

FISHING RESULTS QUÉBEC 2003 Season



Pêches et Océans
Canada

Fisheries and Oceans
Canada

Canada

FISHING RESULTS

- ❖ **Trends in Quebec landings
1987 - 2003 (p)**
- ❖ **Breakdown of the landing values and volumes
by sector 1987 - 2003 (p)**
- ❖ **Results for each of the following species :**
 - ❖ **Snow crab, lobster, Gulf Shrimp**
 - ❖ **Scallops**
 - ❖ **Cod, Greenland halibut, Atlantic halibut, other flat fish**
 - ❖ **Herring, mackerel**

2003 (p) : from January 1 to November 30, 2003

PRELIMINARY COMMENTS

- ❖ **Volume and value**

2002 : final data / 2003 : preliminary data

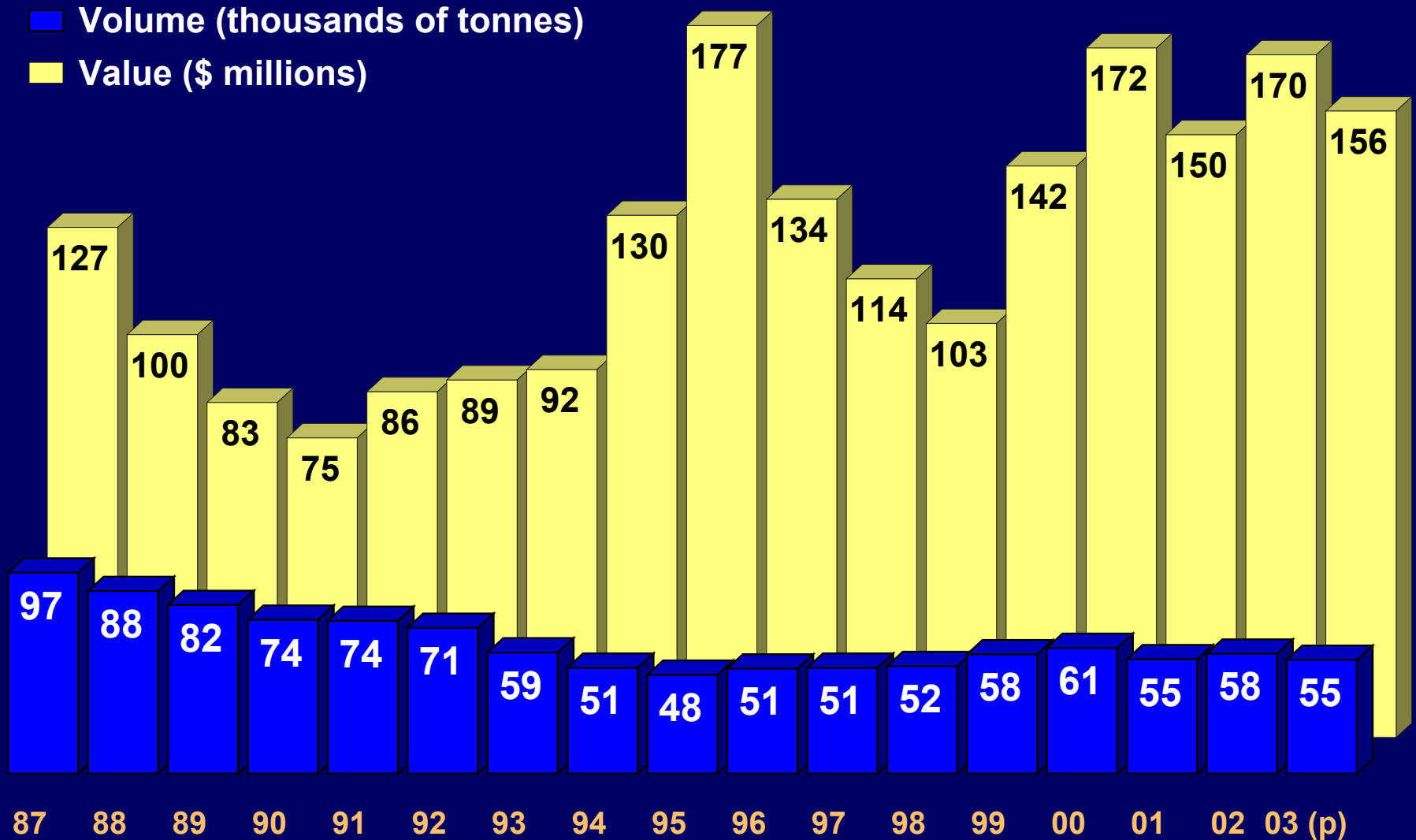
- ❖ **Average dockside price**

2002 : final data / 2003 : preliminary data

- ❖ **State of the resource**

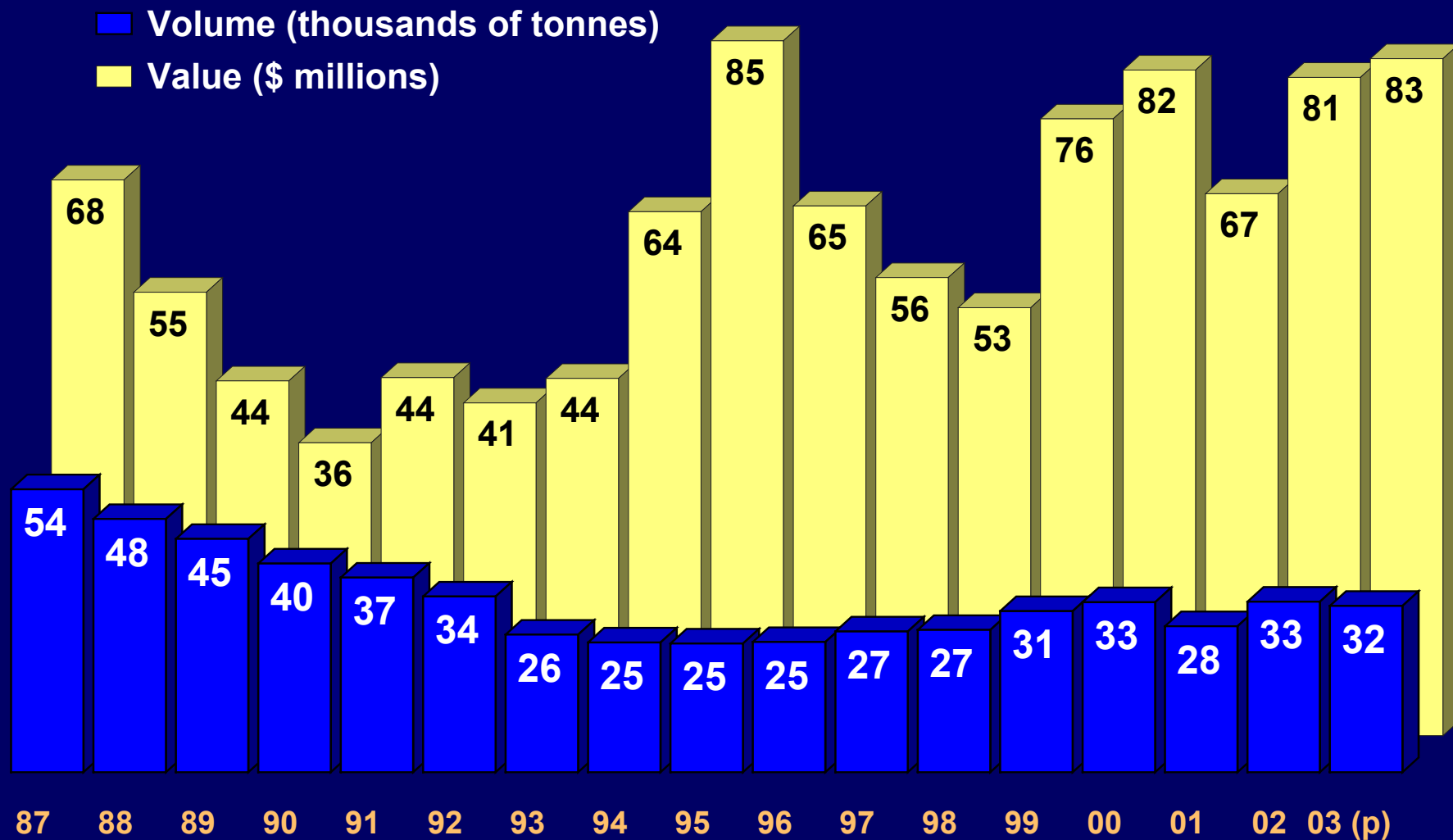
2002 ou 2003 (p) data, depending on species

Trends in Landings Made by Quebec Fishermen - 1987 to 2003 (p)



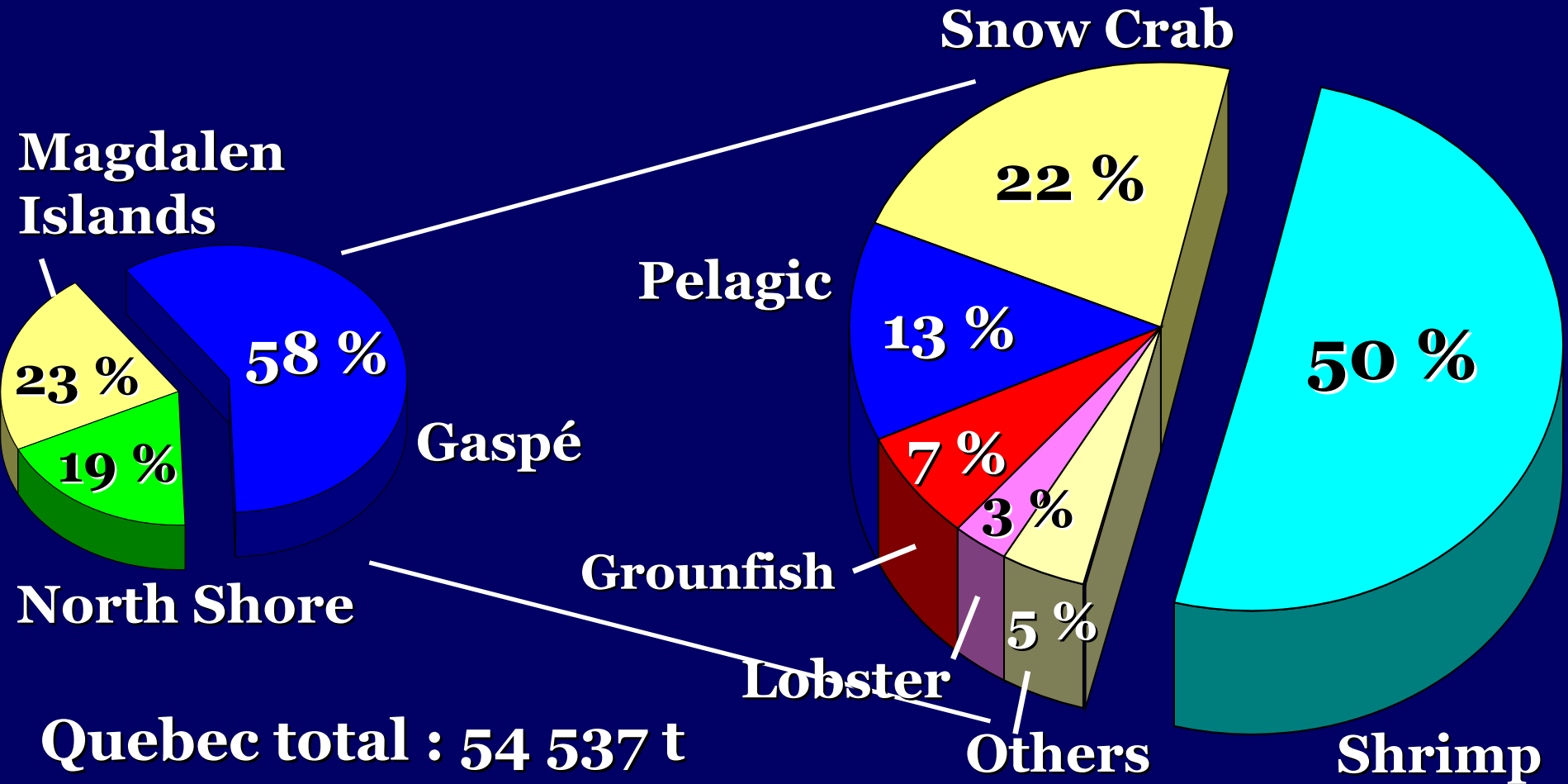
2003 (p) : from January 1 to November 30, 2003

Trends in Landings Made by Gaspé Fishermen - 1987 to 2003 (p)



2003 (p) : from January 1 to November 30, 2003

Breakdown of Landing Volume Gaspé - 2003 (p)

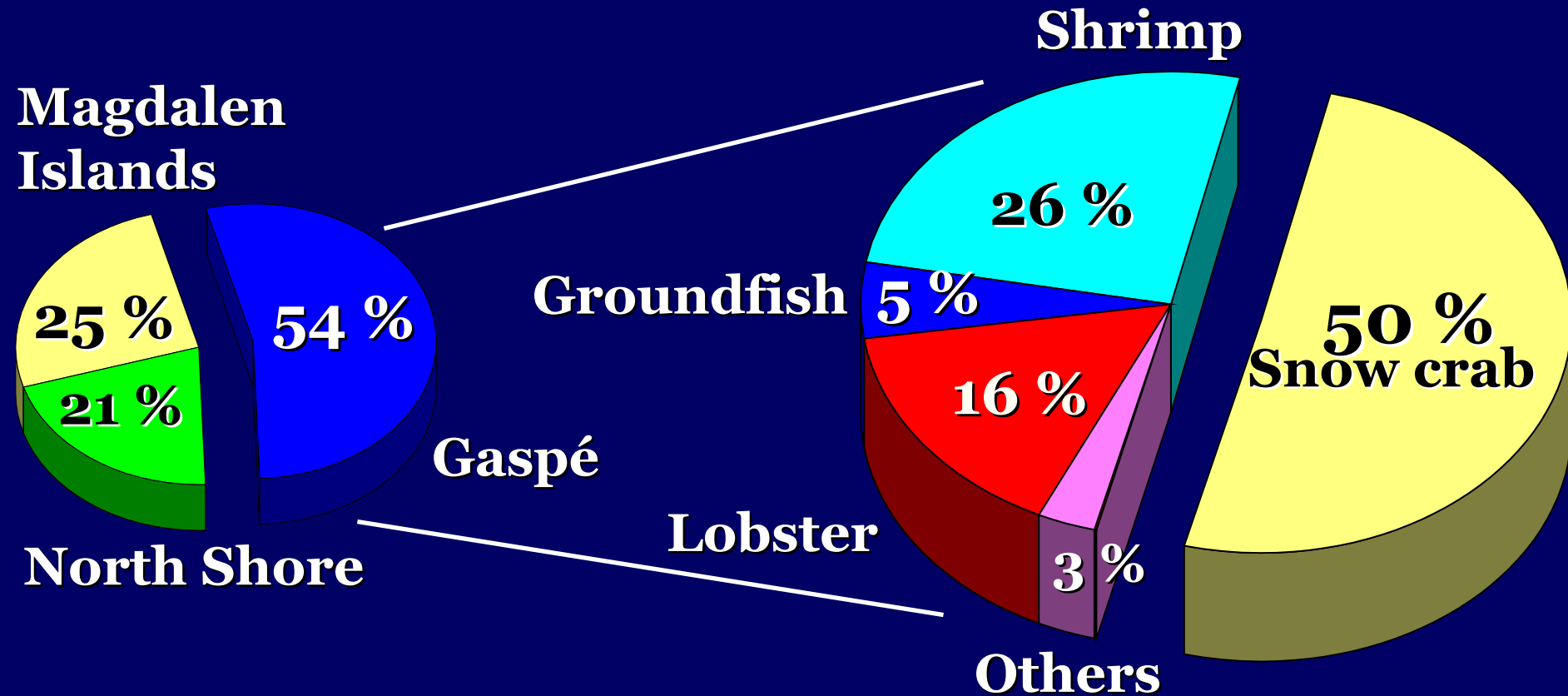


Quebec total : 54 537 t

Gaspé total : 31 755 t

2003 (p) : from January 1 to November 30, 2003

Breakdown of Landing Values Gaspé - 2003 (p)



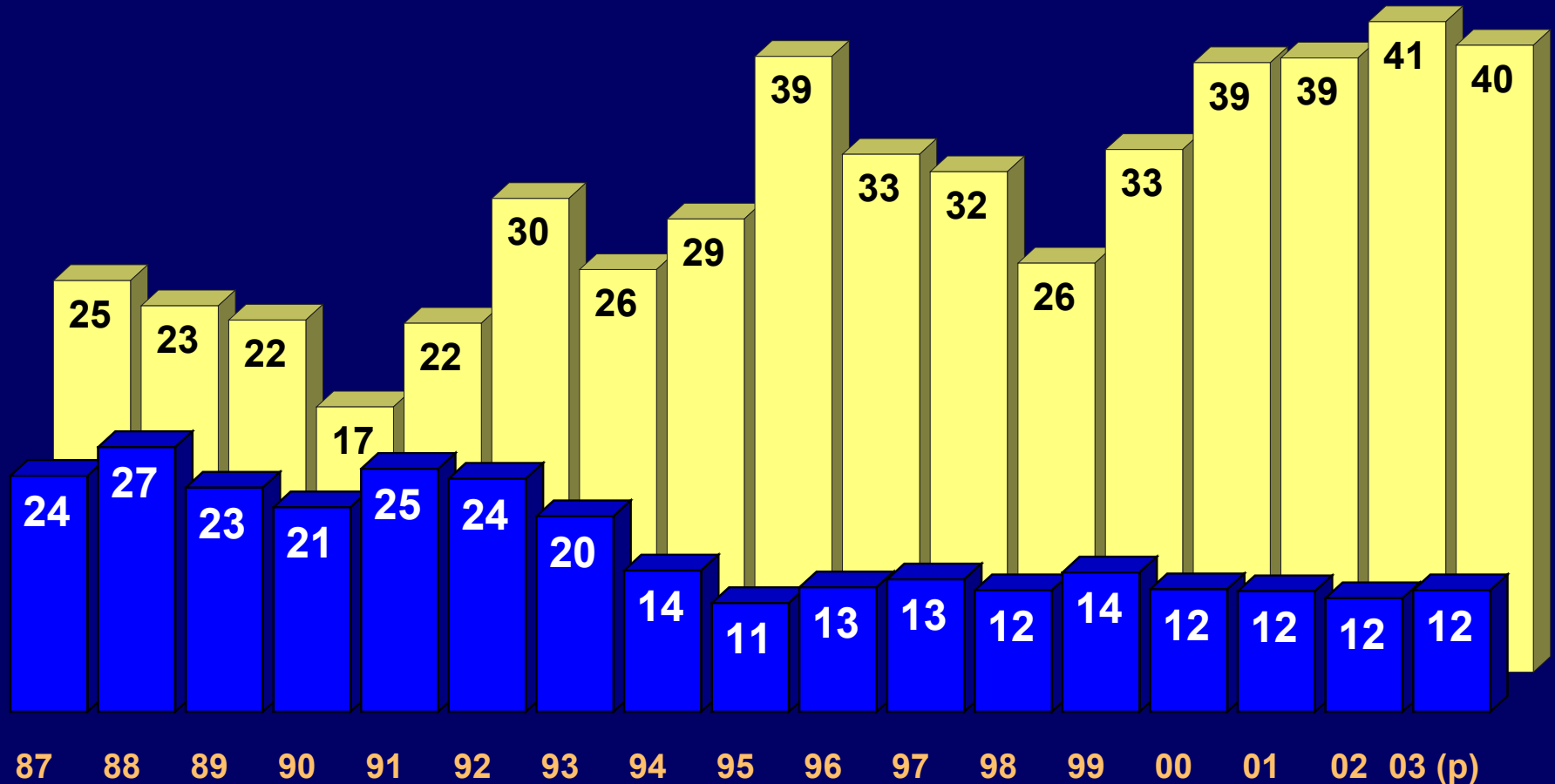
Quebec total: \$155.6M

Gaspé total : \$83.2M

2003 (p) : from January 1 to November 30, 2003

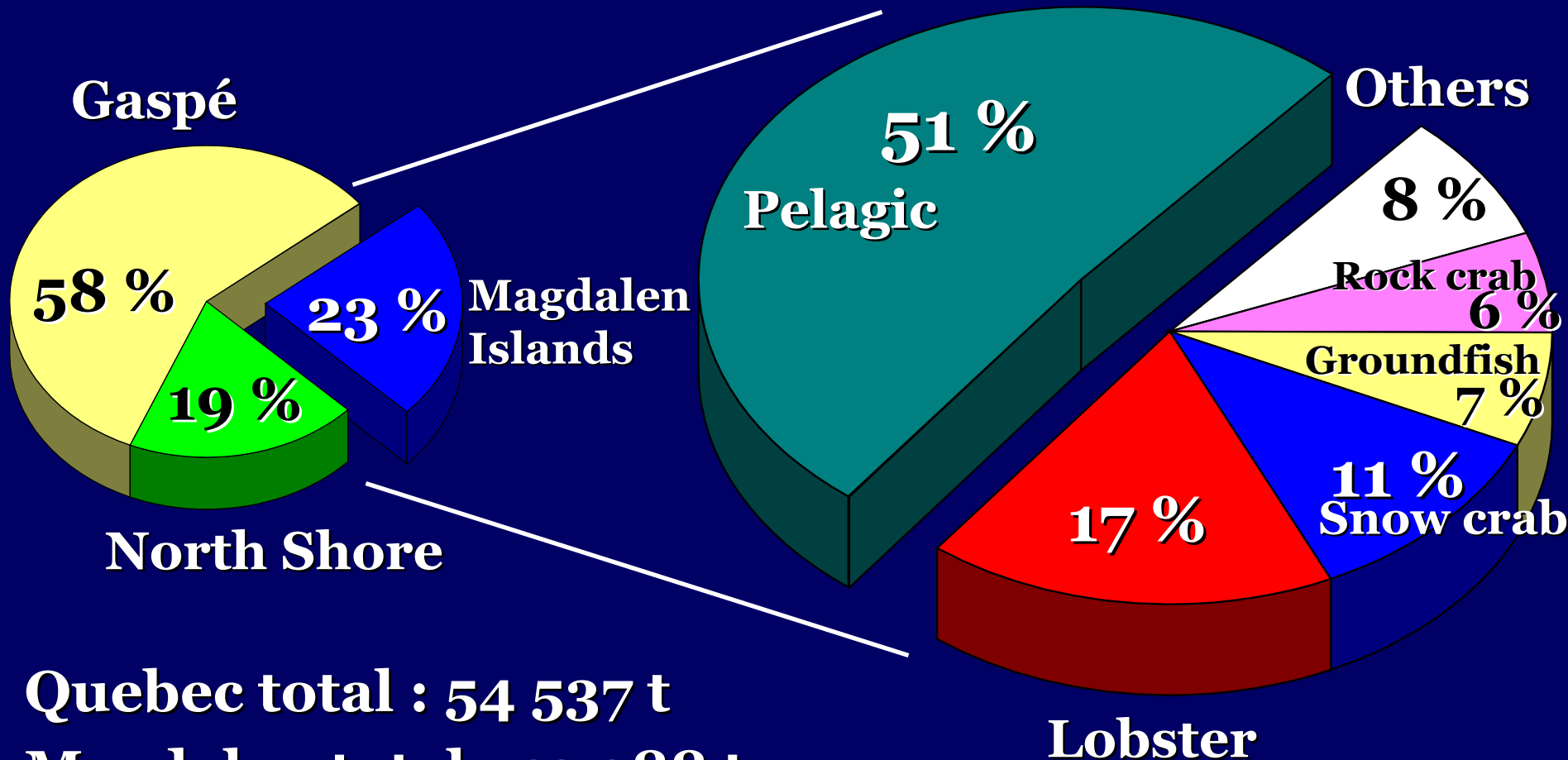
Trends in Landings Made by Magdalen Islands Fishermen - 1987 to 2003 (p)

- Volume (thousands of tonnes)
- Value (\$ millions)



2003 (p) : from January 1 to November 30, 2003

Breakdown of Landings Volume Magdalen Islands - 2003 (p)

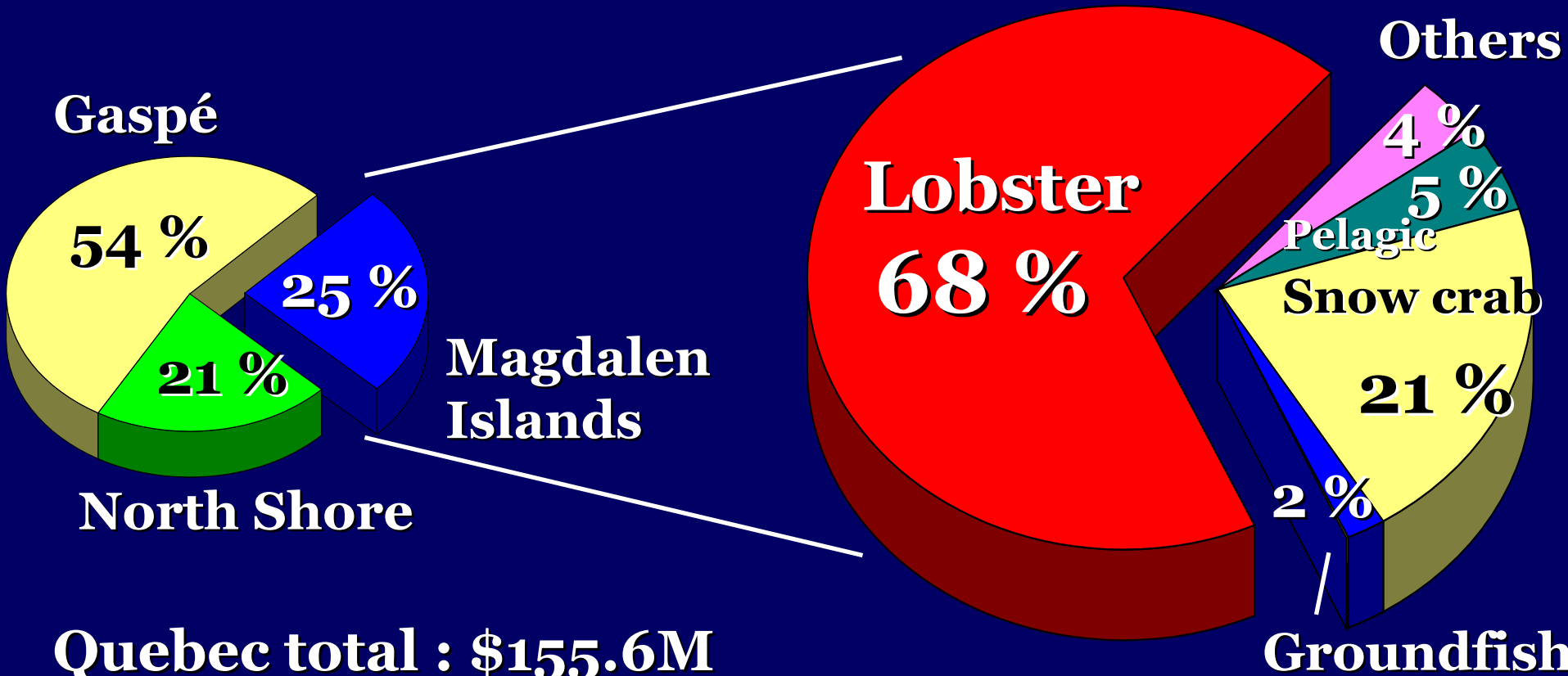


Quebec total : 54 537 t

Magdalen total : 12 288 t

2003 (p) : from January 1 to November 30, 2003

Breakdown of Landing Values Magdalen Islands - 2003 (p)



Quebec total : \$155.6M

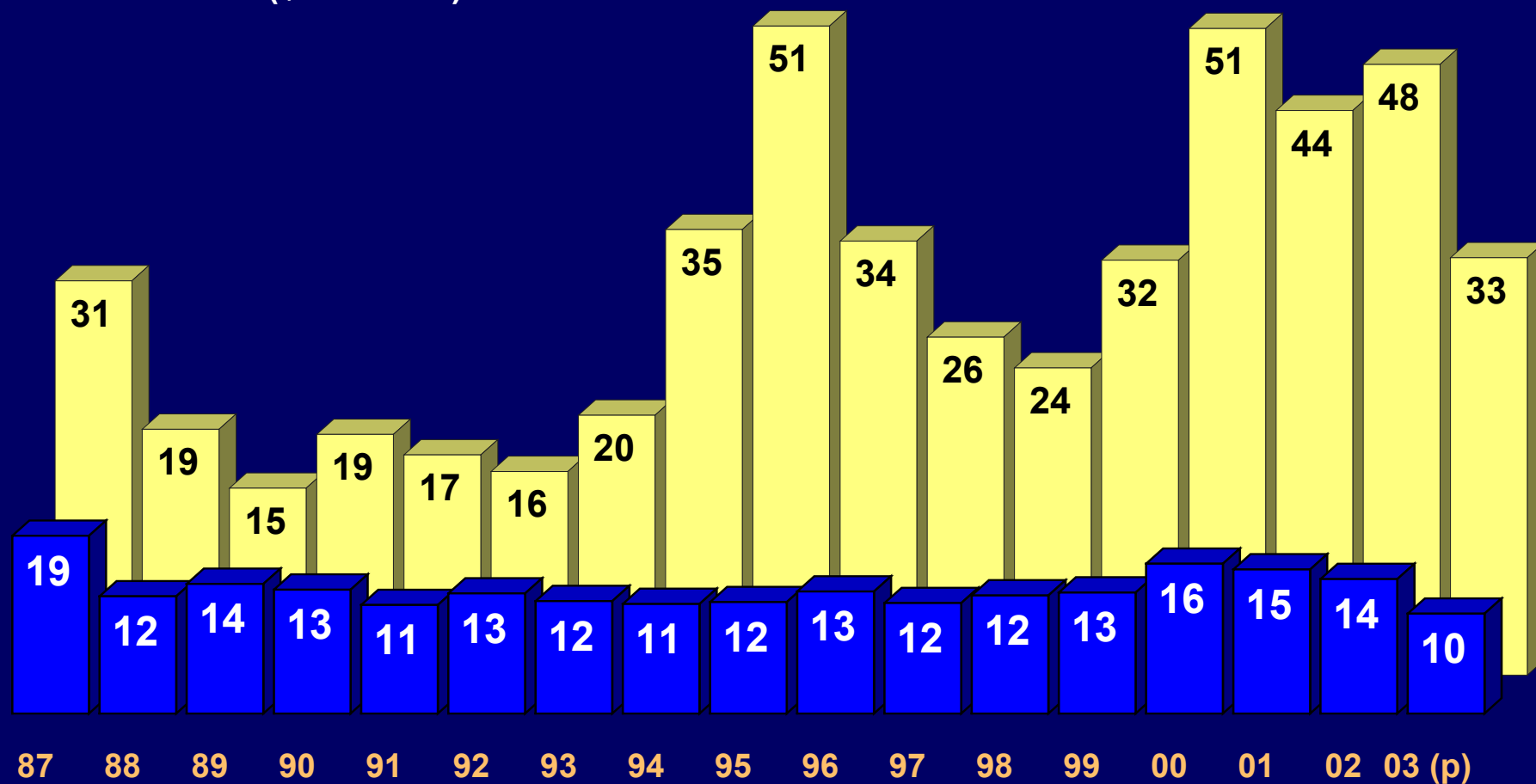
Magdalen total : \$39.7M

2003 (p) : from January 1 to November 30, 2003

Trends in Landings Made by North Shore Fishermen - 1987 to 2003 (p)

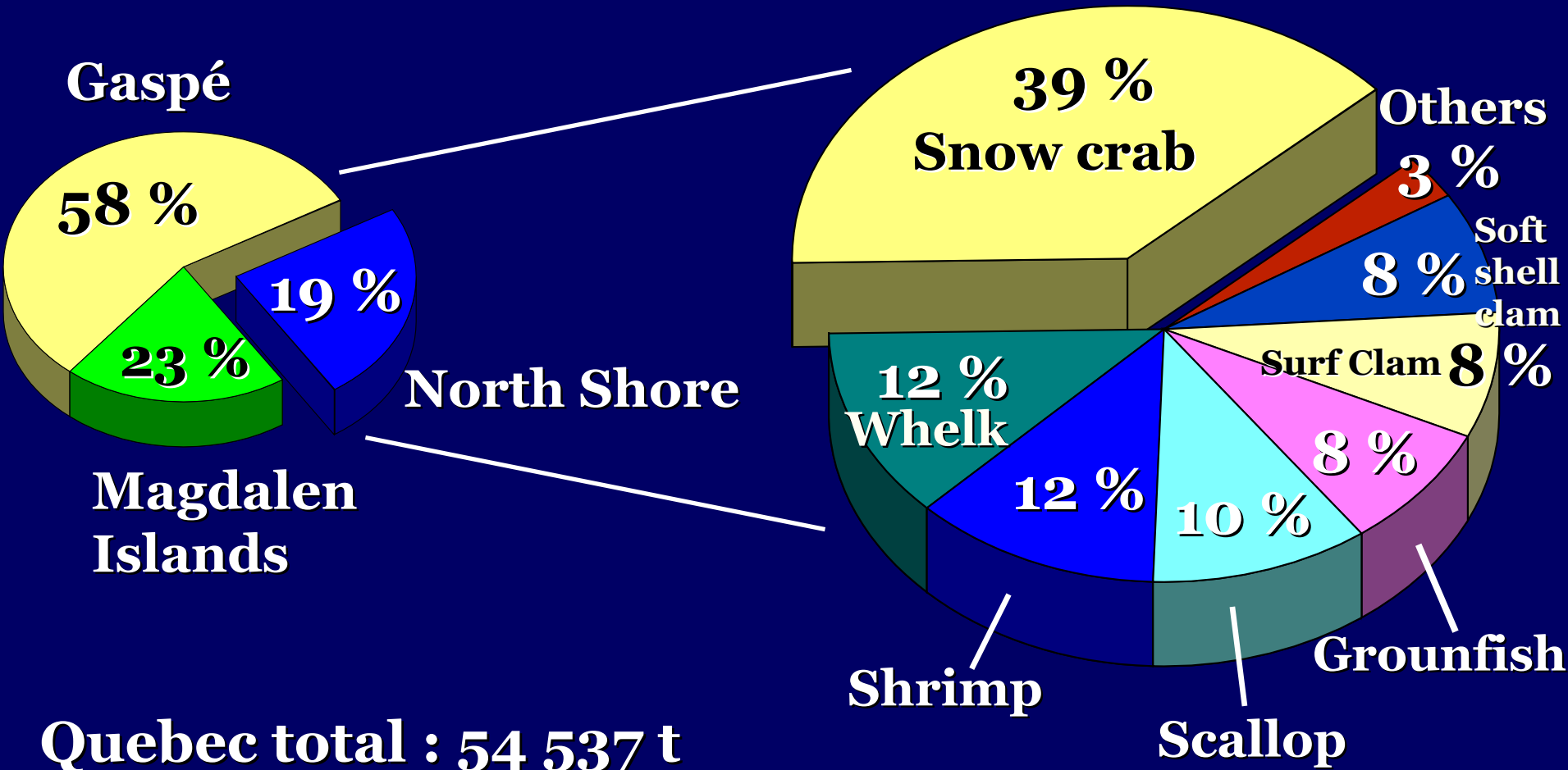
■ Volume (thousands of tonnes)

■ Value (\$ millions)



2003 (p) : from January 1 to November 30, 2003

Breakdown of Landing Volume North Shore - 2003 (p)

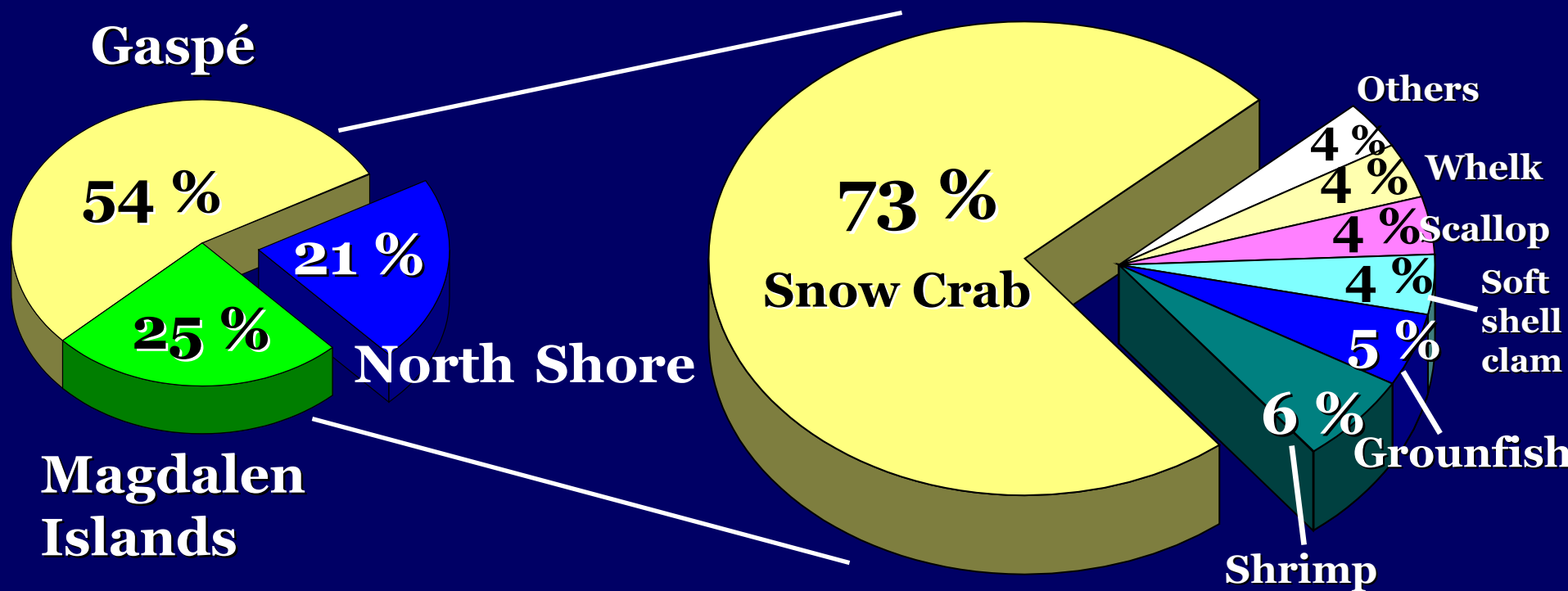


Quebec total : 54 537 t

North Shore total : 10 372 t

2003 (p) : from January 1 to November 30, 2003

Breakdown of Landing Values North Shore - 2003 (p)

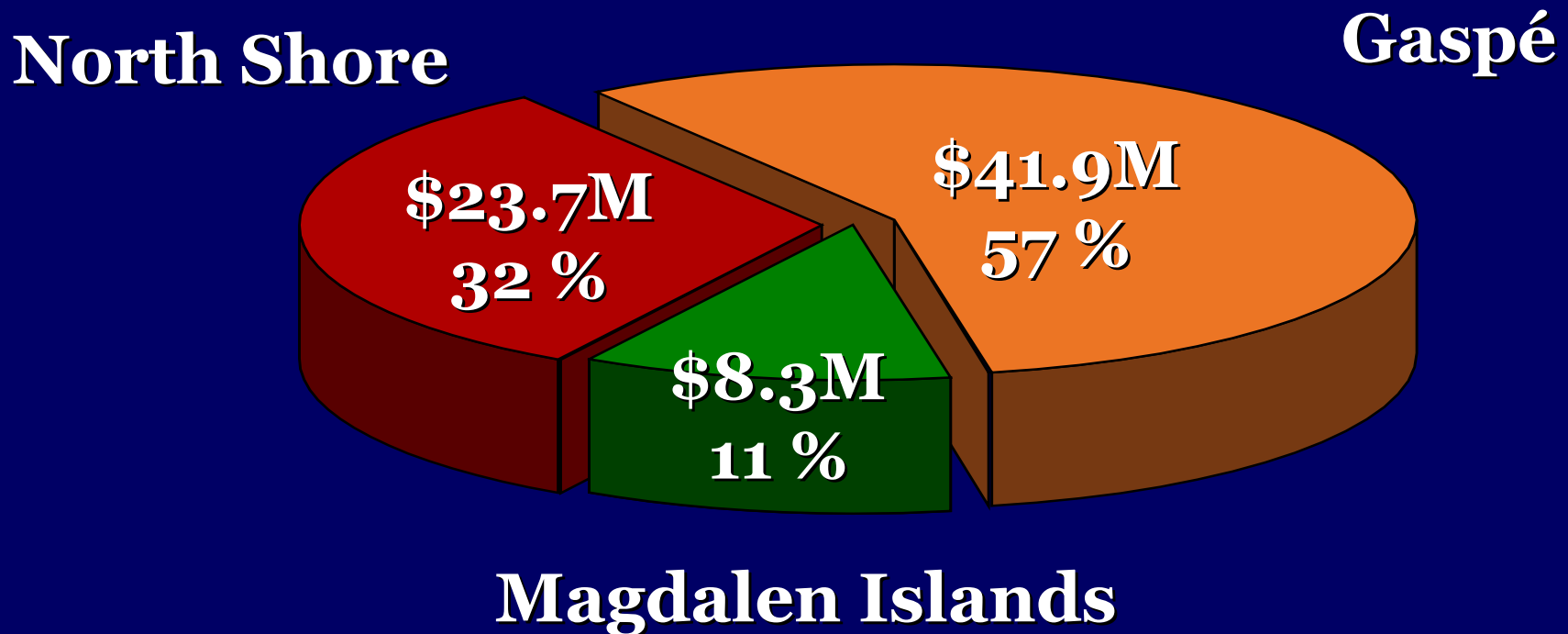


Quebec total : \$155.6M

North Shore total : \$32.6M

2003 (p) : from January 1 to November 30, 2003

VALUE OF SNOW CRAB LANDINGS BY SECTOR - 2003 (p)



Quebec total: \$73.9M

2003 (p) : from January 1 to November 30, 2003

SNOW CRAB

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖ Volume	17 706 t	12,442 t	- 30 %
❖ Value	\$89M	\$73.9M	- 17 %
❖ Average dockside price	\$5.03/kg	\$5.94/kg	+18 %

International situation

- ❖ Price of Canadian product rose 20 % on the US market and nearly 16 % on the Japanese market. However, the increase in the value of the Canadian dollar against the US dollar offset the effect of the price increase.
- ❖ World supply decreased by over 15 %. Canada remains the main supplier, with 66 % of world landings.
- ❖ The US was an important market in 2003, accounting for most of Quebec exports.

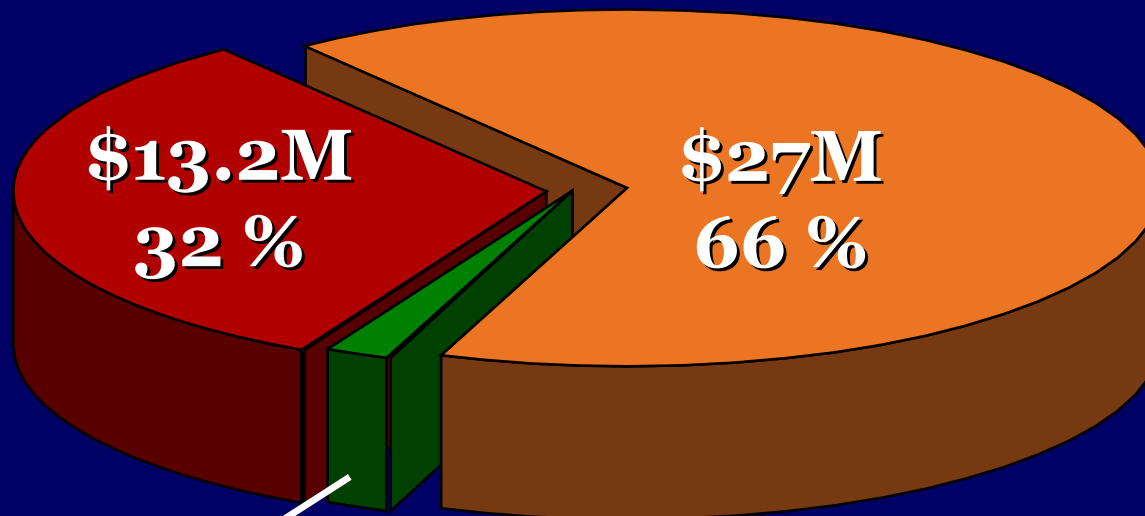
SNOW CRAB STATUS

- ❖ **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: decrease, sometimes substantial, in most sectors in 2003.**
- ❖ **The uptrend previously predicted for the southern Gulf (Area 12) is still expected to occur.**
- ❖ **Lower North Shore (Area 13) stock shows low abundance; fishery closed since 2003.**

VALUE OF LOBSTER LANDINGS BY SECTOR - 2003 (p)

Magdalen Islands

Gaspé



North Shore \$827 000
2 %

Québec total : \$41M

2003 (p) : from January 1 to November 30, 2003

LOBSTER

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖ Volume	2 975 t	3 132 t	+ 5 %
❖ Value	\$41.4M	\$41.0M	- 1 %
❖ Average docksde price	\$13.91/kg	\$13.09/kg	- 6 %

❖ Good year in the Gaspé

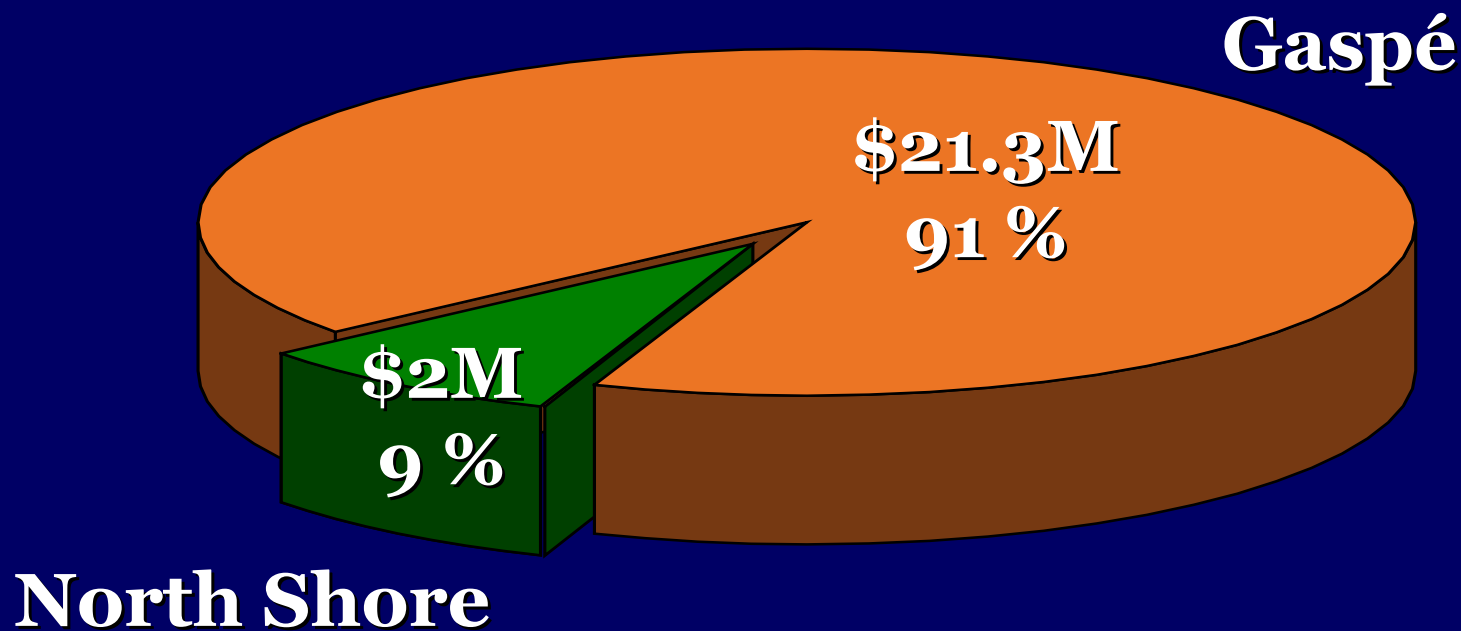
- ❖ Landed price at record level
- ❖ 12 % increase in the volume of landings
- ❖ 2nd record year, after 2001, in terms of landed value

❖ Slight decrease in landed value in the Magdalen Islands

LOBSTER STATUS

- ❖ **Conservation measures to double egg production**
 - ❖ Target attained in the Magdalen Islands with a minimum legal size of 83 mm in 2003 (76 mm in 1996)
 - ❖ Target should be reached in 2004 in the Gaspé: minimum legal size to be increased to 82 mm (76 mm in 1996)
- ❖ **Observed effects of conservation measures :**
 - ❖ Increase in egg production per recruit
 - ❖ Increase in the number of egg-bearing females
 - ❖ Increase in the size and average weight of lobsters; lobsters landed in 2003 weighed 20 % - 25 % more than those landed in 1996
- ❖ **The outlook for 2004 appears good**

VALUE OF GULF SHRIMP LANDINGS BY SECTOR - 2003 (p)



Quebec total : \$23,3M

2003 (p) : from January 1 to November 30, 2003

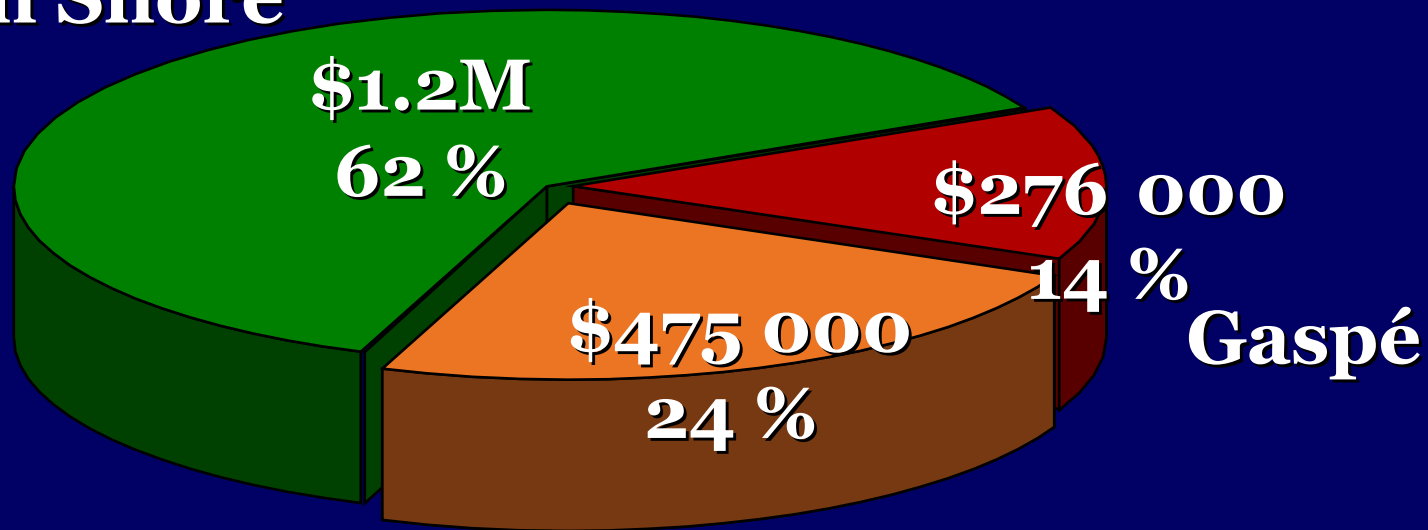
GULF SHRIMP

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖ Volume	16 550 t	17 253 t	+ 4 %
❖ Value	\$22M	\$23.3M	+ 6 %
❖ Average dockside price	\$1.32/kg	\$1.34/kg	+ 1,5 %

- ❖ **The entire quota was caught :**
93 % of the value of landings in the Gaspé
- ❖ **Markets :**
 - ❖ Value of exports: : 22,3 M\$ for the first 9 months of 2003
 - ❖ Results essentially the same as in 2002
 - ❖ The United States remains the main export market (~ 50%).
 - ❖ The European market has increased its share of Canadian exports considerably (46 % share – increase of \$3 M)
 - ❖ Prices remain historically low
- ❖ **High abundance and the outlook for 2004 appears good**
 - ❖ Biomass indicators (scientific surveys and commercial fisheries) were up in 2003

VALUE OF SCALLOP LANDINGS BY SECTOR - 2003 (p)

North Shore



Magdalen Islands

Quebec total : \$2M

2003 (p) : from January 1 to November 30, 2003

SCALLOPS

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖ Volume	1 190 t	1 522 t	+ 28 %
❖ Value	\$1.4M	\$2M	+ 43 %
❖ Average dockside price (Shucked)	\$11.07/kg	\$11.78/kg	+ 6 %

- ❖ Large scallop landings on the east coast of the US and Canada (Georges Bank) continue to exert pressure on scallop prices in North America
- ❖ Increase in volume and value of landings in Quebec is attributable mainly to higher North Shore catches
- ❖ Stock status: little change from 2002
 - ❖ Chaleur Bay: small biomass values for sea scallop
 - ❖ Magdalen Islands: wild stock has small biomass, but commercial-scale seeding at aquaculture sites
 - ❖ North Shore: resource stable

COD

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖ Volume	3 233 t	183 t	- 94 %
❖ Value	\$3.4M	\$250 000	- 93 %
❖ Average dockside price	\$1.29/kg	\$1.63/kg	+ 26 %

- ❖ **Value of Gaspé landings = \$58 400**
Nearly 23% of the value of all Quebec landings
- ❖ **Value of North Shore landings = \$114 400**
Nearly 46% of the value of all Quebec landings
- ❖ **Value of Magdalen Islands landings = \$77 000**
Nearly 31% of the value of all Quebec landings

COD STATUS

Based on 2002 data; the 2003 data will be analysed in March 2004

Southern Gulf

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

Northern Gulf

- ❖ Catches made with trawls in scientific surveys and gillnets in the sentinel fisheries have increased markedly, whereas indices from the mobile and longline sentinel fisheries show stable trends. Stock assessment will take place at the IML in March 2004**
- ❖ Main concentrations : west coast of Newfoundland and off Blanc-Sablon**

TURBOT

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖ Volume	1 052 t	2 682 t	+ 155 %
❖ Value	\$2.4M	\$5.1M	+ 113 %
❖ Average dockside price	\$2.40/kg	\$1.99/kg	- 17 %

❖ **Value of Gaspé landings = \$3.7M**

Nearly 73% of the value of all Quebec landings

❖ **Notable increase of landings in 2003**

❖ **Better season in 2003 owing to increased recruitment and growth**

❖ **Individual quota program moving toward permanent system**

❖ **Biomass : Upward trend**

ATLANTIC HALIBUT

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖ Volume	177 t	108 t	- 39 %
❖ Value	\$907 000	\$595 000	- 34 %
❖ Average dockside price	\$5.86/kg	\$6.30/kg	+ 7.5 %

❖ **Value of Gaspé landings = \$362K**

Approximately 61% of the value of all Quebec landings

❖ **Overall biomass : small but stable**

❖ **Annual TAC set at 350 t since 1999**

OTHER FLATFISH

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖ Volume	634 t	507 t	- 20 %
❖ Value	\$489K	\$440K	- 10 %

Status of resource :

❖ AMERICAN PLAICE

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

❖ YELLOWTAIL FLOUNDER

- ❖ Fairly abundant near the Magdalen Islands

❖ WINTER FLOUNDER

- ❖ Near-average biomass

❖ WITCH FLOUNDER

- ❖ Small biomass for stock as a whole, but concentration in the eastern part of 4T

HERRING

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖Volume	4 840 t	6 244 t	+ 29 %
❖Value	\$1.3M	\$1.5M	+ 15 %
❖Average dockside price	\$0.26/kg	\$0.23/kg	- 12 %

❖Magdalen Islands

❖Landings up

❖Value of Magdalen Islands landings = \$443,000

Nearly 31% of the value of all Quebec landings

❖Gaspé

❖Landings up

❖Value of Gaspé landings = \$908,000

early 63% of the value of all Quebec landings

❖Biomass 4T (preliminary analysis) :

❖Spring biomass at average level in 2003

❖Fall biomass large

❖Biomass 4S :

❖Underharvested stock

MACKEREL

	<u>2002</u>	<u>2003 (p)</u>	<u>Difference</u>
❖ Volume	4 095 t	4,380 t	+ 7 %
❖ Value	\$1.6M	\$1.9M	+ 19 %
❖ Average dockside price	\$0.39/kg	\$0.42/kg	+8 %

- ❖ Slight increase in landed volume in the Magdalen Islands
- ❖ Slight increase in the volume and value of landings in the Gaspé
- ❖ Value of Magdalen Islands landings = \$1.6M
Nearly 86% of the value of all Quebec landings
- ❖ Mackerel stock abundance has increased

Fishing Results - Season 2003 (p) - Québec

Species	Volume (t)	Value	Difference -Value (2003-2002)		Average dockside price (\$/kg) (var. 03/02)
			Tonnes	Value	
Snow crab	12 442	\$73.9M	- 30 %	- 17 %	5.94 (+ 18 %)
Lobster	3 132	\$41M	+ 5 %	- 1 %	13.09 (- 6 %)
Gulf Shrimp	17 253	\$23.3M	+ 4 %	+ 6 %	1.34 (+ 1,5 %)
Scallops	1 522	\$2M	+ 28 %	+ 43 %	11.78 (+ 6 %)
Cod	183	\$250 000	- 94 %	- 93 %	1.63 (+ 26 %)
Turbot	2 682	\$5.1M	+ 155 %	+ 113 %	1.99 (- 17 %)
Atlantic Halibut	108	\$595 000	- 39 %	- 34 %	6.30 (+ 7.5 %)
Flatfish	507	\$440 000	- 20 %	- 10 %	-----
Herring	6 244	\$1.5M	+ 29 %	+ 15 %	0.23 (- 12 %)
Mackerel	4 380	\$1.9M	+ 7 %	+ 19 %	0.42 (+ 8 %)

2003 (p) : from January 1 to November 30, 2003