Queensland Government
Department of Primary Industries

Rural Industry Business Services
Better Decisions, Better Business

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Queensland Fisheries Profile

Business Strategy Unit
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What is the Queensland fisheries profile?

This profile, which specifically relates to Queensland fisheries, is one of a series which examines the size, structure and financial performance trends of Queensland food & fibre industries between 1990–91 and 2000–01.

The profile uses data from a number of sources including the Australian Bureau of Agriculture & Resource Economics (ABARE), Australian Bureau of Statistics (ABS), Department of Primary Industries Queensland, and the Office of Economic and Statistical Research, Queensland Treasury (OESR).

Important things to note

Refer to footnotes for each graph to ensure you interpret the data correctly.

The Input-Output analysis examines the economic significance, input flows and output distribution of Queensland commercial fishing (wild capture and aquaculture).

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Executive summary

Overview of Queensland fisheries: Queensland fisheries can be divided into three broad classifications: commercial fishing (including aquaculture), recreational fishing and indigenous fishing.

In 2000–01, commercial fishing was the sixth-largest primary industry in Queensland, with a gross value (prices paid to fishers at wharf, or wholesale prices paid to aquaculture farmers) of $417m. Based on a 1998 survey, the recreational fishing sector annually keeps fish valued at $42m based on equivalent prices paid to commercial fishers. The importance of indigenous fishing to remote communities has not been quantified; however, in some areas it is thought to be substantial. ***Page 1***

Economic significance: The latest Input-Output tables (1996–97) indicate that the Queensland commercial fishing industry contributed approximately $178m in value added to the State's economy and accounted for up to 2500 jobs. ***Page 2***

Seafood processing: Real turnover of the Queensland seafood processing industry fluctuated between 1991–92 and 1999–00. In 1991–92, the industry's real turnover was $58m, which declined to $41m in 1998–99. Real turnover then increased to $172m in 1999–00. Industry analysts advise that the turnover of the Queensland seafood processing industry appears to be understated. ***Page 13***

Consumption: Since the early 1990s, the per capita consumption of seafood in Australia has remained relatively constant. Almost half of the seafood consumed in Australia is imported. Per capita consumption of imported seafood generally increased between 1991–92 and 1998–99. Over this period world per capital consumption of seafood increased by almost 16%; however, per capita consumption began to decline in the late 1990s. ***Page 15***

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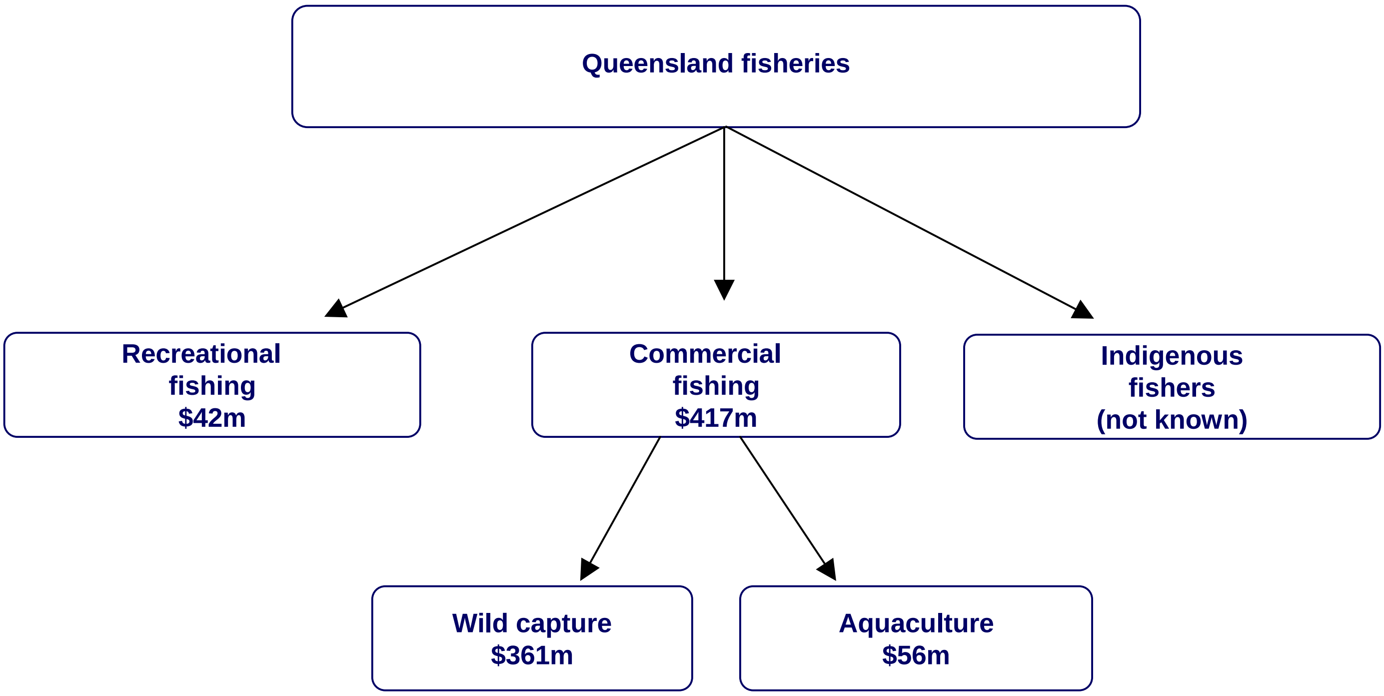
Overview of Queensland fisheries

Queensland fisheries can be divided into three broad classifications; commercial fishing, recreational fishing and indigenous fishing. Commercial fishing is the sixth-largest primary industry in Queensland, with a Gross Value of Production (GVP)[1] of $417m in 2000–01. Based on a survey conducted in 1998, the recreational fishing sector annually keeps fish valued at $42m based on equivalent prices paid to commercial fishers. The importance of indigenous fishing[2] to remote communities is thought to be substantial in some areas; however, there is no formal reporting of catch from these activities (Williams, 2002).

Commercial fishing can be further divided into wild capture and aquaculture production. In 2000–01 the gross value of wild capture production was $361m, while the gross value of aquaculture production was $56m.

Figure 1: Structure and value of Queensland fisheries, 2000–01



[1] Gross Value of Production is the value placed on recorded production at wholesale prices realised in the market place (point at which ownership shifts from the producer (fisher) to the next person in the product chain).

[2] Indigenous fishing includes indigenous people who fish to meet customary obligations, it does not include indigenous people who fish recreationally.

Economic significance

In order to gain more detailed information on the linkages that commercial fishing (wild capture and aquaculture) has with the rest of the Queensland economy, it is necessary to look at the Input-Output (I-O) tables[3] compiled by the Office of Economic and Statistical Research (OESR), Queensland Treasury.

Using the 1996–97 Preliminary I-O tables, it is estimated that Queensland commercial fishing used $171m worth of inputs to produce output worth $349m. The production of this output contributed $178m in value added[4] and 2503 full-time equivalent (fte) jobs[5] to the Queensland economy. Industry analysts advise that employment in commercial fishing may be underestimated in the I-O tables as a recent DPI/Fisheries Research and Development Corporation (FRDC) economic project (yet to be released) estimated that the Queensland commercial fishing industry accounted for approximately 3200 fte jobs in 1997–98.

Table 1: Economic significance of the commercial fishing industry to Queensland

	Inputs used	Value added	Output value	Jobs
Commercial fishing	$171m	$178m	$349m	2503fte

Source: OESR 1996–97 Preliminary Input-Output Tables

The economic contribution of seafood processing is not estimated independently in the Queensland I-O table and is included in the other food products industry. Most of the value added contribution of other food products can be attributed to raw sugar manufacturing and, therefore, it is difficult to estimate the value added contribution of seafood processing on its own.

Input industries to the commercial fishing industry

The I-O tables illustrate the linkages between commercial fishing and the wider economy. The I-O tables show that commercial fishing obtains a significant amount of its inputs from the wholesale trade (approximately $22m), agriculture machinery ($14m), petroleum and coal products ($9m) and other food product (seafood processing) ($9m) industries. It is estimated by the Business Strategy Unit (BSU) that 616 Queensland jobs were dedicated to supplying inputs to commercial fishing. Commercial fishing also used $79m worth of inputs that were imported into Queensland (either from interstate or international sources). Imported inputs may be similar to the inputs already mentioned, the difference being that imported inputs are sourced from outside of the Queensland economy.

Distribution of commercial fishing industry output

Just over half (51%) of the output from the Queensland commercial fishing industry was directly consumed domestically, while around 12% was directly exported (interstate and internationally) (see Figure 2). The remaining commercial fishing output flowed as an input to other industries such as accommodation, cafes and restaurants (27%), retail trade (8%) and other industries e.g. seafood processing (2%).

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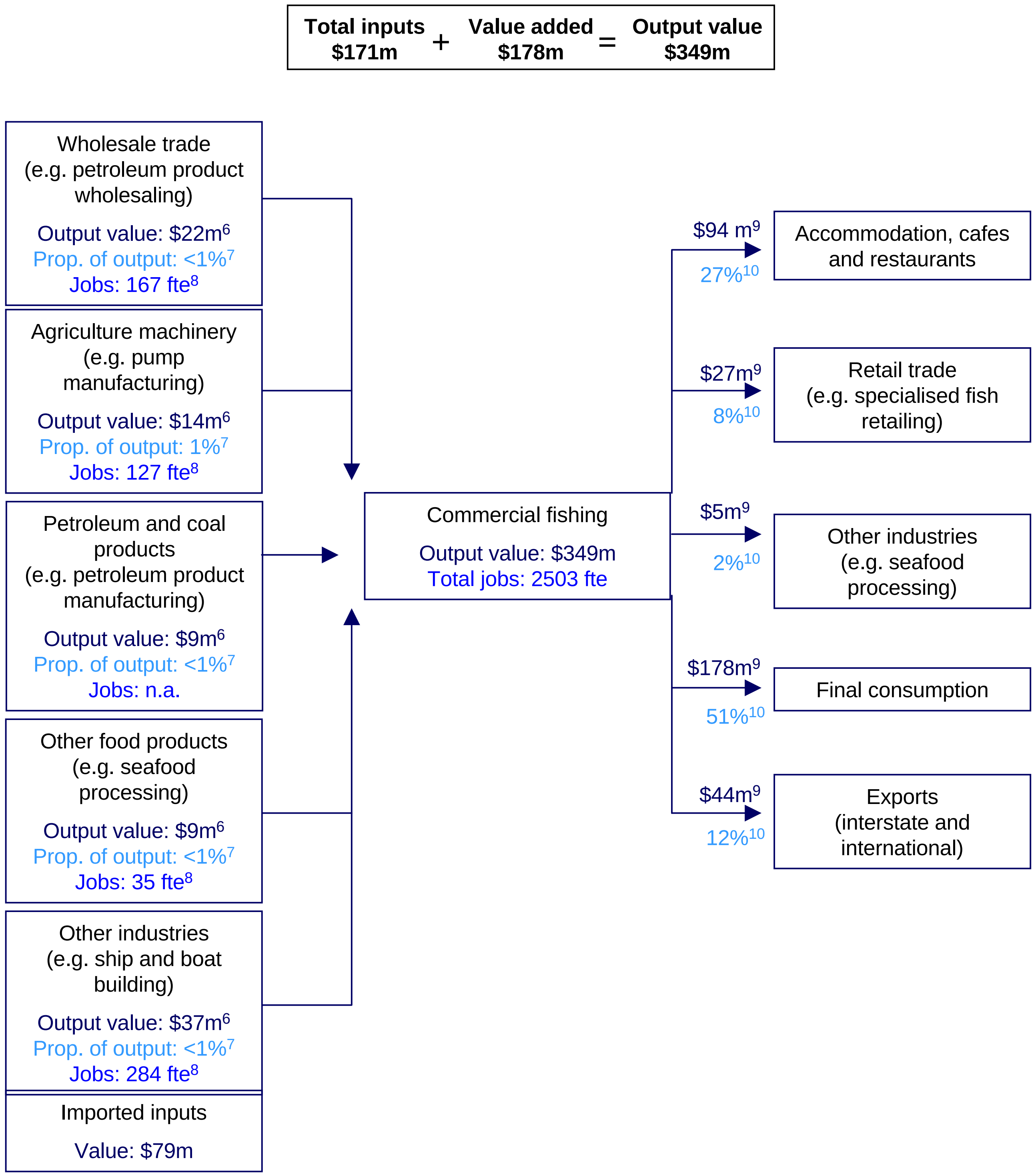
3. Assumptions underpinning I-O tables provided by the OESR are: homogeneity, fixed factor proportions & aggregation.

4. Value Added is defined as incomes (wages, salaries and supplements paid to labour) plus gross operating surplus (returns to capital) plus direct taxes, net of subsidies, and is equivalent to Gross State Product (GSP).

5. Job numbers are in terms of full-time equivalents (35+ hours/week).

Economic significance

Figure 2: Input industries to and distribution of output from Queensland commercial fishing



[6] The value of the industry's output supplied as an input to the Queensland commercial fishing industry.

[7] The proportion of the industry's output value supplied as an input to the Queensland commercial fishing industry.

[8] Job numbers are calculated by assuming a direct relationship between the industry's output value and the number of jobs (i.e jobs = proportion of industry's output value supplied to commercial fishing industry *multiplied* by the total number of jobs in the industry).

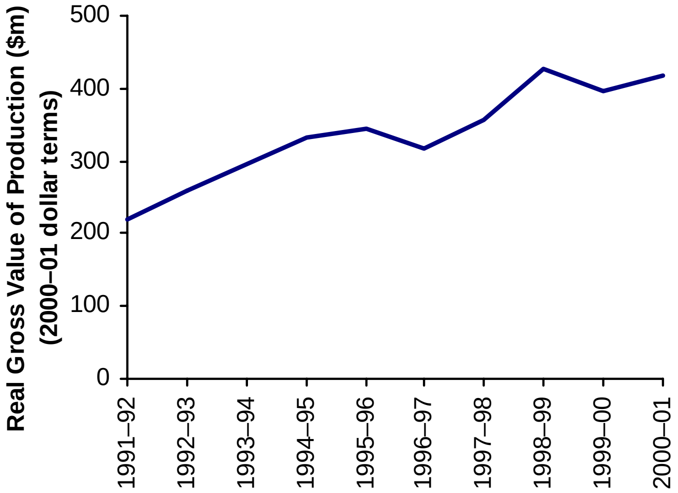
[9] The value of commercial fishing industry output used as an input to this industry.

[10] Proportion of commercial fishing industry output value used as an input to this industry.

Commercial fishing

Gross value of production

Figure 3: Real gross value of Queensland commercial fisheries production, 1991–92 to 2000–01



Source: ABARE Fisheries Statistics

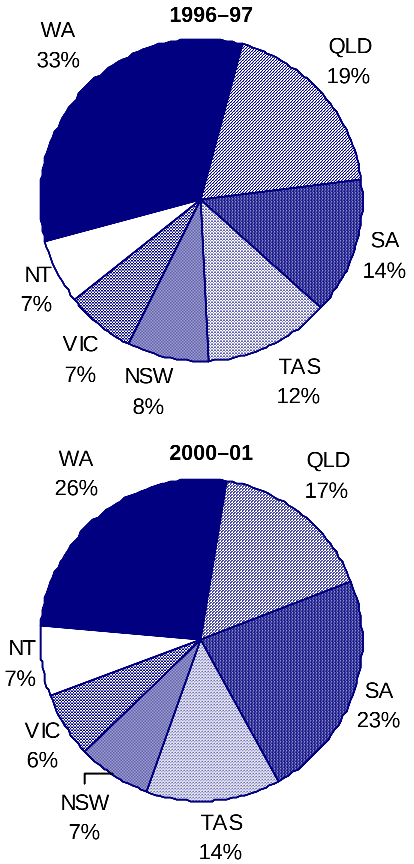
Queensland Fisheries Service, DPI

DPI Aquaculture Information – Report to Farmers

As shown in Figure 1, commercial fishing is the largest component of Queensland fisheries and in 2000–01, had a Gross Value of Production (GVP) of $417m. The real GVP for commercial fishing has almost doubled since the beginning of the 1990s, from $219m in 1991–92. Over this period there were only two years in which the GVP decreased, namely in 1996–97 and in 1999–00. The GVP of Queensland commercial fishing is influenced by factors such as climate and seasonal conditions, market price, and government and industry policy.

As there is a heavy emphasis on exporting Queensland seafood, the market prices received by fishers are determined to some extent by foreign market prices and the value of the Australian dollar.

Figure 4: Value of fisheries production in Australian states 1996–97 and 2000–01



Source: ABARE Fisheries Statistics

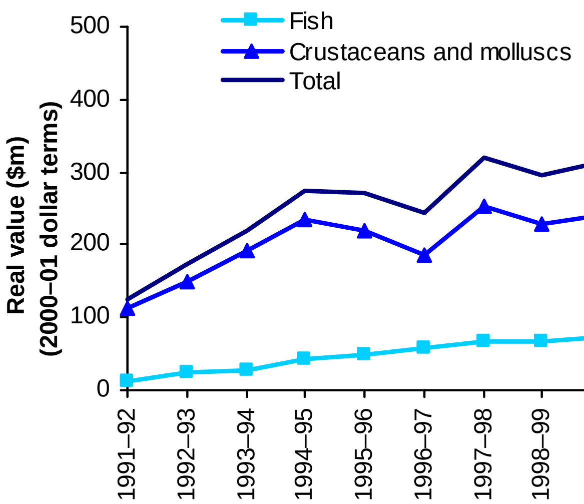
Queensland Fisheries Service, DPI

Although in 1996–97, the gross value of the Queensland commercial fishing industry declined, it remained the second-largest of any state in Australia. However a rapid increase in the gross value of the South Australian commercial fishing industry from 1998–99 to 2000–01, meant that Queensland was the third-largest fisheries producer in 2000–01, behind Western Australian and South Australia (see Figure 4). The significant rise in the value of the South Australian catch was mainly due to a large increase in the value of tuna aquaculture production.

Export value

Queensland commercial fishing also makes a significant contribution to the economy through a sizeable seafood export industry. The real value of Queensland seafood exports, has more than tripled since the early 1990s (see Figure 5). In 2000–01, it is estimated that $402m (free on board) worth of seafood was exported from Queensland ports. Exports of crustaceans and molluscs, such as prawns, spanner crabs and scallops, made up 76% of the export value in 2000–01. Other significant Queensland exports are stout whiting and coral trout.
In addition to international exports, it is also thought that Queensland exports a significant amount of seafood interstate; however, it is difficult to quantify the extent of this trade.

Figure 5: Real value of Queensland seafood exports 1991–92 to 2000–01



Source: ABARE Fisheries Statistics

Number of licences

Queensland commercial fishing can be divided into the wild capture and aquaculture sectors.

In 2000–01 there were 1721 primary licences[11] and 270 authorities to take fish[12], allowing access to the Queensland commercial wild capture sector. It is important to note that the number of vessels in the wild capture sector does *not* include Torres Strait and Northern Prawn licensed vessels, or tuna fishing vessels. This is because these fisheries are non-Queensland managed fisheries. There were also 817 holders of aquaculture licences in 2000–01 (see Figure 16 for details).

Table 2: Number of licences to operate in the Queensland commercial fishing industry, 2000–01

Queensland fishery	Number of licences in 2000–01
Wild Capture	
• primary licences	1721
• authorities to take fish	270
Aquaculture	
• licences	817

Source: Queensland Fisheries Services, Queensland Department of Primary Industries

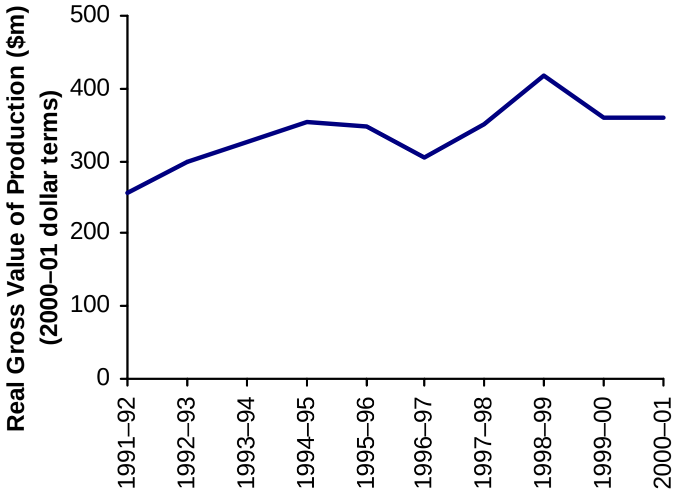
DPI Aquaculture Information – Report to Farmers

11. This does not include tender vessels licences. Tenders are secondary vessels that are licensed but can not generally fish except in conjunction with an appropriately licensed primary vessel.

12. Some of the harvest operations utilise vessels e.g. beche-de-mer and others do not e.g. beach worms or yabbies.

Commercial fishing — wild capture

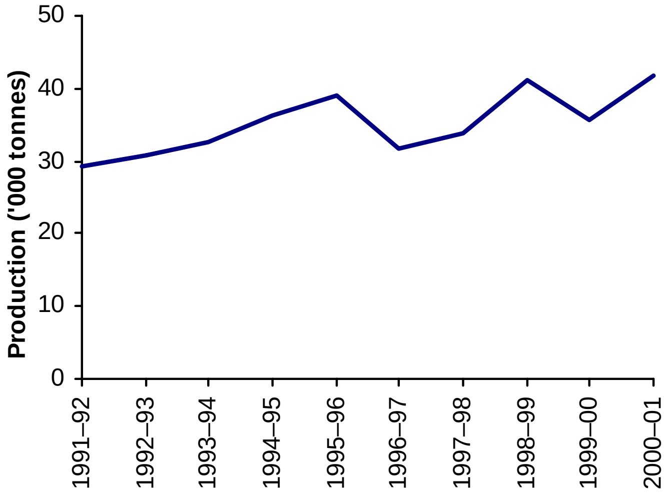
Figure 6: Real gross value of Queensland wild capture production, 1991–92 to 2000–01



Source: ABARE Fisheries Statistics

Queensland Fisheries Service, DPI

Figure 7: Queensland wild capture production 1991–92 to 2000–01



Source: ABARE Fisheries Statistics

Value and quantity of production

The Queensland wild capture fishing sector includes all fish, crustaceans and molluscs that are caught in Queensland managed fisheries, plus, those caught in Commonwealth managed fisheries in Queensland waters.

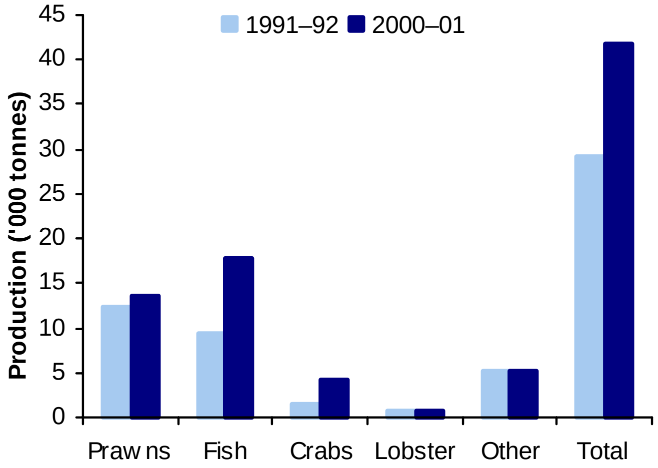
The real gross value of Queensland wild capture production has increased substantially since the early 1990s. In 2000–01, real GVP was $361m, 41% higher than in 1991–92 (see Figure 6).

Between 1991–92 and 2000–01, the quantity of wild capture fishery product harvested increased by 45% from about 29 000 tonnes in 1991–92 to about 42 000 tonnes in 2000–01 (see Figure 7). Over this period prawns and fish made up the majority of production (approximately 70–80%) while crabs, lobsters (mainly Moreton Bay Bugs), squid, scallops and other seafood products accounted for the remainder of production.

Between 1991–92 and 2000–01, the real gross value of Queensland wild caught production increased by a smaller proportion than the quantity of fishery product harvested.

Commercial fishing — wild capture

Figure 8: Production of wild capture fishery products 1991–92 and 2000–01

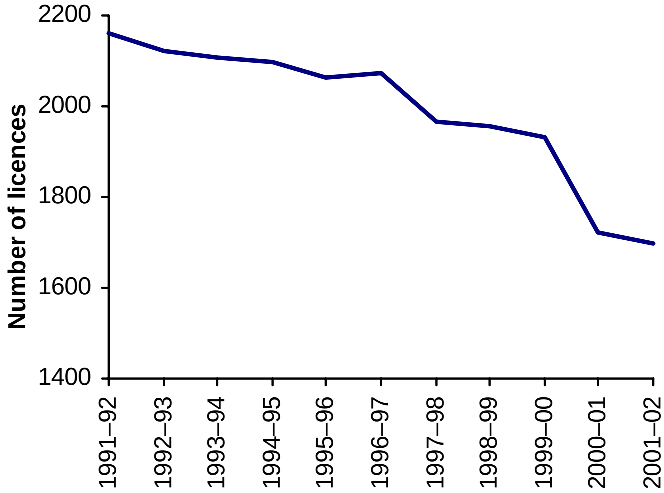


Source: ABARE Fisheries Statistics

Between 1991–92 and 2000–01, the amount of crabs harvested from Queensland waters increased by around 160%. The amount of fish harvested increased by 89%, the quantity of lobster increased by 24%, while the quantity of prawns increased by 9%. The harvesting of products included in the 'other' category (such as scallops and squid) increased by 2%.

Fleet size

Figure 9: Number of primary vessel licences in Queensland 1991–92 to 2001–02



Source: Queensland Fisheries Services, Department of Primary Industries Queensland

The Queensland wild capture commercial fishing fleet consisted of approximately 1698 vessels in 2001–02 (see Figure 9).

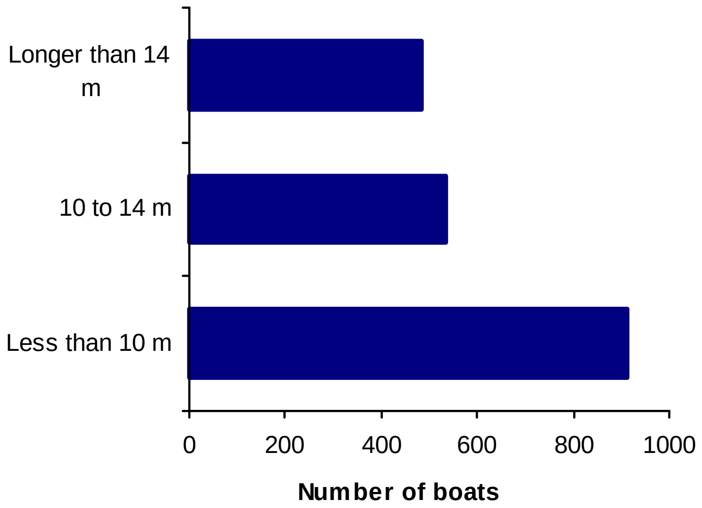
The number of fishing vessels in the Queensland wild capture sector has been declining for several reasons. Firstly, there has been a limited entry policy in place in Queensland since 1979, for otter trawl (vessels using a prawn trawl net, the mouth of which is held hydrodynamically by a pair of otter boards) and 1984 for non-trawl vessels (fishing vessels not rigged for trawling such as crab, net and line boats). Under the limited entry policy 'no new vessel licences are being issued and the only way to enter the fishery for a commercial purpose is to acquire an existing licensed vessel…'(Williams, 2002). Between 1995–96 and 1998–99, several buy-back programs funded by the Queensland and Commonwealth Governments were responsible for the removal of 78 primary vessels licences and 619 individual fishery symbols.[13] The previous 'two for one' licence surrender on vessel replacement in the otter trawl fishery also contributed to the fall in primary boat numbers. In early 2001, a further 98 primary boat licences were bought out of the east coast otter trawl fishery under a $20m Commonwealth/State industry adjustment package.

Although the number of vessels has been declining, the wild capture production has been increasing (see Figure 7) .

[13.] A fishery symbol is an endorsement which specifies the authorised species and gear and area for the holder of the symbol. A licence package usually consists of a number of fishery symbols and together they indicate the range of fisheries in which the boat can operate (Switala et al, 1999).

Commercial fishing — wild capture

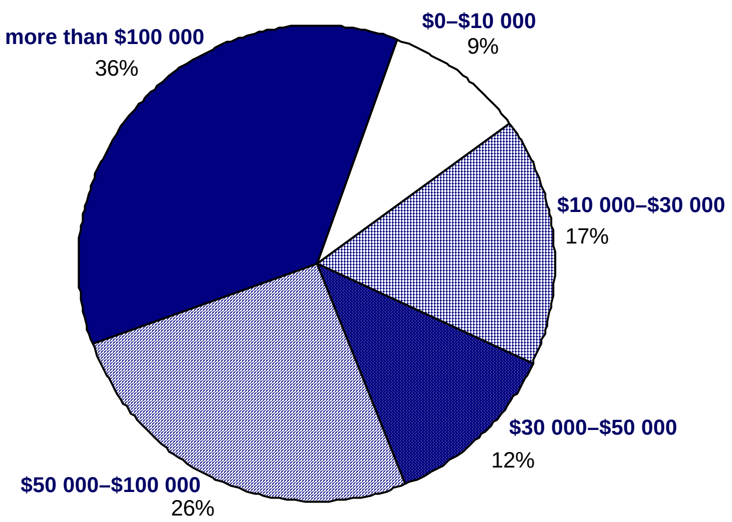
Figure 10: Queensland wild capture – boat length 1996–97



Source: Switala et al 1999

In 1996–97, the Queensland commercial fishing fleet consisted of 2075 primary boats with data being available on 1932 (excluding the boats used in collection fisheries and those whose records were incomplete).[14] Almost half of the fleet (47%) was made up of boats that were less than 10 metres in length, while 28% of the boats were between 10 and 14 metres long and the remaining 25% of boats were longer than 14 metres.

Figure 7: Distribution of GVP in the Queensland wild capture fishing fleet 1996–97



Source: Switala et al 1999

Of the 1932 boats in the Queensland commercial fishing fleet for which data is available, over one-third harvested more than $100 000 of fishery product in 1996–97, while 9% of boats harvested less than $10 000 (see Figure 11). It is expected that the 26% of boats with a GVP between $0 and $30 000, did not solely rely on fishing as their primary source of income.

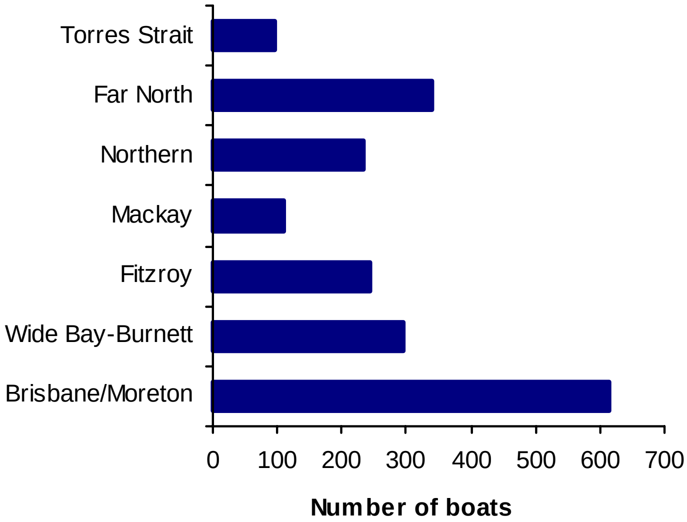
[14] The material presented in this section of the report is derived from data presented in Switala et al, 1999.

Commercial fishing — wild capture

Fleet location

In 1996–97, almost one-third (615) of the boats in the Queensland commercial fishing fleet were located in ports within the Brisbane and Moreton Statistical Division (SD). 339 boats were located in ports within the Far North SD; most of these were located in the port of Cairns. Significant numbers of boats were also located in ports within the Wide Bay–Burnett, Fitzroy, Mackay, Northern and Torres Strait SDs.

Figure 10: Queensland wild capture — boat length 1996–97

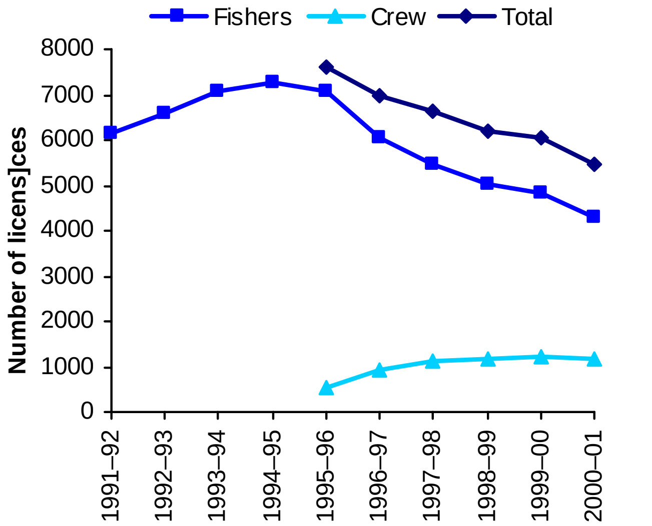


Source: Switala et al 1999

Employment

It is difficult to gauge the level of employment that occurs in the Queensland wild capture fishing sector. In 2000–01, there were 4296 fisher licences plus 1189 crew licences issued[15] in Queensland, compared with 6161 fisher licences in 1992. This number does not provide an indication as to whether the person with a licence is employed full-time or if this is their only form of employment; however, this is regarded as the best available information. The ABS does provide quarterly estimates for employment in 'marine fishing', but they are thought to underestimate the true level of employment in the sector. In 2000–01, the ABS estimated that 4650 people were employed in the marine fishing industry, which is below the total number of licences (5485) issued in that year.

Figure 13: Licensed fishers in Queensland (indication of employment), 1991–92 to 2000–01



Source: Queensland Fisheries Management Authority Annual report

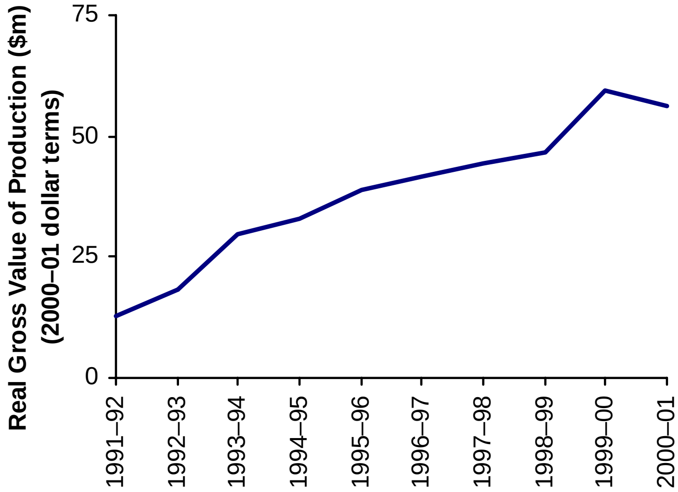
[15] To engage in commercial fishing a person must hold a licence. A licensed commercial fisher can only operate from a licensed commercial fishing vessel.

Commercial fishing — aquaculture

Value and quantity of production

The value of Queensland aquaculture production has increased by more than 300% since 1991–92, to a value of $56 million in 2000–01 (see Figure 14). Aquaculture now represents approximately 12% of the total value of Queensland seafood production, compared to 5% in 1991–92. A substantial increase in the value of prawn and barramundi production is the main driver behind this increase.

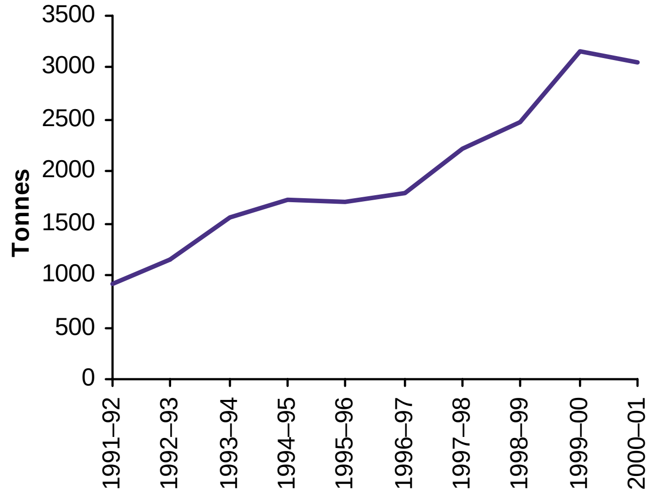
Figure 14: Real gross value of Queensland aquaculture production, 1991–92 to 2000–01



Source: DPI Aquaculture Information – Report to Farmers

The quantity of aquaculture product in Queensland has more than tripled from 914 tonnes in 1991–92 to 3045 tonnes in 2000–01 (see Figure 15). The majority of this increase was due to a large growth in the quantity of prawns and barramundi produced by aquaculture farms in Queensland.

Figure 15: Queensland aquaculture production 1991–92 to 2000–01



Source: DPI Aquaculture Information – Report to Farmers

Commercial fishing — aquaculture

Table 3: Quantity and real value of Queensland aquaculture production, 1991–92 and 2000–01

	1991–92		2000–01	
Product	Volume	Value	Volume	Value
Marine prawns	715t	$10.3m	2100t	$37.3m
Kuruma prawns	25t	n.a.	200t	$7.3m
Barramundi	150t	$1.8m	600t	$5.1m
Redclaw crayfish	40t	$0.7m	75t	$1.1m
Silver perch	10t	n.a.	70t	$0.4m

Source: DPI Aquaculture Information – Report to Farmers

From 1991–92 to 2000–01, the volume of kuruma prawns produced in Queensland increased by about eight times, while the amount barramundi and silver perch produced more than tripled. The quantity of marine prawns almost tripled and the quantity of redclaw crayfish almost doubled (see Table 3).

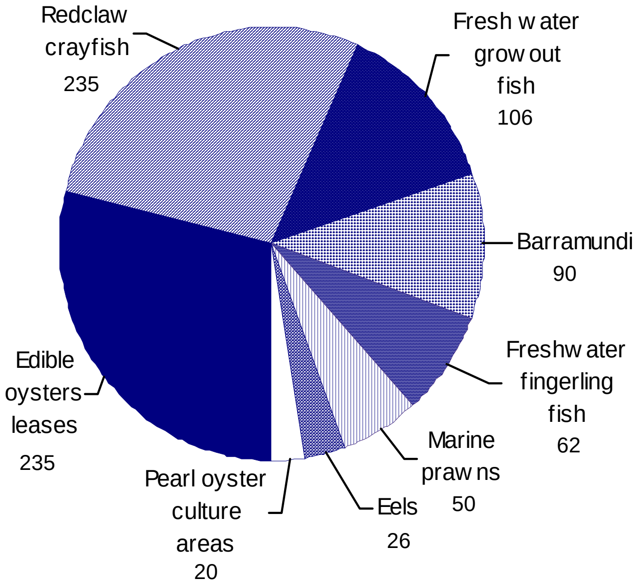
Over the same period the real value of:

- marine prawns more than tripled
- barramundi more than doubled
- redclaw crayfish increase by half.

Table 3 also illustrates that the production of marine prawns accounted for a significant proportion of Queensland aquaculture production in both 1991–92 and 2000–01, while barramundi had the next highest level of production.

Note: the production of oysters, pearl oysters, eels and prawn hatcheries have not been discussed here due to the relatively small quantities of production.

Figure 16: Composition of aquaculture licenses Queensland 2000–01



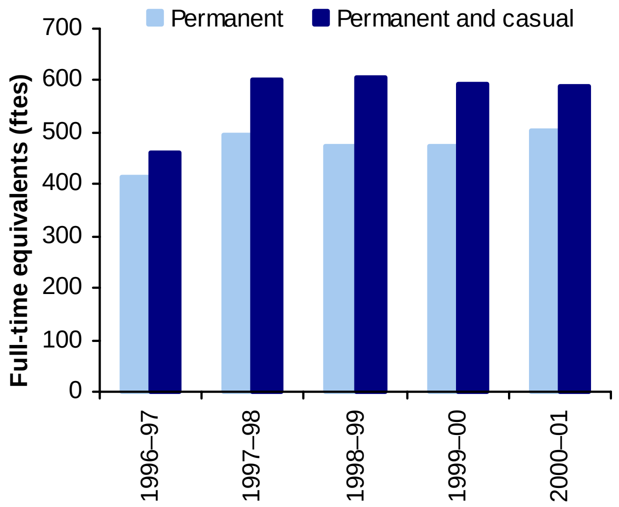
Source: DPI Aquaculture Information – Report to Farmers

Licence structure

In 2000–01, there were 817 holders of aquaculture licences in Queensland. These aquaculture licences cover the production of marine prawns, barramundi, redclaw crayfish, fresh water growout fish, eels, freshwater fingerling fish, edible oysters and pearl culture oysters. Of the 817 licences, those producing edible oysters and redclaw crayfish are the majority. There were 235 areas licensed to produce edible oysters and 228 farms producing redclaw crayfish in 2000–01 (see Figure 16).

Commercial fishing — aquaculture

Figure 17: Employment in Queensland aquaculture 1996–97 to 2000–01



Source: DPI Aquaculture Information – Report to Farmers

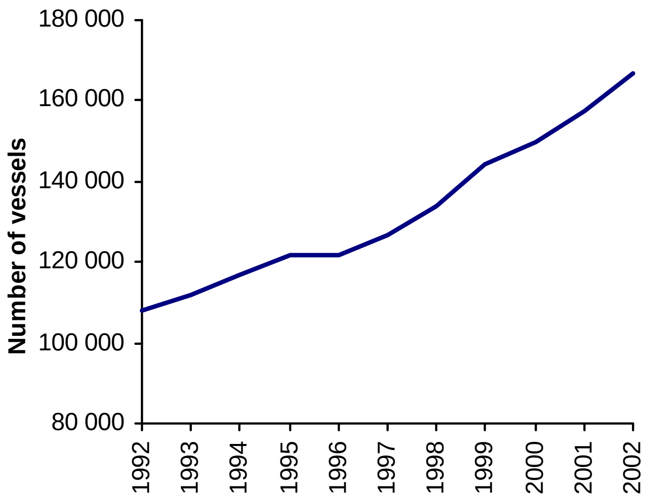
Employment

The total number of permanently employed people in the Queensland aquaculture sector increased by 20%, from 412 full-time equivalents (ftes) (35 hours per week) in 1996–97 to 495 ftes in 1997–98. The significant increase in permanent labour between 1996–97 and 1997–98 can mainly be attributed to the fact that employment in the edible oyster industry was first collected in 1997–98 (67 ftes). The level of permanent labour rose by 7 ftes between 1997–98 and 2000–01, to 502 ftes.

In the Queensland aquaculture sector, a sizeable number of people are employed on a casual basis. When this casual employment is added to the permanent employment, the sector employed the equivalent of 589 ftes in 2000–01.

Recreational fishing industry

Figure 18: Number of recreational vessels registered in Queensland, 1992 to 2002



Source: Queensland Department of Transport – Recreational Vessels Licence Register

Recreational vessels

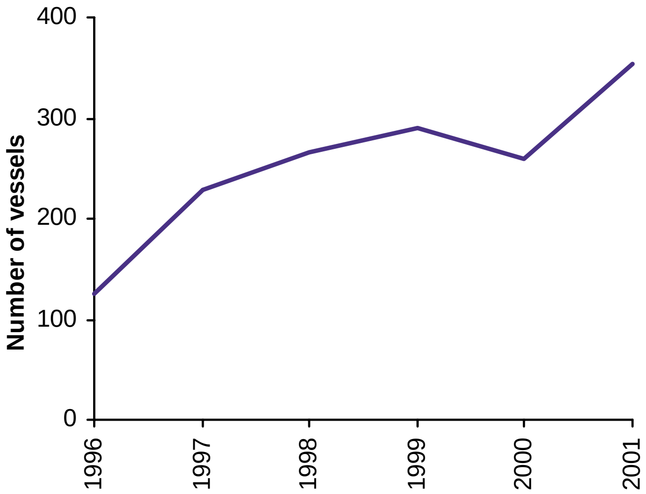
Fishing is an important recreational pursuit for many Queenslanders. Approximately 848 000 Queenslanders over the age of five claimed to have been fishing at least once between November 1997 and November 1998. The nature of recreational fishing integrated with other water-based recreational activity makes it difficult to place an accurate value on the industry. Having said this, it is unquestionable that recreational fishers spend large quantities of money in pursuit of their water-based activity and that they contribute significantly to the economy. In 1998, product landed and kept by recreational fishers was valued at approximately $42m (based on equivalent price paid to commercial fishers).

The number of registered recreational vessels in Queensland increased by 55% between 1992 and 2002 (see Figure 18). In 1992 there were 107 827 recreational boats registered in Queensland, while in 2002 the number had increased to 167 035 boats. Registered recreational boats may be used for a number of recreational activities, one of which is fishing.

Recreational fishing industry

Charter boats

Figure 19: Number of commercial fishing tour charter boats in Queensland 1996 to 2001



Source: Queensland Fisheries Service, Department of Primary Industries Queensland

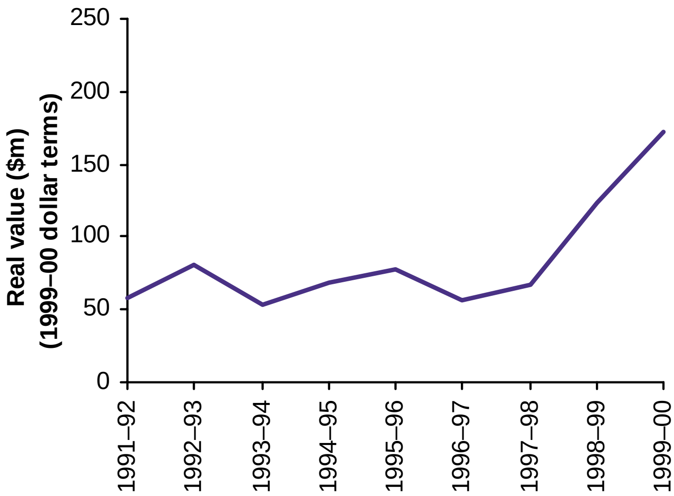
In 2001, there were approximately 354 charter boats operating throughout Queensland, including inland waters, taking recreational fishers on paid fishing tours. Since 1996, persons operating businesses offering fishing tours have been required to hold a commercial fishing permit. The number of commercial fishing tour permits has increased from 126 in 1996 to the current 354.

Also since 1996, the organisers of commercial fishing competitions (competitions open to the public where an entry fee is payable) have been required to obtain a general fisheries permit prior to staging the event. In 1998, there were 48 commercial fishing competitions held in Queensland, which increased to 69 in 2001.

Seafood processing

Turnover

Figure 20: Queensland seafood processing industry real turnover, 1991–92 to 1999–00



Source: ABS Manufacturing Industry Queensland (8221.3)

Real turnover[16] of the Queensland seafood processing industry[17] fluctuated between 1991–92 and 1999–00. In 1991–92, the industry's real turnover was $58m, which fluctuated to $67m in 1997–98. Real turnover then increased to $123m in 1998–99 and $172m in 1999–00. The increase in turnover in 1998–99 and 1999–00 is due to a change in the collection and tabulation processes used by ABS.

All seafood is required to pass from the commercial fisher to the consumer through licensed wholesalers or processors. Processors may on-sell the product with little change through to intermediate processing and product transformation.

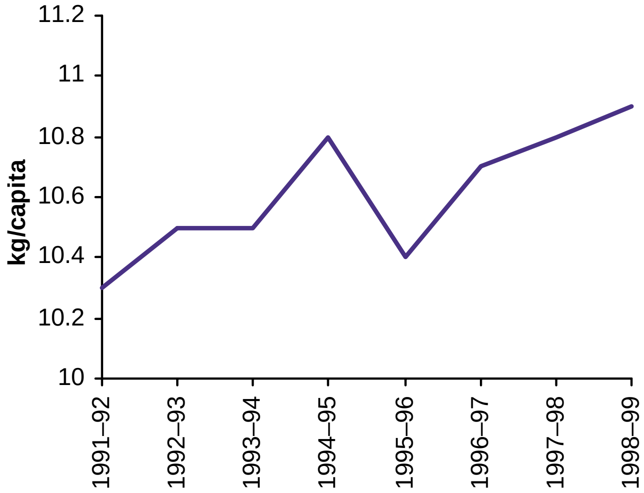
Industry analysts advise that the turnover of the seafood processing industry from 1991–92 to 1997–98, according to ABS, appears to be understated.

16. Turnover (as defined by ABS) is the sales of goods whether produced by the establishment or not, plus transfers out of goods to other establishments of the same business, plus bounties and subsidies on production, plus all other operating income from outside the establishment, plus capital work work done by an establishment's own employees for the business's own use, or for rental or lease.

17. Seafood processing, as classified by the ABS, 'consists of businesses *mainly* engaged in processing fish or other seafoods, as well as in operating vessels which process but do not catch fish'.

Australian consumption

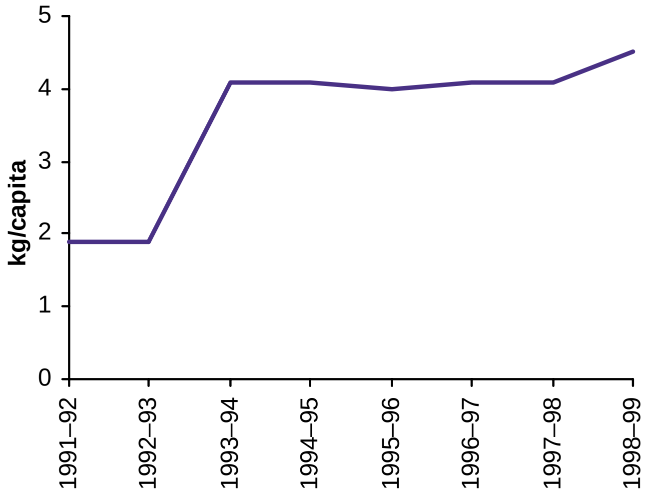
Figure 21: Australian per capita consumption of seafood 1991–92 to 1998–99



Source: ABS Apparent Consumption of Foodstuffs (4306.0)

While Queensland production of seafood products has increased in both quantity and value since the early 1990s, the per capita consumption of seafood in Australia has remained relatively stable in the 10kg to 11kg range. Per capita consumption of seafood in Australia peaked in 1998–99, where it was estimated that the average Australian consumed 10.9kg of seafood products per year. Consumption of seafood products was the lowest in 1991–92, where the average Australian consumed 10.3kg of seafood products per year.

Figure 22: Australian per capita consumption of imported seafood, 1991–92 to 1998–99



Source: ABS Apparent Consumption of Foodstuffs (4306.0)

In 1998–99, almost half of the seafood consumed in Australia was imported. Per capita consumption of imported seafood had a general upward trend between 1991–92 and 1998–99. Per capita consumption of imported seafood was at its lowest in 1991–92 and 1992–93, and peaked in 1998–99 at 4.5kg

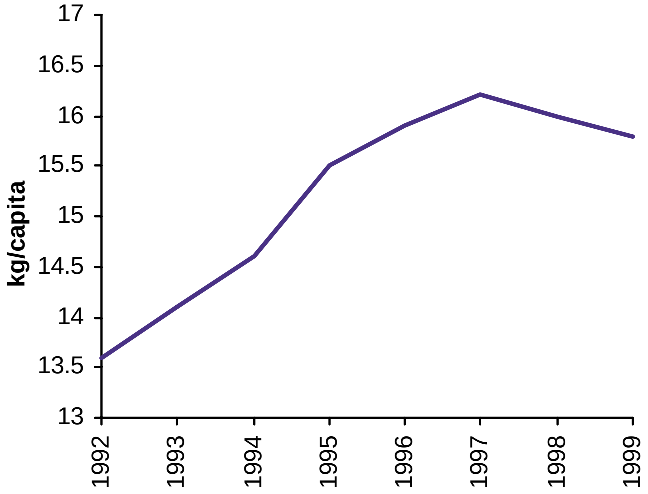
The Australian per capita consumption of seafood only includes seafood products consumed as food by humans. It does not include, for example, the quantity of seafood used as bait, aquarium fish or shell grit. Industry analysts advise that the market for these fishery products is quite substantial.

World consumption

Between 1992 and 1999, world per capita consumption of seafood increased by almost 16% from 13.6kg in 1992 to 15.8kg in 1999. Over this period, world per capita consumption of seafood peaked in 1997 at 16.2kg.

Average world per capita consumption of seafood exceeds the per capita consumption of seafood in Australia. This is because in some countries, seafood is the major source of protein and consumption is high. In Australia, meat is the major source of protein and consequently the consumption of seafood is lower.

Figure 21: World per capita consumption of seafood 1992 to 1999



Source: FAO Food Supply Database

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