



Australian Southern Rocklobster Industry

Rocklobster industry underpins regional economies

The results of an initial economic analysis of the Australian Southern Rocklobster Industry show the industry to be a major employer in regional coastal towns, spread from the Great Australian Bight in South Australia through Victoria and Tasmania. The preliminary estimates highlight the essential role played by the industry in regional towns in the three states where southern rocklobster is found.

The analysis was commissioned by the newly formed Southern Rocklobster Council, the peak body for the industry. The results show that the industry generates approximately 3400 full time job equivalents in both direct fishing and related jobs across the three states. Most of these jobs are directly involved in catching, processing and exporting Australian southern rocklobsters.

The research conducted by EconSearch, an Adelaide based independent economic consultancy, found that the industry exports around 4000 tonnes of southern rocklobsters each year. This is 90% of the annual harvest and is valued at almost \$200 million.

"The Southern Rocklobster Industry is clearly one of Australia's leading and most valuable seafood export industries," said EconSearch Managing Director, Dr Julian Morison.

"The industry across the three states is of national importance particularly when you convert the \$200 million in exports to an injection of almost \$1/2 billion into regional economies."

Dr Morison said that the industry creates flow-on jobs in areas such as transport, finance, business, manufacturing services and repairs.

"Many of these are the mainstays of small coastal towns across the three states."

From these preliminary estimates, Dr Morison said the industry generates approximately 1600 jobs in South Australia, 1400 in Tasmania and 400 in Victoria.



Southern Rocklobster

Catch, Exports and Estimated Economic Impact 2001/02

	SOUTH AUSTRALIA	VICTORIA	TASMANIA	TOTAL
CATCH AND EXPORTS				
Catch^a				
Quantity (t)	2,392	472	1,522	4,386
Value (\$m)	91.9	20.5	64.6	177.0
Exports^b				
Quantity (t)	2,153	425	1,370	3,947
Value (\$m, fob)	102.4	21.1	66.6	190.1
No. of vessels ^c	249	110	230	589
ECONOMIC IMPACT				
Output (\$m)				
Direct (fishing)	91.9	20.5	64.6	177.0
Other sectors ^d	149.6	32.3	119.9	301.8
Total	241.5	52.9	184.5	478.8
Employment (No. of fte jobs)				
Direct (fishing) ^e	789	220	621	1,630
Other sectors	827	196	729	1,751
Total	1,616	416	1,350	3,381

Source: EconSearch. Please refer to page 6 for Definition of Terms



Victoria First Lobster Management Plan

Victoria's first lobster management plan comes into effect in November 2003 for a period of five years. The Plan was developed by a steering committee of key stakeholder groups overseen by the Fisheries Co-management Council and taking into account Ministerial guidelines.

It formalises the strategies and actions to manage the resource in a manner that will allow stocks to rebuild in a framework entirely consistent with Environmental Sustainable Development (ESD).

Ian Cartwright, Steering Committee Chair believes the content of the plan is ground-breaking in many areas and establishes several initiatives that will enhance management of the resource.

"The initiatives include an annual Total Allowable Catch (TAC) Forum with representatives of all stakeholder groups, meeting after the stock assessment to make recommendations on the TAC for both zones and other issues such as closed seasons and size limits," said Mr Cartwright.

"There will also be clear resource performance indicators for both zones with risk assessment derived from the model of each fishery and standardised catch rates."

"This will be used in conjunction with other observed indicators to measure performance, enabling appropriate management actions to take place."

Importantly, as stocks rebuild to exceed specified threshold limits, the Plan also specifies that any additional new quota units can only be issued for a single quota year and can only be held by existing rocklobster licenceholders.

The Plan establishes a recreational sector quota (TARC) for each zone, with this resource allocation providing parallel rights and obligations for both sectors, with strong incentives to rebuild stocks to target levels

The Plan will also look at a maximum number of pots that can be fished from one boat, tradeable commodities and aquaculture.

"Consistent with best practice, performance of the Plan is to be reviewed annually. In the final year another steering committee will be formed for a final review and a new plan prepared," said Mr Cartwright.

South Australia Northern Zone set for quota

The South Australian Northern Zone rocklobster fishery will commence fishing under a quota system for the first time on 1 November 2003. The change comes after a 2 year extensive review process in partnership between industry and Primary Industries and Resources SA.

The process has been managed by the Northern Zone Fishery Management Committee (FMC) which advises the Minister for Primary Industries and Resources on management of the Northern Zone fishery.

The Minister has accepted the TAC of 625 tonnes recommended by the FMC.

The allocation of the TAC will be based on the mix of 50% average catches per pot and 50% of the history of the licences, and will be in place for 3 years after which all pots will attract the average catch of 158.23kgs.

Catherine Barnett, Chair of the Northern Zone Rocklobster FMC said that licence holders have been very much involved in developing the system.

"We have conducted wide-spread consultation involving surveys, a number of industry workshops and a continuous feedback loop all the way to the final recommendations to the Minister," said Ms Barnett.

"There have been many issues and challenges along the way, but the development of the compliance arrangement has been particularly difficult because of the 2700 km coastline in the fishery."

"Finding a cost effective way of monitoring a compliance arrangement was challenging but I am pleased that PIRSA Fishwatch, industry and the Department all worked through this issue and have come up with a suitable program for monitoring the fishery."

The program will involve an on-board daily log of catch numbers, prior report of landings, a catch disposal record, catch weight verification by a registered processor and a vessel monitoring system.

The total number of pots in the fishery has been maintained at the existing level of 3950 with the maximum pot holding of 70 per licence also remaining. The industry has supported unitising, meaning a licence will be able to catch unlimited units of quota with the pot holding owned up to 70 pots.

Tasmania An overview

The Tasmanian Rocklobster Fishery is managed by an Individual Transferable Quota (ITQ) system, input controls and closed seasons. The TAC is approximately 1523 tonnes and best estimates put the amateur catch as around 7.5% of this amount. Fishing takes place for males between November and September and for females from November to the end of April. The quota year starts in March and ends in February the next year. There are 315 licenses which share the quota but normally only between 225 and 230 boats fish in any given year. Each quota unit is worth 145 kilos of rocklobster.

"Fishing is spread all round Tasmania including King and Flinders Islands and the fishery varies from day trippers to boats that spend extended periods at sea," said Rodney Trelloggen, Tasmania Rocklobster Fishermen's Association Executive Officer.

"Weight distribution varies from the south of the State where fish are normally smaller 500-1500 grams to the north where fish up to 5 kilos are not unusual."

"Boats range from smaller wooden traditional lobster boats to state-of-the-art larger steel and wooden vessels, with a recent shift to large fiberglass and aluminum vessels up to 20 metres."

The minimum number of pots that can be fished from a vessel is 15 with the maximum number set at 50 and there are approximately 50 buyers licensed to buy rocklobster in Tasmania and Victoria. The issue of processors' licenses is currently under review by the Tasmanian rocklobster, abalone and processors sectors.

The majority of the catch is exported to China and Hong Kong with small amounts to Taiwan and Japan.

"Policing of the industry is undertaken by the Tasmanian Marine Police Division which is a specialist unit that looks after all of Tasmania's fisheries," said Mr Trelloggen.

"Research is under the control of the Tasmanian Aquaculture and Fisheries Institute aligned with the University of Tasmania and management of the fishery is by the Department of Primary Industry Water and Environment."

"The Minister also has a Fisheries Advisory Committee consisting of members of these groups and including environmentalists, processors and the Tasmanian Rocklobster Fishermen's Association."



Marine Protected Areas in the Commonwealth waters of the SE Region

A system of Marine Protected Areas (MPAs) is being created in the Commonwealth waters (three to two hundred nautical miles from the shore) of the South-east Marine Region by the Commonwealth Department of the Environment and Heritage. The aim of this system of MPAs is to protect 'representative' samples of the region's marine biodiversity.

Eleven "Broad Areas of Interest" have been identified in the SE region as having the greatest range of marine ecosystem types.

Stakeholders in the region, including the fishing industry, are being asked to assist with the selection of a potential MPA site within each Broad Area of Interest. Scientific specifications have been developed that provide the basic decision rules for identifying a potential MPA site and stakeholders are asked to apply the scientific specifications in a way that meets conservation aims and minimises the disruption to their own interests.

To coordinate the fishing industry input to the MPA process, the Australian Seafood Industry Council (ASIC) has appointed Fiona Curley as an industry liaison officer.

"Representatives from all stakeholder groups, including peak fishing industry associations, will be invited to participate in cross-sectoral workshops run by the Commonwealth government," said Ms Curley.

"The workshops will commence in late September 2003 and will be one step in an ongoing process of developing potential MPA sites."

More information on the process for identifying potential MPA sites is contained in the publication Australia's South-east Marine Region: A User's Guide to Identifying Candidate Areas for a regional representative system of Marine Protected Areas August 2003. The User's Guide and electronic maps of the Broad Areas of Interest can be found on the Environment Australia website

<http://www.ea.gov.au/coasts/mpa/commonwealth/identifying/index.html> Or contact Fiona Curley (mob. 0419-678-139) at ASIC for copies.



MPAs to challenge sustainability of lobster stocks

Members of the rocklobster industry, while supporting the Environment Australia process of stakeholders leading the MPA approach in the SE region, (see previous story) believe that many of the areas of interest for MPAs have the potential to impact on the currently sustainable lobster stocks in southern Australia.

Through industry support for marine conservation and investment of millions of dollars each year in marine research, the industry knows that Southern Rocklobster stocks in Victorian, Tasmania and South Australia are sustainable and MPAs are not needed to protect them.

"Independent scientific work by Tasmanian and South Australian Government researchers shows that MPAs have the potential to reduce the sustainability of lobster stocks by displacing fishing and increasing fishing pressure outside MPAs," said Roger Edwards, South Australian Southern Rocklobster Industry spokesperson.

"The industry has been taking, and will continue to take, a lead role in marine conservation measures including the development of MPAs in the South-east Marine Region of Australia."

"However we cannot give our support to any proposed MPA until funding is in place to deal with the impact on lobster stock sustainability from displaced fishing caused by MPAs," continued Mr Edwards.

"We see the issue of adequate funding for establishing (including structural adjustment for displaced fishing), implementing and maintaining any new MPAs, must be provided for by the Government."



Clean Green - worth the wait

The 'Clean Green' rocklobster program to create a species-specific accreditation system, while taking longer than initially anticipated, is expected to provide a world-first system for the industry. The draft standards from pot to plate, are now proceeding to accreditation, following consideration of every activity undertaken in catching, processing and exporting lobsters.

"Every activity has had to be presented so that it can be audited including issues of ecological impact, at-sea safety, food safety and pollution management," said South Australian rocklobster fisher, Kym Redman.

"This scope far exceeds anything presently available to the seafood industry, including the Marine Stewardship Council system."

"Feedback from port visits and training sessions was valuable to refine the standards as well as taking into consideration recent changes in food safety legislation."

JAS-ANZ, the accreditation agency selected to work on the Clean Green program, is translating the draft standards into a form that can be accredited and certified.

"Recent substantial funding from the Commonwealth government is recognition of the proactive vision by the southern rocklobster industry," continued Mr Redman.

"With further funding support, the team is now developing a suite of training tools, and Clean Green merchandise in preparation for the first audit against the draft standards."

Environmental Management Systems for a Bright Green Future

The Seafood Council (SA) has secured funding for the rocklobster industry to finalise and document part of their Clean Green Rocklobster Program (see previous story) as an environmental management system (EMS).

Whilst the Clean Green Program for the industry aims to provide independent third party certification of the rocklobster supply chain for all of the industry's operations from "pot to plate", the recently approved EMS project will finalise the implementation of the environmental standards.

An EMS is not really anything new, but is a process to work through for continually improving operations. If done correctly, it will improve and demonstrate fishers good environmental record. It will assist fishers to implement an environmental management system that provides environmental accountability and credibility, so that improvement will continue to occur long after the finish date of the project.

"Our reputation as a responsible user of the marine environment is critical if we expect the general community to support us in the future," said Samara Miller, Seafood Council (SA) Strategy and Policy Manager.

"Whilst we have initiated many environmental improvements in the industry over the years, this project allows us to ensure that the Clean Green Program contains an auditable environmental system specific to our commercial rocklobster fishery."

"An EMS is not just another document to add to the shelf. It is about fishers demonstrating environmental best practice for their commercial operations which may bring about many benefits such as more secure access to the fish, greater public support and a competitive edge in the market place," Ms Miller said.



Value-adding - trebling the value of a lobster

Debra and Andrew Ferguson of Ferguson Australia, identified the opportunity of value adding to larger southern rocklobsters and have created a range of products based on five years market research and development.

Their ready-to-cook lobster medallions are cut from fresh lobster tails, vacuum-packed in 300 gram servings complete with shell and blast frozen to retain full flavour and texture. Picked lobster is cooked and packaged especially for the consumer seeking a ready-to-use quality product with no fuss.

"We have developed long-term, land-based holding facilities that enable us to keep and feed the lobster we have caught," Mr Ferguson said.

"This allows us to hold for convenience and continuity of supply outside the season."

Previously Ferguson Fisheries had concentrated on the live export market to China, however the company saw the 'gourmet to go' trend emerging in Asia and Europe and with the assistance of an AusIndustry grant, developed the technology to produce their high quality products.

"There has already been a strong response and given initial sales we expect the product range will become a strong export earner over the next few years," said Mr Ferguson.

Notwithstanding Ferguson Australia's unique value-adding and eye-catching packaging, there's another factor the company hopes to push in its marketing: the Australian southern rocklobster itself.

"We've really gone out to brand our species of lobster as we think it should be recognised worldwide."

Where do your southern rocklobster larvae come from?

A new Fisheries Research & Development Corporation funded project is attempting to shed light on the long debated question of where southern rocklobster recruits come from and how some areas of the fishery maintain their populations. The project, lead by CSIRO Marine Research, is a collaborative with SARDI Aquatic Sciences, TAFI, MAFRI and NIWA (New Zealand). It combines sophisticated oceanographic models with knowledge of larval biology to simulate the transport of southern rocklobster larvae by ocean currents across southern Australia.

"Southern rocklobsters have an offshore larval phase lasting up to two years, one of the longest of any of the world's lobster species," said CSIRO's Barry Bruce who leads the project.

"This provides ample opportunities for larvae to be transported from one management zone and state to another."

Although it is generally accepted that recruits (under size) to each zone may come from other zones, there is currently no information available to assess this and thus provide a more targeted approach to managing

spawning stock biomass. Industry, managers and researchers alike, have long been interested in where larvae come from and whether some areas of the fishery are more important in supplying larvae than others.

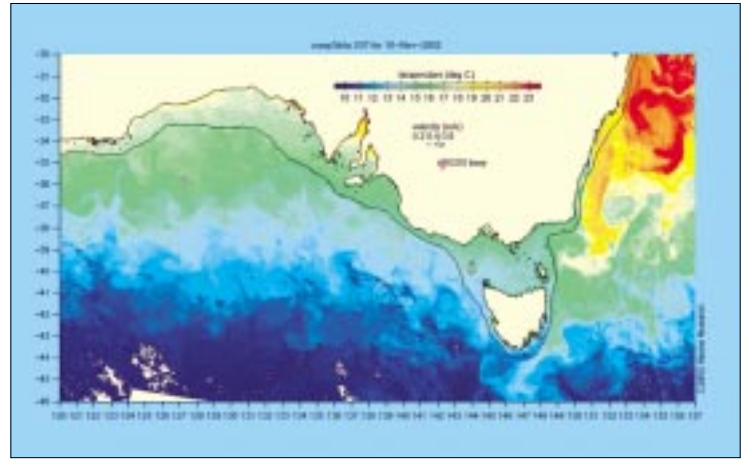
"What happens in the larval phase holds many of the answers," said Mr Bruce.

"Recent developments in modeling techniques now give us the tools to look at this in a detailed way".

The two and a half year project is now entering its second year and is producing its first results.

"From what we have seen so far the picture is far more complex than the standard belief that larvae from western areas just get transported to the east," said Mr Bruce

"We see evidence of some larvae moving between zones, both to the east and west and of others recruiting back to their spawning locations, the latter even in areas like the Northern Zone of South Australia".





Moran exits SARLAC to focus on national role

After 10 years as a leader in the South Australia Rocklobster Advisory Council (SARLAC) – the South Australian peak lobster research association and peak industry body - Terry Moran has decided to focus on the wider industry in his role as president of the Australian Seafood Industry Council (ASIC).

Since his election as ASIC president in November 2001, Terry has taken a lead role on national initiatives in many areas including resource sharing, marine protected areas and marine planning.

Mr Moran said that 10 years is enough and is delighted to be making way for Peter Fabris of Southend in South Australia, to take his place within SARLAC.

"The key achievement during my time with SARLAC, was the raising of the lobster industry profile to achieve widespread community recognition of the importance of the industry to the regional economy in South Australia," said Mr Moran.

"This combined with the acceptance of the need for marine planning and government dealing with the impacts of marine protected areas on the industry, is a major step forward. "

"I also have to say hosting the Third International Lobster Congress in Adelaide in 1999 was a turning point for our industry both in South Australia and across the southern rocklobster states and nationally."

"It certainly set the scene for a more cohesive and planned approach to industry management, industry development and industry politics, well beyond the lobster sector."

Nationally Mr Moran is also on the boards of the National Oceans Office advisory group, Seafood Services Australia and the Seafood Council of South Australia. However he still maintains his interest in the lobster fishery operating out of Beachport in South Australia.

"In departing I'm delighted that the new Southern Rocklobster Council has been conceived and formed," said Mr Moran.

"It was a seed sown in 1999 at the Lobster Congress and I'm sure it will be an overwhelming success as the vehicle to further develop the industry in the future."

DEFINITION OF TERMS

(FROM PAGE 01)

- a EconSearch (2003a and 2003b) and ABARE (2003).
- b Exports are identified according to source state, not the state in which the rocklobster was caught. Estimates for SA are final estimates and were sourced from the ABS, as reported in EconSearch (2003a and 2003b). Estimates for Victoria and Tasmania are preliminary estimates as reported in ABARE (2003).
- c SA (EconSearch 2003a and 2003b), Tasmania (Rodney Trelloggin, pers. comm.) and Victoria (Dave Malloy, MAFRI, pers. comm.).
- d 'Other sectors' refers to other industry sectors in state economies, e.g. fish processing and handling, other manufacturing, trade, business and property services, transport and finance. Detailed analysis has been undertaken to estimate the other sector impacts (i.e. the multiplier effects) in South Australia (EconSearch 2003a and 2003b), and these relationships formed the basis of the corresponding estimates for Victoria and Tasmania. As such, they should be regarded as preliminary, 'ball park' estimates.
- e SA (EconSearch 2003a and 2003b). Tasmania, based on 2.7 full-time equivalents (fte) per vessel (Rodney Trelloggin, pers. comm.). Victoria, based on 2.0 fte per vessel (Dave Malloy, MAFRI, pers. comm.).

Output is a measure of the business turnover or gross revenue of an activity. Total output needs to be used with care as it includes elements of double counting.

Employment is a measure of the number of working proprietors, managers, directors and other employees, in terms of the number of full-time equivalent jobs.

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