

FISHING RESULTS

QUEBEC

2002 Season



Pêches et Océans
Canada

Fisheries and Oceans
Canada

Canada 

FISHING RESULTS

- ❖ **Trends in Quebec landings (1986-2002 (p))**
- ❖ **Breakdown of the landing values and volumes by sector - 2002 (p)**
- ❖ **Results for each of the following species:**
 - ❖ **Snow crab, lobster, Gulf shrimp**
 - ❖ **Scallops**
 - ❖ **Cod, turbot, Atlantic halibut, other flatfish**
 - ❖ **Herring, mackerel**

2002 (p) : from January 1 to November 30, 2002

PRELIMINARY COMMENTS

- ❖ **Volume and value**

2001: final data/2002: preliminary data

- ❖ **Average dockside price**

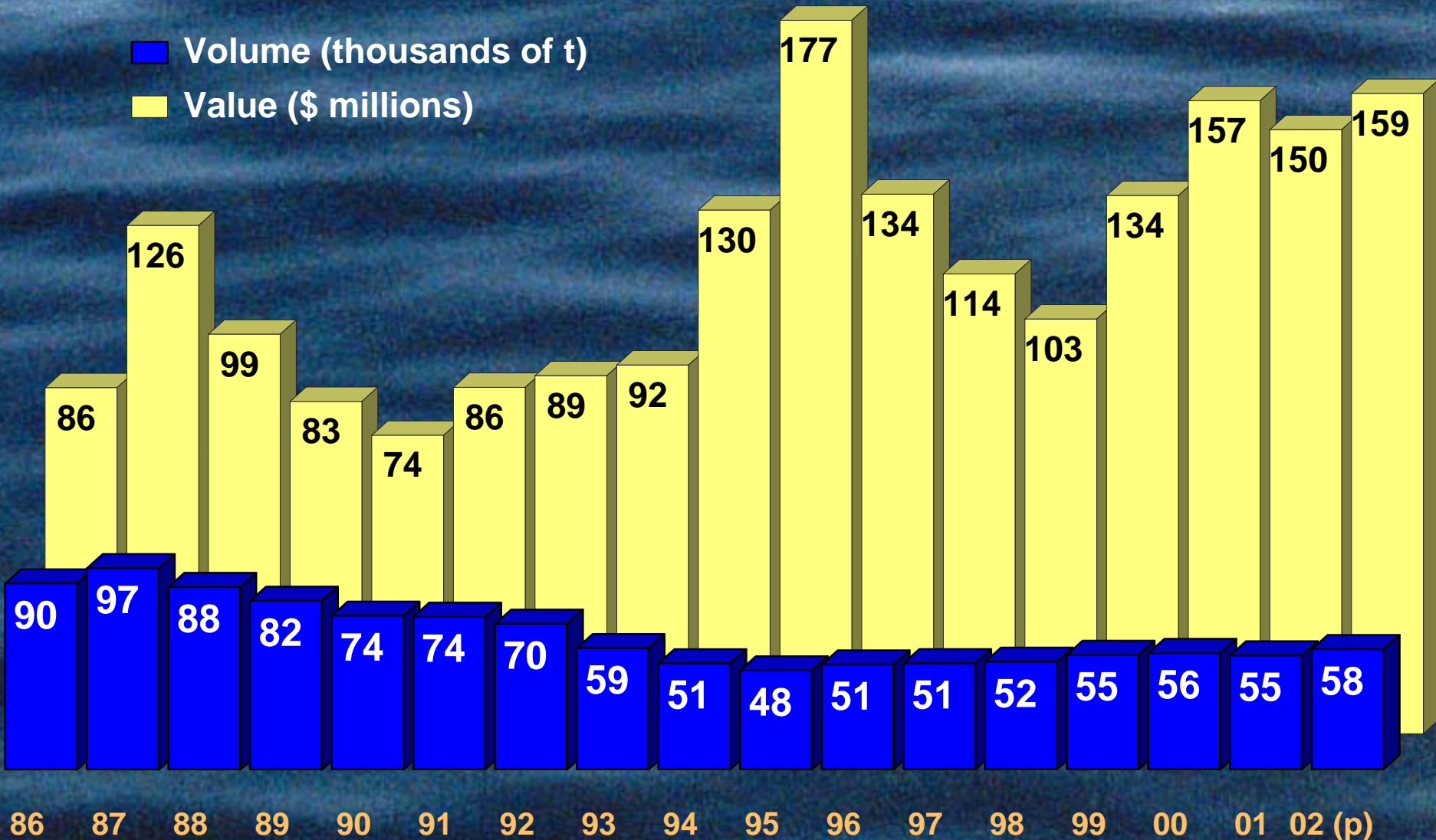
2001: final data/2002: preliminary data

- ❖ **State of the resource**

2001 or 2002 (p) data, depending on species

Trends in Landings Made by Quebec Fishermen - 1986 to 2002 (p)

■ Volume (thousands of t)
■ Value (\$ millions)

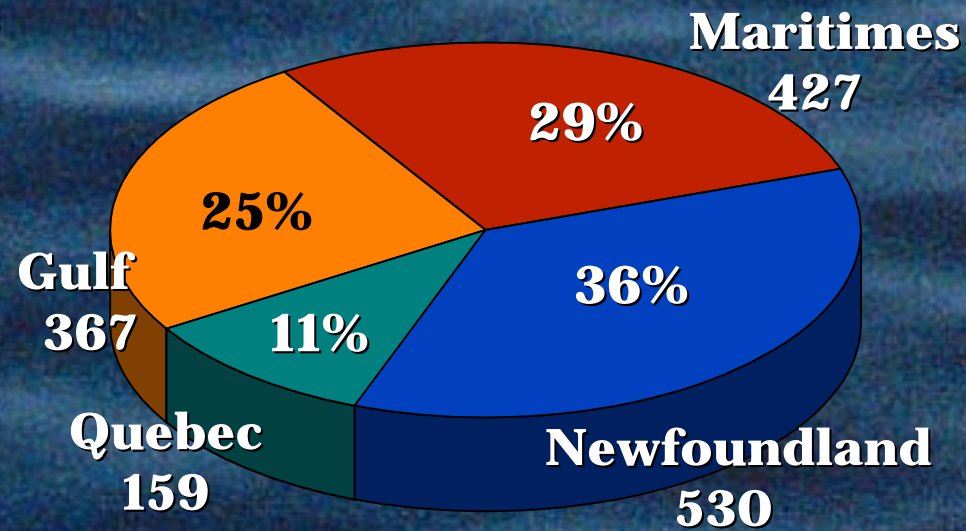
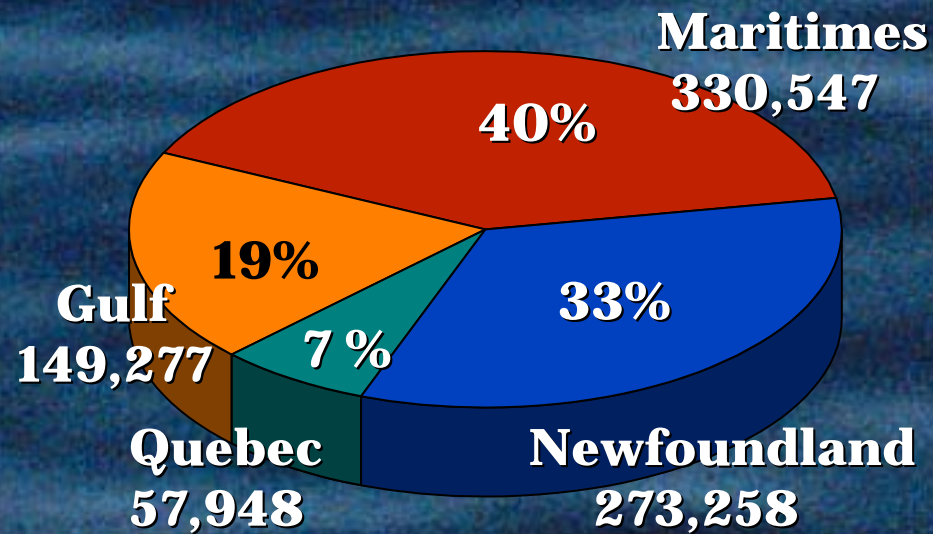


2002 (p) : from January 1 to November 30, 2002

Breakdown of Volume and Value of Landings of the Atlantic Fishing Industry 2002 (p)

VOLUME (tonnes)

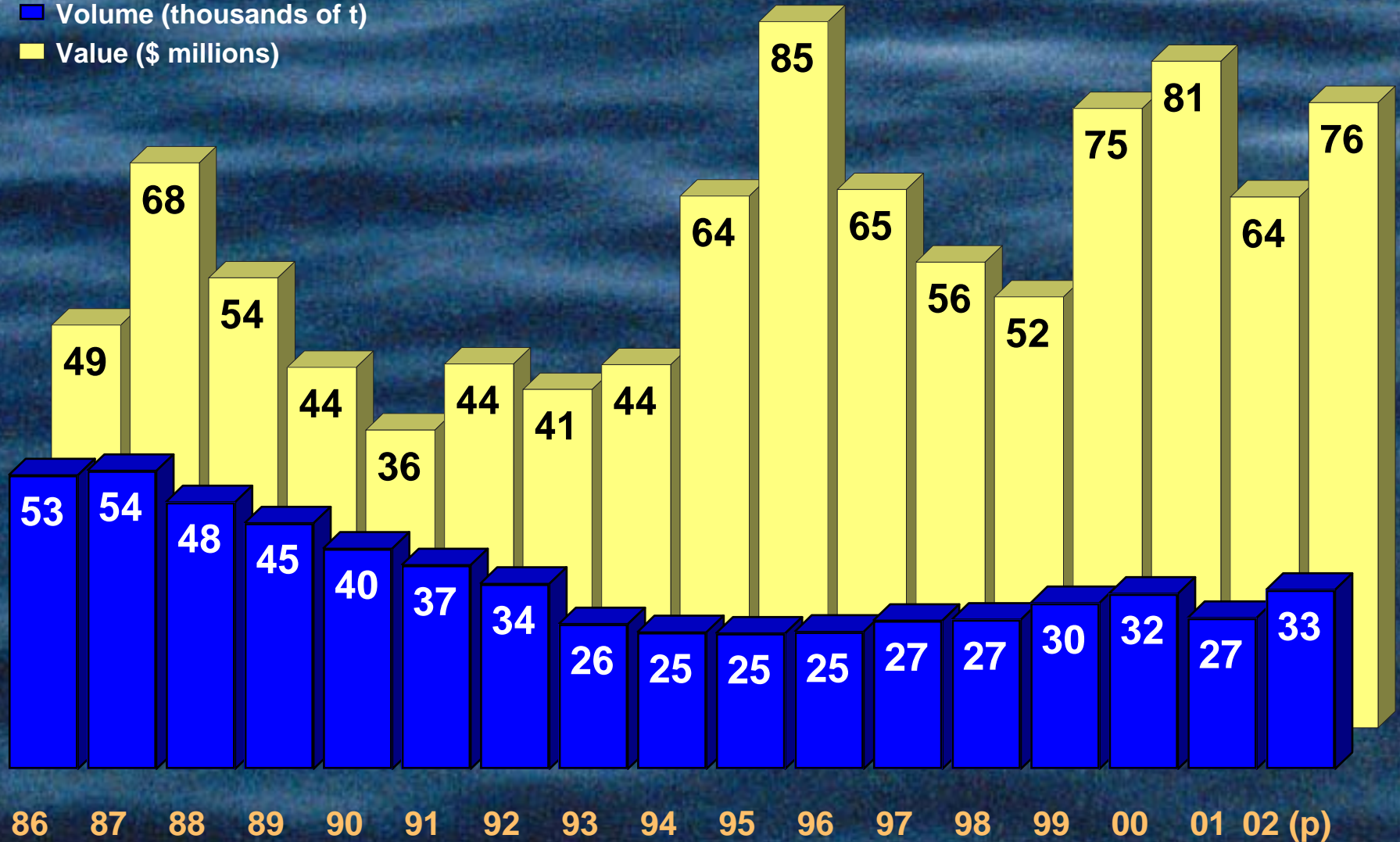
VALUE (\$ millions)



Source: DFO
p: preliminary data

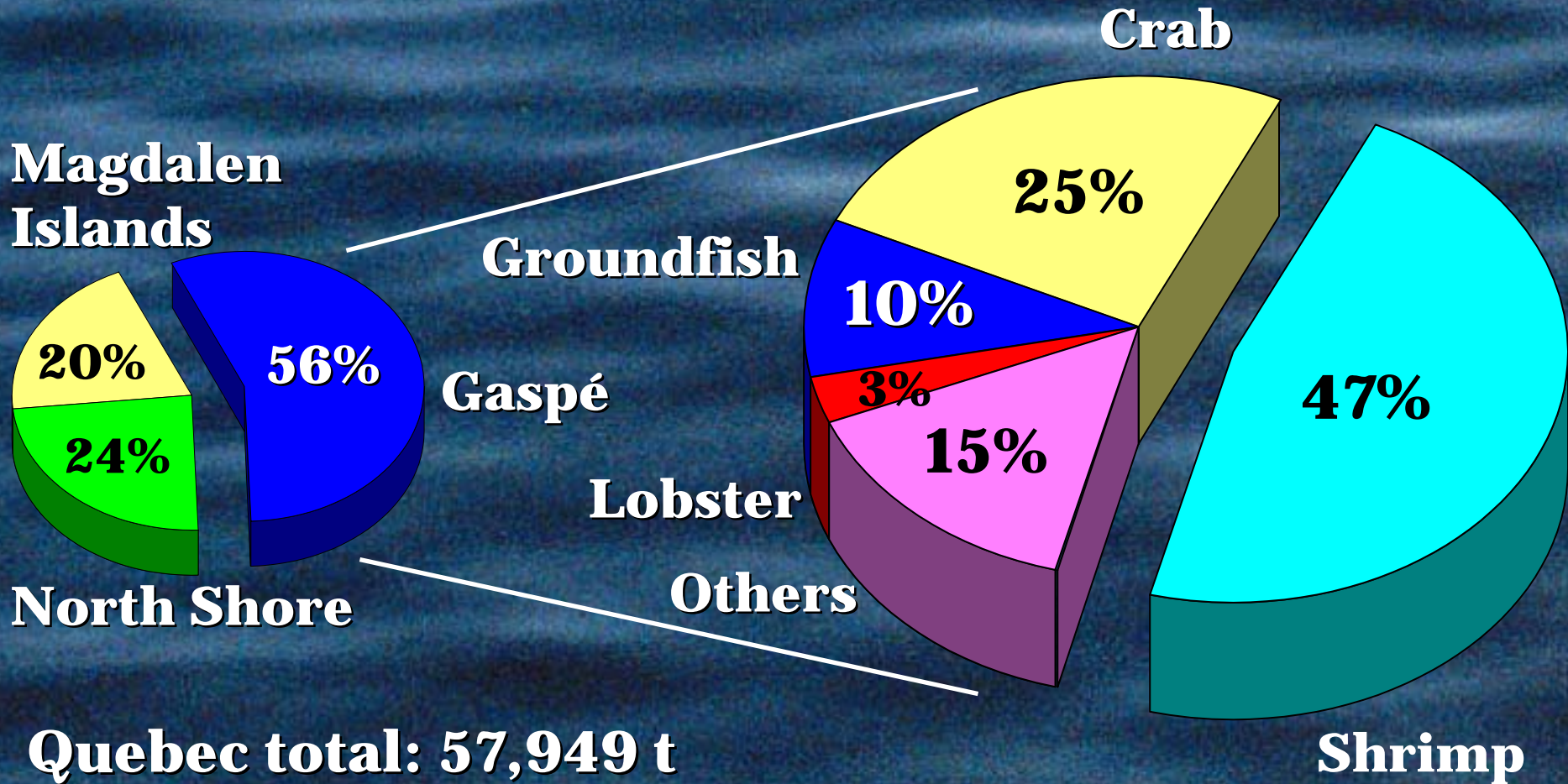
Trends in Landings Made by Gaspé Fishermen - 1986 to 2002 (p)

■ Volume (thousands of t)
 ■ Value (\$ millions)



2002 (p) : from January 1 to November 30, 2002

Breakdown of Landing Volume Gaspé - 2002 (p)

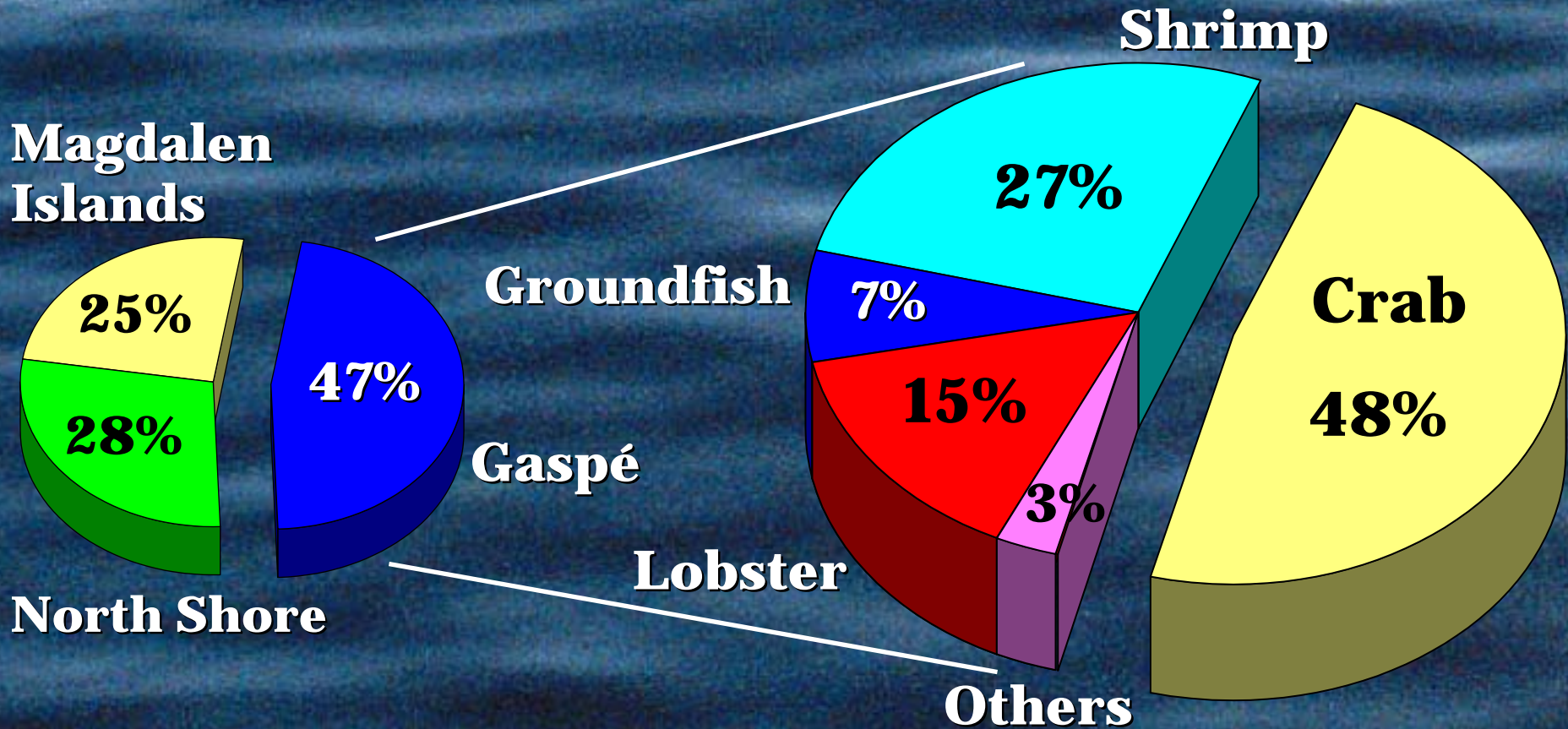


Quebec total: 57,949 t

Gaspé total: 32,485 t

2002 (p) : from January 1 to November 30, 2002

Breakdown of Landing Values Gaspé - 2002 (p)



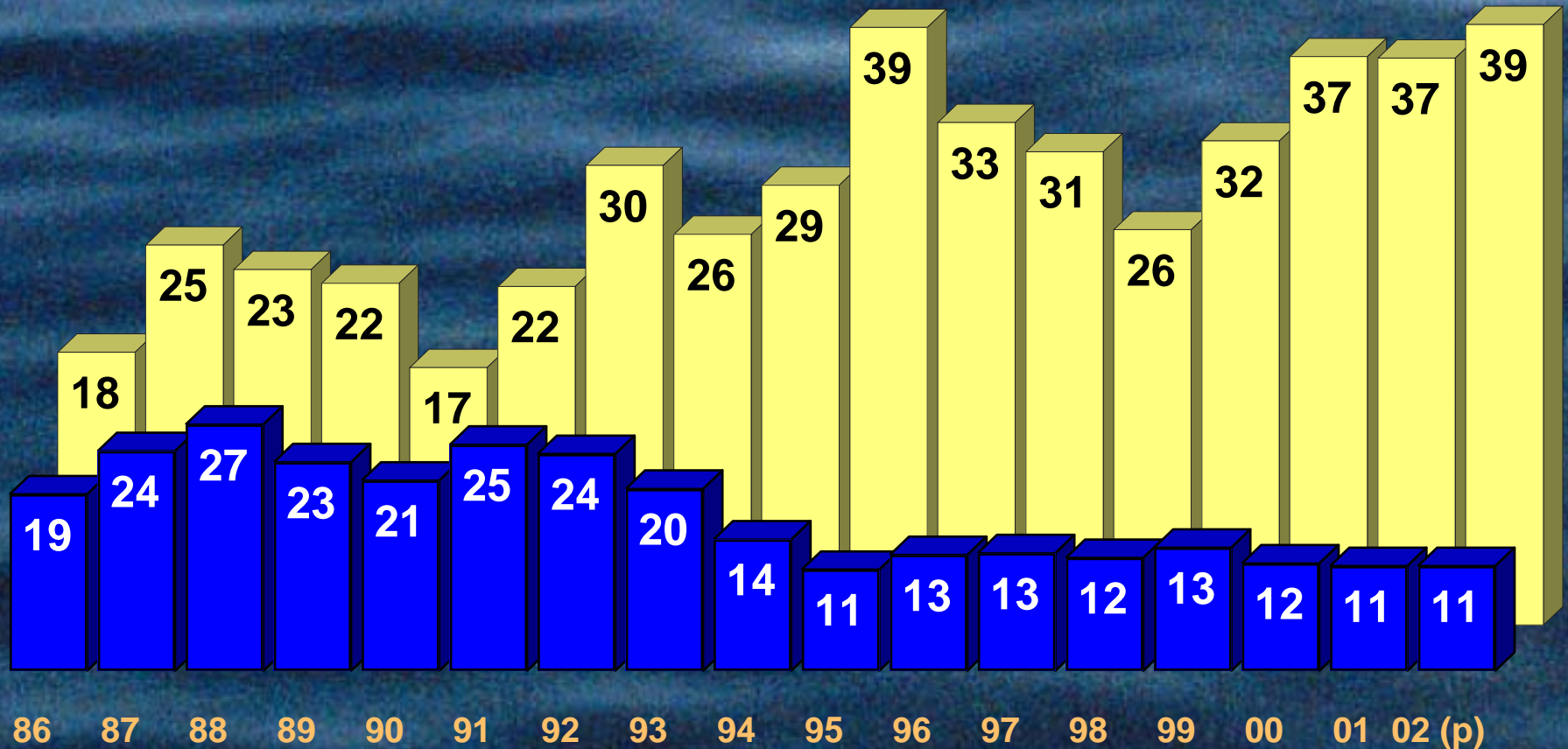
Quebec total: \$158.7M

Gaspé total: \$75.6M

2002 (p) : from January 1 to November 30, 2002

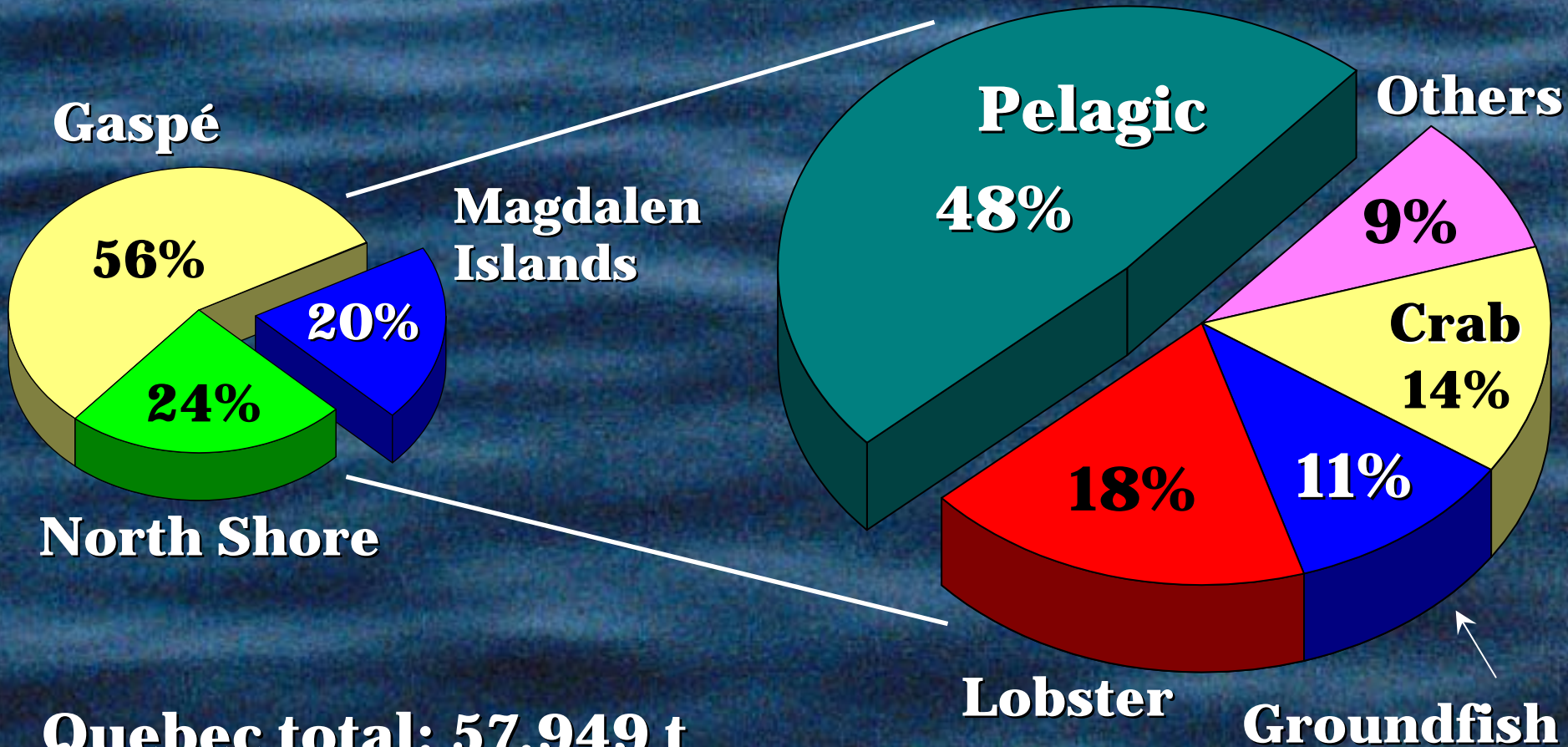
Trends in Landings Made by Magdalen Islands Fishermen - 1986 to 2002 (p)

■ Volume (thousands of t)
■ Value (\$ millions)



2002 (p) : from January 1 to November 30, 2002

Breakdown of Landing Volume Magdalen Islands - 2002 (p)

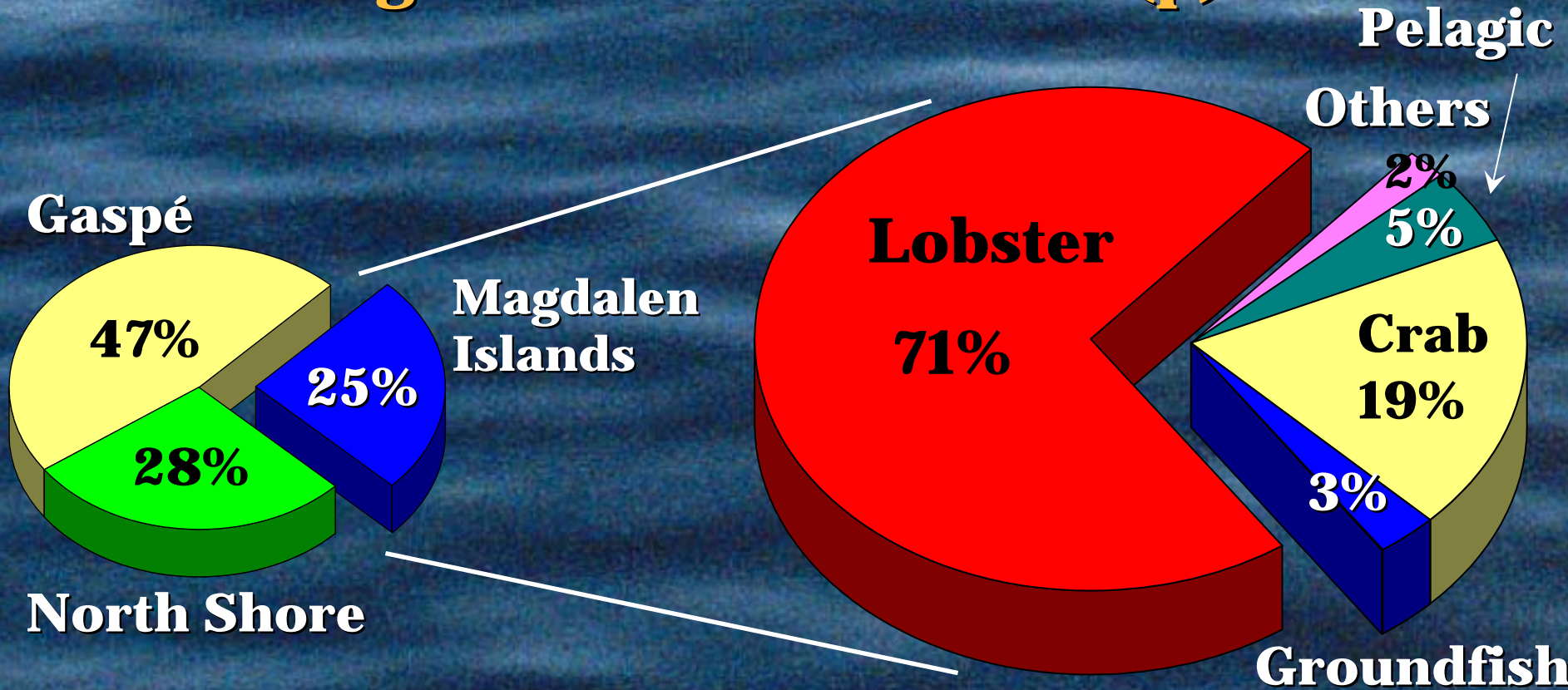


Quebec total: 57,949 t

Magdalen total: 11,433 t

2002 (p) : from January 1 to November 30, 2002

Breakdown of Landing Values Magdalen Islands - 2002 (p)



Quebec total: \$158.7M

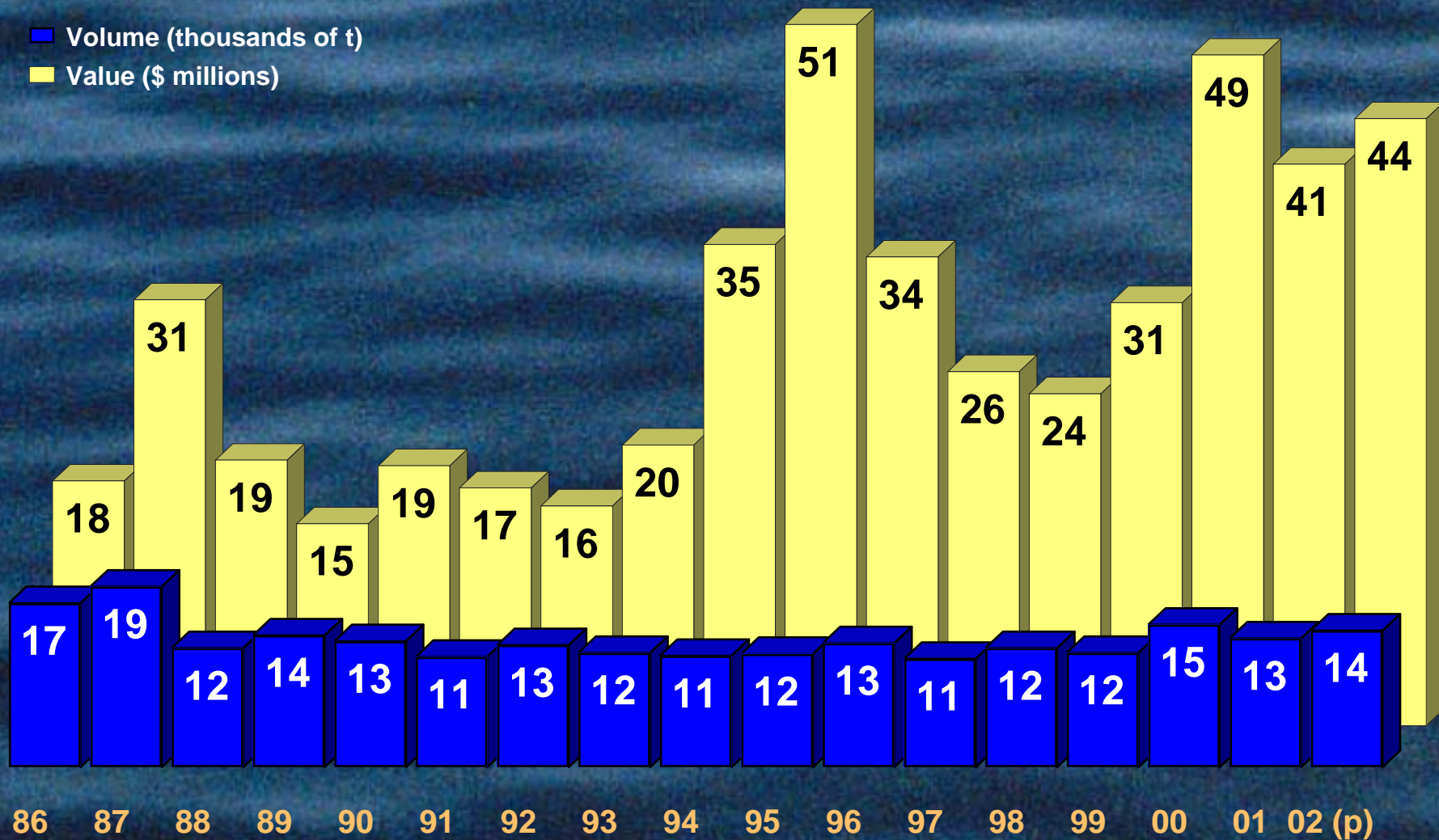
Magdalen total: \$39.2M

2002 (p) : from January 1 to November 30, 2002

Trends in Landings Made by North Shore Fishermen - 1986 à 2002 (p)

■ Volume (thousands of t)

■ Value (\$ millions)



2002 (p) : from January 1 to November 30, 2002

Breakdown of Landing Volume North Shore - 2002 (p)

Gaspé

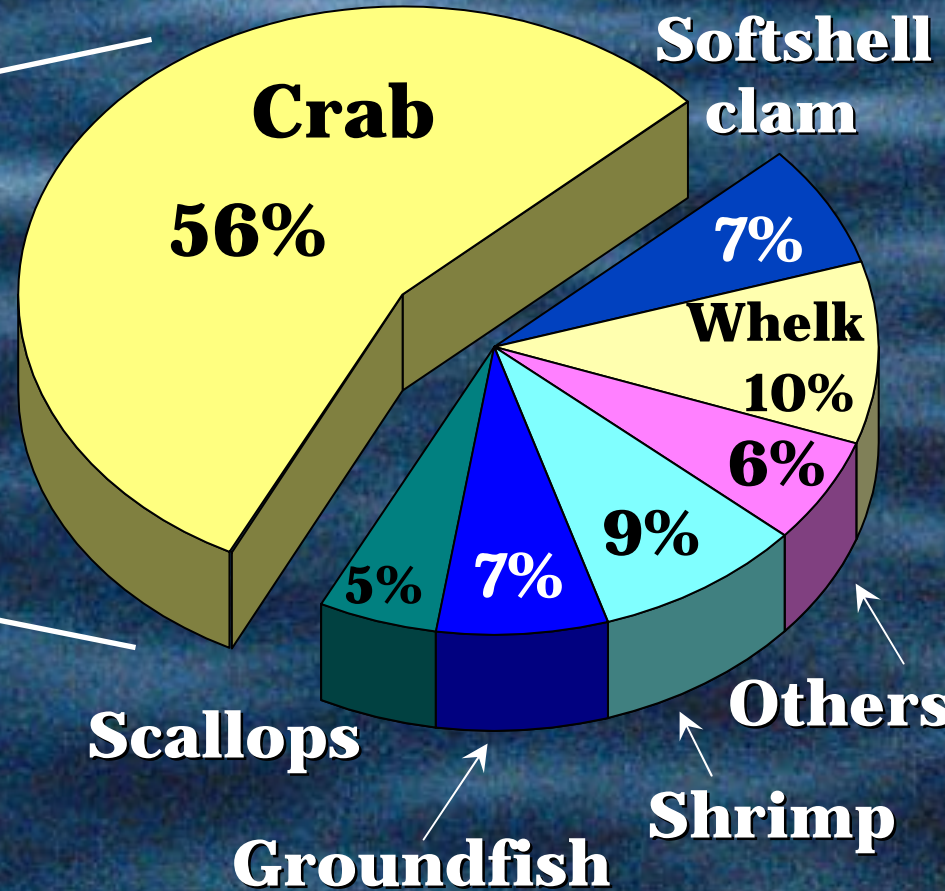
56%

**North
Shore**

24%

20%

Magdalen Islands

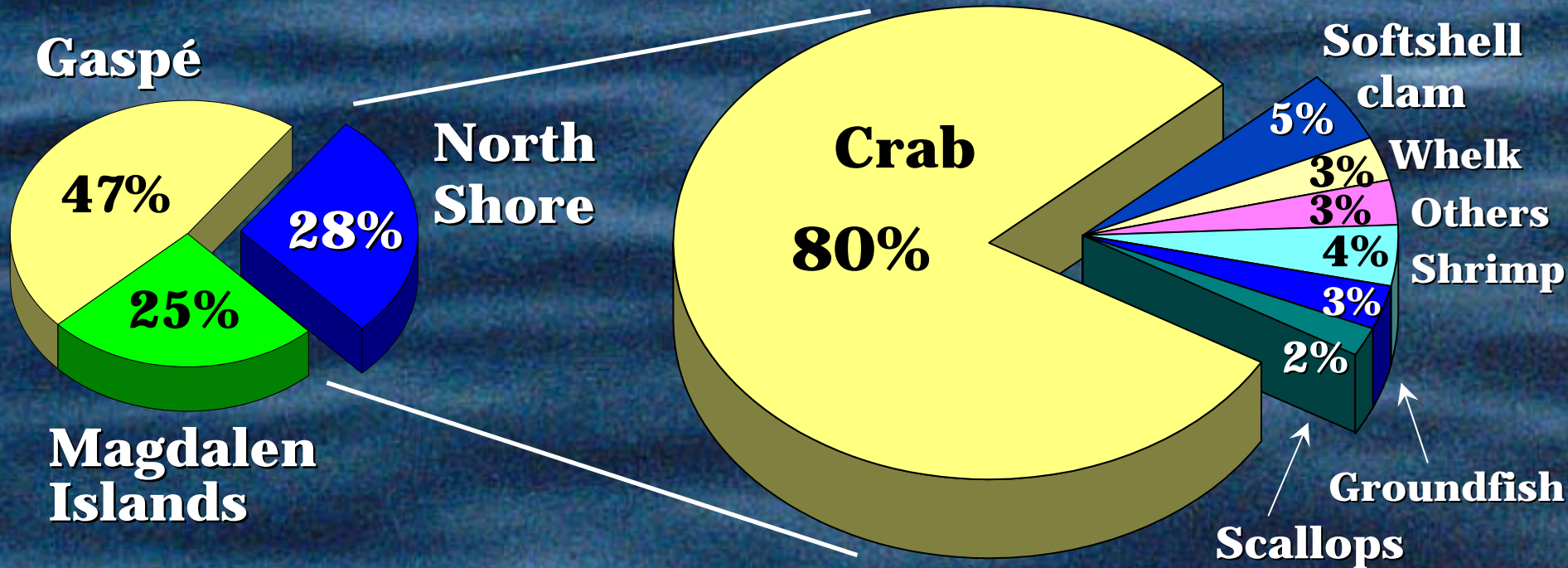


Quebec total: 57,949 t

North Shore total: 14,017 t

2002 (p) : from January 1 to November 30, 2002

Breakdown of Landing Values North Shore - 2002 (p)



Quebec total: \$158.7M

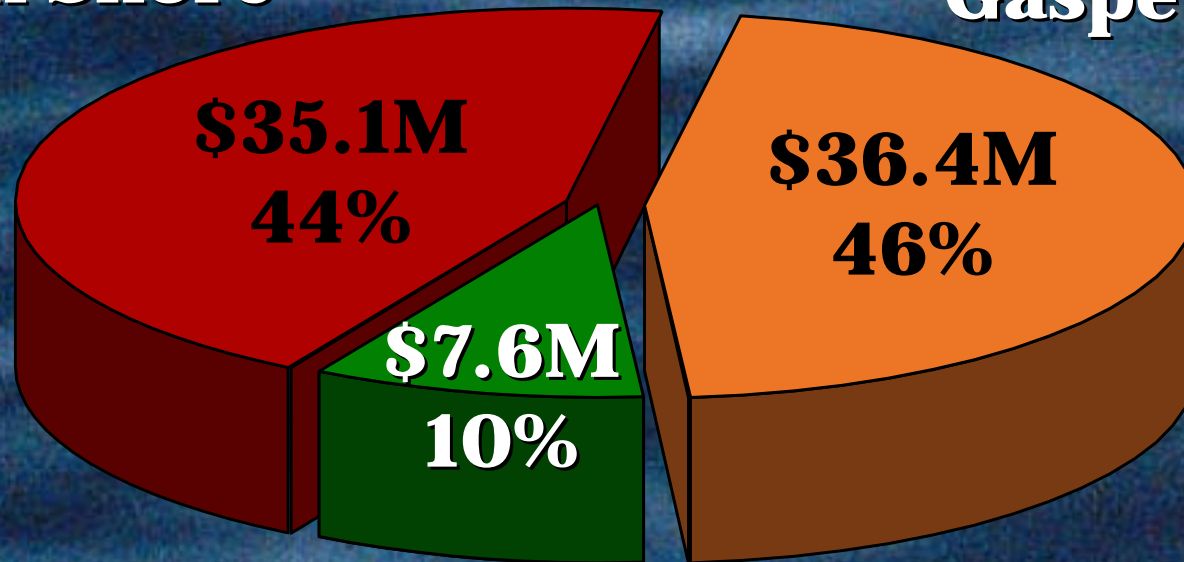
North Shore total: \$43.9M

2002 (p) : from January 1 to November 30, 2002

VALUE OF SNOW CRAB LANDINGS BY SECTOR 2002 (p)

North Shore

Gaspé



Magdalen Islands

Quebec Total: \$79M

2002 (p) : from January 1 to November 30, 2002

SNOW CRAB

	<u>2001</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	14,005 t	17,708 t	+ 26%
❖ Value	\$62.8M	\$79M	+ 26%
❖ Average dockside price	\$4.49/kg	\$4.46/kg	- 1%

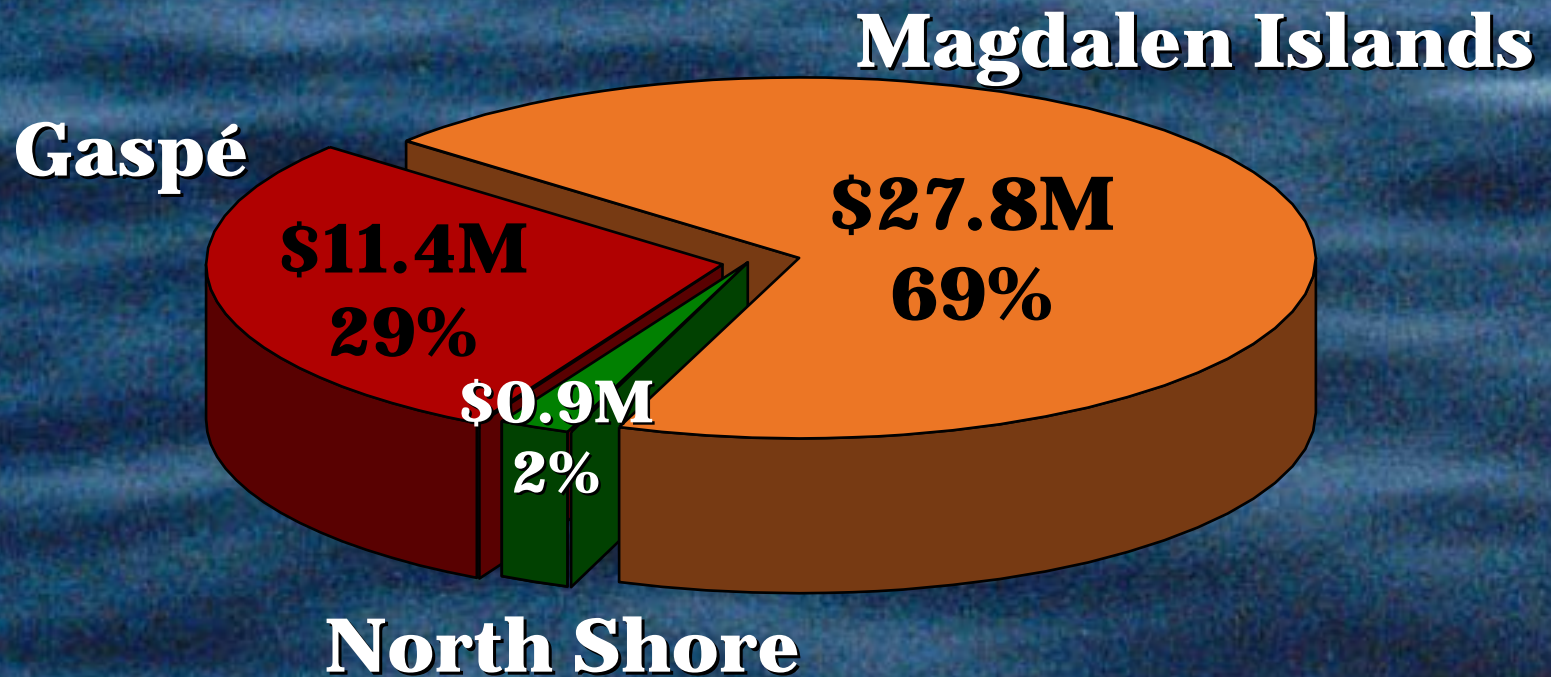
❖ **International situation**

- ❖ **Canada remains the largest supplier of snow crab with 70% of world landings**
- ❖ **Japanese demand for snow crab is up because of controls introduced at Japanese ports to counter illegal landings from Russian vessels**
- ❖ **Prices roughly 3% higher in 2002 for Canadian product on the US market**

SNOW CRAB STATUS

- ❖ **Natural abundance cycle of approximately eight years related to variations in recruitment (Three years of low recruitment follow five years of average to strong recruitment)**
- ❖ **Generally speaking, end of the recruitment wave and downward trend in the medium term, but variable size depending on the sector**
- ❖ **Low and decreasing abundance of the Lower North Shore stock (Area 13) and significant decrease since last year**

VALUE OF LOBSTER LANDINGS BY SECTOR - 2002 (p)



Quebec total: \$40.1M

2002 (p) : from January 1 to November 30, 2002

LOBSTER

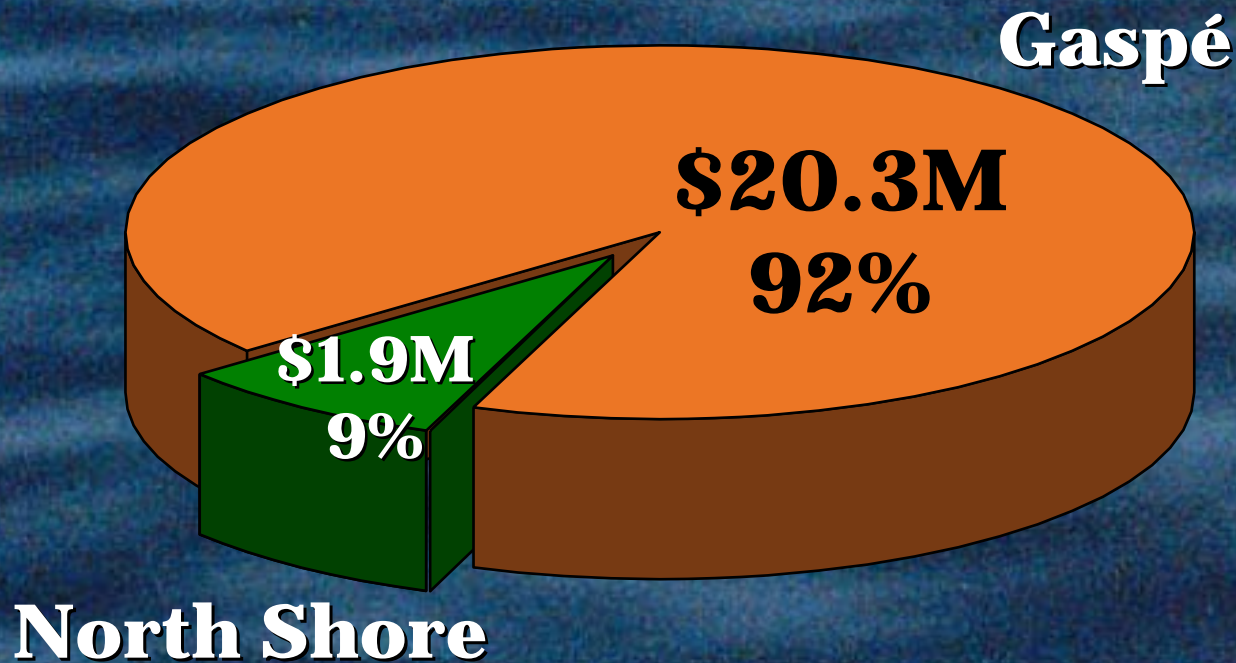
	<u>2001</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	3,321 t	2,972 t	- 11%
❖ Value	\$43M	\$40.1M	- 7%
❖ Average dockside price	\$12.95/kg	\$13.50/kg	+ 4%

- ❖ **Record dockside prices in Quebec, largely due to the drop in catches in most producing regions**
- ❖ **Second record year in terms of value of landings in Quebec**
- ❖ **Decrease in volume of lobster landings, particularly in the Gaspé**

LOBSTER STATUS

- ❖ **Decrease in catches, particularly in the Gaspé, but recruitment for 2003 seems close to recently observed levels**
- ❖ **Implementation of additional conservation measures designed to double egg production per recruit**
 - ❖ **There are plans to continue the program in 2003**
- ❖ **Noticed impacts of conservation measures**
 - ❖ **Increase in the number of egg-bearing females**
 - ❖ **Increase in the size and average weight of catches**
 - ❖ **Increased proportion of Market-size lobsters**

VALUE OF GULF SHRIMP LANDINGS BY SECTOR - 2002 (p)



Quebec total: \$22.2M

2002 (p) : from January 1 to November 30, 2002

GULF SHRIMP

	<u>2001</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	12,735 t	16,555 t	+ 30%
❖ Value	\$18.8M	\$22.2M	+ 32%
❖ Average dockside price	\$1.29/kg	\$1.33/kg	+ 3%

❖ **The entire quota was caught**

92% of the value of landings in the Gaspé

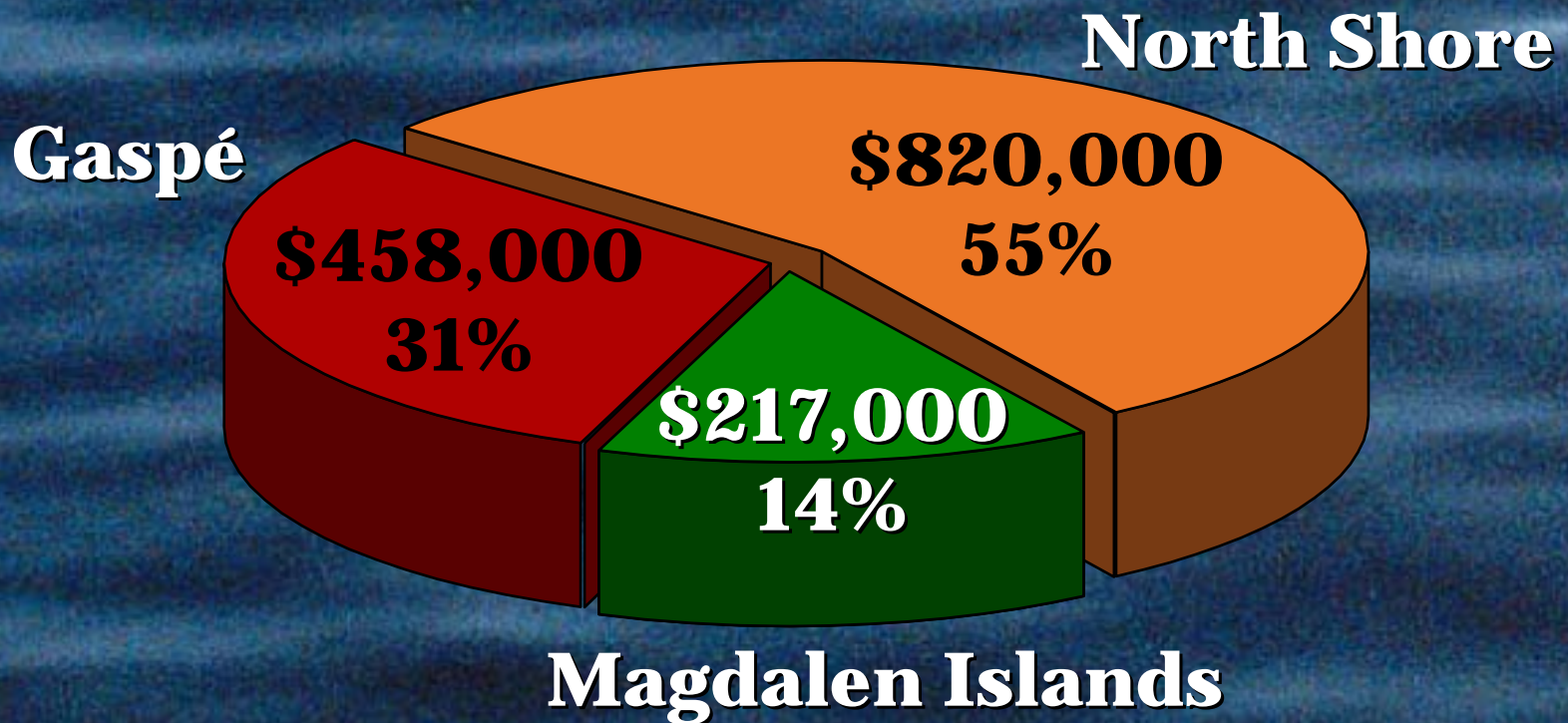
❖ **Markets**

- ❖ Value of exports: \$25M for the first 10 months
- ❖ \$6M increase pro rated to all of 2001
- ❖ The United States remain the main export market (~ 70%). Europe is the second largest market
- ❖ Significant increase (\$3M) in exports to Europe in 2002
- ❖ Prices remain low

❖ **Resource very abundant in 2002**

- ❖ Abundance should remain high in 2003
- ❖ Biomass is stable

VALUE OF SCALLOP LANDINGS BY SECTOR - 2002 (p)



Quebec total: \$1.5M

2002 (p) : from January 1 to November 30, 2002

SCALLOPS

	<u>2001</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	1,745 t	1,234 t	- 29%
❖ Value	\$2.4M	\$1.5M	- 38%
❖ Average dockside price (Shucked)	\$12.01/kg	\$10.77/kg	- 10%

- ❖ **Significant drop in the volume and value of landings attributable to the large decrease in landings on the North Shore**
- ❖ **Drop in the average dockside price on the North Shore, a result of the drop in scallop prices in the United States**
- ❖ **État des stocks : peu de changement par rapport à l'an passé**
 - ❖ **Chaleur Bay: low biomass for sea scallops**
 - ❖ **Magdalen Islands: Very low wild biomass but major sowing project**
 - ❖ **North Shore: Resource stability**

COD

	<u>2001 (p)</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	3,972 t	3,253 t	- 18%
❖ Value	\$5.1M	\$3.4M	- 33%
❖ Average dockside price	\$1.57/kg	\$1.29/kg	- 18%

- ❖ **Value of Gaspé landings = \$2.2M**
Nearly 64% of the value of all Quebec landings
- ❖ **Value of North Shore landings = \$787K**
Nearly 23% of the value of all Quebec landings
- ❖ **Value of Magdalen Islands landings = \$444K**
Nearly 13% of the value of all Quebec landings

COD STATUS

❖ **Southern Gulf**

- ❖ **Low abundance of fish of all sizes**
- ❖ **No significant recovery in the short term**
- ❖ **Low recruitment (juveniles)**
- ❖ **Catches down slightly in the last few years**
- ❖ **Main concentrations:**

North of P.E.I., west coast of Cape Breton and Miscou bank

❖ **Northern Gulf**

- ❖ **Scientific trawl survey catches and the two fixed gear sentinel fishery catches (gillnets and longlines) were down in 2001 and 2002. The impacts will be quantified during the area assessment scheduled for February**
- ❖ **Main concentrations: west coast of Newfoundland and off the coast of Blanc Sablon**

TURBOT

	<u>2001</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	892 t	1,060 t	+ 19%
❖ Value	\$1.7M	\$2.4M	+ 41%
❖ Average dockside price	\$1.92/kg	\$2.49/kg	+ 30%

- ❖ **Value of Gaspé landings = \$2M**
Nearly 83% of the value of all Quebec landings
- ❖ **Landings up in 2002**
- ❖ **The Northern Gaspé industry has been severely affected by fisheries problems**
- ❖ **Individual-quota program to permanent management regime**
- ❖ **Biomass: downward trend**

ATLANTIC HALIBUT

	<u>2001</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	206 t	198 t	- 4%
❖ Value	\$1,05M	\$1,0M	- 5%
❖ Average dockside price	\$5.81/kg	\$5.81/kg	-----

- ❖ **Value of Gaspé landings = \$660K**
Approximately 66% of the value of all Quebec landings
- ❖ **Overall biomass: low, but stable**
- ❖ **Annual TAC at 350 t since 1999**

OTHER FLATFISH

	<u>2001</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	819 t	634 t	- 23%
❖ Value	\$644K	\$465K	- 28%

Status of the resource: status quo with 2001

- ❖ **AMERICAN PLAICE**
 - ❖ Low biomass, in decline since 1992 / No sign of significant recruitment
- ❖ **YELLOWTAIL FLOUNDER**
 - ❖ Quite high abundance near the Magdalen Islands
- ❖ **WINTER FLOUNDER**
 - ❖ Level of biomass: average
- ❖ **WITCH FLOUNDER**
 - ❖ Abundance index up in southern Gulf, down in northern Gulf

HERRING

	<u>2001</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	5,832 t	4,830 t	- 17%
❖ Value	\$1.2M	\$1.2M	-----
❖ Average dockside price	\$0.21/kg	\$0.26/kg	+ 24%

❖ **Magdalen Islands**

- ❖ Landings down

- ❖ Value of Magdalen Islands landings = \$377,000

Nearly 30% of the value of all Quebec landings

❖ **Gaspé**

- ❖ Slight increase in landings

- ❖ Value of Gaspé landings = \$740 000

Nearly 60% of the value of all Quebec landings

❖ **Biomass 4T (preliminary analysis)**

- ❖ Decreasing spring biomass since 1995

- ❖ Fall biomass high

❖ **Biomass 4S**

- ❖ Stock underharvested

MACKEREL

	<u>2001</u>	<u>2002 (p)</u>	<u>Difference</u>
❖ Volume	2,904t	4,077 t	+ 40%
❖ Value	\$1.3M	\$1.6M	+ 23%
❖ Average dockside price	\$0,45/kg	\$0.39/kg	- 13%

- ❖ **Significant increase in the volume of Magdalen Islands landings**
- ❖ **Significant increase in the volume and value of Gaspé landings**
- ❖ **Value of Magdalen Islands landings = \$1.4M**
Nearly 88% of the value of all Quebec landings
- ❖ **The abundance of mackerel stocks is increasing**

Fishing Results - Season 2002 - Quebec

Preliminary Data

Species	Volume (t)	Value (\$ M)	Difference - Value (2001-2002)		Average dockside price (\$/kg) (var. 01/02)
			Tonnes	Value	
Snow Crab	17,708	79.0	+ 26%	+ 26%	4.46 (- 1%)
Lobster	2,972	40.1	- 11%	- 7%	13.50 (+ 4%)
Gulf Shrimp	16,555	22.2	+ 30%	+ 32%	1.33 (+ 3%)
Scallops	1,234	1.5	- 29%	- 38%	10.77 (- 10%)
Cod	3,253	3.4	- 18%	- 33%	1.29 (- 18%)
Turbot	1,060	2.4	+ 19%	+ 41%	2.49 (+ 30%)
Atlantic Halibut	198	1.0	- 4%	- 5%	5.81 (-----)
Flatfish	634	0.5	- 23%	- 28%	-----
Herring	4,830	1.2	- 17%	-----	0.26 (+ 24%)
Mackerel	4,077	1.6	+ 40%	+ 23%	0.39 (- 13%)