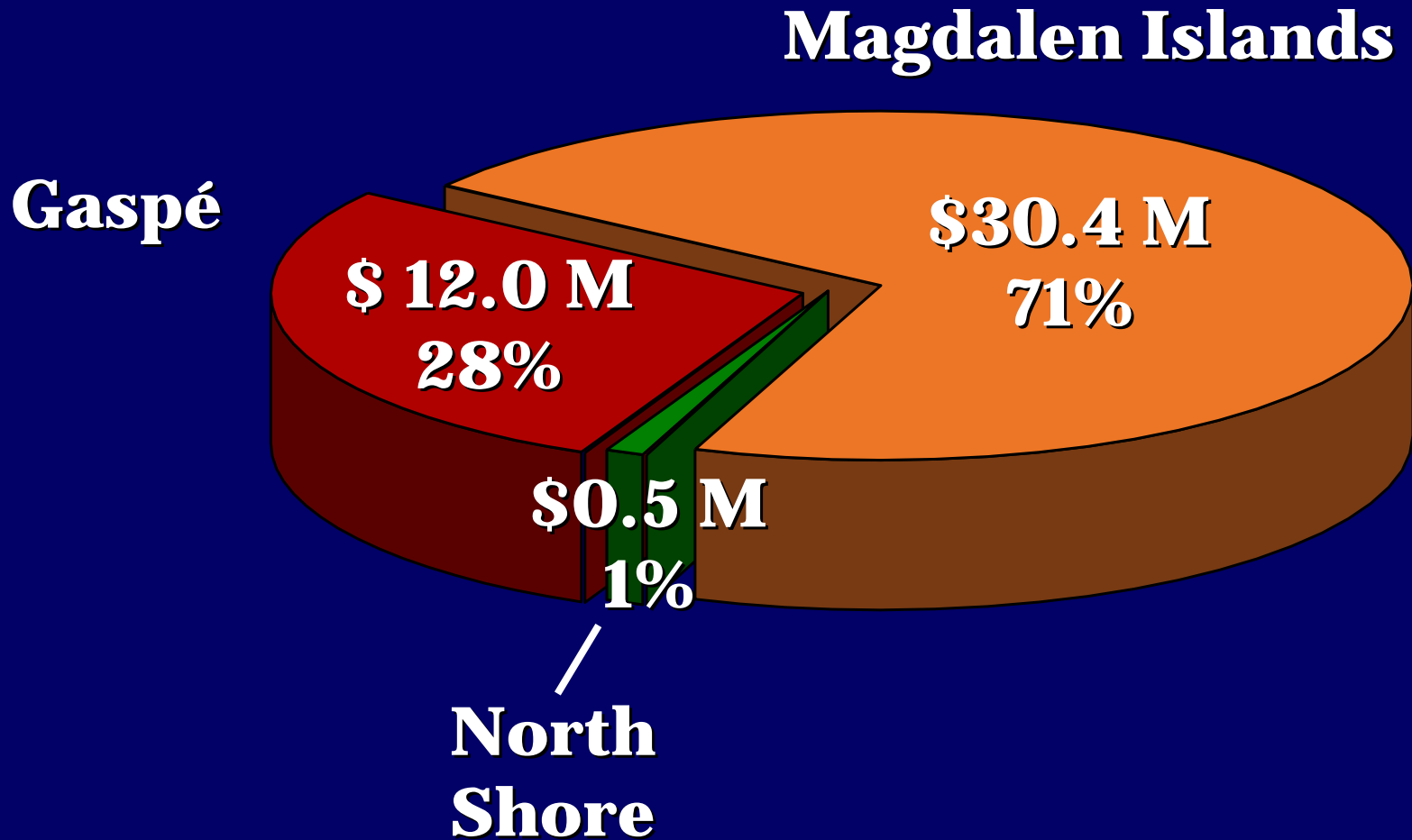
	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	12,445 t	15,060 t	+ 21%
❖ Value	\$78.4 M	\$91.9 M	+ 17%
❖ Average landed price	\$6.30/kg	\$6.10/kg	- 3%

- ❖ **In 2004, price of Canadian product held steady on the U.S. market. However, the Canadian dollar rose against the U.S. dollar, resulting in a 7% decrease in the price in \$CAN. In Japan, there was a slight increase in the import price in \$CAN.**
- ❖ **Slight increase in world supply. Canada remains the main supplier, with 74% of world landings. Quebec 's share was just over 10%.**
- ❖ **U.S. an important market in 2004, accounting for 85% of Quebec exports.**

SNOW CRAB STATUS

- ❖ **Natural abundance cycle (about 8 years) linked to variations in recruitment (5 years of moderate to strong recruitment, followed by 3 years of weak recruitment).**
- ❖ **Northern Gulf (areas 13 to 17) stocks are in declining phase of abundance cycle d'abondance. After decreases in 2003, stability (or slight increases) in 2004, except in areas 17 and 17a (down 25% and 15% respectively).**
- ❖ **The uptrend previously predicted for the southern Gulf (Area 12) is still expected to occur.**
- ❖ **Lower North Shore (Area 13) stock shows very low abundance: fishery closed since 2003.**

VALUE OF LOBSTER LANDINGS BY SECTOR - 2004 (p)



Quebec total: \$42.8 M

LOBSTER

	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	3,127 t	3,325 t	+ 6%
❖ Value	\$41.0 M	\$42.8 M	+ 4%
❖ Average landed price	\$13.12/kg	\$12.88/kg	- 2%

❖ **Very good year in the Magdalen Islands**

- ❖ **13% rise in landed volume**

- ❖ **Despite a slight decrease in landed price (-2%), 2004 was a record year for landed value (+12%).**

❖ **Drop in landed value in the Gaspé.**

LOBSTER STATUS

❖ **Conservation measures to double egg production per recruit:**

❖ **Target reached in the Magdalen Islands and the Gaspé, with minimum legal size set at 83 mm and 82 mm respectively in 2003 (76 mm in 1996).**

❖ **Effects of conservation measures:**

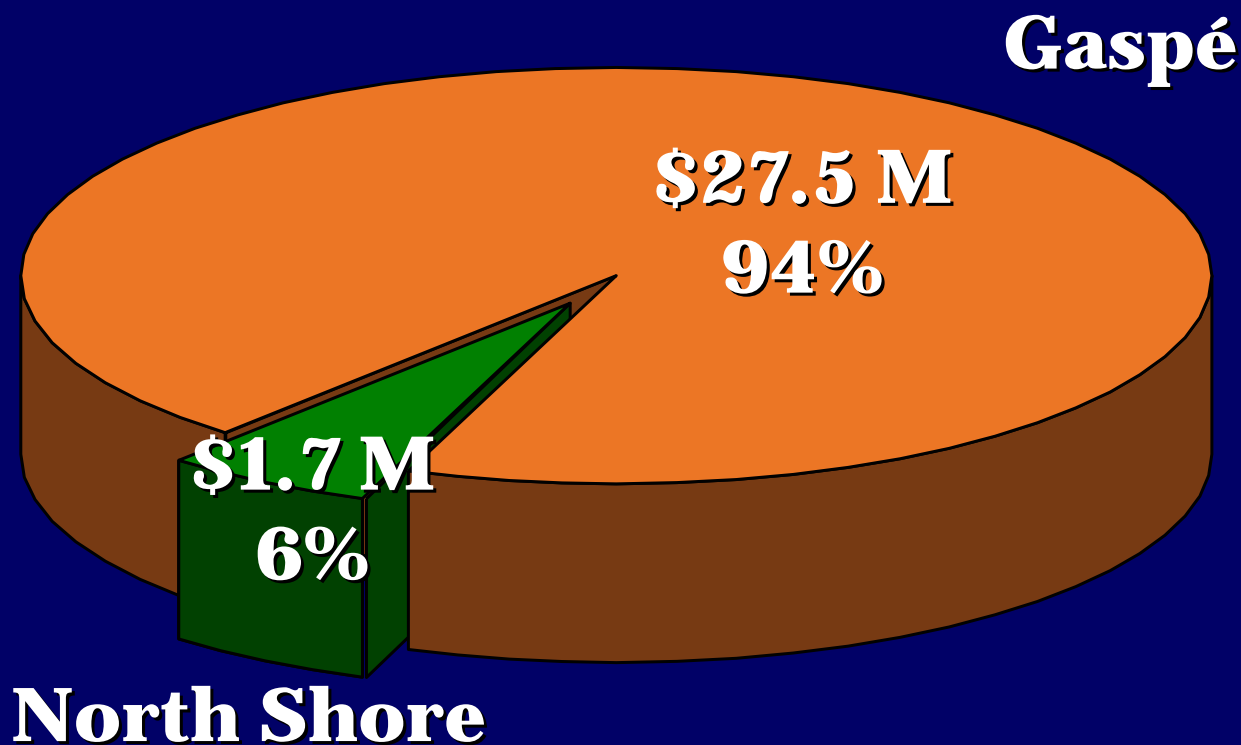
❖ **Increase in egg production per recruit.**

❖ **Increase in number of egg-bearing females.**

❖ **Increase in size and average weight of lobster caught; lobsters landed in 2004 weighed de 20–25% more than those landed in 1996.**

❖ **The recruitment indices for the Magdalen Islands point to good results for the region in 2005.**

VALUE OF GULF SHRIMP LANDINGS BY SECTOR - 2004 (p)



Quebec total: \$29.2 M

GULF SHRIMP

	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	17,279 t	22,348 t	+ 29 %
❖ Value	\$ 23.6 M	\$29.2 M	+ 24 %
❖ Average landed price	\$1.35/kg	\$1.29/kg	- 4 %

❖ The entire quota was caught:

The Gaspé accounted for 94% of landed value.

❖ Markets:

❖ Value of exports: \$ 27.6 M for the first 10 months of 2004;

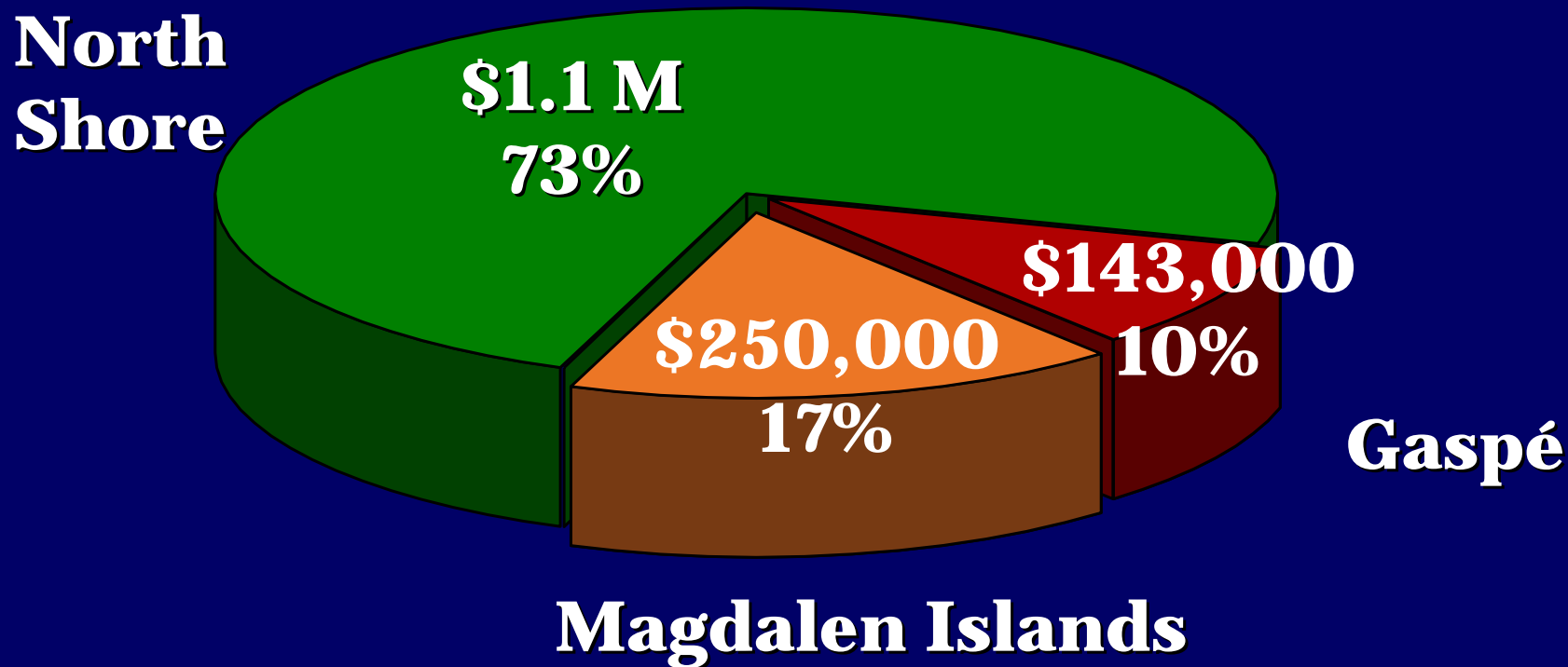
- 15% increase in Quebec exports.

❖ The U.S. remained the main export market (~ 50%).

❖ Record low prices.

❖ Stock abundance remained very high in 2004 and the outlook for the fishery is still good in 2005.

VALUE OF SCALLOP LANDINGS BY SECTOR - 2004 (p)



Quebec total: \$1.5 M

SCALLOPS

	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	1,423 t	1,068 t	- 25 %
❖ Value	\$ 1,9 M	1,5 M\$	- 21 %
❖ Average landed price (Meat)	\$12.03 /kg	\$12.46 /kg	+ 4 %

❖ **Scallop landings on the east coast of the U.S. and Canada (Georges Bank) still sizeable, but smaller than in past years. Prices rose slightly as a result of this. The landed volume of scallops declined in all sectors in 2004.**

❖ **Stock status: little change from 2003**

❖ **Chaleur Bay: low biomass values for sea scallop.**

❖ **Magdalen Islands: wild stock has low biomass, but integrated strategy to take account of seeding at aquaculture sites.**

❖ **North Shore: resource stable.**

COD

	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	175 t	1,500 t	+ 757%
❖ Value	\$238,000	\$2 M	+ 740%
❖ Average landed price	\$1.63/kg	\$1.57/kg	- 4%

❖ **Landed value in the Gaspé = \$1.2 M**

Nearly 61% of the total value of Quebec landings

❖ **Landed value on the North Shore = \$601,400**

Nearly 30% of the total value of Quebec landings

❖ **Landed value in the Magdalen Islands = \$175,400**

Nearly 9% of the total value of Quebec landings

COD STATUS

(Based on 2003 data. The 2004 data will be analysed in March 2005)

Southern Gulf

- ❖ **Low abundance for fish of all sizes.**
- ❖ **Low biomass values for adult fish.**
- ❖ **Low recruitment (juvenile cod).**
- ❖ **No recovery of adult biomass expected in short term, even with no fishing.**

Northern Gulf

- ❖ **Stock abundance remains low.**
- ❖ **Recruitment (age 3) at record low level in 2003.**
- ❖ **Spawning stock biomass still below the conservation limit for this stock.**

TURBOT (Greenland halibut)

	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	2,682 t	3,170 t	+ 18%
❖ Value	\$5.1 M	\$6.6 M	+ 29%
❖ Average landed price	\$2.00/kg	\$2.29/kg	+ 15%

- ❖ Landed value in the Gaspé = \$4.8 M
Nearly 73% of the total value of Quebec landings.
- ❖ Increase in landings in 2004 (fixed gear quota caught).
- ❖ Biomass: upward trend (based on only one index).

ATLANTIC HALIBUT

	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	108 t	148 t	+ 37%
❖ Value	\$604,000	\$817,000	+ 35%
❖ Average landed price	\$6.44/kg	\$6.36/kg	- 1%

❖ Landed value in the Gaspé = \$514 K

Approximately 63% of the total value of Quebec landings.

❖ Overall biomass: low, but stable.

❖ Annual TAC set at 350 t since 1999.

OTHER FLATFISH

	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	514 t	681 t	+ 33%
❖ Value	\$439 K	\$575 K	+ 31%

Resource status:

❖ AMERICAN PLAICE

- ❖ Low biomass, declining since 1992.
- ❖ No sign of significant recruitment.

❖ YELLOWTAIL FLOUNDER

- ❖ Fairly abundant near the Magdalen Islands.

❖ WINTER FLOUNDER

- ❖ Near-average biomass.

❖ WITCH FLOUNDER

- ❖ Low biomass for stock as a whole.

HERRING

	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	6,241 t	6,405 t	+ 3%
❖ Value	\$1.63 M	\$1.61 M	- 1%
❖ Average landed price	\$0.26/kg	\$0.25/kg	- 4%

❖ Magdalen Islands

- ❖ Increase in landings

- ❖ Landed value in the Magdalen Islands = \$817,000

Nearly 51% of the total value of Quebec landings

❖ Gaspé

- ❖ Decrease in landings

- ❖ Landed value in the Gaspé = \$730,000

Nearly 45% of the total value of Quebec landings

❖ Biomass 4T (preliminary analysis):

- ❖ Spring biomass below average in 2003

- ❖ Fall biomass high

❖ Biomass 4S:

- ❖ Underharvested stock, average annual landings of 400 t (for bait only).

MACCKEREL

	<u>2003</u>	<u>2004 (p)</u>	<u>Difference</u>
❖ Volume	4,380 t	1,610 t	- 63%
❖ Value	\$1.8 M	\$662 400	- 63%
❖ Average landed price	\$0.42/kg	\$0.41/kg	- 2%

- ❖ Sharp decrease in landed volume in the Magdalen Islands
- ❖ Slight upturn in landed volume and value in the Gaspé
- ❖ Landed value in the Magdalen Islands = \$380,000
Nearly 57 % of the total value of Quebec landings.
- ❖ Major changes in migration routes explain the abundance of small mackerel in summer and fall.

Results of 2004 Season - Quebec

Species	Volume (in t)	Value	Difference (2004-2003)		Average Landed Price (\$/kg) (change 04/03)
			Tonnes	Value	
Snow crab	15,060	\$91.9 M	+ 21%	+ 17%	6.10 (-3%)
Lobster	3, 325	\$42.8 M	+ 6%	+ 4%	12.88 (-2%)
Gulf shrimp	22,348	\$29.2 M	+ 29%	+ 24%	1.29 (-4%)
Scallops	1,068	\$1.5 M	- 25%	- 21%	12.46 (+4%)
Cod	1,500	\$2 M	+ 757%	+ 740%	1.57 (-4%)
Turbot	3,170	\$6.6 M	+ 18%	+ 29%	2.29 (+15%)
Atlantic halibut	148	\$817,000	+ 37%	+ 35%	6.36 (-1%)
Flatfish	681	\$575,000	+ 33%	+ 31%	-----
Herring	6,405	\$1.6 M	+ 3%	- 1%	0.25 (-4%)
Mackerel	1,610	\$662,400	- 63%	- 63%	0.41 (-2%)

Canada 