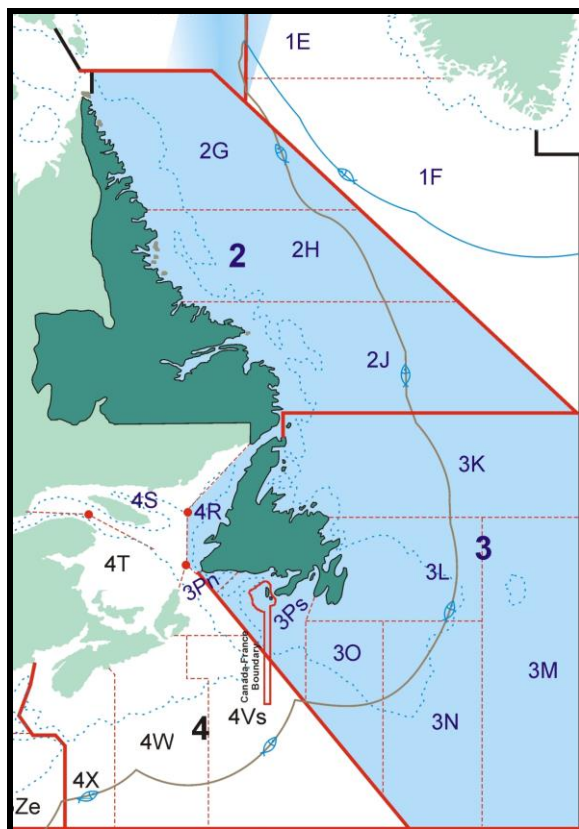


Profile of Commercial Fishery in NAFO Division 3Pn Newfoundland and Labrador (NL) Region



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January 2013

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¹ The data file contains fish/marine species that were landed in NAFO Divisions 3Pn during the 1998-2011. This data file is based on fish caught by harvesters homeported in 3Pn. However, their catches may have been caught in NAFO Divisions outside of their homeport NAFO Division.

² The data file contains species that were landed in NAFO Divisions 3Pn and 4R during the 1975 to 1997 period. Whereas the 1998-2011 data is based on fish caught by harvesters homeported in either 3Pn or 4R, the historic data shows total landings regardless of who or where the fish was caught.

1. Introductory Notes

- This report documents the landings and values of active fishing enterprises homeported (i.e. located) in NAFO Division 3Pn, irrespective of where they catch or land their fish. DFO defines an active fishing enterprise as one that reports commercial landings to DFO for the given calendar year in which the enterprise was registered.
- NAFO Division 3Pn is managed by the DFO office in Corner Brook. Due to confidentiality reasons the data will be presented at the NAFO level by inshore (< 34' 11") and nearshore (35'-64' 11") fleets. There are no midshore and offshore landings in this division.
- Two time series are documented in this report: 1975 to 1997 and 1998 to 2011. The different series were warranted because DFO changed its data collection processes in 1998 to include additional detail (e.g. reports by fisher, inclusion of discards, etc.). This report focuses on the 1998-2011 dataset.

2. NAFO Division 3Pn Landed Volumes and Landed Value in Provincial Context

- As illustrated in *Tables 1* and *2*, NAFO Division 3Pn accounted for approximately 1% of the Province's total landings and landed values during the 1998 to 2011 period.

Table 1: Landed Volumes (MT) by Homeport NAFO Division 1998-2011

Homeport NAFO	1998-2004 Ave.	2005	2006	2007	2008	2009	2010	2011
2H	231	212	191	300	118	108	104	147
2J	7,776	7,385	8,532	8,116	8,445	6,696	7,443	7,761
3K	48,799	70,729	74,646	66,180	69,512	50,880	49,684	43,311
3L	126,724	139,577	137,031	135,228	136,605	141,737	150,313	131,828
3PN	3,187	2,560	2,732	2,262	2,231	2,328	1,267	1,099
3PS	29,938	27,357	28,516	27,465	27,878	23,629	23,922	23,263
4R	50,463	64,873	69,336	72,501	69,116	75,553	68,446	55,463
UKNAFO ³	320	3,029	982	173	176	68	96	77
Total	267,438	315,723	321,966	312,226	314,081	300,998	301,274	262,949

Table 2: Landed Values (\$CAN '000) by Homeport NAFO Division 1998-2011

Homeport NAFO	1998-2004 Ave.	2005	2006	2007	2008	2009	2010	2011
2H	681	603	448	992	379	285	300	613
2J	18,383	11,424	12,724	14,530	15,038	10,897	12,835	18,670
3K	100,514	80,628	76,581	85,633	99,350	69,622	69,059	93,831
3L	269,090	240,109	196,558	241,894	260,257	263,362	281,438	358,179
3PN	4,291	3,363	3,832	4,393	4,377	3,512	2,447	2,595
3PS	62,731	44,331	41,850	52,120	50,908	40,708	41,346	59,019
4R	47,090	55,424	57,920	57,854	57,474	41,395	45,624	54,373
UKNAFO	686	4,074	1,647	1,364	1,533	438	693	589
Total	503,466	439,956	391,560	458,780	489,316	430,218	453,741	587,869

³ NDNAFO – Unidentified NAFO Division

3. Overall Landed Volumes and Landed Value by Fleet Category (1998-2011)

- The average annual landings for the inshore fleet over the 1998-2011 period was 1,360 MT with an average landed value of \$2.4 million (*Table-3*). On average the inshore fleet accounted for 52% of the division's landings, and 60% of the landed value
- The total average landings for the nearshore fleet over the 1998-2011 period was 1,267 MT with an average landed value of \$1.5 million (*Table-3*). On average the nearshore fleet accounted for 48% of the division's landings, and 40% of the landed value.

Table 3: Total Landed Volume (MT) and Landed Value (\$CAN '000) by Fleet Category NAFO Division 3Pn (1998-2011)								
Landings/Values	1998/-2004 Ave.	2005	2006	2007	2008	2009	2010	2011
Inshore Landings	1,695	1,210	1,442	1,088	1,062	1,211	704	461
Nearshore Landings	1,492	1,351	1,290	1,174	1,168	1,117	564	638
Inshore Value	2,565	1,688	2,259	2,733	2,907	2,175	1,655	1,576
Nearshore Value	1,726	1,675	1,573	1,660	1,470	1,337	791	1,019
Total Landings	3,187	2,560	2,732	2,262	2,231	2,328	1,267	1,099
Total Value	4,291	3,363	3,832	4,393	4,377	3,512	2,447	2,595

4. Landings, Value and Prices by Fleet Category and Species (1998-2011)

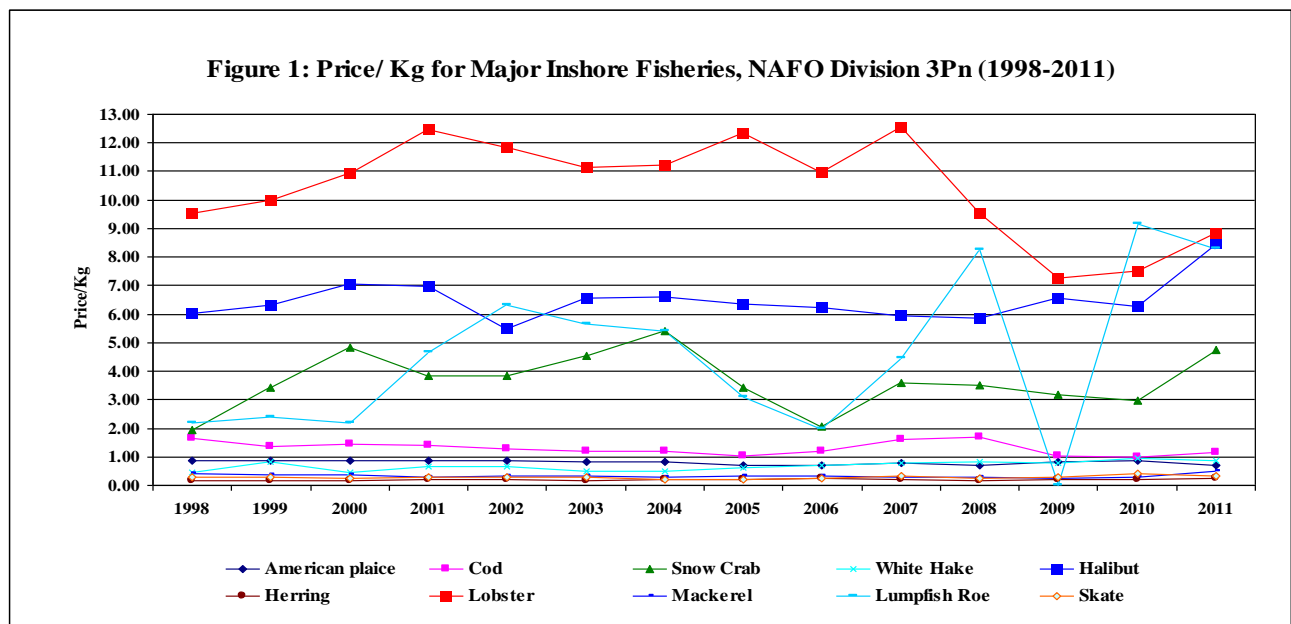
- As *Table-4* illustrates, cod was the primary species landed in by the inshore fleet in NAFO Division 3Pn over the 1998 to 2011 period, albeit the landings have decreased in recent years primarily due to quota reductions and less fishing activity. While lobster landings have increased substantially and halibut landings have been relatively stable, landings for all other species decreased over this period.

Table 4: Inshore Landings (kg) by Major Species NAFO Division 3Pn								
Species	Ave. 1998-2004	2005	2006	2007	2008	2009	2010	2011
Cod	1,068,816	818,088	1,080,886	807,929	816,431	969,061	505,768	275,848
Lobster	21,188	28,183	54,557	89,631	131,520	111,718	120,024	103,024
Halibut	35,090	34,072	25,185	31,735	37,950	45,300	33,913	33,938
White Hake	76,236	41,863	10,050	27,553	23,672	18,538	12,673	20,214
Herring	87,802	92,288	83,182	14,377	3,705	15,529	9,371	8,257
Mackerel	64,684	81,032	76,498	51,282	5,838	4,221	518	4,344
American plaice	56,015	22,037	20,358	17,345	9,441	9,846	5,373	4,104
Skate	43,615	22,670	18,195	25,015	7,921	10,082	4,587	2,111
Lumpfish Roe	126,322	49,409	56,789	4,131	197	-	1,290	6
Other	115,288	19,996	16,413	18,609	25,434	26,867	10,241	8,668
Total	1,695,055	1,209,639	1,442,113	1,087,605	1,062,109	1,211,163	703,758	460,514

- Over the 1998 to 2011 period, cod accounted for 52% of the landed value in NAFO Division 3Pn. In 2010 and 2011, it accounted for 30% and 20% respectively. As *Table-5* illustrates, the lobster has replaced cod as the primary fishery in recent years, accounting for 54% of the total landed value in 2010 and 58% on 2011. Similarly, the landed value of halibut has increased relative to other species. In 2011, this fishery accounted for 18% of the total landed value. It is interesting to note that during the 1998 to 2006 period, lumpfish roe accounted for 13% of total landed value annually. Very little lumpfish roe has been harvested since 2006.

Species	Ave.1998-2004	2005	2006	2007	2008	2009	2010	2011
Cod	1,476,503	851,957	1,288,483	1,300,521	1,367,329	1,019,609	500,732	318,073
Lobster	231,806	347,766	597,950	1,125,787	1,252,379	810,198	900,729	910,742
Halibut	225,416	217,191	157,377	188,369	221,828	297,719	212,480	287,762
White Hake	41,641	25,181	6,851	21,957	19,880	14,178	11,874	17,535
Snow Crab	33,407	1,776	4,272	10,743	4,668	2,060	3,092	9,161
American plaice	48,370	15,183	14,571	13,275	6,452	8,154	4,700	2,816
Herring	16,945	18,926	19,860	3,212	622	2,993	2,034	2,180
Mackerel	21,538	26,567	25,183	14,537	1,734	1,103	154	2,139
Skate	11,966	5,125	4,862	7,781	2,007	2,945	1,921	669
Lumpfish Roe	370,107	152,498	112,678	18,351	1,631	-	11,798	49
Other	87,481	25,913	26,989	28,641	28,463	15,688	5,810	25,180
Total	2,565,181	1,688,084	2,259,076	2,733,173	2,906,994	2,174,648	1,655,324	1,576,307

- As *Figure-1* shows, the price/kg of most major species caught by the inshore fleet during the 1998 to 2011 period was below \$2.00. In contrast the average price for lobster, halibut, lumpfish roe, and snow crab over this period was \$10.44, \$6.48, \$4.58 and \$3.67 respectively. In recent years the price of lobster dropped considerably but improved in 2011 to \$8.84/kg. There was a noticeable price increase for halibut, snow crab, and lumpfish roe in 2011. The price for cod was in 2011 was \$1.15/kg.



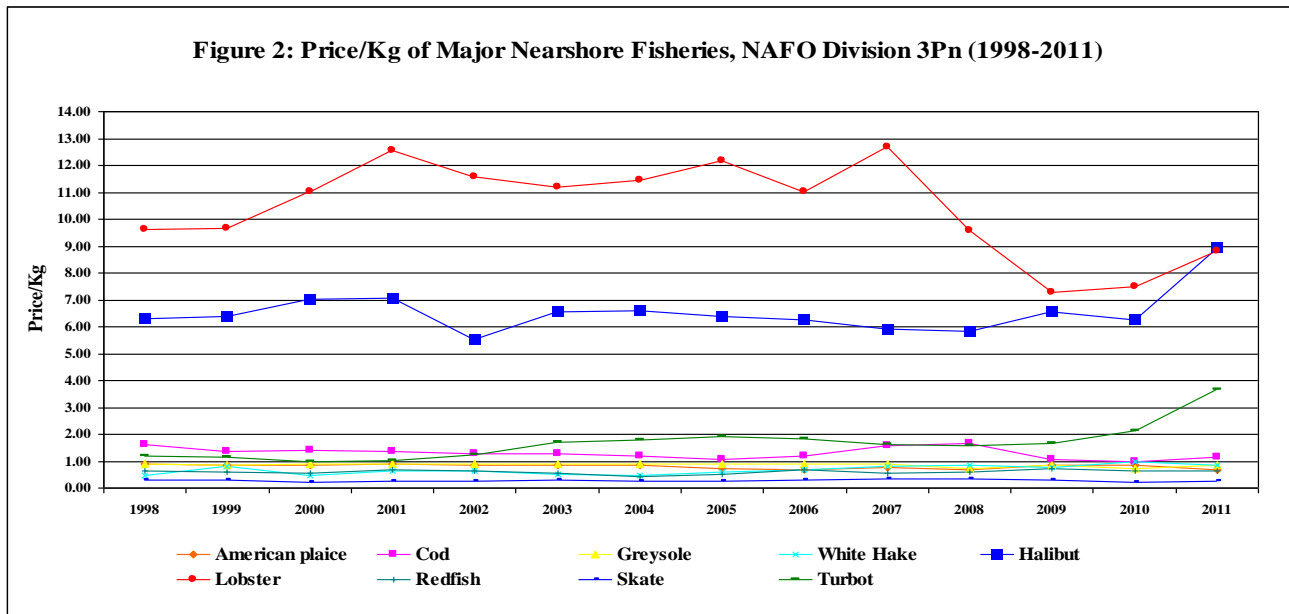
- As *Table-6* illustrates, nearshore landings in NAFO Division 3Pn fluctuated considerably from year to year over the 1998 to 2011 period. Overall, the primary species landed during this period were greysole, cod, redfish, skate, and American plaice, accounting for 37%, 27%, 12%, 9% and 5% respectively. In 2011, greysole accounted for 50% of the landings, while cod accounted for 19%.

Species	Ave.1998-2004	2005	2006	2007	2008	2009	2010	2011
Greysole	546,170	611,980	557,012	487,523	446,496	280,097	98,301	317,987
Cod	405,340	253,306	313,037	330,282	324,305	480,853	196,210	121,056
Redfish	178,891	237,240	111,556	41,470	132,013	145,868	160,547	48,534
Skate	147,998	35,292	141,723	185,849	126,572	58,961	1,113	31,523
Halibut	29,702	53,107	45,925	32,054	26,959	37,328	22,543	27,633
Lobster	569	1,908	3,136	13,477	22,577	21,359	25,259	22,758
American plaice	80,001	57,757	61,181	41,393	52,223	32,151	16,033	17,955
White Hake	13,632	26,421	19,523	12,669	14,222	16,682	9,874	18,792
Other	89,414	73,832	36,687	29,677	23,038	43,222	33,816	32,031
Total	1,491,717	1,350,843	1,289,780	1,174,393	1,168,405	1,116,521	563,694	638,269

- In terms of landed value the primary nearshore fisheries in over the 1998 to 2011 period were cod, greysole, halibut, redfish and lobster, accounting for 29%, 26%, 14%, 6% and 6% respectively. As *Table-7* illustrates the relative dependence on greysole, halibut and lobster has increased in recent years as the landings and value of cod has decreased. In 2011, cod catches only accounted for 14% of the landed value, while the dependence on greysole, halibut and lobster accounted for 27%, 24% and 20% respectively.

Species	Ave. 1998-2004	2005	2006	2007	2008	2009	2010	2011
Greysole	479,812	536,010	489,506	426,426	314,787	242,134	69,999	277,218
Halibut	189,779	338,293	287,230	190,111	156,892	245,272	140,583	246,813
Lobster	6,345	23,200	34,569	170,966	216,240	155,593	189,106	200,775
Cod	566,446	264,254	369,391	515,172	536,620	505,676	194,210	139,321
Turbot	5,683	14,528	5,344	6,918	6,120	4,539	65,473	65,931
Redfish	101,700	122,391	73,781	22,865	78,287	107,060	105,828	30,068
White Hake	7,779	15,825	13,270	10,001	12,153	12,867	9,606	16,308
American plaice	69,711	40,615	42,910	31,544	35,243	27,503	13,741	12,425
Skate	36,525	8,371	41,328	64,601	45,018	17,311	248	7,858
Other	262,463	311,389	215,450	221,419	68,489	18,982	2,504	22,308
Total	1,726,242	1,674,875	1,572,778	1,660,022	1,469,850	1,336,936	791,299	1,019,024

- As *Figure-2* shows, the price/kg of most major species caught by the nearshore fleet during the 1998 to 2011 period was below \$2.00. In contrast the average price for lobster and halibut over this period was \$10.44 and \$6.54 respectively. In recent years the price of lobster dropped considerably but improved to \$8.82/kg in 2011. The price for cod was in 2011 was \$1.15/kg, while greysole sold for \$0.87/kg.



5. Active Fishing Enterprises by Vessel Category (1998-2011)

- In 2011, there were 60 active inshore fishing enterprises homeported in NAFO Division 3Pn and 18 in the nearshore fleet. As *Table-8* shows there has been a substantial decrease in the inshore fleet over the 1998 to 2011 period due to the combined effects of inactivity, rationalization processes, buddy-up arrangements, and attrition.
- Assuming that each inshore enterprise had 1.75 crew and each nearshore vessel averaged 4 crew (for both fleets DFO's estimate includes the skipper), an estimated 177 people participated in the 3Pn fishery in 2011.

Fleet	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Inshore	151	132	121	106	88	87	102	87	86	78	81	69	70	60
Nearshore	19	19	19	19	21	18	18	21	19	23	22	23	19	18
Total	170	151	140	125	109	105	120	108	105	101	103	92	89	78

6. Average Landed Value by Fleet Category (1998-2011)

- Overall, the average landed value per inshore enterprise during the 1998 to 2011 period was \$26K, compared to \$78K for each nearshore enterprise. Year-to-year fluctuations correspond to a combination of factors including number of active enterprises, resource abundance, quotas, market prices, and substitution effects. The average landed value per inshore enterprise improved in recent years due to higher lobster catches and prices. The nearshore fleet average has been impacted by lower cod and greysole landings (see *Figure-3*).

Appendix-A

Licence Profile of NAFO Division 3Pn (2000-2011)												
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
Bait - Commercial	55	67	74	76	77	84	85	84	85	86	87	87
Capelin FG - Commercial	2	1	1	1	1	1	1	1	1	1	1	1
Cod Handline - Commercial	0	0	0	0	8	0	0	0	0	0	0	0
Cod Handline - Experimental	0	0	0	0	0	1	0	0	0	0	0	0
Eels - Commercial	4	2	2	2	2	1	2	2	1	1	1	1
Groundfish Danish Seine - FG-Comm.	7	7	7	7	7	7	7	6	6	6	6	6
Groundfish FG - Commercial	119	100	98	98	98	96	95	93	92	91	90	90
Groundfish MG - Commercial	4	3	3	3	3	3	3	3	3	3	3	3
Groundfish MG - Experimental	0	0	0	0	1	0	0	0	0	0	0	0
Hagfish - Emerging	0	0	16	18	16	1	1	0	0	0	0	0
Herring FG - Commercial	22	20	18	18	18	18	18	18	17	17	17	17
Lobster - Commercial	56	50	49	50	50	48	48	48	48	48	48	48
Lobster - Experimental	0	0	0	0	0	3	0	0	0	0	0	0
Mackerel FG - Commercial	72	63	62	62	64	65	68	68	68	67	67	68
Rock Crabs - Emerging	0	0	0	1	0	0	0	0	0	0	0	0
Scallop - Recreational	0	2	2	2	4	8	13	16	11	11	11	10
Sea Urchins - Commercial	0	0	0	0	0	0	0	0	1	1	1	1
Sea Urchins - Emerging	0	0	1	0	0	0	1	1	0	0	0	0
Seal - Assistant - Commercial	35	27	39	52	43	21	19	18	2	2	1	1
Seal - Personal Use	2	2	3	4	4	3	3	3	1	1	1	1
Seal - Experimental	0	0	0	0	0	1	1	1	1	0	0	3
Seal - Professional - Commercial	122	119	116	126	133	152	148	144	97	95	93	92
Seal - Temporary Assistant - Temp	0	0	0	0	0	0	2	0	1	0	0	0
Snow Crab - Commercial	0	0	0	9	11	12	12	10	10	10	10	10
Snow Crab - Exploratory	2	2	2	0	0	0	0	0	0	0	0	0
Snow Crab - Experimental	0	0	7	0	0	0	0	0	0	0	0	0
Snow Crab - Inshore - Commercial	0	0	0	13	13	13	11	10	10	10	10	10
Snow Crab - Temporary	13	12	12	0	0	0	0	0	0	0	0	
Squid - Commercial	28	22	22	22	22	22	22	22	23	23	24	30
Swordfish - Commercial	1	1	1	1	1	0	2	0	0	0	0	0
Toad Crab - Emerging	0	0	0	1	0	0	2	0	0	0	0	0
Whelk - Commercial	1	1	1	1	1	1	3	3	3	3	4	4

Appendix-B

