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**THE FISHING COMMUNITIES
OF THE BRITISH COLUMBIA COAST:
RECENT TRENDS**

Program Planning and Economics Branch
Pacific Region
DFO

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THE FISHING COMMUNITIES OF THE BRITISH COLUMBIA COAST: RECENT TRENDS

EXECUTIVE SUMMARY

1. The purpose of this report is to provide information on recent changes in the regional distribution of Canada's Pacific commercial fishing industry in the 1970s and 1980s. Data on the distribution of fishing licences among coastal communities and the value of the landings of local fishing fleets are examined for regional disparities. The study focuses on the fortunes of fifty coastal communities which depend on commercial fishing to a significant extent. The report provides Department of Fisheries and Oceans managers with a stocktaking of the health of the fishing industry based in the communities of the British Columbia coast. To the extent that the Department has actively promoted the goal of regional development through its fisheries management programs and policies, the study provides information on how successful this has been.

2. Some disproportional regional effects could well be expected, for the last 20 years was a period of rapid change for the Pacific commercial fishing industry. A salmon licence limitation program was introduced in 1969 in a pathbreaking effort to control unwarranted expansion of salmon fleet capacity. The same type of regulatory regime was applied in most of the major fisheries during the 1970s. The study period also encompassed a very dramatic "boom and bust" cycle in industry fortunes, and saw the emergence of important new, non-salmon fisheries. Finally, fisheries management during the 1970s and early 1980s was heavily influenced by ongoing negotiations toward a Canada-US Pacific Salmon Treaty, and was beset by growing domestic conservation problems.

3. To distinguish between fishermen living in more remote coastal areas and those living in urban centres, the study divides the British Columbia coast into two regions, the Coastal Region and the Metropolitan Region. The two regions are separated by a line joining Bamfield on the West Coast of Vancouver Island, to Chemainus on the East Coast of Vancouver Island, to Gibsons on the Sunshine Coast. Fishing vessels are allocated between the two regions according to the homeport information provided in the DFO licence

application file. Coastal Region communities are home base for half the British Columbia commercial fishing fleet.

4. The Coastal Region, the main focus of this study, is disaggregated, in turn, into a number of sub-regions based on DFO Statistical Area boundaries - the North Coast (the Queen Charlotte Islands, the Nass-Skeena, and the Central Coast areas), the South Coast (Johnstone Strait, the East Coast Vancouver Island, and the Sunshine Coast areas) and the West Coast Vancouver Island.

5. Over the period beginning in 1967-72 and ending in 1984, the long-term trend in the total number of British Columbia commercial fishing vessels stayed virtually flat. However, the number of active vessels based in the Coastal Region increased. By 1984, 50 percent of licensed vessels operated out of Coastal Region ports, compared with 42 percent in the 1967-72 period. The decline of the salmon fleet was slower, and the growth of the non-salmon fleet faster, in the Coastal Region. The data document a gradual, on-going decentralization of the British Columbia fishing industry away from the Metropolitan Region.

6. Landed value of Coastal Region fleets also grew faster than that of Metropolitan Region fleets in the same period. By 1984, landed value attributable to Coastal Region fleets had moved to over 45 percent of total landed value, up from 36 percent in the period 1967-72. Real landed value also grew at a significantly faster rate in the Coastal Region compared with the Metropolitan Region. This is to be expected given the relative change in the size of regional fleets. The landed value data thus support the decentralization trend already noted in the fleet data.

7. While fleet and landed value trends both suggest that the Coastal Region gained a larger share of the fishing industry, there is evidence that the income gap between the two regions' fishermen, which favours the Metropolitan Region, widened in recent years. The data suggest a redistribution of low-income vessels from the Metropolitan to the Coastal Region over the period. We may also be seeing a contrary redistribution of high-income vessels (salmon seine vessels) towards the Metropolitan Region.

8. Looking at trends within the Coastal Region, the South Coast and Nass-Skeena (Prince Rupert) areas built up their fishing fleets over the period 1975 to 1984. Other areas, which also tend to be the most remote, did not fare as well. Again, while real landed value was increasing apace in both the Coastal and Metropolitan areas, this trend was not strongly in evidence in the Coastal Region outside the South Coast and the Queen Charlotte Islands area. In fact, real landed value declined in the Nass-Skeena and Central Coast areas of the North Coast, and in the West Coast Vancouver Island Region. Over most of the Coastal Region, average landed value per vessel lagged well behind the Metropolitan Region. The areas with the lowest average landings per vessel were also generally the most remote areas of the coast.

9. The study deals in detail with 50 Coastal Region communities which were identified as having 5 or more active commercial fishing vessels in 1984. For the purposes of analysis, these communities are classified in a number of different ways - by the size of the local

fishing industry (major and minor ports), by gear type, and by the importance of Native ownership.

10. While, on a coastwide basis, the fleet was becoming more decentralized, moving away from the Metropolitan Region, within the Coastal Region itself things were becoming more centralized in major fishing ports. Real landed value trends also diverged, with growth in the landings of fleets based in the major ports, and a decline in landings of fleets based in the minor ports of the Coastal Region. Average landings per vessel based in minor ports continued to be well below that of vessels based in major ports, although the income gap narrowed slightly during the study period.

11. Among minor ports, in the North Coast Region, Hartley Bay and Kitkatla lost 25 percent of their fleets between 1976 and 1984. In South Coast, it was Lund and the Gulf Islands (Galiano, Gabriola and Lasqueti) that suffered major decline. And in the West Coast Vancouver Island Region a similar size of loss was reported by Bamfield and Coal Harbour. Landed value (current dollars) also declined at Kitkatla, Bamfield and Coal Harbour. A number of minor ports bucked this trend and underwent rapid growth. Kelsey Bay, for example, moved to rank 24 in terms of landed value in 1984, from 48 in 1976. However, most of the success stories belonged to South Coast Region ports.

12. Twenty-one (21) ports are identified in the study as major ports, with over 40 active vessels and landings of over \$1 million in 1984. Six (6) are located in the North Coast Region, 12 in the South Coast Region, and 3 in the West Coast Vancouver Island Region.

13. In North Coast, the regional centre, Prince Rupert, recorded a gain in the number of locally-based vessels. Average landed value, both here and in the Queen Charlotte Islands (Masset and Queen Charlotte City/Skidegate), was comparable to the Metropolitan Region. Otherwise, the smaller North Coast communities languished with declining fleets, declining real landed value and some of the lowest average earnings on the coast. Of the 21 major ports, Port Simpson ranked 18, Bella 20, and Bella Coola 21 in terms of landed value per vessel in 1984. Average fishing income in Bella Coola was about one third of that in Prince Rupert. Bella Bella vessels made one half of their Prince Rupert counterparts.

14. In South Coast, we note, as in North Coast, the vitality of the regional centre, Nanaimo, with its growing fleet and high average earnings. Unlike on the North Coast, however, the fishing industry based in many of the other major fishing communities of the South Coast was also growing and prosperous. In most communities - Port Hardy, Alert Bay, Sointula, Quadra Island, Powell River, Comox-Courtenay, Qualicum Beach, Deep Bay and Ladysmith - fleets remained stable or grew, while the trend in real landed value was consistently up. Of all the South Coast communities, only Pender Harbour seemed to decline as a fishing port during the ten year period.

15. The picture for the West Coast of Vancouver Island was more akin to that of the North Coast. The fishing industry based in the regional centre, Port Alberni, was relatively prosperous and growing. Elsewhere, the picture was mixed. The data for Tofino show modest growth. At Ucluelet, however, the emerging pattern was one of declining fleet size and real landed value. With respect to landed value per vessel, Port Alberni, Tofino and

Ucluelet, ranked 8th, 11th and 16th among the 21 major fishing communities under study.

16. When major port data are reclassified by predominant gear type, the results are consistent with trends in fisheries management during the study period. Given Canadian actions taken to "encourage" the US to sign the Pacific Salmon Treaty, we would expect to see the troll and mixed ports benefitting from relatively unfettered troll regulations - but surprisingly, the benefits seem to have been concentrated in the South Coast and the Queen Charlotte Islands. The local West Coast Vancouver Island fleet was not able to take advantage of the situation to the same extent. Within the net fleet, the data confirm what many observers claimed in the early 1980s - namely, that the gillnet fleet, and by extension the communities which rely on gillnetting, were suffering economic hardship.

17. The resilience of the Coastal Region fisheries economy was attributable, at least in part, to the gain in the size of the Native fleet. Real landed value attributable to the Native fleet also increased. The data for 7 ports designated as "Native ports" displayed similar trends, including a significant growth in real average landed value per vessel. These results suggest that federal policies to enhance the Native commercial fishery have been relatively successful. However, outside of Prince Rupert (Nass-Skeena) and South Coast, Native vessels continue to be low earners, with average landed value about half the coastwide figure.

18. Previous work in this area has attempted to demonstrate a link between fleet regulatory policy (limited-entry licensing) and regional disparities. The results of the present study demonstrate that while a number of remote fishing communities show signs of decline, many more are expanding their role in the fishing industry. With so many other factors at work, it is not possible to determine the precise, positive or negative role of DFO's fleet regulatory policy. However, to the extent that the Department has had a regional development goal over the past twenty years, the available data suggest that it has been fairly successful in more widely spreading the increasing fisheries wealth among the fishing communities and Indian settlements of the British Columbia coast.

THE FISHING COMMUNITIES OF THE BRITISH COLUMBIA COAST: RECENT TRENDS

1. INTRODUCTION ¹

The purpose of this report is to provide information on recent changes in the regional distribution of Canada's Pacific commercial fishing industry in the 1970s and 1980s. Data on the distribution of fishing licences among coastal communities and the value of the landings of local fishing fleets are examined for regional disparities. The study focuses on the varying fortunes of fifty coastal communities which depend on commercial fishing to a significant extent.

Depending on their size, the coastal communities of British Columbia depend, to varying degrees, on earnings from commercial fishing for their economic base. The cycles in the fisheries economy impact on a substantial portion of local residents, as well as the local business and service sectors. A reduction in fishing income could affect such a community in a number of ways. Since earnings from fishing in small, remote communities are, as we shall see, often substantially lower than in urban and regional centres, many fishermen rely on alternative employment for a significant proportion of their income. When fishing earnings are reduced, these other industries may not be able to provide sufficient income to make up the loss. In order to subsist, fishermen might be forced to move to a larger centre with a more differentiated economic base and opportunities for work. The small community would suffer an economic loss under these conditions. Its fishing revenues would decline, income from secondary employment would decline, and the government revenues attracted to the community by fishing would be lost.

Understanding the critical importance of the fishing industry to the viability of coastal communities, a major goal of the management policy of the Department of Fisheries and

¹ Two previous studies have dealt with the same subject matter. See W.F. Sinclair, The Importance Of The Commercial Fishing Industry To Selected Remote Coastal Communities Of British Columbia, Department of the Environment, 1971. Also, G.K. Warriner and L.N. Guppy, "From Urban Centre To Isolated Village: Regional Effects Of Limited Entry In The British Columbia Fishery", Journal of Canadian Studies, Vol 19, No. 1, Spring 1984.

Oceans (DFO), Pacific Region, over the years has been to protect the social and economic opportunities of isolated British Columbia coastal communities. The Department has long recognized that the social and economic contribution of the fisheries is most starkly drawn in the fishing communities and Indian settlements along the coast, and no major policy change has been made without consideration of its impacts on regional development and Native people. This report provides information on which to base an evaluation of the success of DFO in meeting its regional development objectives.

The following Section documents the economic and political history of the commercial fishing industry in the 1970s and 1980s. Section 3 briefly describes data sources, and Section 4 discusses the regional definitions and community classifications used in the analysis. In order to distinguish between fishermen living in more remote coastal areas and those living in urban centres, a line is drawn across the coast creating two large regions - the Coastal Region and the Metropolitan Region. Section 5 looks at the comparative performance of the fishing industry in each region since the inception of limited-entry licensing in the salmon fishery (1969) through until 1984. In Section 6, distribution patterns are examined within the Coastal Region over the decade 1975 to 1984. Data on the number of vessels, and total and average landed value are presented for the North Coast, South Coast and West Coast Vancouver Island regions, and 7 sub-areas. Section 7 brings the analysis down to the community level, to look at the performance of the commercial fishing industry based in the 21 major ports of the Coastal Region. The Section looks at the relationship between industry performance and the predominant gear type of the local fleet, and also at the relative performance of 29 additional minor fishing ports. With 75 percent of the Native fleet based in Coastal Region communities, this fleet deserves particular attention. This is provided in Section 8. Section 9 summarizes the conclusions of the study. Statistical and technical appendices round out the presentation.

2. BACKGROUND

Some disproportional regional effects could well be expected, for the last 20 years was a period of rapid social and economic change for the Pacific commercial fisheries.

A salmon licence limitation program was introduced in 1969 in a pathbreaking effort to control unwarranted expansion of salmon fleet capacity. By 1987, the salmon fleet had declined dramatically with only about 4300 vessels reporting landings, compared with 6100 in 1969. Moreover, the composition of the salmon fleet had changed dramatically. The powerful seine fleet grew from 369 active vessels in 1969 to 547 vessels in 1987, while the small-boat gillnet and troll fleets declined by 35 percent over the same period. Overall, the number of active vessels in all fisheries rose somewhat in the 1970s and then fell back to 1969 levels. The period was also characterized by a significant growth in participation in non-salmon fisheries, which served to offset the loss in vessels participating in the salmon fishery. These trends are reflected in the data presented in Figure 1.

Figure 1-A Size Of The Fishing Fleet

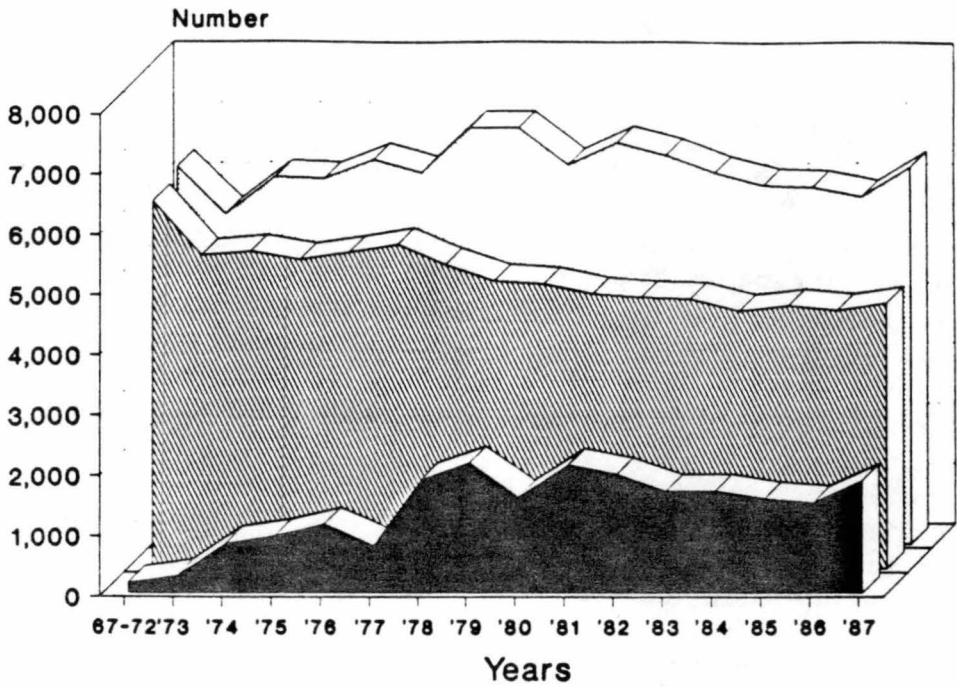
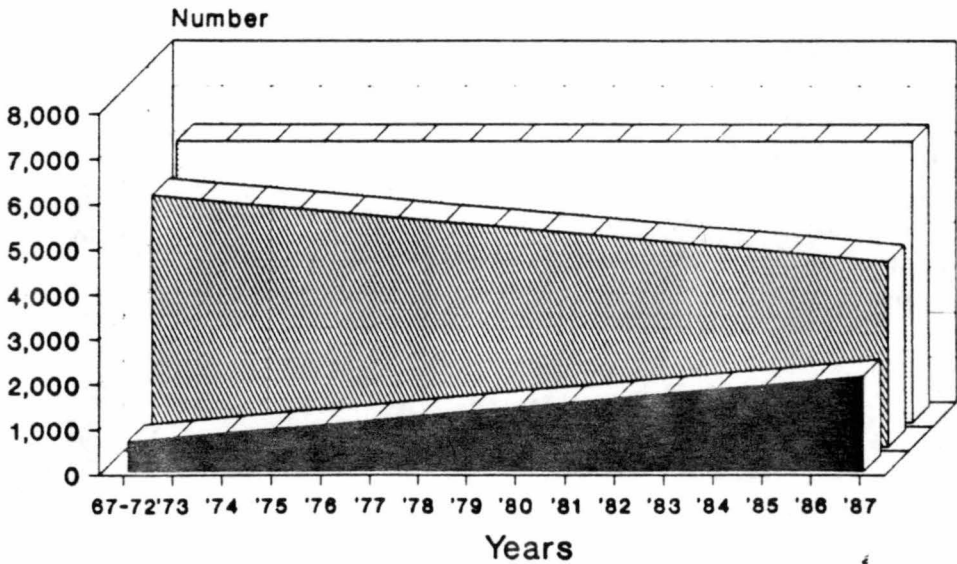


Figure 1-B Size Of The Fishing Fleet - Trends



Non-Salmon
 Salmon
 Total Fleet

Figure 2-A illustrates the changing value of commercial landings since 1969. Over the period, fish prices rose substantially, and the value of landings shows a strong upward trend. The data are less unequivocal, however, when the value of landings is expressed in real dollar terms. See Figure 2-B. In real terms, the overall trend is modestly upward, accounted for almost entirely by strong growth in the real landed value of the non-salmon catch. See Figure 2-C.

Three periods can be distinguished:

- o During the 1970s, the non-salmon fleet grew rapidly, boosting the total active fleet total to over 6900 vessels by 1979. Much of the new participation was linked to the roe herring fishery. This lucrative fishery, along with good catches and high prices for most other species, helped fuel a major investment boom in new fishing capacity which lasted until 1979. Thus, in spite of government efforts (through licence limitation programs in all major fisheries), the capacity of fishing fleets, already excessive in 1969, doubled or perhaps trebled by 1980.² Much of the investment was made with borrowed money tied to the prevailing bank short-term interest rate.
- o In the early 1980s, the period of expansion ended, as area licensing in the roe herring fishery helped collapse the active roe herring fleet, and generally poor economic conditions resulted in attrition in most fisheries. Beginning in 1980, fish price increases abated, and for some species prices actually declined. Salmon catches were also down, and the value of the ancillary roe herring fishery collapsed. As a result, the fleet no longer made the high incomes it had enjoyed in the late 1970s. The early 1980s were also a period of fast rising interest rates which peaked at close to 25 percent in the summer of 1981. High interest rates, in concert with reduced earnings and escalating fuel prices, resulted in up to 20 percent of the fishing fleet being in serious financial trouble. The five years, 1980 to 1984, were a period of very poor earnings for the fleet as a whole.³
- o The year 1985 saw an upturn in fortunes with record landed value reported in each of the succeeding three years. The industry, in this period, can be described as buoyant, prosperous and healthy. The shakeout of the early 1980s has left the sector, at least for now, with an improved capital structure and a reasonable profit position.

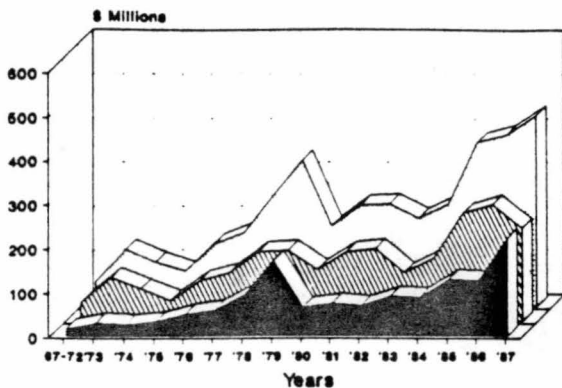
The question examined in this report, is whether this turbulent recent economic history has been prejudicial to small, coastal fishing communities.

A major political issue - the negotiation of the Canada-US Pacific Salmon Treaty - dominated the late 1970s and early 1980s. Although the two countries did not get to the stage of declaring a "fish war", Canada increased its fishing pressure on Fraser River stocks

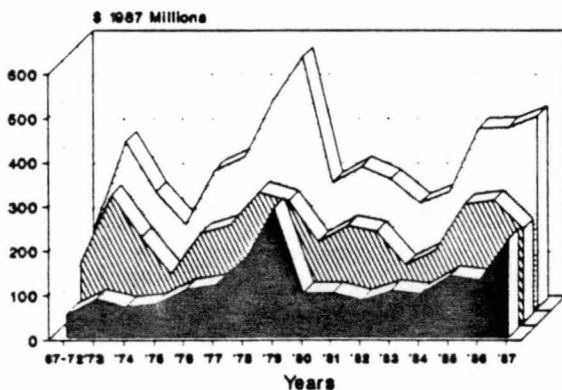
² P.H. Pearse and J. Wilen, "Impact of Canada's Pacific Salmon Fleet Control Program", Journal of the Fisheries Research Board of Canada, Vol. 36, No. 7, 1979, pp 764-769.

³ For a detailed analysis of this period, see DPA Group Inc, British Columbia Salmon Fleet Financial Performance, 1981-1985, prepared for DFO, 1988.

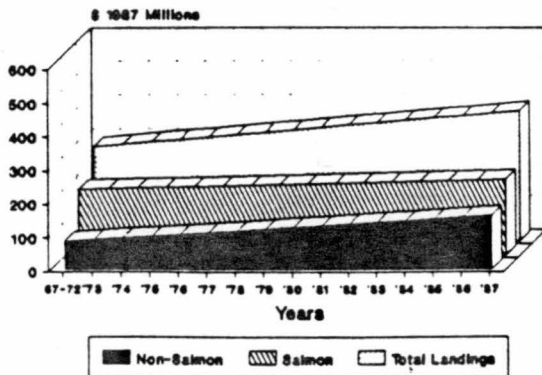
**Figure 2-A Landed Value
In Current Dollars**



**Figure 2-B Landed Value Expressed in
Constant 1987 Dollars**



**Figure 2-C Landed Value Expressed in
Constant 1987 Dollars - Trends**



through fishing outside of the Convention area, as well as on US coho and endangered chinook stocks. This proved to be a bonanza for Canadian trollers, who were largely unfettered throughout the period. At the same time, domestic conservation concerns were beginning to severely restrict net openings.⁴ It could be expected that the particular fisheries management strategies employed by DFO during this period might have had an important impact on the distribution of the fishing fleet and fishing income among coastal communities.

3. DATA

The data in this report are based on special reports produced from DFO catch and licensing statistics files:

- o The licence data file is compiled from the information contained in each year's approved licence applications for all Pacific fisheries. Aside from containing the Commercial Fishing Vessel (CFV) number, and the licences held, the file provides a variety of information on the vessel and its owner, including the band number of Native vessel owners, the vessel's homeport, and the owner's place of residence.
- o The catch statistics file contains records of each sale made by a licensed vessel in a particular year. Information is available by CFV number for area of catch, gear used, and landed value.

From 1975 to 1981, and in 1984, the Small Craft Harbours Branch of DFO, Pacific Region, combined these data sources to produce a computerized Homeport Statistics Report listing all the ports on the coast, a count of locally-based vessels, and the landed value reported by these vessels. Unfortunately, homeport data were not keypunched for 1982 or 1983, so no Homeport Statistics Reports were run for those years. After 1984, the question of homeport location was dropped from the licence application form.⁵

The data are not complete enough to allow easy compilation of time series data. Ideally, data for four year periods, beginning with the advent of limited-entry licensing, say from 1967-1970, up to the most recent four year period, would be required to fully analyze trends in the regional distribution of the fishing industry.⁶ This is clearly not possible as the

⁴ G. Munro and R. Stokes, The Canada - United States Pacific Salmon Treaty, unpublished manuscript prepared for the Workshop On Canadian Oceans Policy, 1988.

⁵ An indication of homeport will be restored to the licence application form beginning with the 1990 licence year.

⁶ Analysis based on four year periods is standard procedure to account for the natural variability of salmon stock abundance.

earlier data were not computerized, and the most recent data are incomplete.

The trade-off between completeness and research time available was resolved by constructing the equivalent of a Homeport Statistics Report for 1983. Two sets of data for comparable cycle years are thus available for analysis of trends - 1975/1979/1983 and 1976/1980/1984. The former represents the traditionally poor year of the salmon cycle, and the latter the traditional sub-dominant year. In comparing results for the Coastal and Metropolitan Regions, in Section 5, below, it was also possible to include baseline data for the period 1967-72. The small area and community analysis of Sections 6 and 7, however, is based on 6 years of data only.

The choice of these years for analysis may be dictated by data availability, but it also leaves the report open to criticism. The late 1970s and the early 1980s were certainly a volatile period, covering a major boom and bust cycle in the Pacific commercial fisheries. The only counter to this, is that the fisheries are inherently volatile, and it would be difficult to agree on any set of years as somehow representative. Anybody close to the recent discussions on salmon catch allocation, for example, which are tasked with identifying "a base period", on which to make reasonable current allocation decisions, knows the difficulties that are involved in reaching consensus on what years constitute "typical" experience in this industry. The reader is thus encouraged to see this report as, first and foremost, a set of information, and to view the interpretation of the data with a sceptic's eye.

This is particularly true of the trend data, which is presented in many of the graphs, and which uses a Least Squares Linear Regression technique. The use of a trend line is problematic where there are few data points (as noted above, this analysis often covers as few as 6 data points), and where the data are highly variable (which is particularly true for landed value data over the period).

In the presentation, which follows, landed value data are presented in current-year dollars. Trends are shown in constant 1987 dollars.

4. DEFINITION OF REGIONS

To distinguish between fishermen living in more remote coastal areas and those living in urban centres, the British Columbia coast has been divided into two regions, the Coastal Region and the Metropolitan Region. In broad terms, the two regions would be separated by a line joining Bamfield on the West Coast of Vancouver Island, to Chemainus on the East Coast of Vancouver Island, to Gibsons on the Sunshine Coast. Fishing vessels have been allocated between the two regions according to the homeport information provided

in the licence application form.⁷

The Coastal Region, which is the focus of the present analysis, has been disaggregated, in turn, into a number of sub-regions based on DFO Statistical Area boundaries. The North Coast consists of the Queen Charlotte Islands, the Nass-Skeena, and the Central Coast areas; the South Coast consists of Johnstone Strait, the East Coast Vancouver Island, and the Sunshine Coast. No sub-regional breakdown is provided for the West Coast Vancouver Island. Thus

<u>REGION</u>	<u>DFO STATISTICAL AREAS</u>	<u>1983 FLEET</u>
1. <u>COASTAL REGION</u>	<u>1-17;21-27;28(Gibsons)</u>	<u>3088</u>
(a) NORTH COAST:	1-10	970
- Queen Charlotte Islands	- 1-2	
- Nass-Skeena	- 3-5	
- Central Coast	- 6-10	
(b) SOUTH COAST:	12-17;28(Gibsons)	1613
- Johnstone Strait	- 12-13	
- East Coast Vancouver Is	- 14;17	
- Sunshine Coast	- 15-16;28(Gibsons)	
(c) WEST COAST VAN IS:	21-27	505
2. <u>METROPOLITAN REGION</u>	<u>All Other Areas</u>	<u>3089</u>

Coastal Region communities were home base for half the British Columbia commercial fishing fleet in 1983. Somewhat over one half of Coastal Region vessels were based in South Coast, shy of one third were based in North Coast, and the remaining sixth of the fleet was based in West Coast Vancouver Island fishing ports.

⁷ The principal community in which a fisherman resides is generally the same place, or one nearby, where the boat is tied up. This is true approximately 90 percent of the time. Reperforming the analysis based on the owner's address as the basis for classification, rather than homeport, would make very little difference to the results presented here.

5. OVERVIEW OF FISHING INDUSTRY TRENDS IN THE COASTAL AND METROPOLITAN REGIONS, 1967-72 to 1984

FLEET SIZE

Figure 3-A illustrates changes in the size of the Pacific commercial fishing fleet over time, and the broad regional changes which have occurred vis-a-vis the Coastal and Metropolitan Regions. While the trend data in Figure 3-B suggest that the total number of vessels making landings has been virtually flat over the long-term, the number of licensed vessels based in the Coastal Region has increased. By 1984, 50 percent of licensed vessels operated out of Coastal Region ports, compared with 42 percent in the 1967-72 period. The decline of the salmon fleet has been slower, and the growth of the non-salmon fleet faster, in the Coastal Region. See Figure 4. The data suggest a gradual decentralization of the British Columbia fishing industry in the period under discussion.

LANDED VALUE

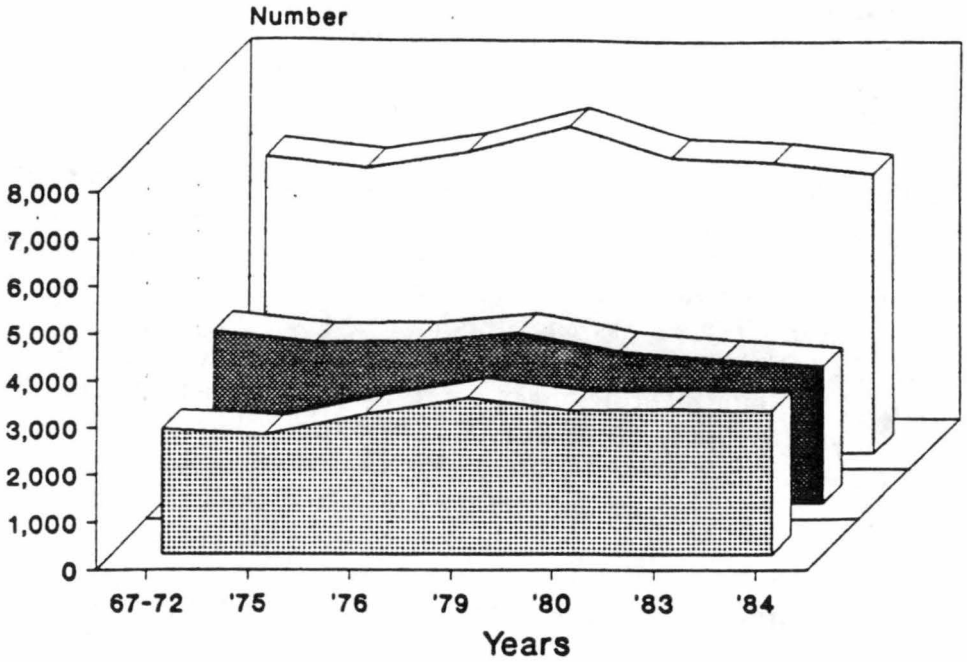
Figure 2, above, illustrated the change in the landed value of the Pacific commercial fishing fleet over time. As already noted, fish prices rose considerably over the 1970s and again after 1984, and this shows in the strong upward trend in landed value. Total landed value increased from \$58 million in the period 1969-1972, to over \$400 million in 1987. Of this increase, \$170 million was associated with salmon, and \$207 million with non-salmon fisheries.

The data presented in Figure 5-A, demonstrate that the earnings of vessels based in the Coastal Region increased from \$20.75 million over the period 1967-1972, to \$108.3 million in 1984, an increase of 422 percent. The same figures for the Metropolitan Region were \$37.25 million and \$129.7 million, an increase of 248 percent. In 1984, just over 45 percent of fleet landed value was associated with licensed vessels operating out of Coastal Region ports, compared with 36 percent in the 1967-72 period. These trends are presented in Figure 6-B, in terms of 1987 constant dollars. The general conclusion is that landed value of Coastal Region fleets grew faster in the study period than that of Metropolitan Region fleets. The landed value data thus corroborate the decentralization trend already noted in the vessel data.

AVERAGE LANDED VALUE OF VESSELS

While the trends noted to this point tend to favour the Coastal Region in comparison to the Metropolitan Region, Figure 6-A demonstrates that the gap in average landed value between Coastal and Metropolitan Region vessels is significant and widening. Average landed value of Coastal Region vessels increased from \$7,883 in 1967-72, to \$35,551 in 1984. The corresponding numbers for Metropolitan Region vessels were \$10,239 and \$44,380. The trends are displayed in Table 6-B in 1987 constant dollars and point to the gap in average landed value, in real terms, growing slightly over the period.

**Figure 3-A Size Of The Fishing Fleets
In The Coastal And Metropolitan Regions**



**Figure 3-B Size Of The Fishing Fleets
In The Coastal And Metropolitan Regions
- Trends**

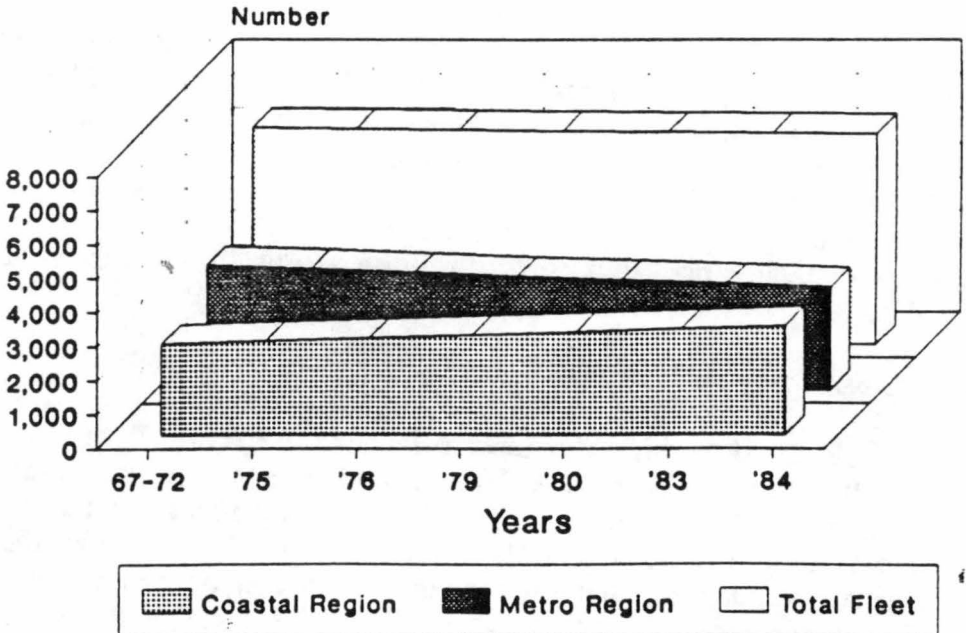


Figure 4-A Size Of The Salmon Fleet In The Coastal And Metropolitan Regions

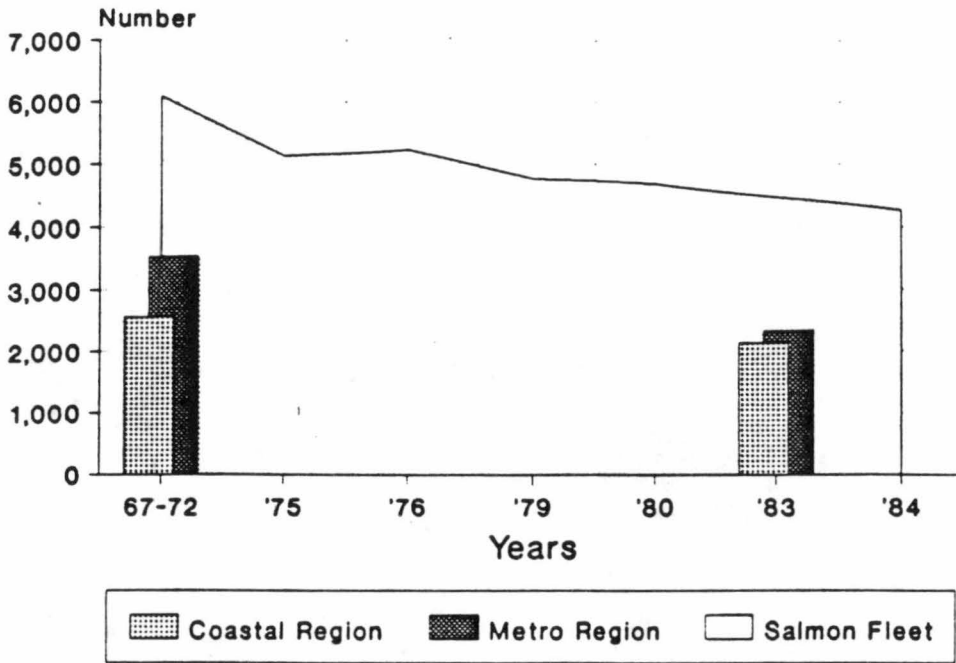
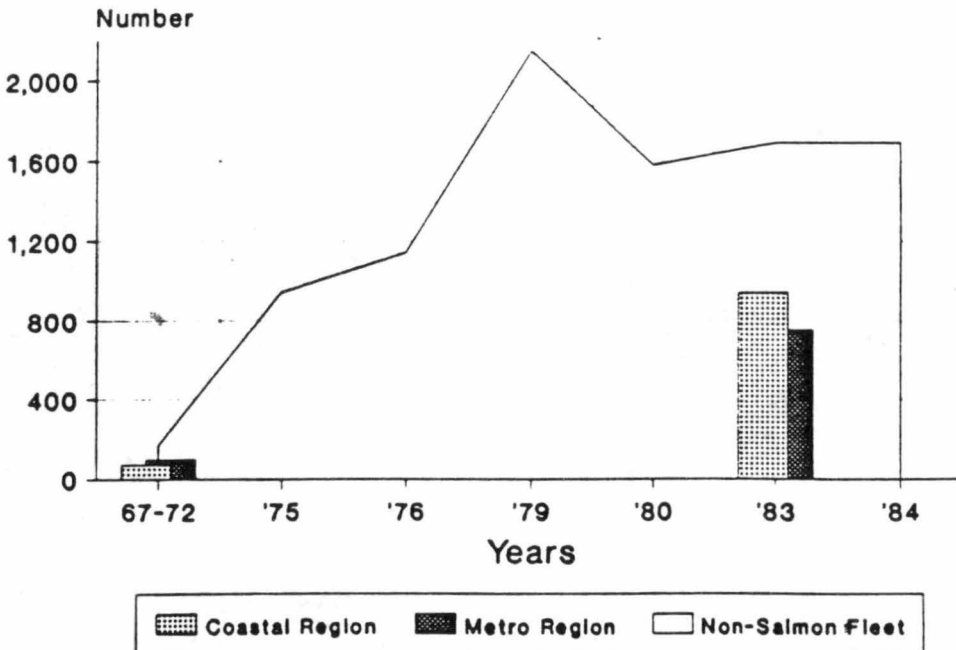
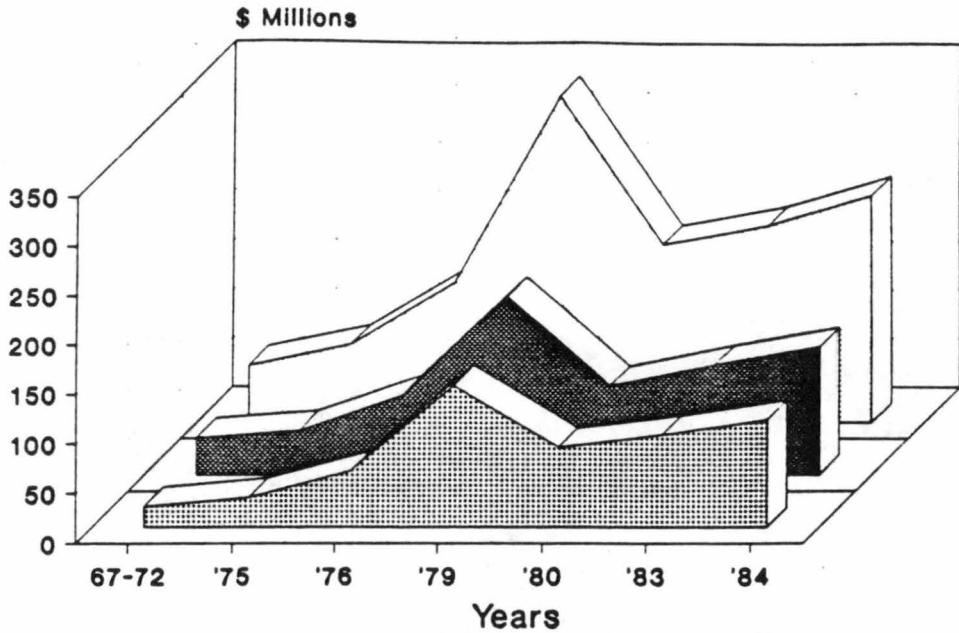


Figure 4-B Size Of The Non-Salmon Fleet In The Coastal And Metropolitan Regions



**Figure 5-A Landed Value Of Fleets
In The Coastal And Metro Regions -
Current Dollars**



**Figure 5-B Landed Value Of Fleets
In The Coastal And Metro Regions -
Constant 1987 Dollars - Trends**

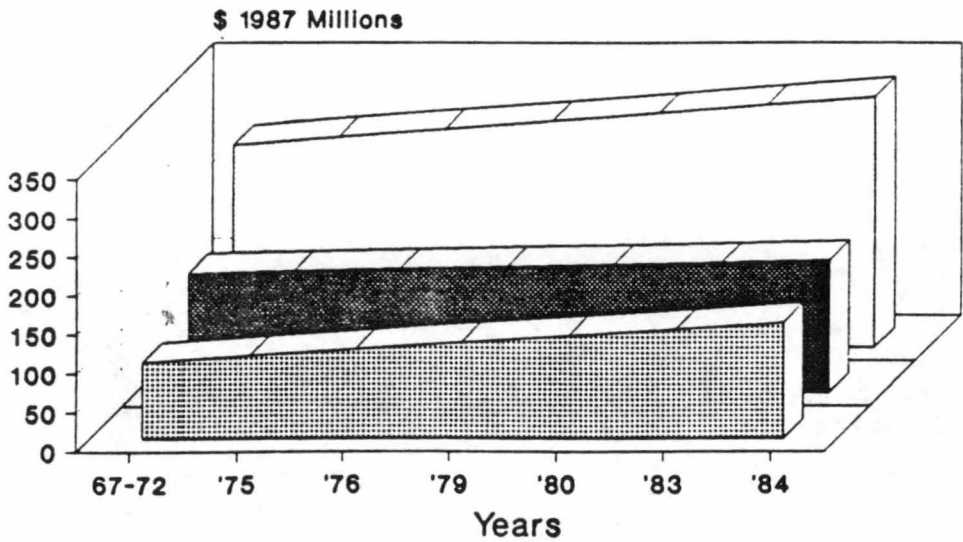


Figure 6-A Average Landed Value Per Vessel In The Coastal And Metro Regions- Current Dollars

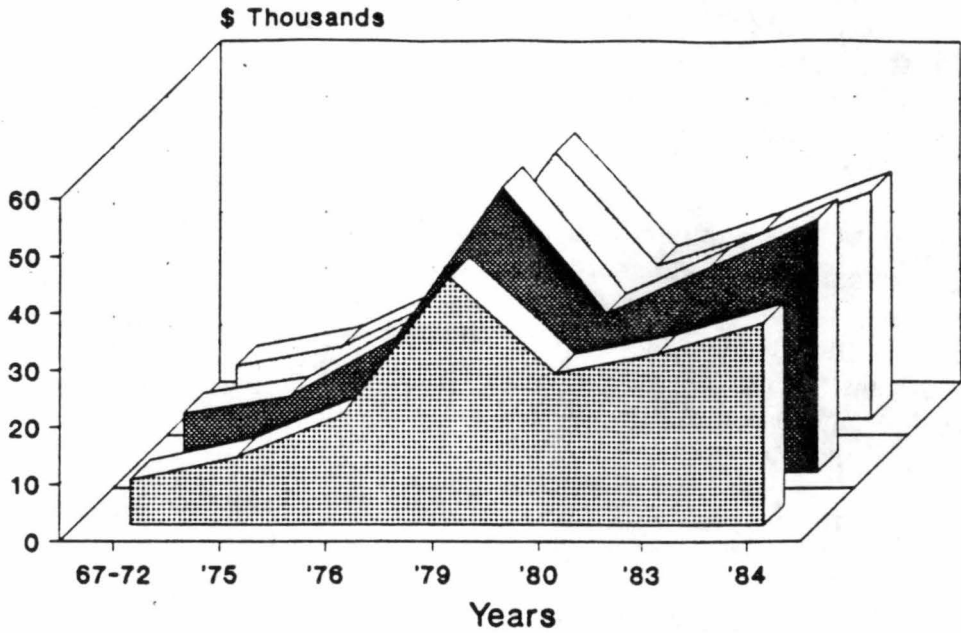
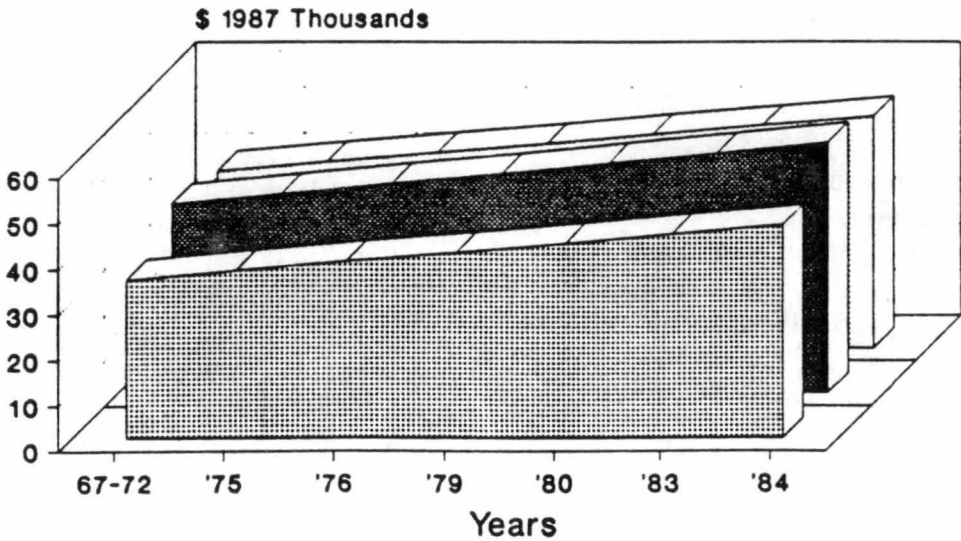


Figure 6-B Average Landed Value Per Vessel In The Coastal And Metro Regions- Constant 1987 Dollars - Trends



Part of the explanation for continuing regional disparities in average landed value lies in the geographic distribution of the high-earning seine fleet. While half of all commercial fishing vessels are based in the Coastal Region, only 40 percent of the salmon seine fleet are located there. See Figure 7. Also, average vessel landed value is significantly lower for salmon vessels in the Coastal Region, across all gear types. Coastal Region non-salmon vessels, however, do better than their Metropolitan Region counterparts. Data for 1983 are presented in Figure 8.

In summary, while fleet numbers and total landed value trends suggest that the Coastal Region has been gaining a larger share of the fishing industry, average landings data suggest that an increasing percentage of highliners are based in the Metropolitan Region. There is evidence that the income gap between the two regions has widened in recent years, suggesting a redistribution of low-income vessels from the Metropolitan Region to the Coastal Region, and possibly, contrarily, a redistribution of high-income vessels (salmon seine vessels) to the Metropolitan Region.

6. FISHING INDUSTRY TRENDS WITHIN THE COASTAL REGION, 1975-1984 ⁸

In Figure 9, we begin to look at the changes in the fishing industry within the Coastal Region during the decade 1975 to 1984. Data on the number of fishing vessels based in North Coast, South Coast and West Coast Vancouver Island ports indicate relatively rapid growth in the South Coast fleet, with a fairly flat situation elsewhere. Figure 10-A presents landed value results over the same period. The South Coast again posts significant gains. The trend for the remaining sub-regions actually shows a decline in landed value in constant dollars. See Figure 10-B.

Looking more closely at the North Coast, Figures 11 and 12 present data for the Queen Charlotte Islands, the Nass-Skeena and the Central Coast areas. Earlier, we noted that, overall, the North Coast region reported a relatively flat situation with respect to both fleet size and real landed value. The indicators for the Nass-Skeena (Prince Rupert), the largest of its component areas, are a little more complex. While the trend in the local fleet was up, the trend in real landed value was down slightly. For the Queen Charlotte Islands, however, the reverse was true. Fleet size was down, but real landed value was fairly strongly up, probably reflecting improved fishing opportunities for the local troll fleet. For the Central Coast the indicators were fairly gloomy - the trends show a declining fleet, and flat or declining real landed value.

Figures 13 and 14 show the trends in the various areas of the South Coast. With respect

⁸ This and the following Section present data for 6 years -1975/76, 1980/81, and 1983/84. Although trend data are presented and discussed, they should be interpreted with caution, especially trend data on landed value which are often extremely volatile.

Figure 7 Structure Of The Fleets By Gear Type In The Coastal And Metropolitan Regions, 1983

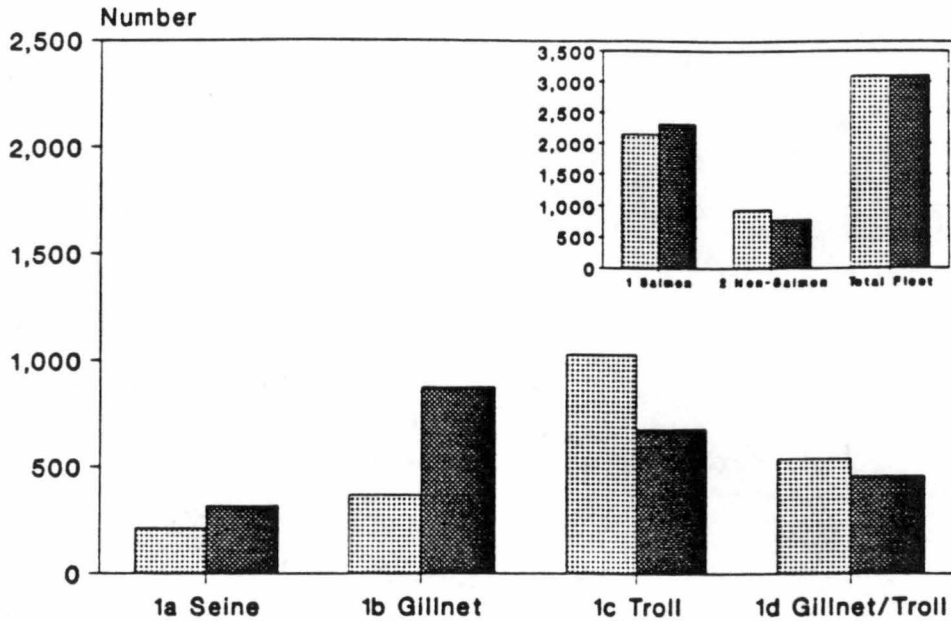


Figure 8 Average Landed Value Per Vessel By Gear Type In The Coastal & Metropolitan Regions, 1983

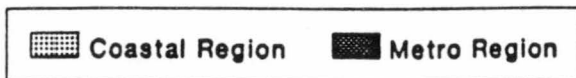
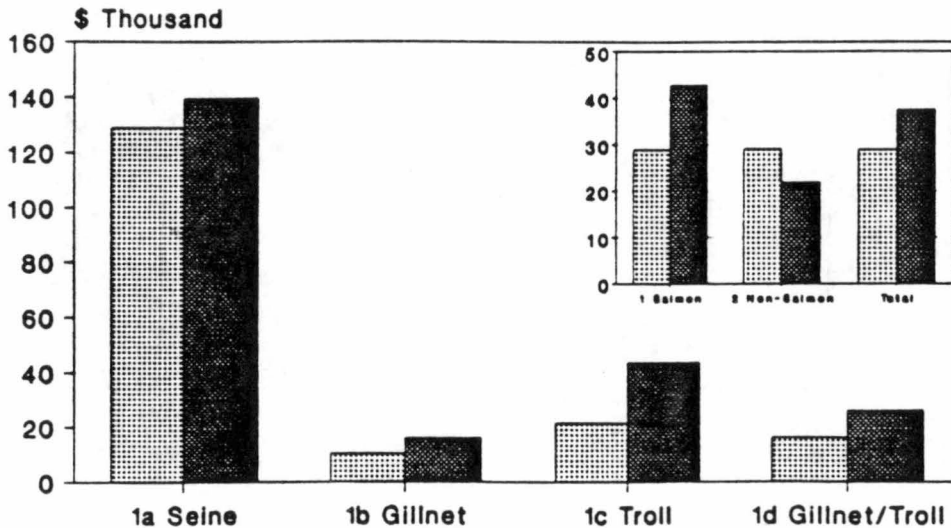


Figure 9-A Size Of The Coastal Region Fishing Fleets

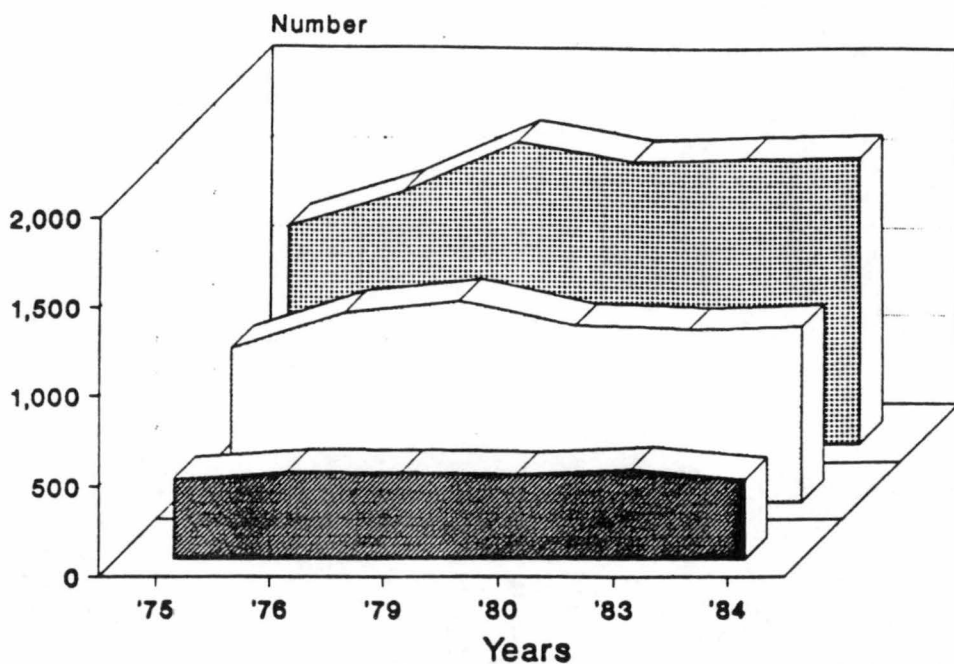


Figure 9-B Size Of The Coastal Region Fishing Fleets - Trends

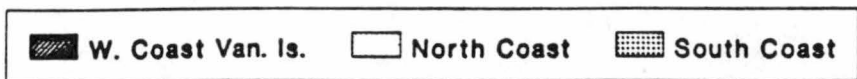
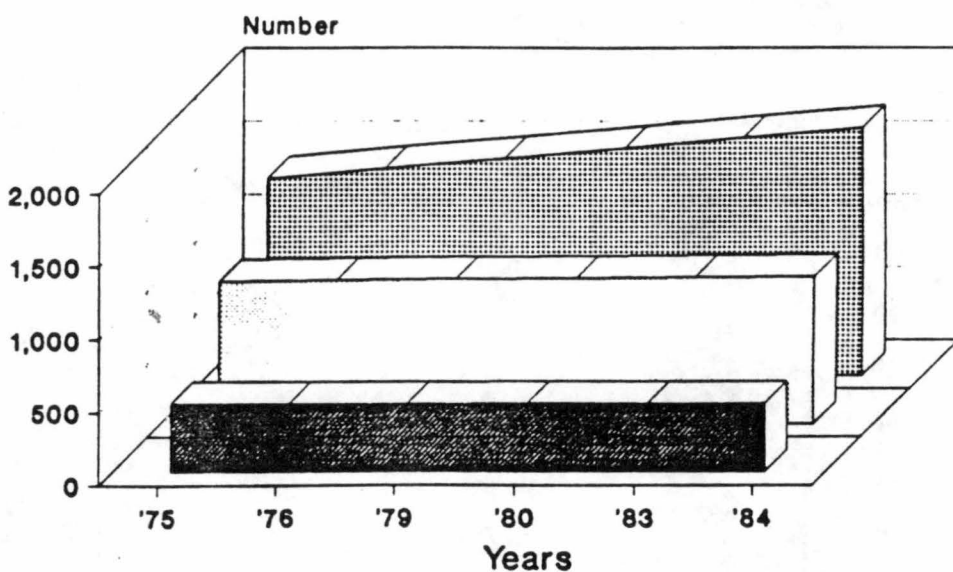


Figure 10-A Landed Value Of The Coastal Region Fleets In Current Dollars

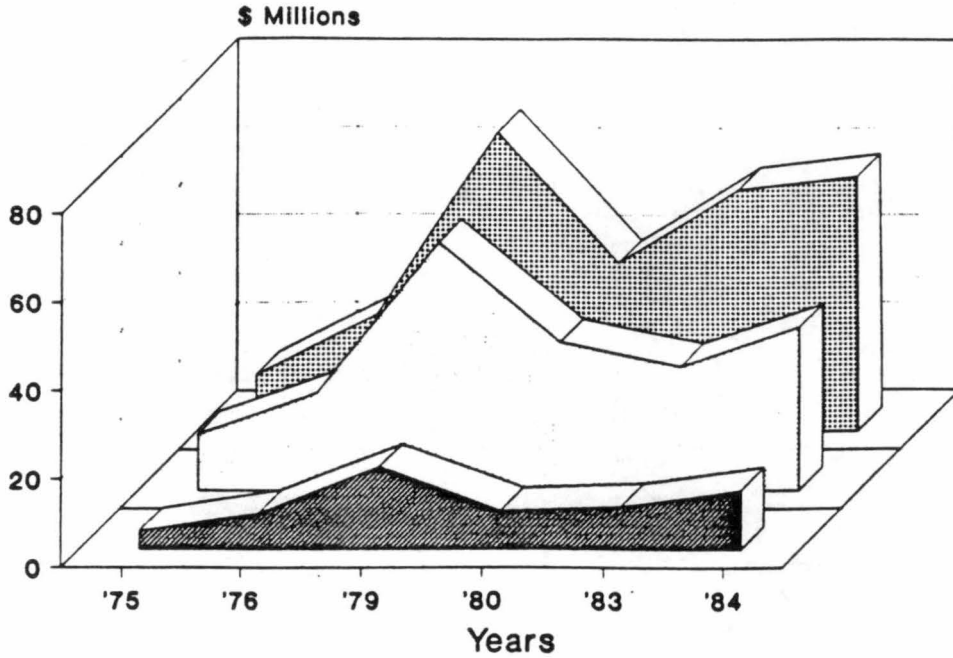
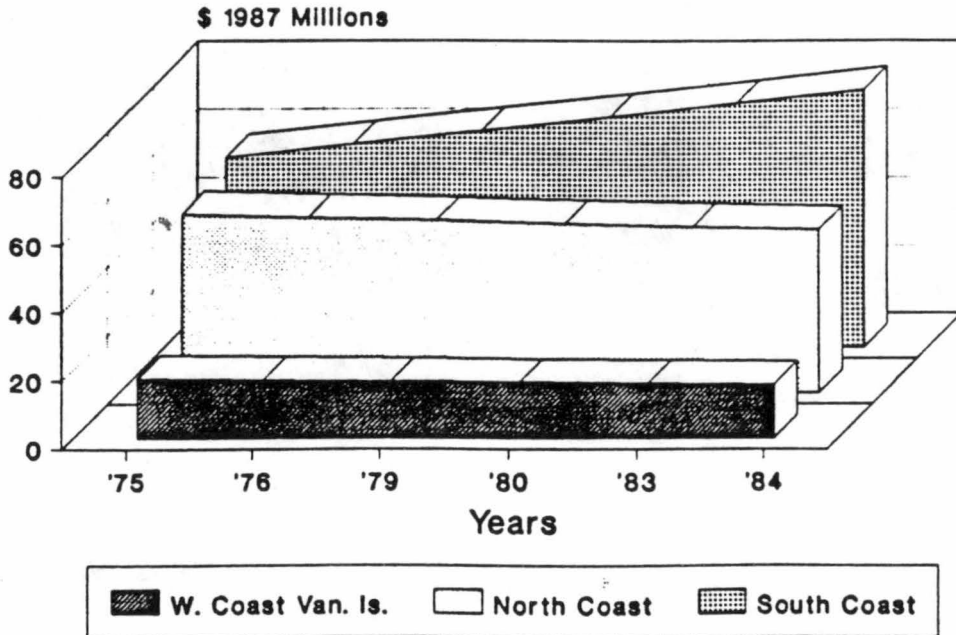


Figure 10-B Landed Value Of The Coastal Region Fleets - Constant 1987 Dollars - Trends



W. Coast Van. Is.
 North Coast
 South Coast

Figure 11-A Size Of The North Coast Fishing Fleets

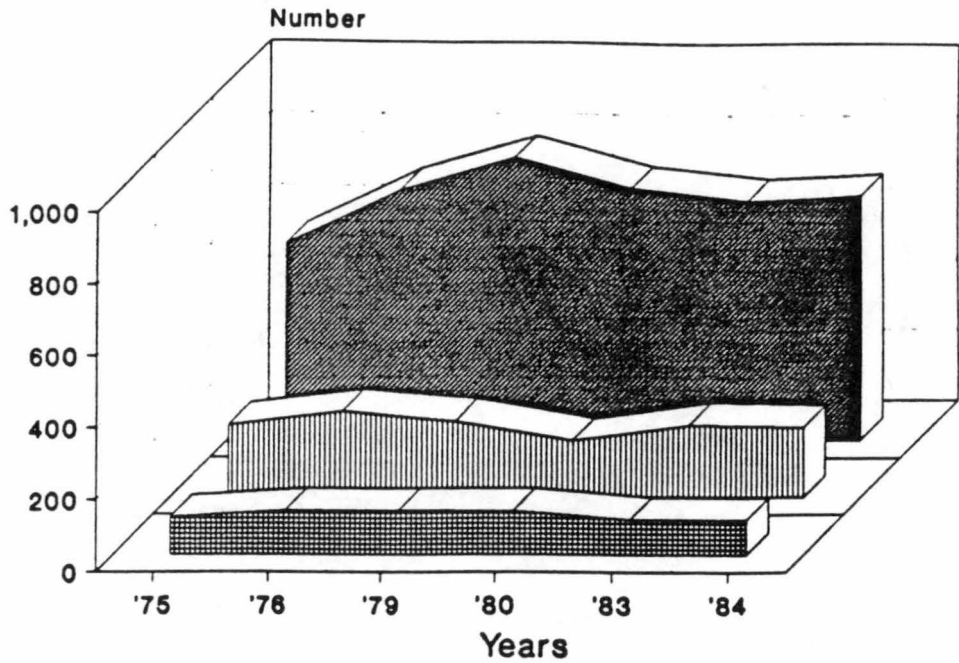
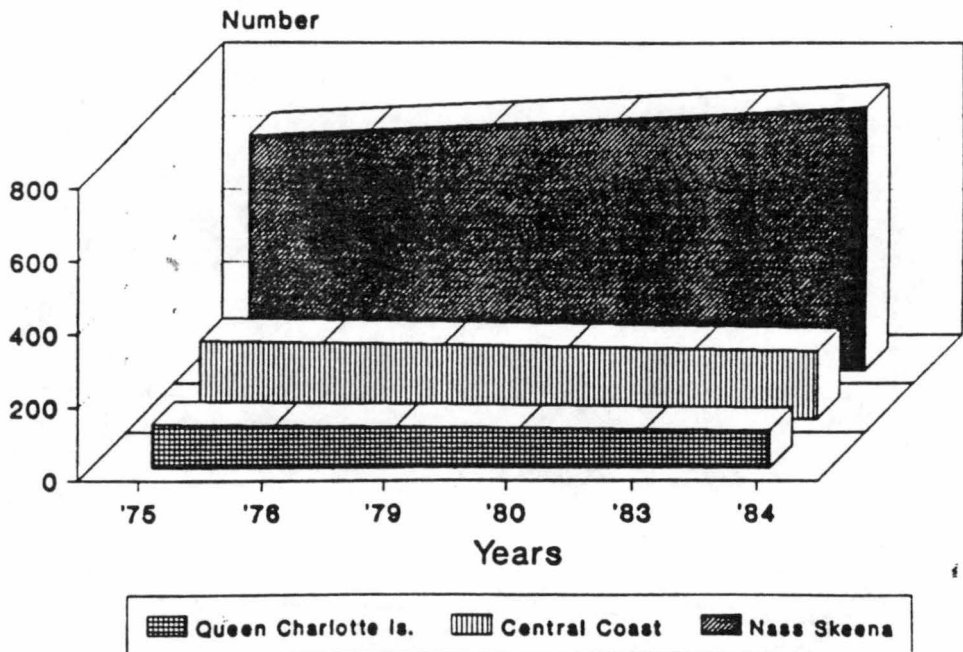


Figure 11-B Size Of The North Coast Fishing Fleets - Trends



Queen Charlotte Is.
 Central Coast
 Nass Skeena

Figure 12-A Landed Value Of The North Coast Fleets In Current Dollars

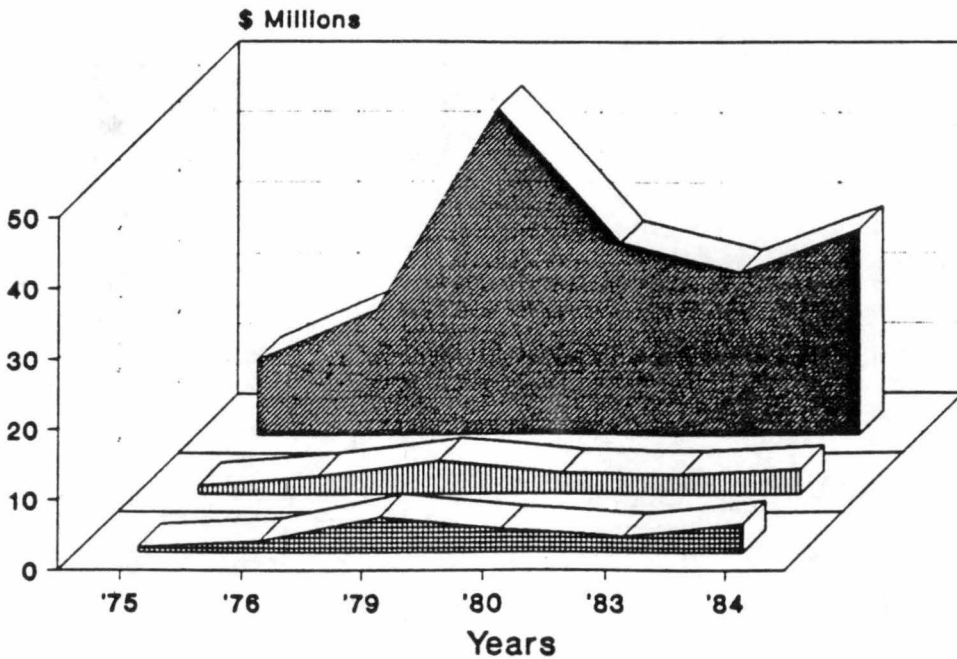
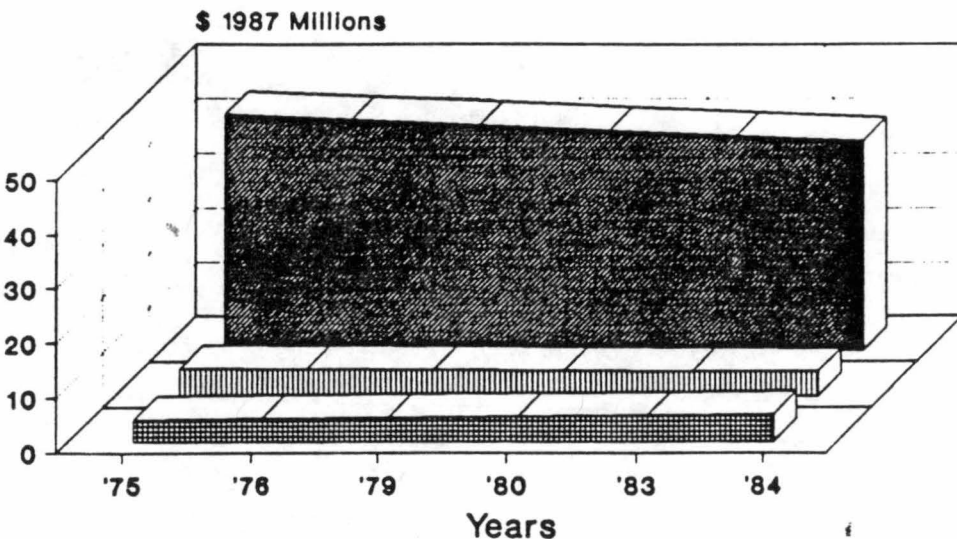


Figure 12-B Landed Value Of The North Coast Fleets - Constant 1987 Dollars - Trends



Queen Charlotte Is.
 Central Coast
 Nass Skeena

Figure 13-A Size Of The South Coast Fishing Fleets

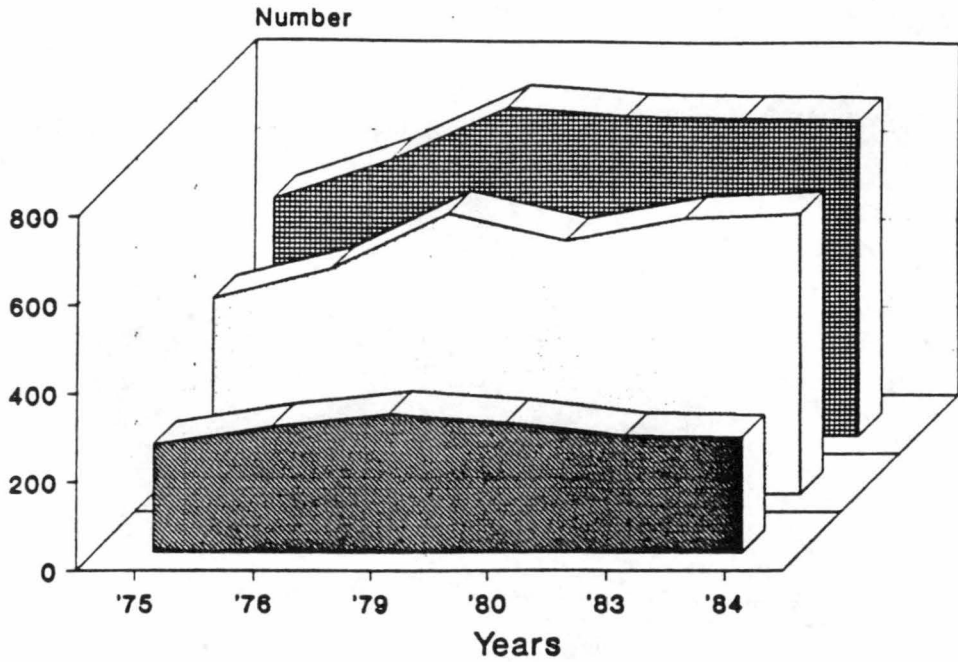
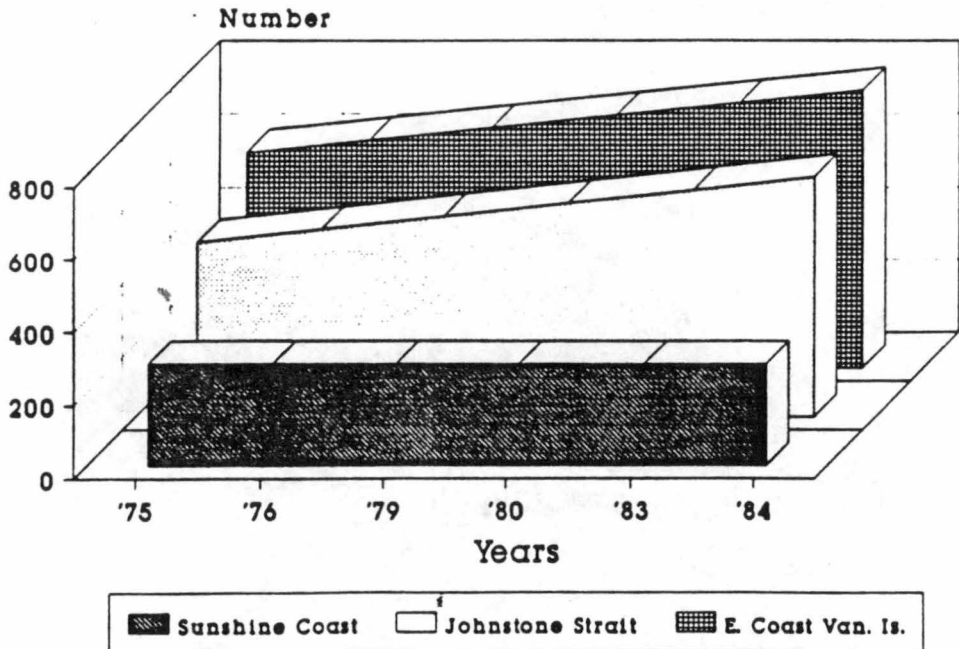


Figure 13-B Size Of The South Coast Fishing Fleets



Sunshine Coast
 Johnstone Strait
 E. Coast Van. Is.

Figure 14-A Landed Value Of The South Coast Fleets In Current Dollars

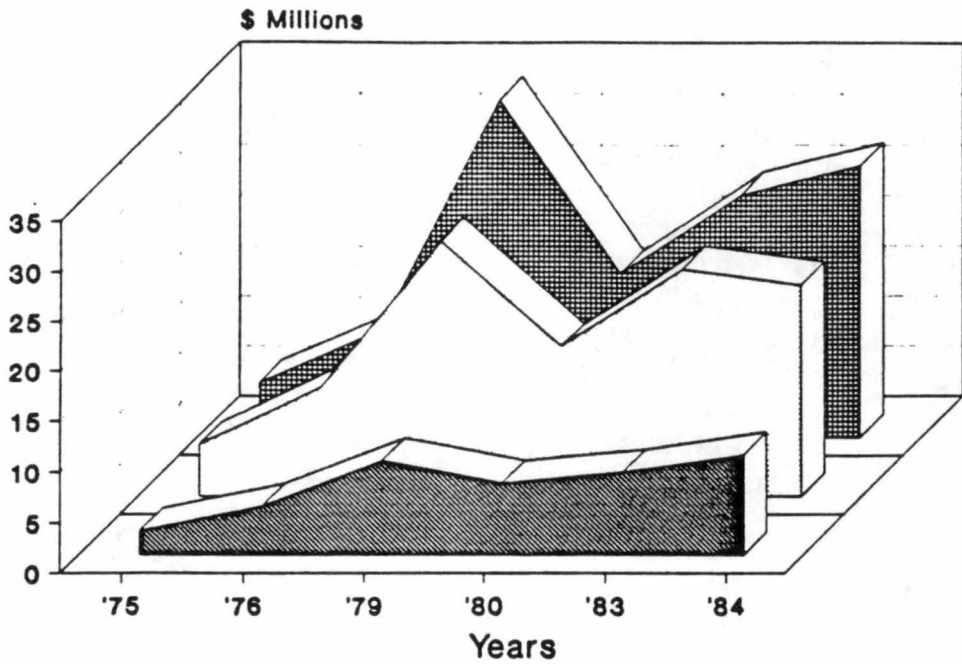
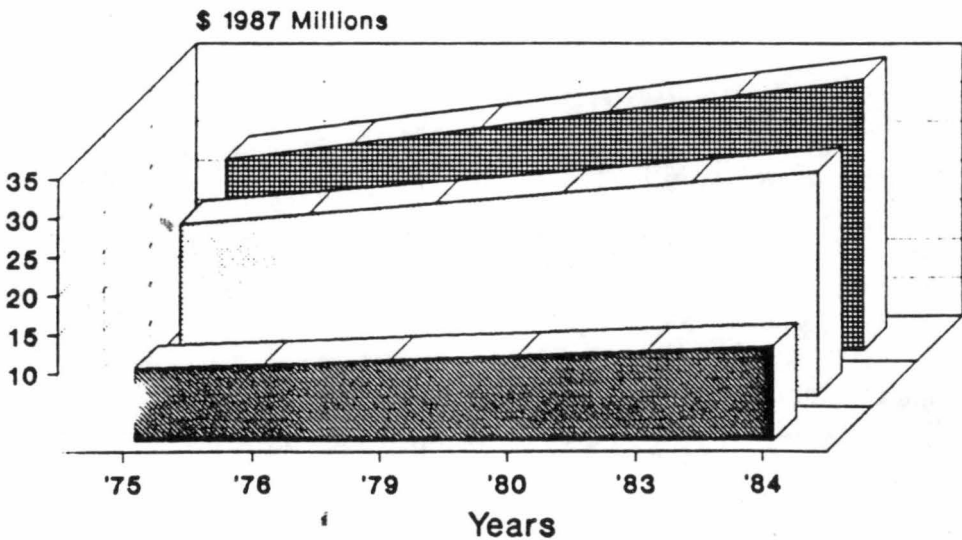


Figure 14-B Landed Value Of The South Coast Fleets - Constant 1987 Dollars - Trends



Sunshine Coast
 Johnstone Strait
 E. Coast Van. Is.

to fleet size, the trend is unequivocally and strongly up for both the Johnstone Strait and East Vancouver Island areas, with a flatter trend for the Sunshine Coast. The real landed value trends indicate significant growth in all 3 sub-areas.

The West Coast Vancouver Island region has not been broken down into sub-areas. The data from Figures 9 and 10 show fleet size and landed value to be fairly flat, or declining, which is different from the overall positive trends in the Coastal Region as a whole, but not dissimilar to the situation in North Coast.

Figure 15 presents data for landed value per vessel across the Coastal Region during the period 1975 to 1984. Metropolitan Region vessels, as noted earlier, are more productive than Coastal Region vessels in most years. Only North Coast vessels begin to approach their Metropolitan counterparts in terms of average landed value. West Coast Vancouver Island vessels lag considerably behind. South Coast vessels lie somewhere in between. Again, part of the explanation lies in a concentration of low-productivity vessels in the Coastal Region, and part lies in the fact that within each salmon gear type productivity is lower for Coastal Region vessels.

In summary, the South Coast and Nass-Skeena (Prince Rupert) areas built up their fishing fleets over the period 1975 to 1984. Other areas, which also tend to be the most remote, did not fare as well. While real landed value was increasing apace in both the Coastal and Metropolitan areas, this trend was not strongly in evidence in the Coastal Region outside South Coast and the Queen Charlotte Islands area of North Coast. In fact, real landed value declined in the Nass-Skeena and Central Coast areas of North Coast, and in the West Coast Vancouver Island Region. Over most of the Coastal Region, average landed value per vessel lagged well behind the Metropolitan Region. The areas with the lowest average landings per vessel were also generally the most remote areas of the coast.

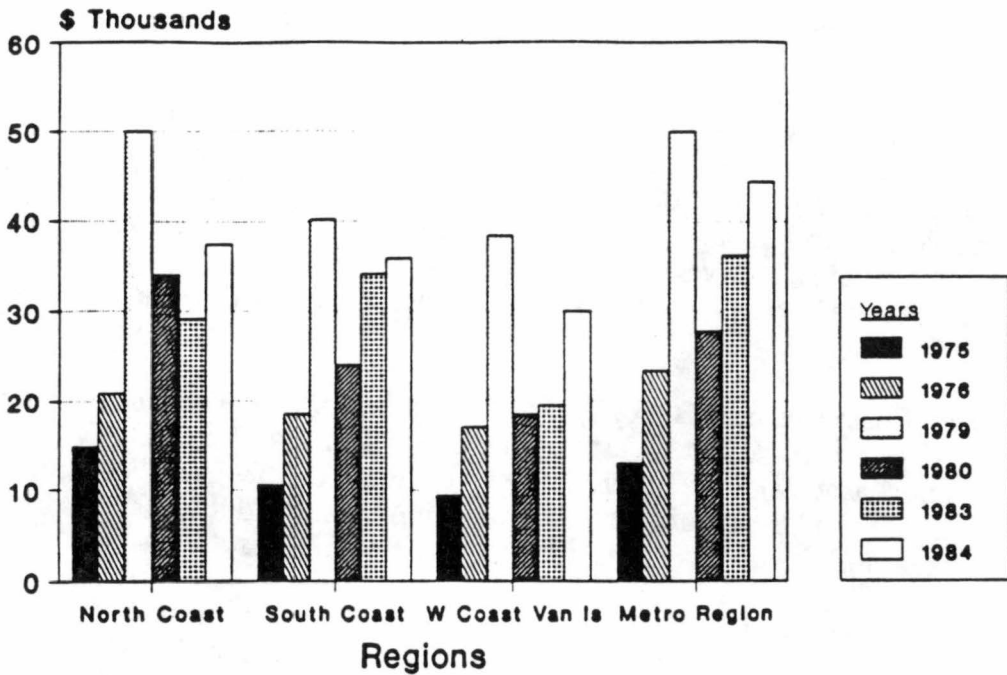
7. THE FISHING COMMUNITIES, 1975-1984

This study deals in detail with 50 Coastal Region communities which were identified as having 5 or more active commercial fishing vessels in 1984. For the purpose of analysis, these communities have been classified in a number of different ways - by size of the local fishing industry, by gear type, and by the importance of Native or aboriginal group. Full details are provided in Appendix A.

Twenty-one communities were identified as major fishing ports, with over 40 active vessels and landings of over \$1 million in 1984. Six (6) are located in the North Coast Region, 12 in the South Coast Region, and 3 in the West Coast Vancouver Island Region.

An additional 29 communities were identified as minor fishing ports, with a fleet of under 40 active vessels. With one exception, Gibsons, with a 27 vessel fleet and landings of \$2.5 million, the minor ports had landings in the \$100,000 to \$1,000,000 range in 1984. The

Figure 15 Average Landed Value Of The Coastal Region Fleets In Current Dollars



majority of the minor ports (16) are located on the South Coast. Seven (7) are situated on the West Coast Vancouver Island, and 6 on the North Coast.

Figures 16, 17 and 18 display comparative data for major and minor ports over the period 1975 to 1984. From Figure 16, it is clear that the growth of the Coastal Region fleet, noted above, was concentrated in major fishing ports, while the minor ports suffered a decline. Real landed value trends also diverge, with growth in the landings of fleets based in major ports, and decline in landings of fleets based in minor ports. See Figure 17. However, while average landings per vessel based in minor ports continued to be well below that of vessels based in major ports, the gap narrowed slightly during the study period. See Figure 18.

In the North Coast Region, Hartley Bay and Kitkatla lost 25 percent of their fleets between 1975 and 1984; in the South Coast region it was Lund and the Gulf Islands (Galiano, Gabriola and Lasqueti) that suffered major decline; and in the West Coast Vancouver Island Region a similar size of loss was reported by Bamfield and Coal Harbour. Landed value (current dollars) also declined at Kitkatla, Bamfield and Coal Harbour.

A number of minor ports bucked this trend and underwent rapid growth. Kelsey Bay, for example, moved to rank 24 in terms of landed value in 1984, from 48 in 1976. Port McNeill, Kyuquot and the northern Gulf Islands - Hornby, Denman, Cortes and Texada - each added 5 to 10 vessels to the local fleet. Note, however, that these success stories are mostly located in South Coast.

In conclusion, while on a coastwide basis the fleet has been becoming more decentralized and been moving away from the Metropolitan Region, within the Coastal Region itself things have been becoming more centralized in the major fishing communities. The remainder of this Section deals specifically with the status of the 21 major fishing communities in the Coastal Region.

The Major Fishing Ports Of The Coastal Region

(a) North Coast Region

Fleet size and landed value data for 6 North Coast ports are presented in Figures 19 and 20.

The North Coast Region is dominated by Prince Rupert, the first-ranking fishing community outside of the Metropolitan Region. In 1984, the Prince Rupert fleet accounted for just over 10 percent of the active vessels on the coast and approximately 11.5 percent of landed value. In the same year, the city was homeport to 61 percent of North Coast vessels, and accounted for 73 percent of landed value. Landings per vessel of \$45,000 were comparable to the Metropolitan Region and well above those for the Coastal Region (\$36,000) and for the remainder of the North Coast Region (\$25,000). Between 1975 and 1984, the trend in

Figure 16-A Size Of The Coastal Region Fishing Fleets - Major And Minor Ports

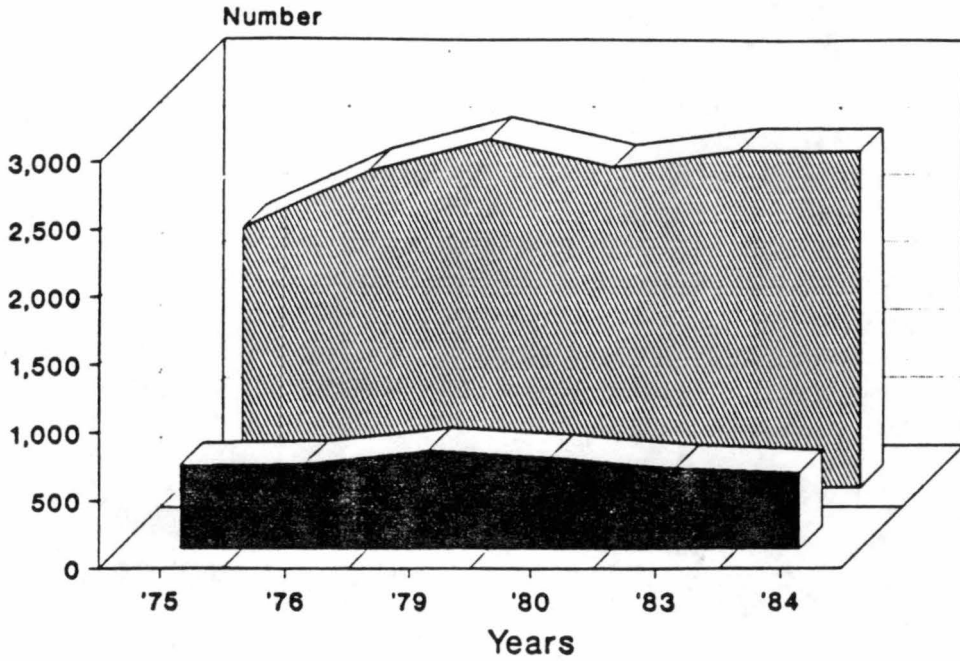
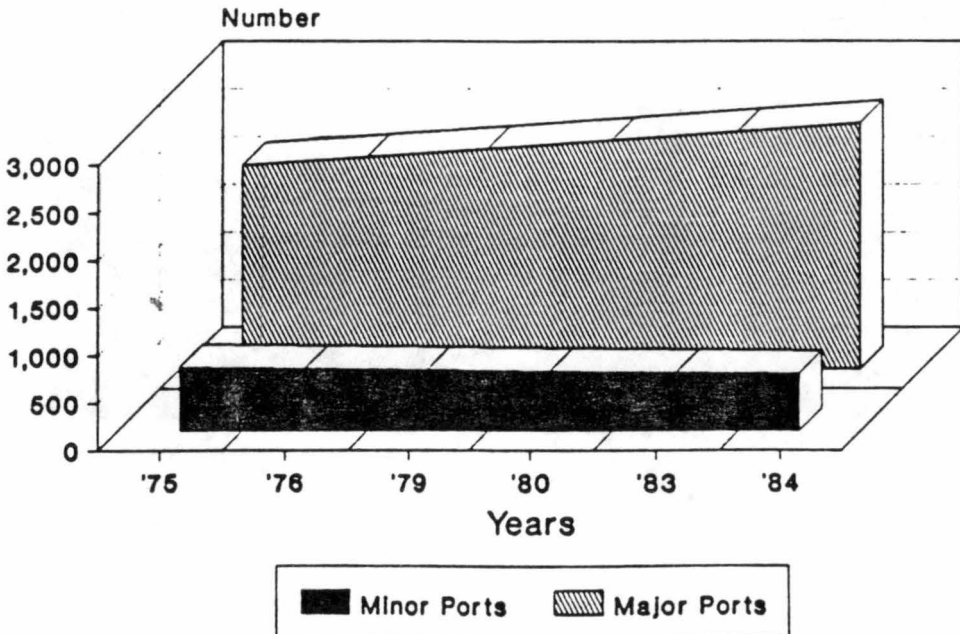


Figure 16-B Size Of The Coastal Region Fishing Fleets - Major And Minor Ports - Trends



Minor Ports
 Major Ports

Figure 17-A Landed Value Of The Coastal Region Fleets - Major And Minor Ports - In Current Dollars

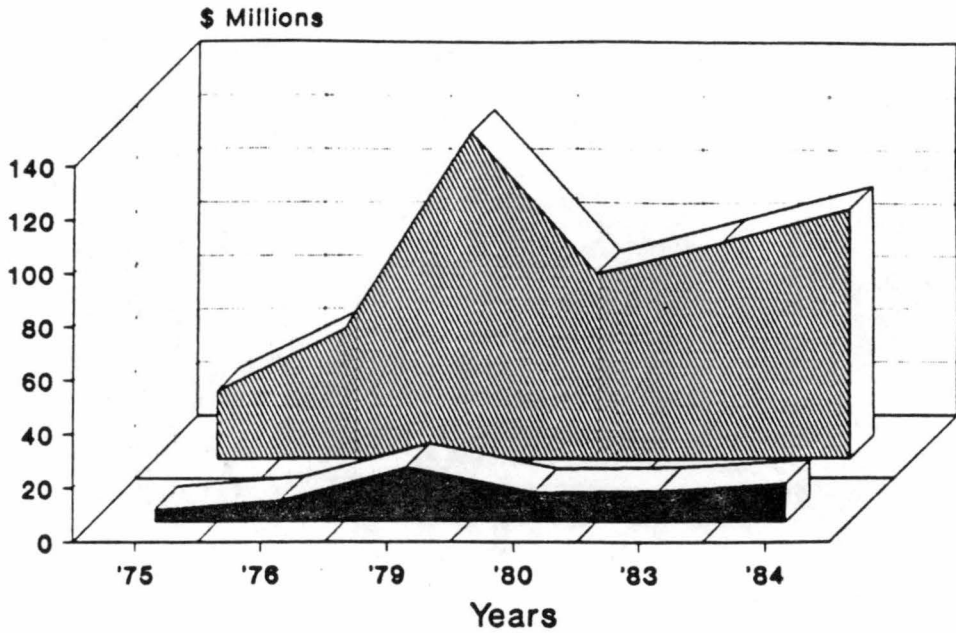
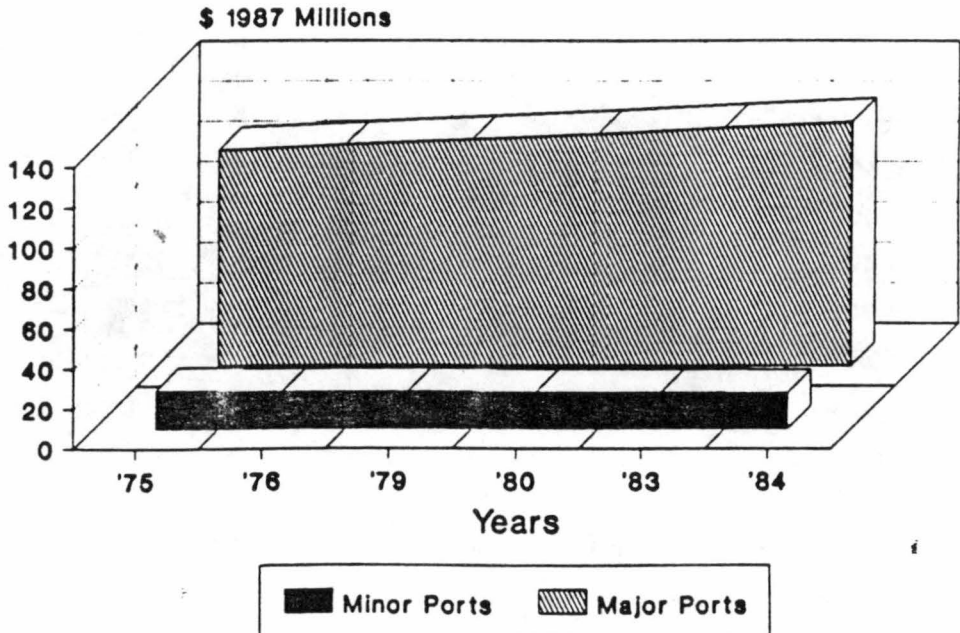


Figure 17-B Landed Value Of The Coastal Region Fleets - Major And Minor Ports - Trends In Constant 1987 Dollars



Minor Ports
 Major Ports

Figure 18-A Average Landed Value Of The Coastal Region Fleets - Major And Minor Ports - In Current Dollars

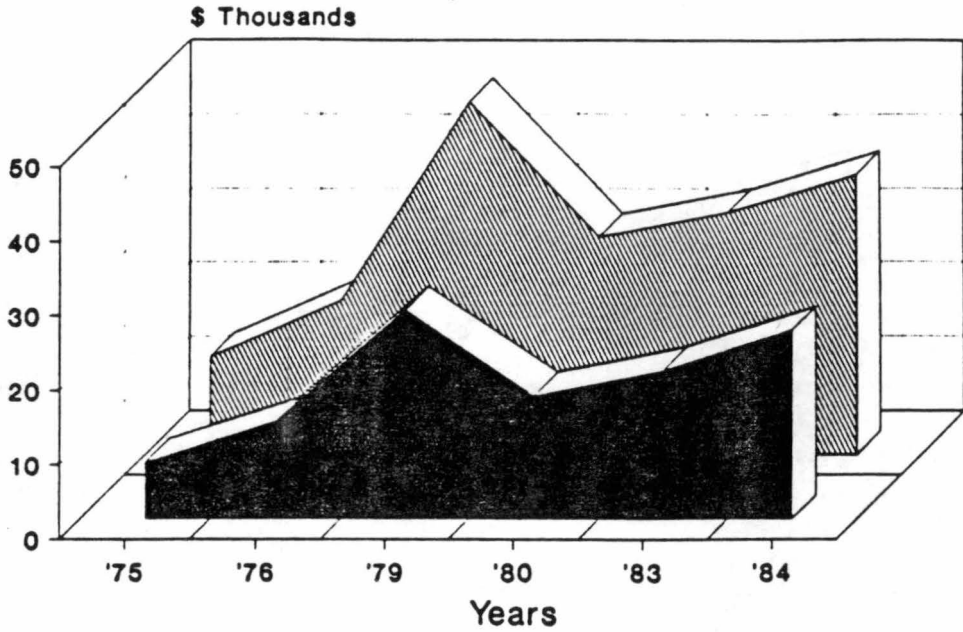


Figure 18-B Average Landed Value Of The Coastal Region Fleets - Major And Minor Ports - Trends In Constant 1987 Dollars

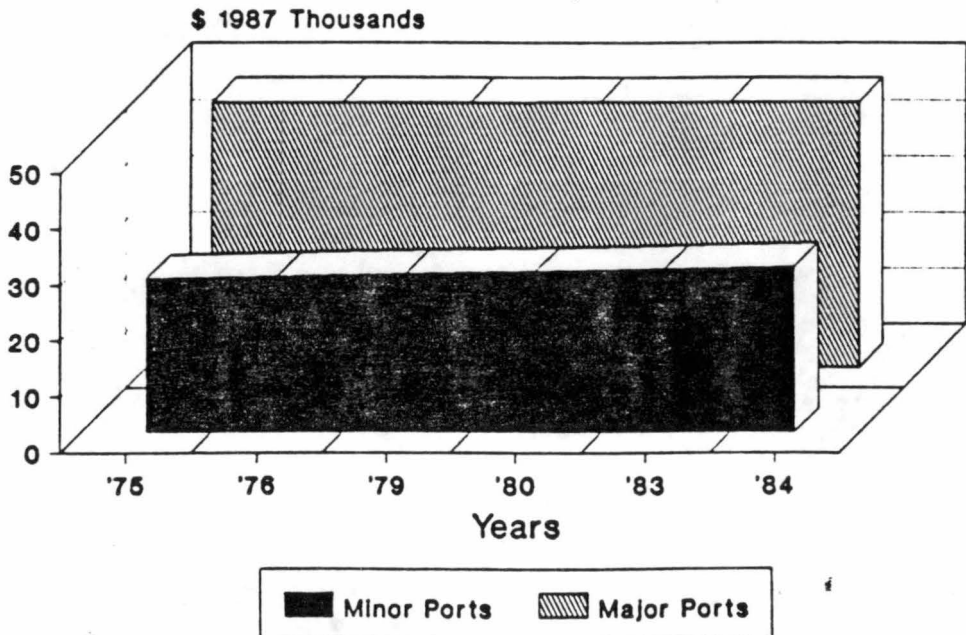
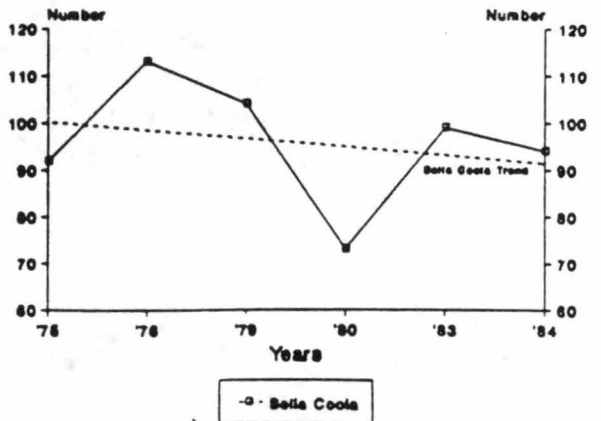
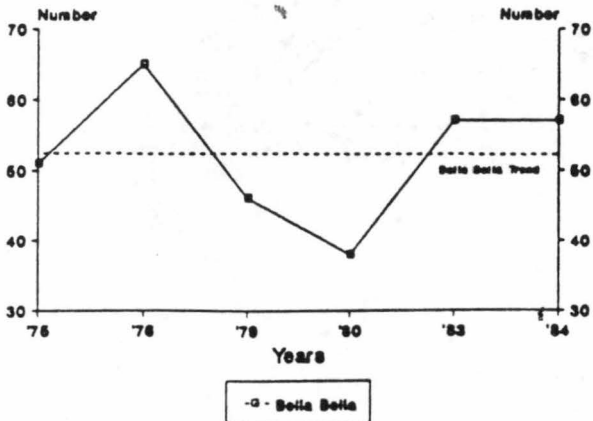
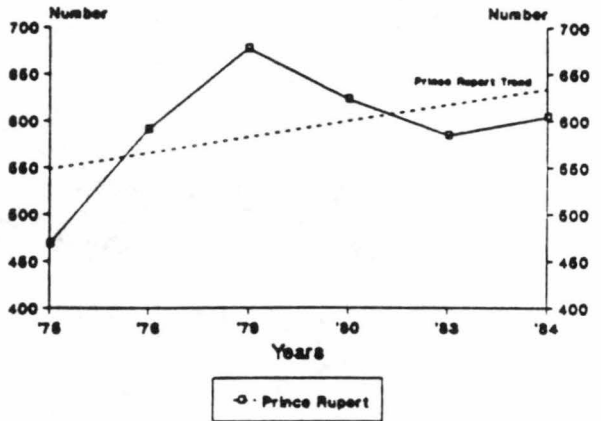
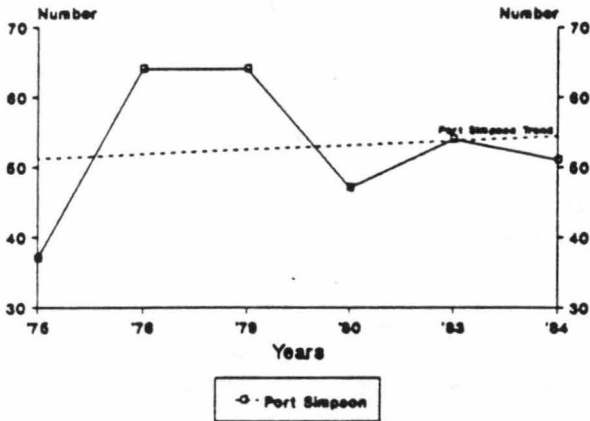
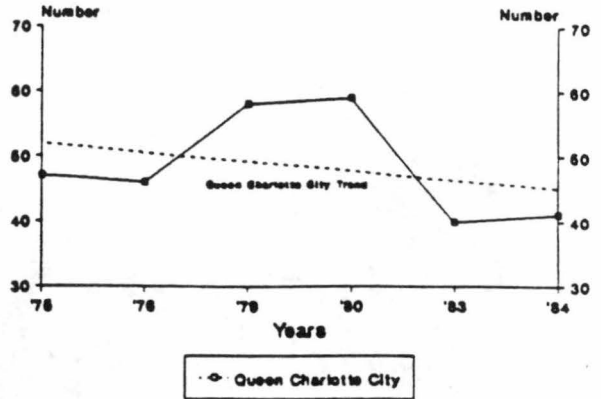
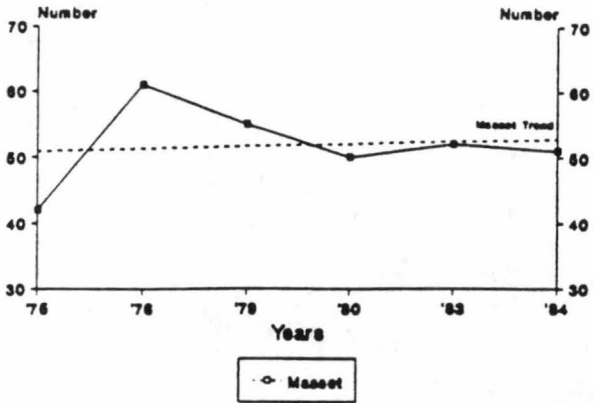


Figure 10. Size Of The Fishing Fleets - North Coast Communities



fleet size was significantly up, in contrast to other North Coast communities.

Five (5) smaller communities have major port status in the North Coast Region, but no individual fleet exceeds 10 percent of the regional fleet. The fleet trend data suggest that Bella Coola and Queen Charlotte City were having difficulty holding their fleets, although this conclusion is not corroborated in the trend in real landed value which is pretty flat throughout, with the exception of Masset where earnings grew over the period.

Average earnings of the two Queen Charlotte Islands communities were closing the gap with those of Prince Rupert by 1984. Otherwise, the smaller North Coast communities languished with some of the lowest average earnings on the coast. Of the 21 major ports, Port Simpson ranked 18, Bella Bella 20, and Bella Coola 21 in terms of landed value per vessel in 1984. Average fishing income in Bella Coola was about one third of that in Prince Rupert. Bella Bella vessels made one half of their Prince Rupert counterparts.

In summarizing the situation in North Coast, the regional centre, Prince Rupert, recorded a gain in the number of locally-based vessels. Fishing income, both here and in the Queen Charlotte Islands, were comparable to the Metropolitan Region. Otherwise, North Coast communities appeared to be having a struggle to maintain their share of the fishing industry.

(b) South Coast Region

Fleet size and landed value data for 12 South Coast ports are presented in Figures 21 and 22.

The South Coast Region has a widely-distributed fishing economy. Nanaimo, the regional centre, was also the major fishing port in South Coast in terms of landed value. In 1984, Nanaimo accounted for slightly less than 4 percent of the fleet, and 4.6 percent of landings coastwide. Campbell River, the major fishing community when ranked by the size of its 1984 fleet, accounted for just over 4 percent of the active vessels on the coast and approximately 3 percent of landed value. Between them, the two ports accounted for 30 percent of South Coast vessels, and 31 percent of landed value. Landings per vessel of \$46,600 for Nanaimo were comparable to the Metropolitan Region (and to Prince Rupert) and were well above those for the Coastal Region (\$36,000) and for the remainder of the South Coast Region (\$35,000), including Campbell River (\$28,000). Between 1975 and 1984, the trend in fleet size in both communities was significantly up, in keeping with the trend for the South Coast as a whole. Real landed value remained rather flat - the rapid growth in regional fishing income was therefore attributable to growth in the smaller communities.

Ten (10) smaller communities have major port status in the South Coast Region. Four (4) are situated in the Johnstone Strait area north of Campbell River. In all cases - Port Hardy, Alert Bay, Sointula, and Quadra Island - fleets remained stable or grew, while the trend in real landed value was consistently up. Four (4) East Coast Vancouver and

Figure 20 Landed Value Of The Fishing Fleets - North Coast Communities - In Constant 1987 Dollars

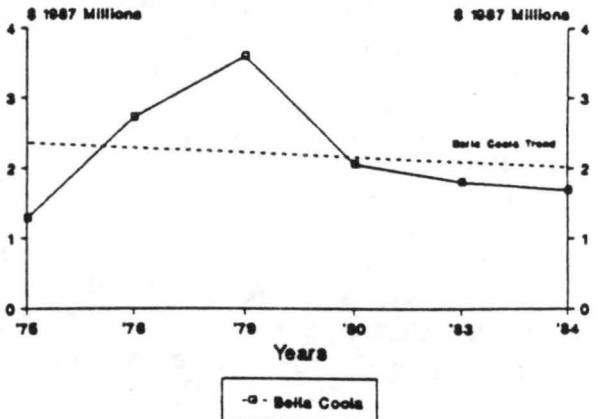
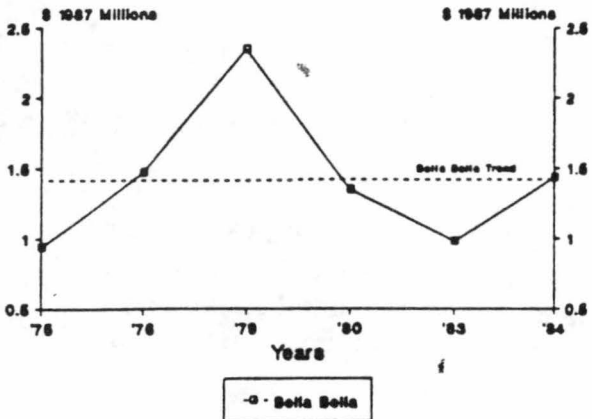
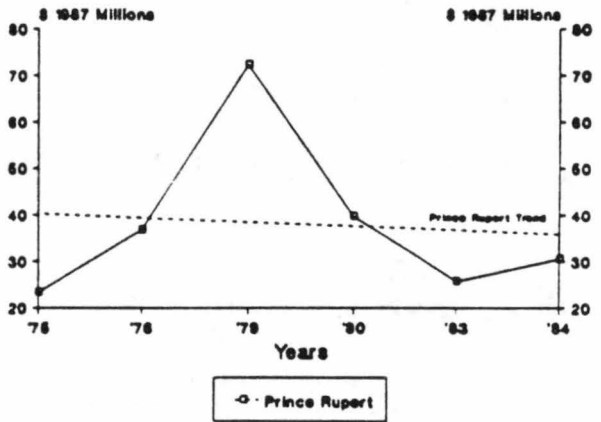
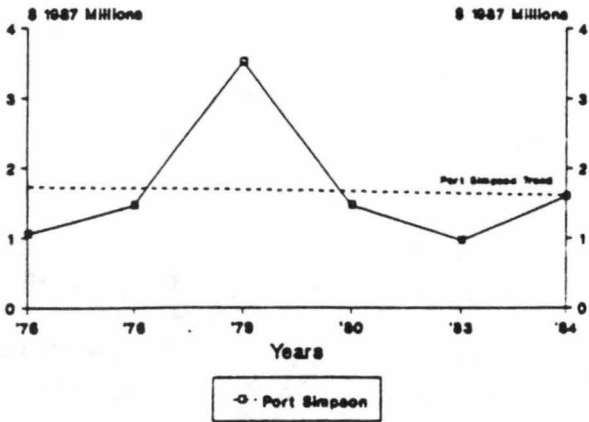
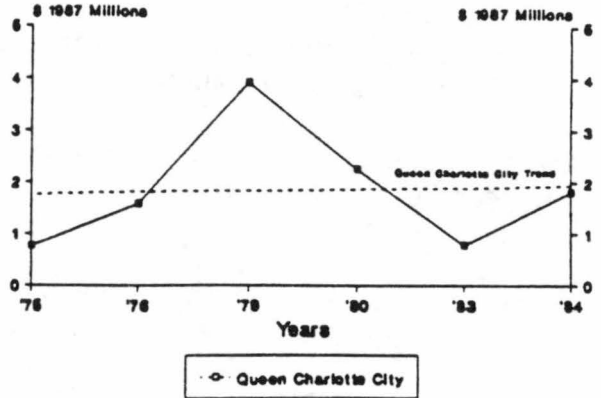
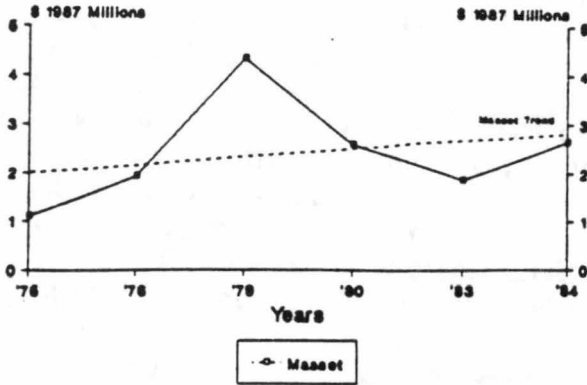


Figure 21. Size Of The Fishing Fleets - South Coast Communities

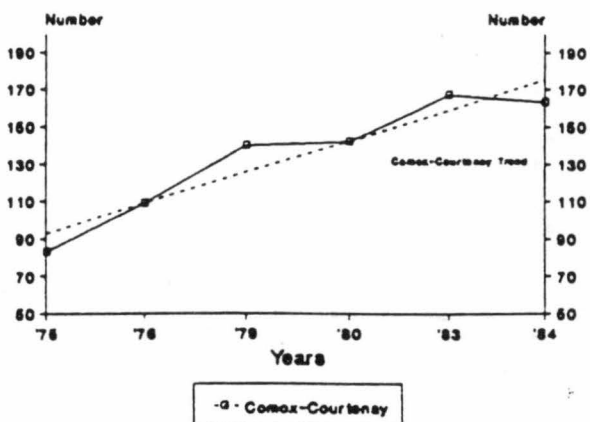
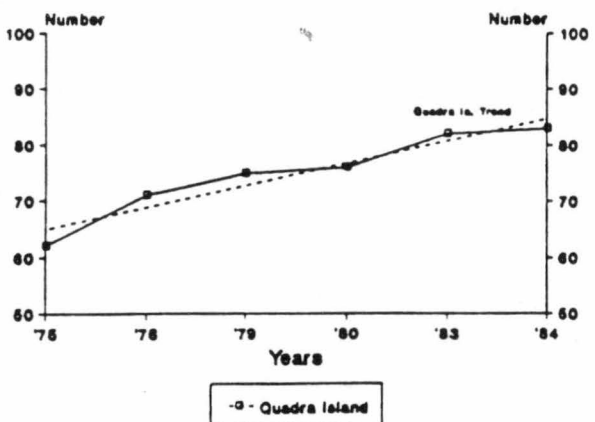
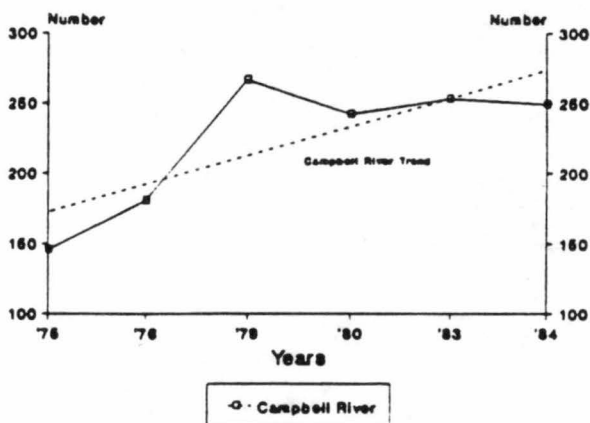
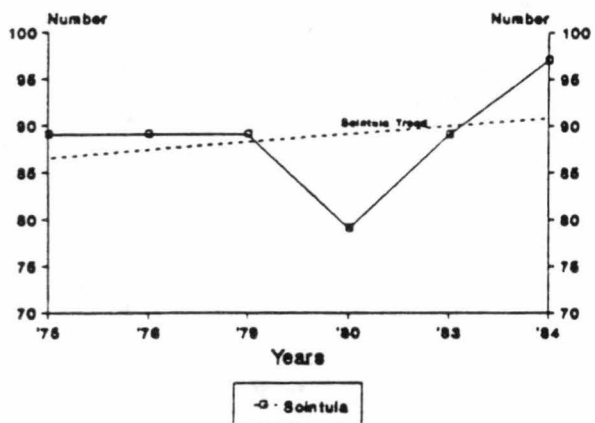
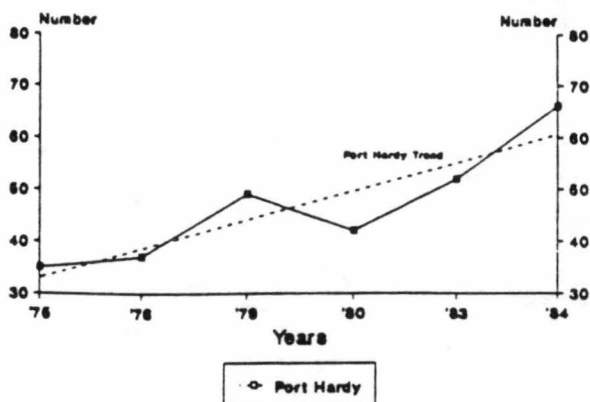
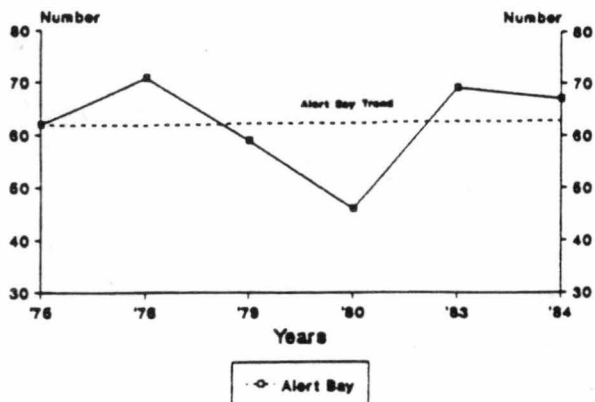


Figure 21 cont

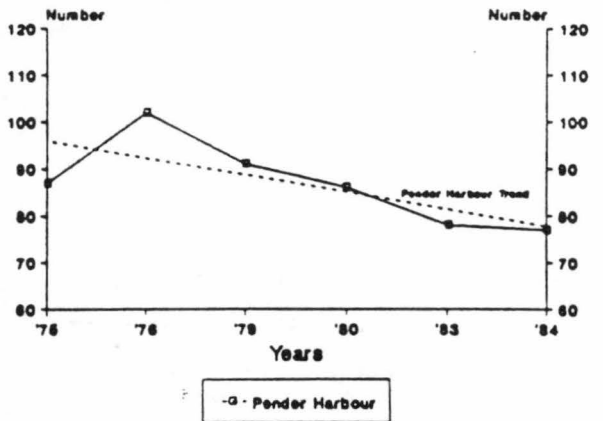
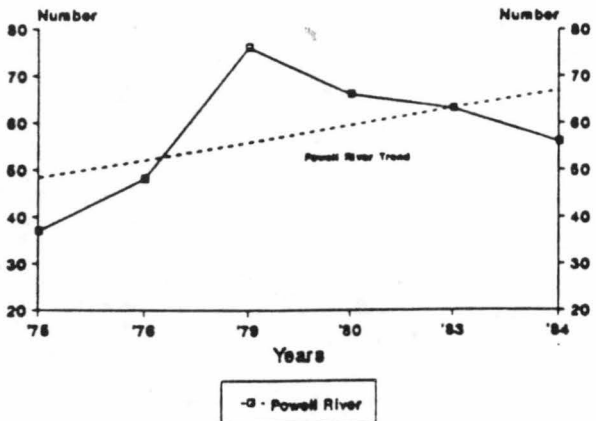
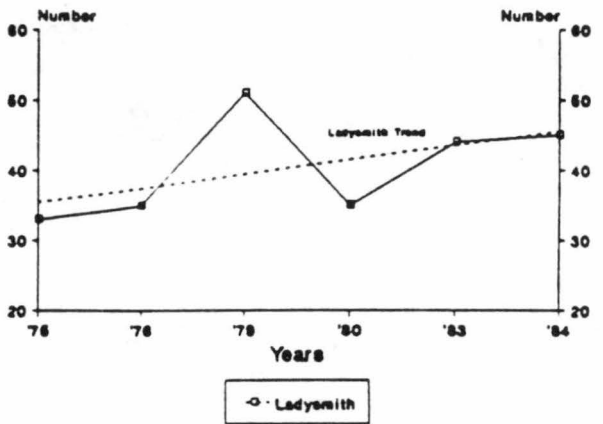
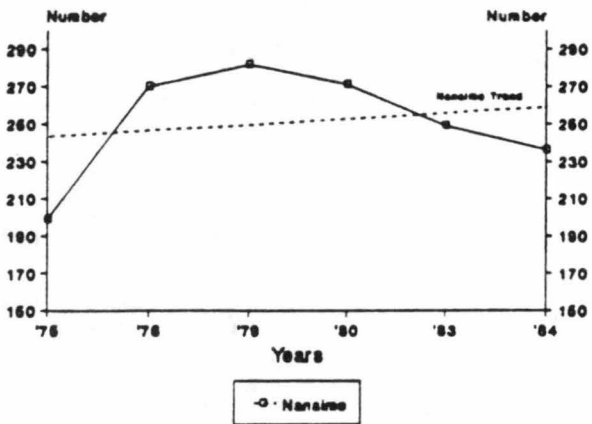
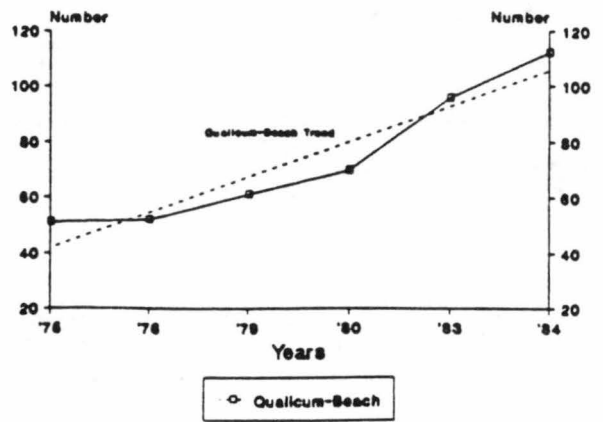
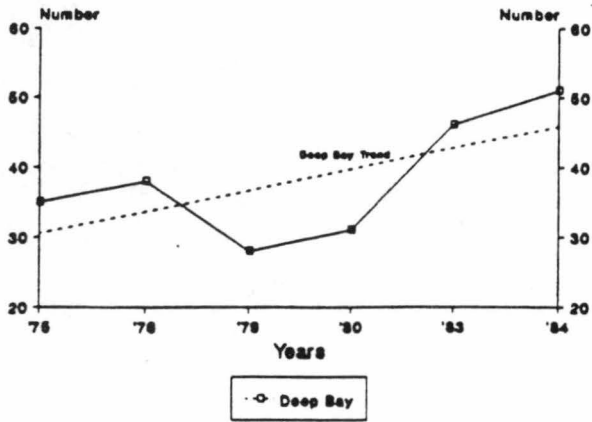


Figure 22. Landed Value Of The Fishing Fleets - South Coast Communities

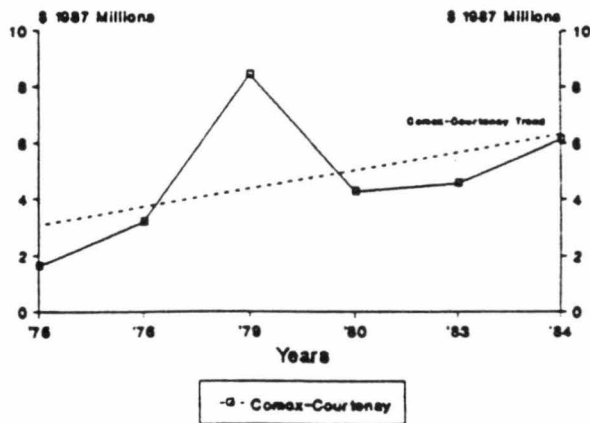
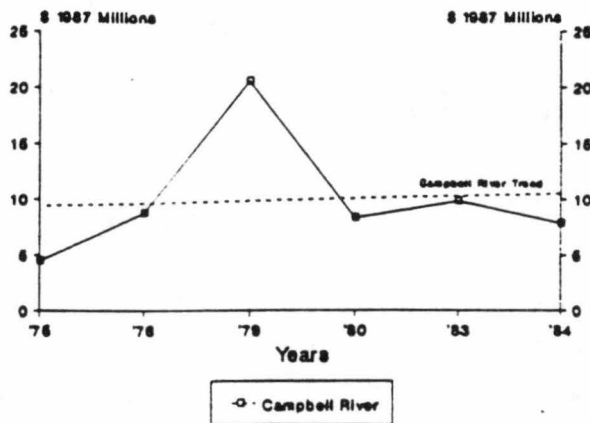
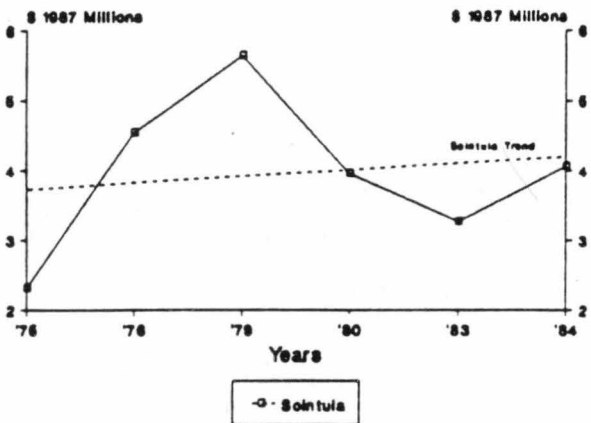
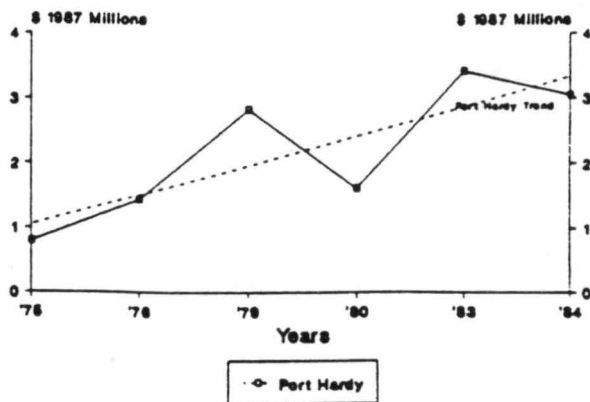
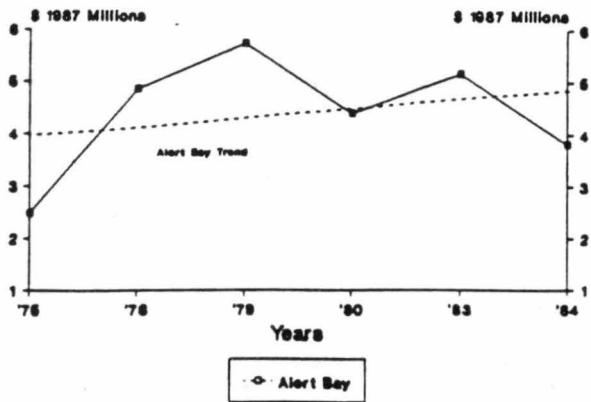
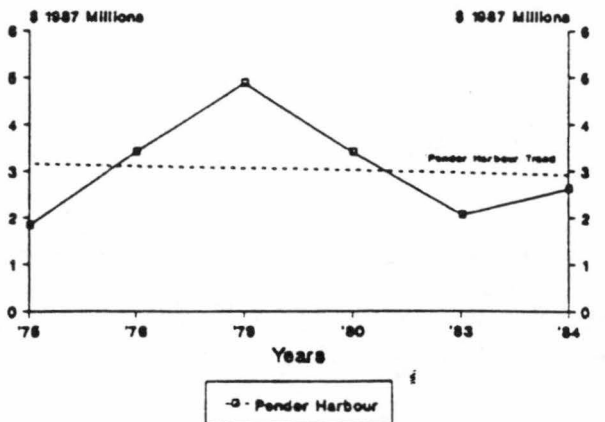
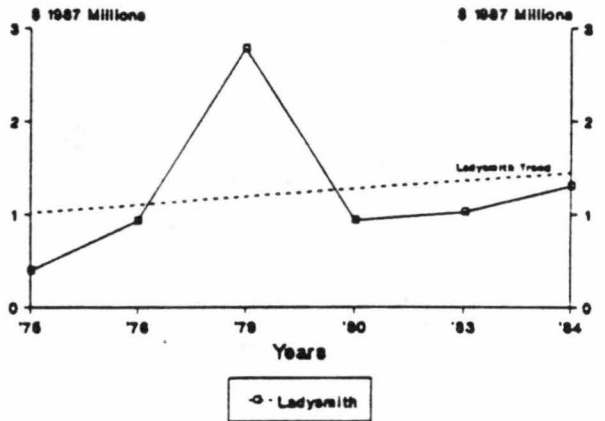
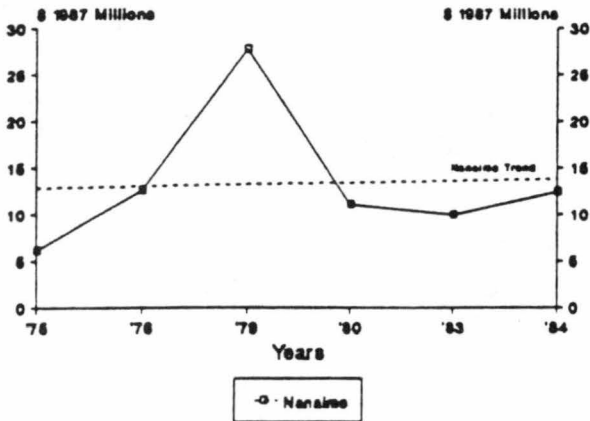
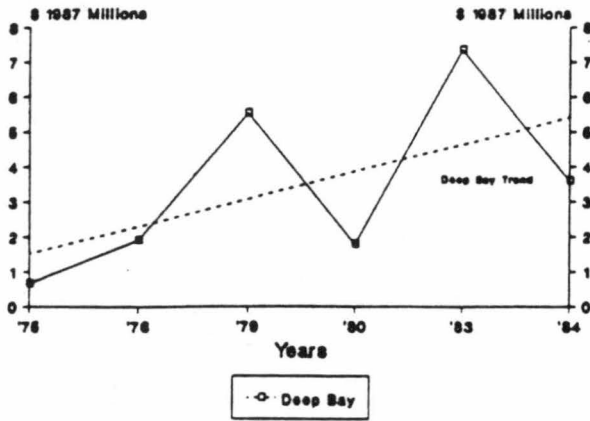


Figure 22 cont



communities south of Campbell River - Comox-Courtenay, Qualicum Beach, Deep Bay and Ladysmith - fared pretty much the same. The two communities on the Sunshine Coast - Powell River and Pender Harbour - had varying fortunes, with Powell River following the generally positive South Coast trend. Of all the South Coast communities, only Pender Harbour seemed to decline as a fishing port during the ten year period.

Four (4) of these smaller communities - Alert Bay, Port Hardy, Powell River and Deep Bay - had average earnings in excess of \$40,000 in 1984. Only one community - Ladysmith - recorded average landings of under \$30,000.

In summarizing conditions in the South Coast region, we note, as in North Coast, the vitality of the regional centre, Nanaimo, with its growing fleet and high average earnings. Unlike on the North Coast, however, the fishing industry based in many of the hinterland communities of the South Coast was also growing and prosperous.

(c) West Coast Vancouver Island Region

Fleet size, landed value and average landed value data for 3 West Coast Vancouver Island ports are presented in Figures 23 and 24.

The West Coast Vancouver Island Region is dominated by Port Alberni, the regional centre, and the fifth-ranking fishing port outside the Metropolitan Region. In 1984, the Port Alberni fleet accounted for 2.3 percent of the active vessels on the coast and approximately 2.3 percent of landed value. In the same year, the city was homeport to 31 percent of West Coast Vancouver Island vessels, and accounted for 40 percent of that region's landed value. Landings per vessel of \$39,000 were comparable to the coastwide average and above those for the Coastal Region (\$36,000) and for the remainder of the West Coast Vancouver Island Region (\$26,000). Between 1975 and 1984, the trend in fleet size and real landed value was significantly up.

Two (2) smaller communities have major port status in the West Coast Vancouver Island Region - Ucluelet and Tofino. Together they accounted for about 2 percent of coastwide landed value in 1984. Fleet trend data suggest that Ucluelet was having difficulty holding its commercial fleet during the period, and this conclusion is supported by the trend in real landed value which was also down. The story is different for Tofino where the fleet and earnings grew over the period. Average landed value per vessel for Tofino and Ucluelet, \$35,000 and \$29,000 respectively, ranked 11th and 16th among the 21 major fishing communities.

The picture on the West Coast of Vancouver Island is somewhat akin to that of the North Coast. The regional centre, Port Alberni, has a relatively prosperous and growing fishing industry. Elsewhere, the picture is mixed, with declining fleet size and low earnings not an uncommon pattern.

**Figure 23. Size Of The Fishing Fleets -
West Coast Vancouver Island Communities**

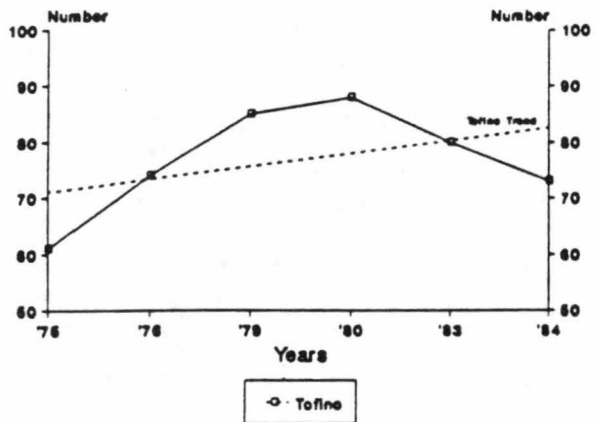
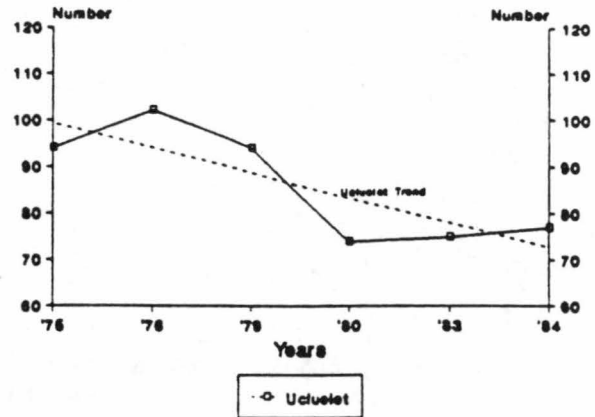
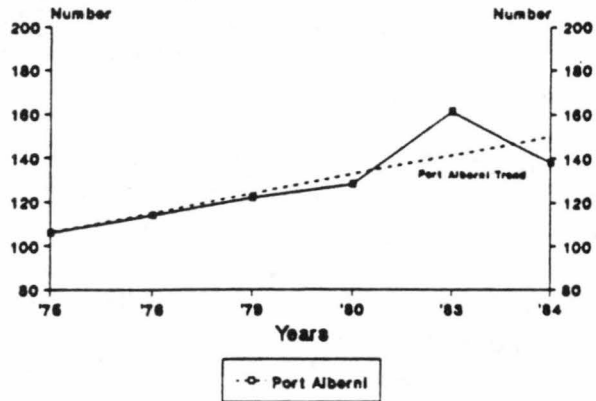
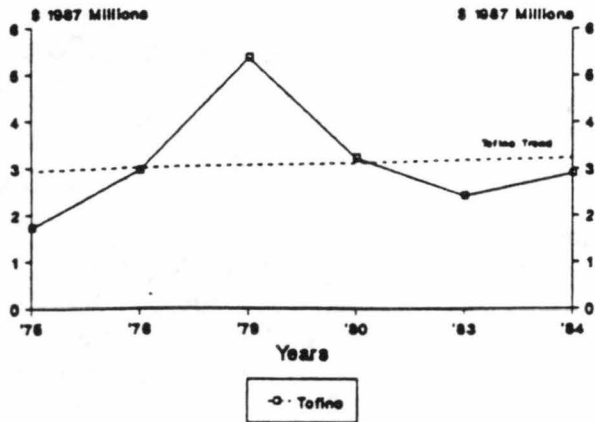
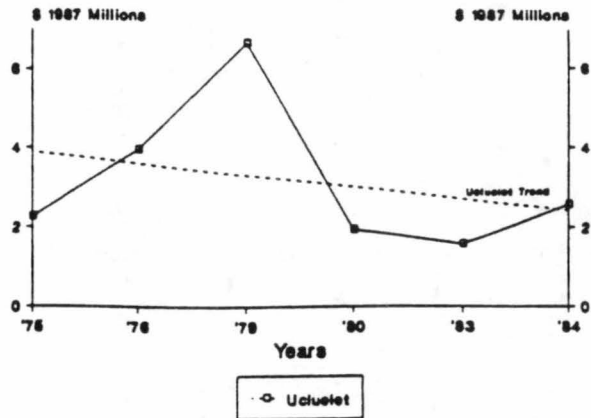
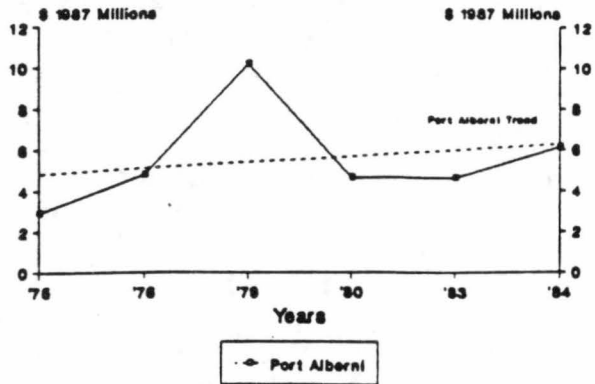


Figure 24. Landed Value Of the Fishing Fleets - West Coast Vancouver Island Communities



The Influence Of Gear Mix

The structure of the fleet, i.e. the number of vessels of different gear types, varies significantly from one community to another. In order to check the correspondence between performance and fleet structure, the Major Ports of the Coastal Region have been categorized by the gear mix used by the local salmon fleet in 1983: i.e. whether net or troll clearly predominated, and the relative importance, within the net sector, of gillnet versus seine.

Three (3) ports contain almost 75 percent of the seine vessels in the coastal region - Alert Bay, Campbell River, and Prince Rupert. We refer to these as "the seine ports". The homeport fleet in 4 ports - Port Simpson, Bella Bella, Bella Coola and Pender Harbour - is over 75 percent gillnet, and these have been designated "the gillnet ports". Likewise, 10 ports, located in the Queen Charlotte Islands (2 ports), the West Coast Vancouver Island (3 ports, including Port Alberni), the East Coast Vancouver Island (4 ports, including Nanaimo), and the Sunshine Coast (Powell River), have fleets composed of 75 percent or more trollers. These we call "the troll ports". The remaining 4 ports - Port Hardy, Campbell River, Deep Bay and Quadra Island - are "the mixed ports". Over 25 percent of their vessels use net gear, and over 25 percent use troll gear.

Figures 25 and 26 show fleet and landed value information for this classification of homeports. The strong upward trends for the troll ports and the mixed gear ports, are in contrast to poorer performance of the net ports, particularly the gillnet ports.

None of this is at odds with trends in fisheries management discussed earlier in the context of Canadian actions taken to "encourage" the US to sign the Pacific Salmon Treaty. We would have expected to see the troll and mixed ports benefitting from relatively unfettered troll regulations - but surprisingly, the benefits seem to have been concentrated in the South Coast and the Queen Charlotte Islands. The local West Coast Vancouver Island fleet does not seem to have been able to take advantage of the situation to the same extent. Within the net fleet, the data confirm what many observers were claiming in the early 1980s - namely, that the gillnet fleet, and by extension the communities which rely on gillnetting, were suffering economic hardship.

8. THE NATIVE FLEET

Approximately 75 percent of the Native commercial fishing fleet is based in Coastal Region communities. In analyzing regional disparities, therefore, this fleet deserves particular attention.

Figure 25-A Size Of The Coastal Region Fishing Fleets - Gear Ports

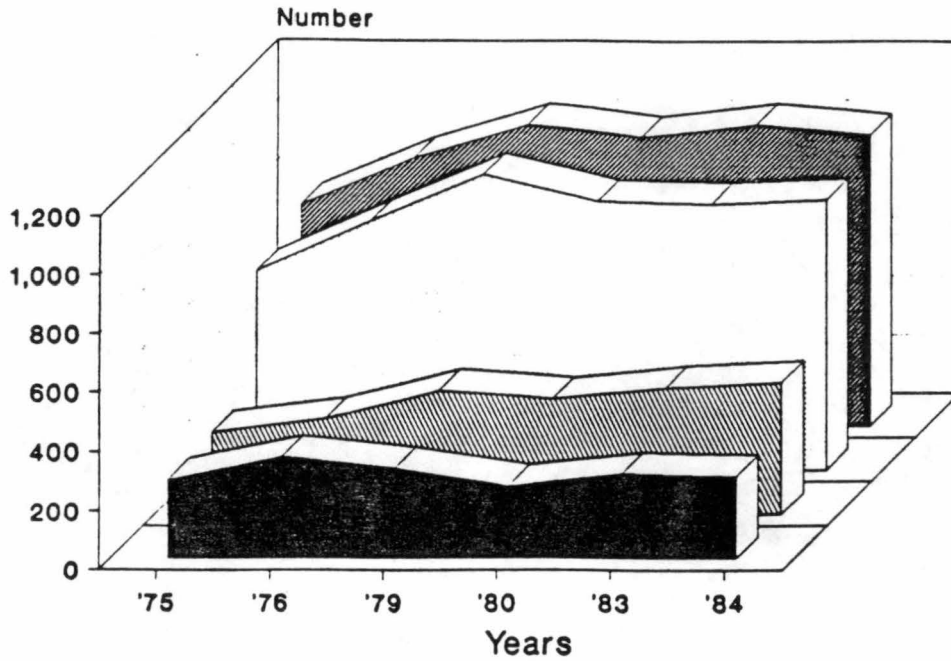


Figure 25-B Size Of The Coastal Region Fishing Fleets - Gear Ports - Trends

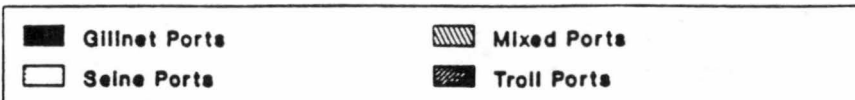
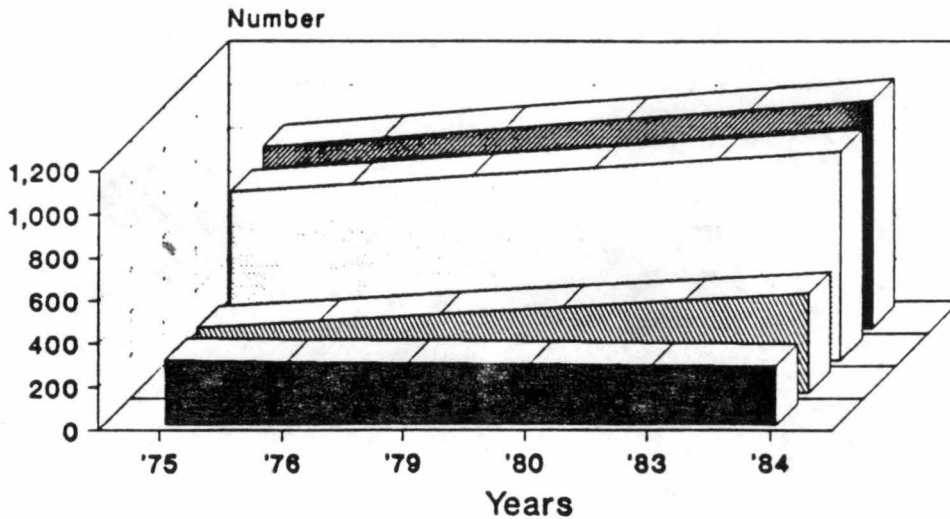


Figure 26-A Landed Value Of The Coastal Region Fleets - Gear Ports - In Current Dollars

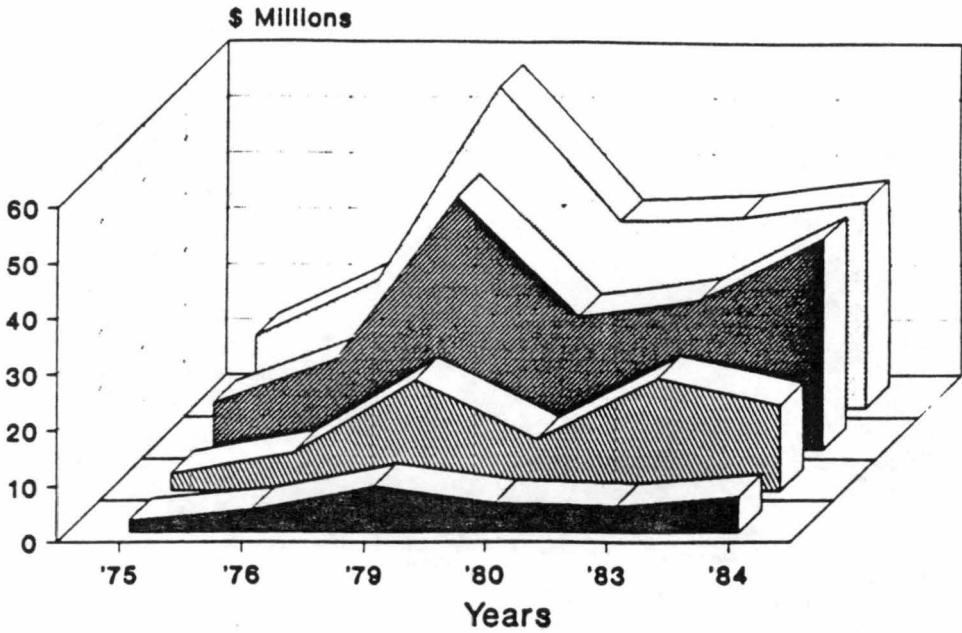
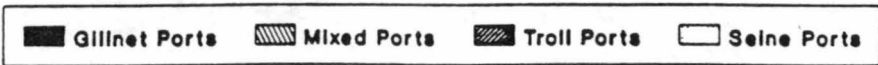
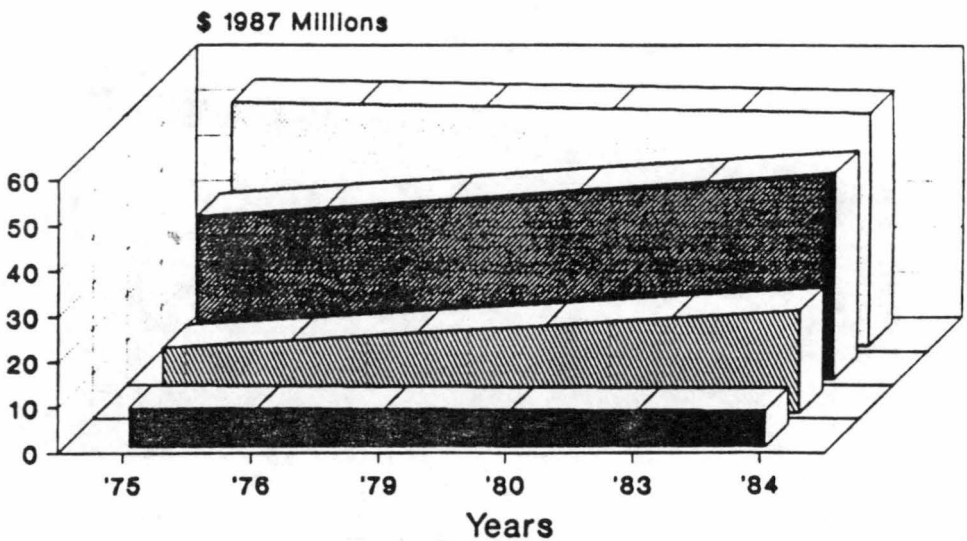


Figure 26-B Landed Value Of The Coastal Region Fleets - Gear Ports - Trends In Constant 1987 Dollars



Fleet Size ⁹

As noted earlier, the decline of the salmon fleet has been slower in the Coastal Region, while the growth of the non-salmon fleet has been faster than in the Metropolitan Region. At least part of the explanation lies in the growth of the Native fleet over the period. In Figure 27, data are presented which show, on the one hand, the numbers of Native, salmon vessels holding their own, as the fleet as a whole declined over the period 1968-72 to 1985, and on the other hand, the numbers of Native, non-salmon vessels (mainly in the roe herring and halibut fisheries) rising substantially during the same period. The resilience of the Coastal Region fisheries economy is attributable, at least in part, to the gain in the size of the Native fleet.

Table 1 identifies the net gain in Native vessels, compared with the net loss of vessels in the fleet as a whole, over the period 1968-72 to 1985:

Table 1 Net Gain (Loss) In Vessels By The Native And Non-Native Fleets, 1968-72 To 1985

	GAIN	(LOSS)*
NATIVE FLEET	469	
NON-NATIVE FLEET		(805)
TOTAL FLEET		(336)

 * For both fleets, 1985 is the most recent year for which data are available. Fleet numbers include Native-owned and Native-operated vessels.

DISTRIBUTION OF THE NATIVE-OWNED FLEET BY REGION ¹⁰

Table 2 provides data for 1983 on the regional distribution of the Native fleet. Native vessels are underrepresented in the South Coast fleet, which, as we have seen, was where much of the growth in the industry was taking place during the period 1975 to 1984. Seventy-five (75) percent of the Coastal Region Native fleet is concentrated in the North Coast and West Coast Vancouver Island Regions.

⁹ For the purposes of this Section, a Native vessel is defined as a vessel which is Native-owned and/or -operated.

¹⁰ The data provided in this Section are for Native-owned vessels only.

Figure 27-A Size Of The Native Salmon Fleet

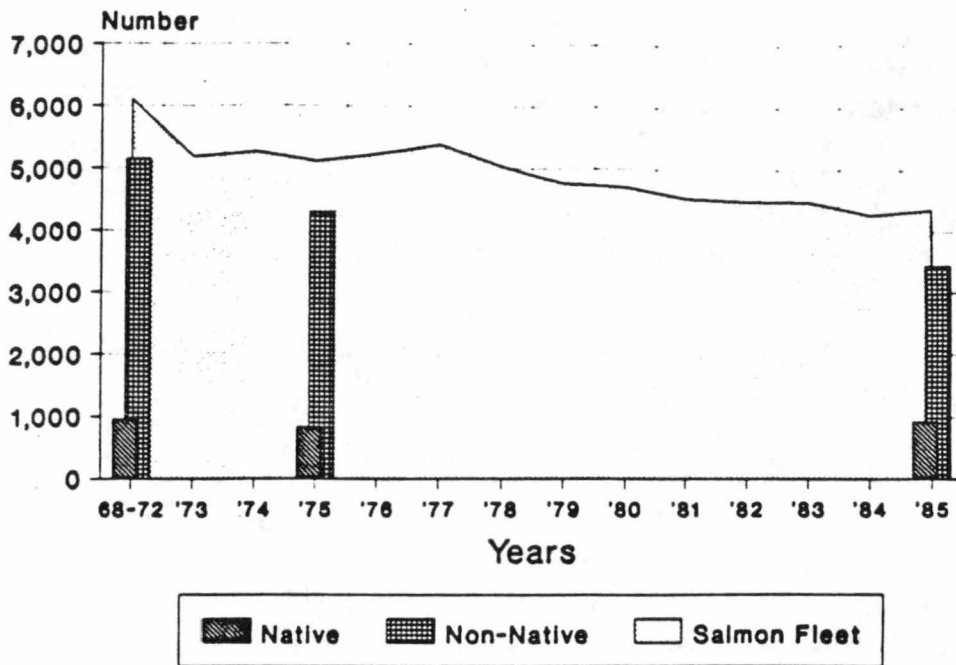


Figure 27-B Size Of The Native Non-Salmon Fleet

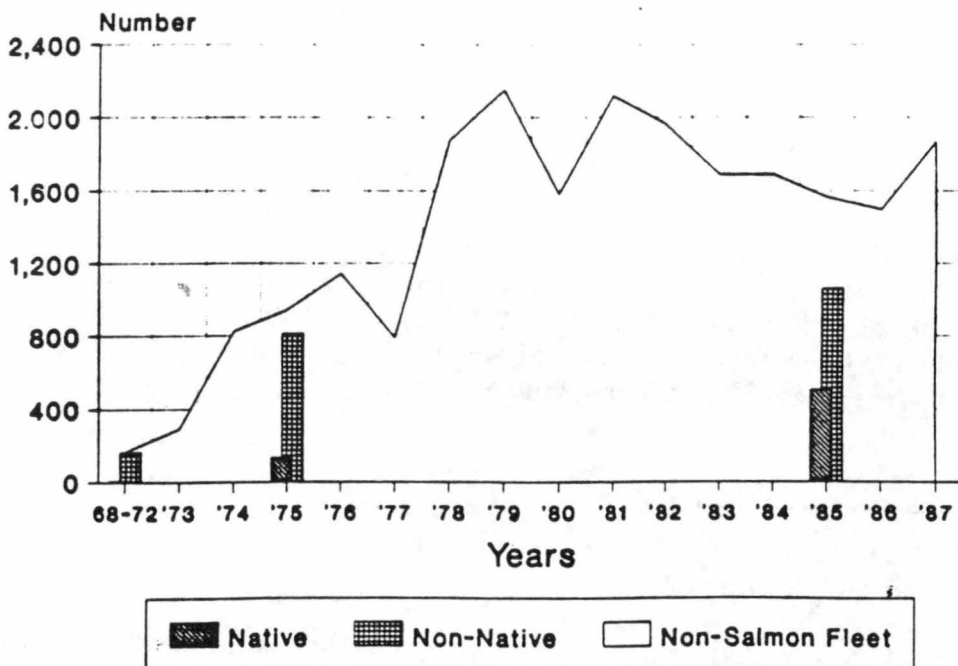


Table 2 *Regional Distribution Of The Coastal Region Native-Owned Fleets, 1983*

<u>REGION</u>	<u>NATIVE</u>		<u>TOTAL FLEET</u>	
	<u>#</u>	<u>%</u>	<u>#</u>	<u>%</u>
<u>NORTH COAST</u>	<u>316</u>	<u>55</u>	<u>970</u>	<u>31</u>
- QCI	18	3	97	3
- Nass-Skeena	167	29	672	22
- Central Coast	131	23	201	7
<u>SOUTH COAST</u>	<u>144</u>	<u>25</u>	<u>1613</u>	<u>52</u>
- Johnstone Strait	93	16	625	20
- East Coast Van Is	46	8	722	23
- Sunshine Coast	5	1	266	9
<u>WEST COAST VAN IS</u>	<u>119</u>	<u>21</u>	<u>505</u>	<u>16</u>
<u>COASTAL REGION</u>	<u>579</u>	<u>100</u>	<u>3089</u>	<u>100</u>

AVERAGE LANDED VALUE OF NATIVE-OWNED VESSELS

Figure 28 displays average landed value data for the year 1983 for Coastal Region vessels by gear type and by Native/non-Native ownership. Looking at the salmon fishery, the Coastal Region Native fleet performed at roughly the level of the coastwide average (\$35,000 per vessel as against \$36,000 per vessel coastwide). The Native fleet, however, contains a disproportionately high number of seiners, whose performance outpaces their non-Native counterparts. For the 60 percent of the Native salmon fleet using troll gear alone or in combination with gillnet gear, performance begins to slip. Native single-gear trollers, for example, averaged \$11,000 in fishing income in 1983, compared with \$30,000 for the same vessels coastwide. Native performance in non-salmon fisheries was also well below the coastwide average.

Performance of Native vessels by region is shown in Table 3. The highest Native fishing incomes are in South Coast, which is home to a highly productive seine fleet. Otherwise, outside of Prince Rupert (Nass-Skeena), the Native fleets are basically low earners, with total fishing incomes of from \$11,000 to \$17,000, about half the Coastwide figure.

Figure 28 Average Landed Value Of
Native Vessels By Gear Type In The
Coastal Region, 1983

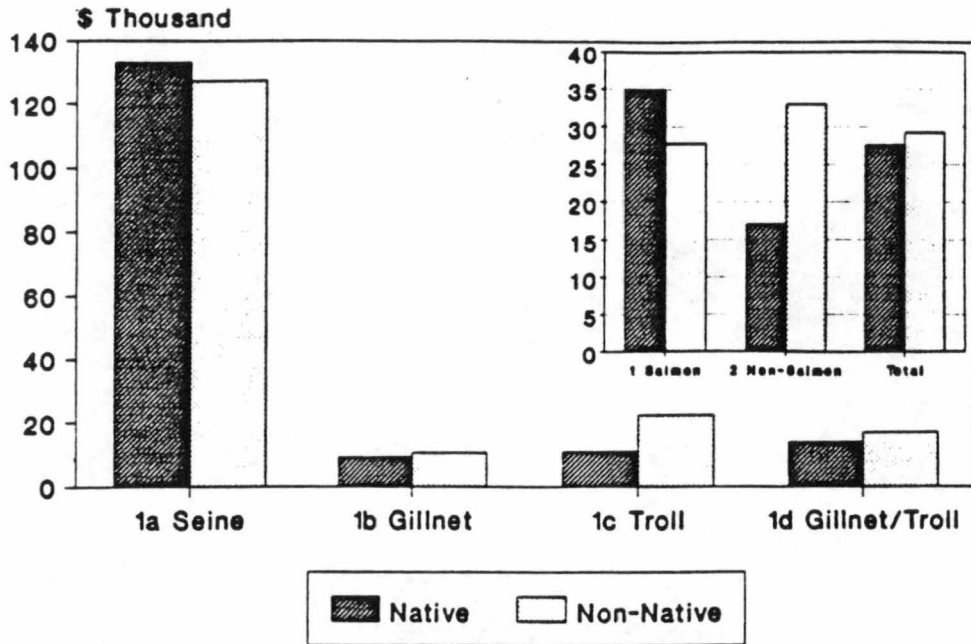


Table 3 Average Landed Value Of Native-Owned Vessels By Region, 1983

REGION/AREA	AVERAGE FISHING INCOME (\$)	
	NATIVE FLEET	TOTAL FLEET
<u>NORTH COAST</u>	<u>19,400</u>	<u>29,161</u>
- QCI	17,039	24,104
- Nass-Skeena	30,500	34,335
- Central Coast	13,874	14,340
<u>SOUTH COAST</u>	<u>58,312</u>	<u>34,122</u>
- Johnstone Strait	67,775	36,263
- East Coast Van Is	44,263	33,414
- Sunshine Coast	11,500	31,012
<u>WEST COAST VANCOUVER IS</u>	<u>14,983</u>	<u>19,475</u>
<u>COASTAL REGION</u>	<u>28,056</u>	<u>30,168</u>
<u>COASTWIDE</u>		<u>33,211</u>

THE NATIVE PORTS

Of the 50 homeports covered by this study, 10 were homeport to more than 15 Native-owned vessels in 1984. Three of these - Prince Rupert, Campbell River and Port Alberni - are major population centres. The remaining 7 ports are important Native fishing villages, often remotely located with limited alternative employment opportunities. This set of ports has been designated "the Native Ports". Included are Ahousaht, Alert Bay, Bella Bella, Bella Coola, Port Simpson, Quadra Island, and Tofino.

Figures 29, 30 and 31 present fleet and landings data for the Native ports over the period 1975 to 1984. As might be expected, the overall picture is fairly optimistic. Figure 29 reflects the growth in the numbers of Native-owned vessels over the period, and this growth also carries over to landed value, shown in Figure 30, and average landed value per vessel, shown in Figure 31, where real growth has taken place. These results suggest that federal policies to enhance the Native commercial fishery have been relatively successful.

Figure 29-A Size Of The Coastal Region
Fishing Fleets - Native Ports

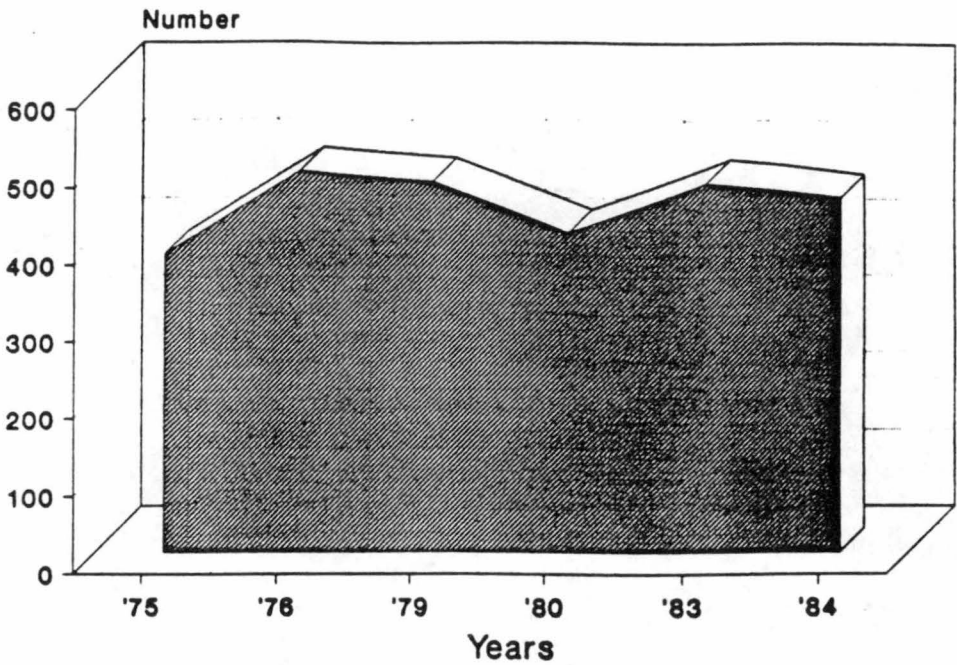
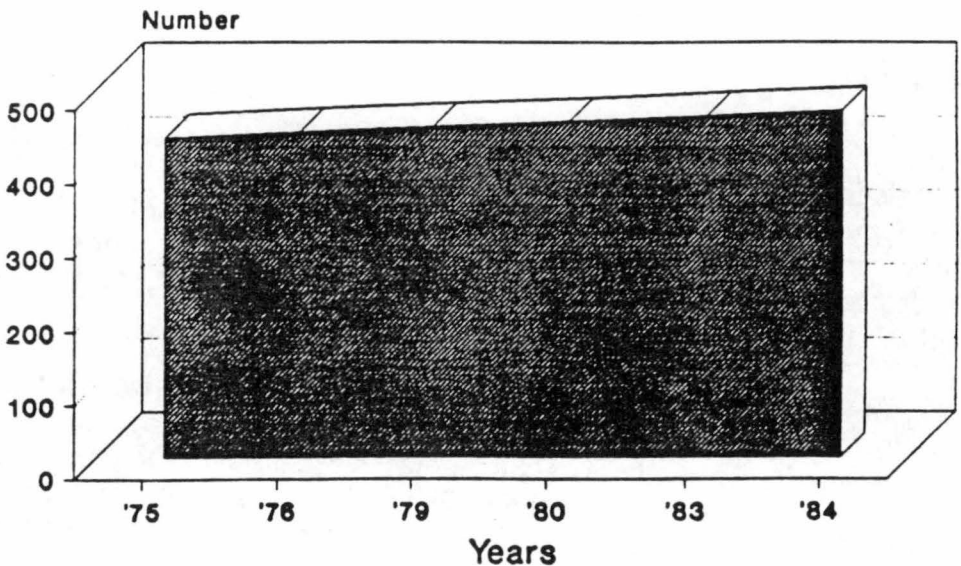


Figure 29-B Size Of The Coastal Region
Fishing Fleets - Native Ports - Trends



Native Ports

Figure 30-A Landed Value Of The Coastal Region Fishing Fleets - Native Ports - In Current Dollars

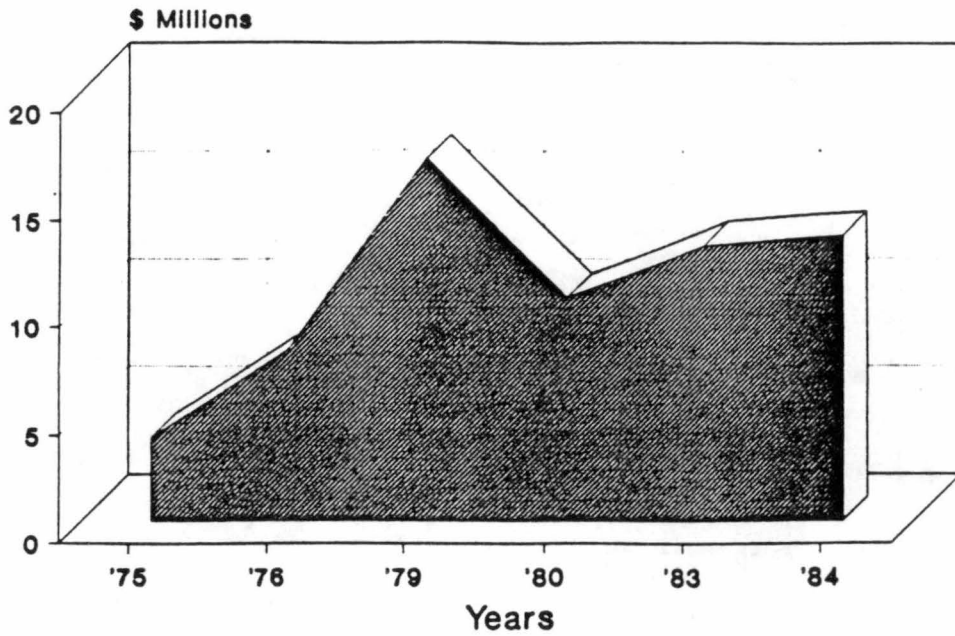
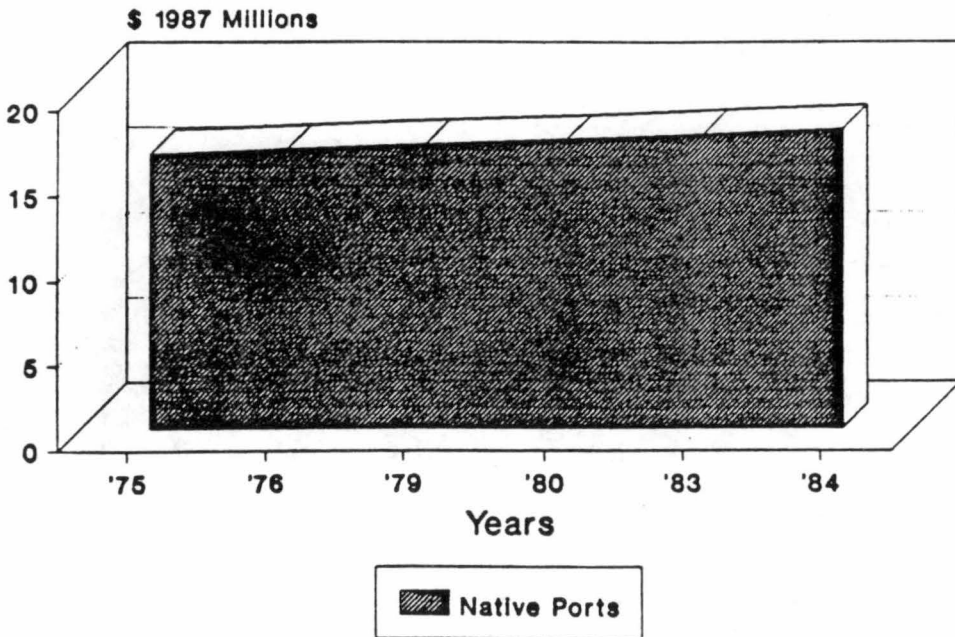


Figure 30-B Landed Value Of The Coastal Region Fishing Fleets - Native Ports - In Constant 1987 Dollars - Trends



Native Ports

Figure 31-A Average Landed Value Of The Coastal Region Fishing Fleets - Native Ports - In Current Dollars

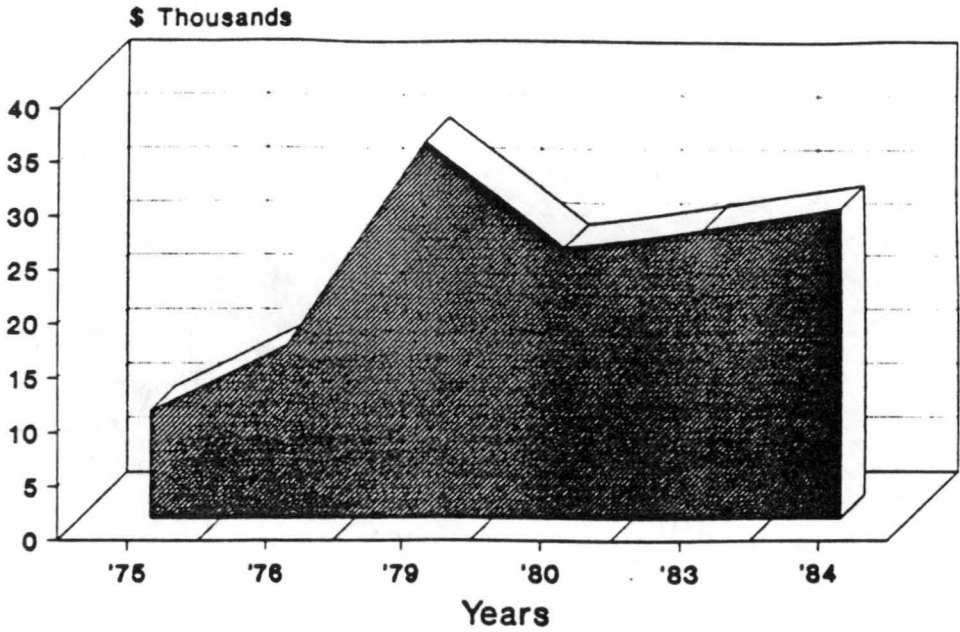
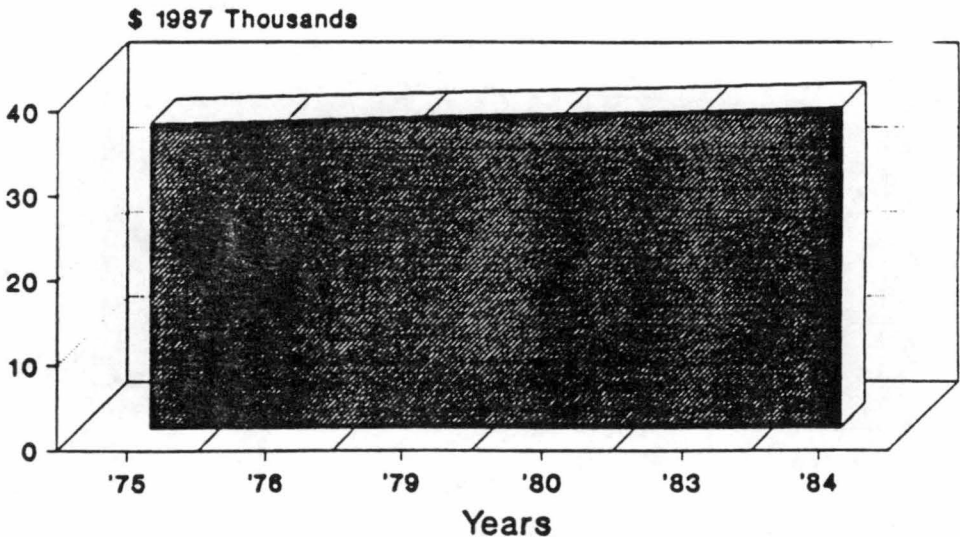


Figure 31-B Average Landed Value Of The Coastal Region Fishing Fleets - Native Ports - Trends In Constant 1987 Dollars



Native Ports

9. SUMMARY AND CONCLUSIONS

1. The purpose of this report was to provide information on trends in the regional distribution of Canada's Pacific commercial fishing industry during the 1970s and 1980s.
2. Some disproportional regional effects could well be expected, for the last 20 years was a period of rapid social and economic change for the Pacific commercial fisheries. The study period encompassed a very dramatic "boom and bust" cycle in commercial fishing industry fortunes, as well as the emergence of important new, non-salmon fisheries. Finally, fisheries management during the 1970s and early 1980s was heavily influenced by ongoing negotiations toward a Canada-US Pacific Salmon Treaty, and was beset by growing domestic conservation problems.
3. Over the period beginning in 1967-72 to 1984, the trend in the total number of British Columbia commercial fishing vessels making landings has stayed virtually constant. However, the number of active vessels based in the Coastal Region has increased, while the number of vessels based in the Metropolitan Region declined. The decline of the salmon fleet was slower, and the growth of the non-salmon fleet faster, in the Coastal Region. These data document a gradual, on-going decentralization of the British Columbia fishing industry away from the Metropolitan Region.
4. Landed value of Coastal Region fleets also grew faster than that of Metropolitan Region fleets in the same period. Real landed value also grew at a significantly faster rate in the Coastal Region compared with the Metropolitan Region. The landed value data thus support the decentralization trend noted in the fleet data.
5. While fleet and landed value trends both suggest that the Coastal Region has been gaining a larger share of the fishing industry, there is evidence that the income gap between the two regions' fishermen, which favours the Metropolitan Region, has widened in recent years.
6. Looking at trends within the Coastal Region, the South Coast and Nass-Skeena (Prince Rupert) areas built up their fishing fleets over the period 1975 to 1984. Other areas, which also tend to be the most remote, did not fare as well.
7. While real landed value was increasing apace in both the Coastal and Metropolitan areas, this trend was not strongly in evidence in the Coastal Region outside South Coast and the Queen Charlotte Islands area of North Coast. In fact, real landed value was on the decline in the Nass-Skeena and Central Coast areas of North Coast, and in the West Coast Vancouver Island Region.
8. Over most of the Coastal Region, average landed value per vessel lagged well behind the Metropolitan Region. The areas with the lowest average landings per vessel were also

generally the most remote areas of the coast.

9. While on a coastwide basis the fleet has been becoming more decentralized and been moving away from the Metropolitan Region, within the Coastal Region itself things have been becoming more centralized in the major fishing communities.

10. Real landed value trends also diverge, with growth in the landings of fleets based in the major ports, and decline of landings of fleets based in the minor ports of the Coastal Region.

11. Among minor ports Hartley Bay, Kitkatla, Lund, some of the Gulf Islands (Galiano, Gabriola and Lasqueti), Bamfield and Coal Harbour lost 25 percent of their fleets between 1976 and 1984. A number of minor ports bucked this trend and underwent rapid growth in the past 20 years. Most of the success stories belonged to South Coast.

12. Twenty-one (21) ports were identified as major ports. These ports were homeport to over 40 active vessels with landings of over \$1 million in 1984. Six (6) are located in the North Coast Region, 12 in the South Coast Region, and 3 in the West Coast Vancouver Island Region.

13. In North Coast, the regional centre, Prince Rupert, recorded a gain in the number of locally-based vessels. Average landed value, both here and in the Queen Charlotte Islands, was comparable to the Metropolitan Region. Otherwise, the smaller North Coast communities languished with declining fleets, declining real landed value and some of the lowest average earnings on the coast.

14. In South Coast, we noted, as in North Coast, the vitality of the regional centre, Nanaimo, with its growing fleet and high average earnings. Unlike on the North Coast, however, the fishing industry based in many of the other major fishing communities of the South Coast was also growing and prosperous. In most communities - Port Hardy, Alert Bay, Sointula, Quadra Island, Powell River, Comox-Courtenay, Qualicum Beach, Deep Bay and Ladysmith -fleets remained stable or grew, while the trend in real landed value was consistently up. Of all the South Coast communities, only Pender Harbour seemed to suffer decline as a fishing port during the ten year period.

15. The picture for the West Coast of Vancouver Island was more akin to that of the North Coast. The fishing industry based in the regional centre, Port Alberni, was relatively prosperous and growing. Elsewhere, the picture was mixed. The data for Tofino show modest growth. At Ucluelet, however, the emerging pattern was one of declining fleet size and declining landed value.

16. When major port data were reclassified by predominant gear type, the results were consistent with trends in fisheries management during the study period. Given Canadian actions taken to "encourage" the US to sign the Pacific Salmon Treaty, we would expect to see the troll and mixed ports benefitting from relatively unfettered troll regulations - but

surprisingly, the benefits were concentrated in the South Coast and the Queen Charlotte Islands. The local West Coast Vancouver Island fleet was not able to take advantage of the situation to the same extent. Within the net fleet, the data confirm what many observers were claiming in the early 1980s - namely, that the gillnet fleet, and by extension the communities which rely on gillnetting, were suffering economic hardship.

17. The resilience of the Coastal Region fisheries economy is attributable, at least in part, to the gain in the size of the Native fleet. Real landed value attributable to the Native fleet also increased. The data for 7 ports designated as "Native ports" also displayed the same trends, including a significant growth in real average landed value per vessel. These results suggest that federal policies to enhance the Native commercial fishery have been relatively successful. However, outside of Prince Rupert (Nass-Skeena) and South Coast, the Native fleets continue to be basically low earners, with average landed value about half the Coastwide figure.

18. Previous work in this area has attempted to demonstrate a link between fleet regulatory policy (limited-entry licensing) and regional disparities. The results of the present study demonstrate that while a number of remote fishing communities show signs of decline, many more are expanding their role in the fishing industry. With so many other factors at work, it is clearly not possible to determine the precise, positive or negative role of DFO's fleet regulatory policy.

19. To the extent that the Department of Fisheries and Oceans has had a regional development goal over the past twenty years, the results of this study suggest that it has been quite successful in more widely spreading increasing fisheries wealth among the fishing communities and Native settlements of the British Columbia coast.

APPENDIX A

CLASSIFICATION OF HOMEPORTS

The study deals with 50 homeports which were identified as having 5 or more active vessels in 1984. For the purposes of analysis, these ports are stratified in a number of different ways - by gear type, by amount of Native ownership and by the size and landings of the local fleet.

o THE MAJOR PORTS

Twenty-one ports were identified as major ports. These ports were homeport to over 40 active vessels with landings of over \$1 million in 1984:

Prince Rupert	Campbell River	Nanaimo
Comox-Courtenay	Port Alberni	Ladysmith
Tofino	Bella Coola	Quadra Island
Pender Harbour	Masset	Bella Bella
Port Hardy	Powell River	Deep Bay
Port Simpson	Alert Bay	Ucluelet
Sointula	Qualicum Beach	Queen Charlotte City-Skidegate

o THE MINOR PORTS

An additional 29 ports were identified as minor ports, with under 40 active vessels. Only Gibsons vessels had landed value in excess of \$1 million:

Kelsey Bay	Lasqueti Is	Gibsons
Kyuquot	Bamfield	Cortes Is
Kitkatla	Ahousaht	Porcher Is
Galiano Is	Lund	Hartley Bay
Gabriola Is	Fanny Bay	Kitimat
Egmont	Coal Harbour	Denman Is
Quatsino	Klemtu	Chemainus
Winter Harbour	Tahsis	Metlakatla
Secret Cove	Port McNeill	Sechelt
Texada Is	Hornby Is	

o THE NATIVE PORTS

Of the 50 homeports covered by this study, 10 had more than 15 Native-owned vessels in 1984. Three of these - Prince Rupert, Campbell River and Port Alberni - are major population centres. The remaining 7 ports are important Native fishing villages, often

remotely located with limited alternative employment opportunities. This set of ports has been designated as "the Native Ports":

Bella Coola	Ahousaht	Tofino	Port Simpson
Bella Bella	Alert Bay	Quadra Is	

The Major Ports have also been categorized by gear: whether net or troll clearly predominates, and the relative importance, within the net sector, of gillnet versus seine. Thus:

o THE SEINE PORTS

The following 3 ports contain almost 75 percent of the seine vessels in the Coastal Region:

Alert Bay	Campbell River	Prince Rupert
-----------	----------------	---------------

o THE GILLNET PORTS

The homeport fleet is 75 percent gillnet in the following 4 cases:

Port Simpson	Bella Bella	Pender Harbour
Bella Coola		

o THE TROLL PORTS

The following 10 ports have a high percentage (over 75 percent) of vessels which use troll gear:

Masset	Comox-Courtenay	Nanaimo
Qualicum Beach	Tofino	Port Alberni
Ucluelet	Powell River	Queen Charlotte City-Skidegate
Ladysmith		

o THE MIXED GEAR PORTS

Only 4 of the major ports have over 25 percent of their vessels using net gear, and over 25 percent using troll gear.

Quadra Is	Campbell River	Deep Bay
Port Hardy		

TITLE: THE FISHING COMMUNITIES OF THE BRITISH COLUMBIA
COAST - TRENDS

DESCRIPTION: APPENDIX B

DATA ON B.C. FISHING INDUSTRY TRENDS, 1967-72 TO 1984

TABLE B-1

SIZE OF THE B.C. COMMERCIAL FISHING
FLEET, 1967-72 TO 1987

Year	Non-Salmon			Salmon					TOTALS		
	Total	Native	Non-Native	Total	Native	Non-Native	Coastal	Inland	All	Coastal	Inland
1967-72	188	4	184	6102	886	5147	2982	2640	6,279	2,628	3,1
1973	292			5184					6,468		
1974	325			5284					6,089		
1975	846	133	812	5120	828	4286			6,086	2,520	3,4
1976	1143			5246					6,389	2,881	3,4
1977	780			5378					6,188		
1978	1877			5037					6,914		
1979	2152			4789					6,911	3,288	3,6
1980	1863			4707					6,280	3,043	3,2
1981	2120			4848					6,688		
1982	1888			4801					6,487		
1983	1882			4465			2148	2337	6,177	3,088	3,0
1984	1892			4278					6,978	3,047	2,8
1985	1888	806	1081	4388	823	3465			6,934		
1986	1488			4278					6,778		
1987	1888			4400					6,288		

* Source: 1967-72, 1978, 1979 - Sci Sinclair, A Licensing & Fee System for the Coastal Fisheries of BC, 1978

TABLE B-2

LANDED VALUE OF THE B.C. COMMERCIAL
FISHING FLEET, 1967-72 TO 1987

<u>Year</u>	<u>Non-Salmon</u>		<u>Salmon</u>		<u>\$('000)</u>	<u>\$('000)</u>	<u>1987 \$('000)</u>
	<u>\$('000)</u>	<u>1987 \$('000)</u>	<u>\$('000)</u>	<u>1987 \$('000)</u>	<u>Total</u>	<u>Total</u>	
					<u>Landings</u>	<u>Landings</u>	<u>Total</u>
					<u>(Ours)</u>	<u>(Catch State)</u>	<u>Landings</u>
1967-72	18,000	52,523	42,000	137,872	58,000	58,000	190,394
1973	30,000	87,101	100,000	290,338	130,000	130,000	377,437
1974	27,000	70,670	74,000	193,889	101,000	101,000	264,360
1975	33,000	77,959	47,000	111,032	74,900	80,000	188,991
1976	50,000	109,857	92,000	202,137	137,465	142,000	311,994
1977	59,000	120,085	109,000	221,853	168,000	168,000	341,938
1978	94,000	175,789	158,000	295,475	252,000	252,000	471,264
1979	171,000	292,840	161,000	275,715	323,231	332,000	568,555
1980	65,000	101,046	117,000	181,843	170,993	182,000	282,929
1981	73,000	100,888	158,000	218,356	231,000	231,000	319,242
1982	68,000	84,816	165,000	205,803	233,000	233,000	290,619
1983	90,000	106,128	111,000	130,889	205,145	201,000	237,015
1984	88,000	99,441	145,000	163,851	238,047	233,000	263,292
1985	128,000	139,099	247,000	268,360	375,000	375,000	407,429
1986	126,000	131,520	266,000	277,653	392,000	392,000	409,172
1987	223,000	223,000	212,000	212,000	435,000	435,000	435,000

TABLE B-3

CONSUMER PRICE INDICES USED IN TREND
CALCULATIONS

1968	38.0
1969	39.7
1970	41.0
1971	42.2
1972	44.2
1973	47.6
1974	52.8
1975	58.5
1976	62.9
1977	67.9
1978	73.9
1979	80.7
1980	88.9
1981	100.0
1982	110.8
1983	117.2
1984	122.3
1985	127.2
1986	132.4
1987	138.2

DESCRIPTION:

APPENDIX C: FISHING INDUSTRY DATA BY REGION, 1975 TO 1984

FILE:

REID C:\COMMUNIT\SUMVAL2.WK1

TABLE C-1

SIZE OF THE FISHING FLEETS IN THE COASTAL
AND METROPOLITAN REGIONS, 1975 TO 1984

REGION/Area	SIZE OF THE FLEET		1975 RANK	1976 NUMBER	1976 PERCENT	1976 RANK	1979 NUMBER	1979 PERCENT	1979 RANK
	1975 NUMBER	1975 PERCENT							
Queen Charlotte Is	104	1.75	7	122	1.91	7	122	1.77	7
Mass Skeena	548	9.22	1	698	10.90	1	789	11.42	1
Central Coast	201	3.38	6	238	3.72	6	210	3.04	6
NORTH COAST	853	14.35		1,058	16.52		1,121	16.22	
Johnstone Strait	443	7.45	4	509	7.95	3	636	9.20	3
East Coast Van Is	534	8.98	2	624	9.74	2	744	10.77	2
Sunshine Coast	246	4.14	5	286	4.47	5	315	4.56	5
SOUTH COAST	1,223	20.57		1,419	22.16		1,695	24.53	
WEST COAST VAN IS	444	7.47	3	484	7.56	4	483	6.99	4
COASTAL REGION	2,520	42.38		2,961	46.24		3,013	43.60	
METROPOLITAN REGION	3,426	57.62		3,443	53.76		3,898	56.40	
TOTAL FLEET	5,946	100.00		6,404	100.00		6,911	100.00	

REGION/Area	SIZE OF THE FLEET		1980 RANK	1983 NUMBER	1983 PERCENT	1983 RANK	1984 NUMBER	1984 PERCENT	1984 RANK
	1980 NUMBER	1980 PERCENT							
Queen Charlotte Is	121	1.92	7	97	1.57	7	97	1.62	7
Mass Skeena	706	11.22	2	672	10.88	2	690	11.56	2
Central Coast	156	2.48	6	201	3.25	6	197	3.30	6
NORTH COAST	983	15.63		970	15.70		984	16.48	
Johnstone Strait	572	9.09	3	625	10.12	3	638	10.69	3
East Coast Van Is	724	11.51	1	722	11.69	1	717	12.01	1
Sunshine Coast	293	4.66	5	266	4.31	5	263	4.41	5
SOUTH COAST	1,589	25.26		1,613	26.11		1,618	27.10	
WEST COAST VAN IS	471	7.49	4	505	8.18	4	445	7.45	4
COASTAL REGION	2,785	44.28		3,088	49.99		3,047	51.04	
METROPOLITAN REGION	3,505	55.72		3,089	50.01		2,923	48.96	
TOTAL FLEET	6,290	100.00		6,177	100.00		5,970	100.00	

14-Mar-89

FISHING PORT STUDY (All Are

TABLE C-2

LANDED VALUE OF THE FISHING FLEETS IN THE COASTAL AND METROPOLITAN REGIONS, 1975 TO 1984

REGION/Area	LANDED VALUE		1975 RANK	1976		1976 RANK	1979		1979 RANK
	\$'000	PERCENT		\$'000	PERCENT		\$'000	PERCENT	
Queen Charlotte Is	876	1.17	7	1,693	1.23	7	5,075	1.57	6
Mass Skeena	10,652	14.22	1	17,842	12.98	1	46,328	14.33	1
Central Coast	1,196	1.60	6	2,551	1.86	6	4,643	1.44	7
NORTH COAST	12,724	16.99		22,086	16.07		56,046	17	
Johnstone Strait	5,092	6.80	3	10,810	7.86	2	25,332	7.84	3
East Coast Van Is	5,445	7.27	2	10,656	7.75	3	33,454	10.35	2
Sunshine Coast	2,421	3.23	5	4,846	3.53	5	9,332	2.89	5
SOUTH COAST	12,958	17.30		26,312	19.14		68,118	21.07	
WEST COAST VAN IS	4,205	5.61	4	8,239	5.99	4	18,526	5.73	4
COASTAL REGION	29,887	39.90		56,637	41.20		134,368	41.57	
METROPOLITAN REGION	45,013	60.10		80,828	58.80		188,863	58.43	
TOTAL FLEET	74,900	100.00		137,465	100.00		323,231	100.00	

AREA/REGION	LANDED VALUE		1980 RANK	1983		1983 RANK	1984		1984 RANK
	\$'000	PERCENT		\$'000	PERCENT		\$'000	PERCENT	
Queen Charlotte Is	3,334	1.95	6	2,338	1.14	7	4,168	1.75	6
Mass Skeena	27,202	15.91	1	23,067	11.24	2	29,169	12.25	1
Central Coast	2,968	1.74	7	2,882	1.40	6	3,590	1.51	7
NORTH COAST	33,504	19.59		28,287	13.79		36,927	15.51	
Johnstone Strait	14,809	8.66	3	22,664	11.05	3	21,069	8.85	3
East Coast Van Is	16,369	9.57	2	24,125	11.76	1	26,992	11.34	2
Sunshine Coast	7,096	4.15	5	8,249	4.02	5	9,956	4.18	5
SOUTH COAST	38,274	22.38		55,038	26.83		58,017	24.37	
WEST COAST VAN IS	8,693	5.08	4	9,835	4.79	4	13,380	5.62	4
COASTAL REGION	74,371	43.49		93,160	45.41		108,325	45.51	
METROPOLITAN REGION	96,622	56.51		111,985	54.59		129,722	54.49	
TOTAL FLEET	170,993	100.00		205,145	100.00		238,047	100.00	

14-Mar-89

*** FISHING PORT STUDY .1

TABLE C-3

REGION/Area	AVERAGE LANDED VALUE PER VESSEL					
	1975	1976	1979	1980	1983	1984
	\$	\$	\$	\$	\$	\$
Queen Charlotte Is	8,423	13,877	41,598	27,554	24,103	42,969
Mass Skeena	19,438	25,562	58,717	38,530	34,326	42,274
Central Coast	5,950	10,718	22,110	19,026	14,338	18,223
NORTH COAST	14,917	20,875	49,996	34,083	29,162	37,527
Johnstone Strait	11,494	21,238	39,830	25,890	36,262	33,024
East Coast Van Is	10,197	17,077	44,965	22,609	33,414	37,646
Sunshine Coast	9,841	16,944	29,625	24,218	31,011	37,856
SOUTH COAST	10,595	18,543	40,188	24,087	34,122	35,857
WEST COAST VAN IS	9,471	17,023	38,356	18,456	19,475	30,067
COASTAL REGION	11,860	19,128	44,596	26,704	30,168	35,551
METROPOLITAN REGION	13,139	23,476	48,451	27,567	36,253	44,380
TOTAL FLEET	12,597	21,465	46,771	27,185	33,211	39,874

TITLE: THE FISHING COMMUNITIES OF THE BRITISH COLUMBIA COAST - TRENDS

DESCRIPTION: APPENDIX D

FILE: REID C:\COMMUNIT\APPENDD.WK1

TABLE D-1

SIZE OF THE FISHING FLEETS - MAJOR PORTS - 1975 TO 1984

COMMUNITY	SIZE OF THE FLEET		1975 RANK	1976 NUMBER	1976 PERCENT	1976 RANK	1979 NUMBER	1979 PERCENT	1979 RANK
	1975 NUMBER	1975 PERCENT							
Alert Bay	62	1.04	11	71	1.11	11	59	0.85	15
Bella Bella	51	0.86	14	65	1.01	14	46	0.67	22
Bella Coola	92	1.55	6	113	1.76	5	104	1.50	6
Campbell River	146	2.46	3	181	2.83	3	267	3.86	3
Comox-Courtenay	83	1.40	9	109	1.70	6	140	2.03	4
Deep Bay	37	0.59	19	64	0.59	15	64	0.93	25
Edenburgh	33	0.55	22	35	0.55	23	51	0.74	19
Esquimalt	35	0.71	21	38	0.95	20	28	0.41	17
Fort St. John	199	3.35	2	270	4.22	2	282	4.08	2
Pender Harbour	87	1.46	8	102	1.59	8	91	1.32	8
Port Alberni	106	1.78	4	114	1.78	4	122	1.77	5
Port Hardy	35	0.59	20	37	0.58	21	49	0.71	20
Port Simpson	42	0.62	17	61	1.00	16	55	0.80	13
Powell River	37	0.62	18	48	0.75	18	76	1.10	11
Prince Rupert	469	7.89	1	591	9.23	1	678	9.81	1
Quadra Island	62	1.04	10	71	1.11	12	75	1.09	12
Qualicum Beach	51	0.86	15	52	0.81	17	61	0.88	14
Queen Charlotte C.	47	0.79	16	46	0.72	19	58	0.84	16
Sointula	89	1.50	7	89	1.39	9	89	1.29	9
Tofino	61	1.03	12	74	1.16	10	85	1.23	10
Ucluelet	94	1.58	5	102	1.59	7	94	1.36	7
MAJOR PORTS	1,918	32.26		2,333	36.43		2,574	37.24	
MINOR PORTS	619	10.41		628	9.81		727	10.52	
COASTAL REGION	2,537	42.67		2,961	46.24		3,301	47.76	
METRO REGION	3,409	57.33		3,443	53.76		3,610	52.24	
TOTAL FLEET	5,946	100.00		6,404	100.00		6,911	100.00	

TABLE D-1 CTD

REGION/Area HOMEPORT	SIZE OF THE FLEET		1980		1983		1984		1984
	NUMBER	PERCENT	RANK	NUMBER	PERCENT	RANK	NUMBER	PERCENT	RANK
Alert Bay	46	0.73	17	69	1.12	13	67	1.12	13
Bella Bella	38	0.60	21	57	0.92	15	57	0.95	15
Bella Coola	73	1.16	11	99	1.60	6	94	1.57	8
Caapbell River	242	3.85	3	253	4.10	2	249	4.17	2
Comox-Courtenay	142	2.26	4	167	2.70	4	163	2.73	4
Deep Bay	47	0.49	16	54	0.74	16	51	0.85	19
Ladysmith	35	0.56	23	44	0.71	20	45	0.75	20
Masset	31	0.79	24	46	0.84	19	51	0.85	17
Nanaïao	271	4.31	2	249	4.03	3	236	3.95	3
Pender Harbour	86	1.37	7	78	1.26	11	77	1.29	10
Port Alberni	128	2.03	5	161	2.61	5	138	2.31	5
Port Hardy	42	0.67	20	52	0.84	17	66	1.11	14
Port Simpson	50	0.75	15	52	0.87	18	51	0.85	18
Powell River	66	1.05	13	63	1.02	14	56	0.94	16
Prince Rupert	623	9.90	1	584	9.45	1	604	10.12	1
Quadra Island	76	1.21	9	82	1.33	9	83	1.39	9
Qualicum Beach	70	1.11	12	96	1.55	7	112	1.88	6
Queen Charlotte C.	59	0.94	14	40	0.65	22	41	0.69	21
Sointula	79	1.26	8	89	1.44	8	97	1.62	7
Tofino	88	1.40	6	80	1.30	10	73	1.22	12
Ucluelet	74	1.18	10	75	1.21	12	77	1.29	11
MAJOR PORTS	2,366	37.62		2,490	40.31		2,488	41.68	
MINOR PORTS	677	10.76		598	9.68		559	9.36	
COASTAL REGION	3,043	48.38		3,088	49.99		3,047	51.04	
METRO REGION	3,247	51.62		3,089	50.01		2,923	48.96	
TOTAL FLEET	6,290	100.00		6,177	100.00		5,970	100.00	

TABLE D-2

LANDED VALUE OF THE FISHING FLEETS - MAJOR PORTS - 1975 TO 1984

COMMUNITY	LANDED VALUE		1975 RANK	1976		1976 RANK	1979		1979 RANK
	\$'000	PERCENT		\$'000	PERCENT		\$'000	PERCENT	
Alert Bay	1,049	1.40	5	2,224	1.62	4	3,349	1.04	7
Bella Bella	397	0.53	16	669	0.49	18	1,370	0.42	21
Bella Coola	544	0.73	13	1,239	0.90	12	2,099	0.65	17
Campbell River	1,873	2.50	3	4,002	2.91	3	12,038	3.72	3
Comox-Courtenay	682	0.91	10	1,455	1.06	9	4,919	1.52	5
Deep Bay	279	0.37	22	868	0.63	15	3,235	1.00	9
Ladysmith	168	0.22	23	424	0.31	24	1,626	0.50	20
Masset	468	0.62	14	881	0.64	14	2,535	0.78	13
Nanaimo	2,595	3.46	2	5,725	4.16	2	16,183	5.01	2
Pender Harbour	775	1.03	8	1,555	1.13	8	2,843	0.88	12
Alberni	1,238	1.65	4	2,172	1.58	5	5,944	1.84	4
Hardy	335	0.45	17	652	0.47	20	1,649	0.51	19
Port Simpson	446	0.60	15	667	0.49	19	2,046	0.63	18
Powell River	652	0.87	11	1,097	0.80	13	2,465	0.76	14
Prince Rupert	9,895	13.21	1	16,769	12.20	1	42,262	13.07	1
Quadra Island	551	0.74	12	1,395	1.01	10	2,899	0.90	11
licum Beach	326	0.44	18	625	0.45	22	2,321	0.72	15
Queen Charlotte C.	326	0.44	18	712	0.52	17	2,296	0.71	16
Sointula	978	1.31	6	2,066	1.50	6	3,299	1.02	8
Tofino	730	0.97	9	1,340	0.97	11	3,127	0.97	10
Ucluelet	955	1.28	7	1,801	1.31	7	3,879	1.20	6
MAJOR PORTS	25,262	33.73		48,336	35.16		122,384	37.86	
MINOR PORTS	4,696	6.27		8,231	5.99		20,306	6.28	
COASTAL REGION	29,958	40.00		56,637	41.20		142,690	44.14	
METRO REGION	44,962	60.00		80,828	58.80		180,541	55.86	
TOTAL LANDED VALUE	74,900	100.00		137,465	100.00		323,231	100.00	

TABLE D-2 CTD

COMMUNITY	LANDED VALUE		1980 RANK	1983 \$'000	1983 PERCENT	1983 RANK	1984 \$'000	1984 PERCENT	1984 RANK
	1980 \$'000	1980 PERCENT							
Alert Bay	2,830	1.66	5	4,358	2.12	5	3,375	1.42	6
Bella Bella	868	0.51	21	830	0.40	21	1,272	0.53	21
Bella Coola	1,320	0.77	15	1,523	0.74	17	1,488	0.63	19
Campbell River	5,341	3.12	3	8,353	4.07	3	6,945	2.92	3
Comox-Courtenay	2,740	1.60	6	3,874	1.89	7	5,428	2.28	4
Deep Bay	1,140	0.67	17	6,239	3.04	4	3,176	1.33	9
Ladysmith	600	0.35	24	867	0.42	20	1,156	0.49	22
Masset	1,657	0.97	13	1,555	0.76	16	2,341	0.98	15
Nanaimo	7,078	4.14	2	8,425	4.11	2	11,001	4.62	2
Pender Harbour	2,182	1.28	8	1,740	0.85	15	2,319	0.97	16
Port Alberni	3,006	1.76	4	3,933	1.92	6	5,416	2.28	5
Port Hardy	1,035	0.61	18	2,898	1.41	8	2,686	1.13	10
Port Simpson	943	0.55	20	817	0.40	21	1,418	0.60	20
Powell River	1,926	1.13	11	2,228	1.09	11	2,564	1.08	12
Prince Rupert	25,538	14.94	1	21,756	10.61	1	26,994	11.34	1
Quadra Island	1,660	0.97	12	2,853	1.39	9	2,634	1.11	11
Qualicum Beach	2,110	1.23	9	2,205	1.07	12	3,723	1.56	6
Queen Charlotte C.	1,450	0.85	14	661	0.32	23	1,604	0.67	18
Sointula	2,548	1.49	7	2,770	1.35	10	3,598	1.51	7
Tofino	2,071	1.21	10	2,033	0.99	13	2,562	1.08	13
Ucluelet	1,244	0.73	16	1,333	0.65	18	2,261	0.95	17
MAJOR PORTS	69,288	40.52		81,251	39.61		93,959	39.47	
MINOR PORTS	11,124	6.51		11,909	5.8		14,147	5.94	
COASTAL REGION	80,471	47.06		93,160	45.41		108,325	45.51	
METRO REGION	90,522	52.94		111,985	54.59		129,722	54.49	
TOTAL LANDED VALUE	170,993	100.00		205,145	100.00		238,047	100.00	

TABLE D-3

AVERAGE LANDED VALUE OF THE FISHING FLEETS - MAJOR PORTS - 1975 TO 1984

COMMUNITY	AVERAGE LANDED VALUE (\$)					
	1975	1976	1979	1980	1983	1984
Alert Bay	16,919	31,318	56,763	61,522	63,159	50,377
Bella Bella	7,784	10,286	29,783	22,850	14,561	22,311
Bella Coola	5,913	10,965	20,183	18,087	15,384	15,831
Campbell River	12,829	22,110	45,086	22,069	33,016	27,891
Comox-Courtenay	8,217	13,349	35,136	19,296	23,198	33,301
Deep Bay	7,541	13,567	50,547	24,249	115,537	62,274
Ladysmith	5,091	12,100	31,882	17,140	19,705	25,680
Masset	13,371	23,174	90,536	53,438	33,804	45,908
Nanaimo	13,040	21,205	57,387	26,117	33,835	46,613
Pender Harbour	8,908	15,244	31,242	25,375	22,308	30,117
Port Alberni	11,679	19,053	48,721	23,488	24,429	39,244
Port Hardy	9,571	17,613	33,653	24,645	55,731	40,701
Port Simpson	10,619	10,935	37,200	18,860	15,712	27,795
Qualicum River	17,622	22,861	32,434	29,186	35,365	45,781
Prince Rupert	21,098	28,373	62,333	40,992	37,253	44,691
Quadra Island	8,887	19,651	38,653	21,843	34,793	31,730
Qualicum Beach	6,392	12,013	38,049	30,143	22,969	33,240
Queen Charlotte C.	6,936	15,471	39,586	24,582	16,525	39,123
Sointula	10,989	23,209	37,067	32,250	31,124	37,095
Tofino	11,967	18,111	36,788	23,533	25,413	35,093
Ucluelet	10,160	17,657	41,266	16,816	17,773	29,366
MAJOR PORTS	13,171	20,718	47,546	29,285	32,631	37,765
MINOR PORTS	7,586	13,107	27,931	16,431	19,915	25,308
COASTAL REGION	11,808	19,128	43,226	26,445	30,168	35,551
METRO REGION	13,189	23,476	50,011	27,879	36,253	44,380
TOTAL LANDED VALUE	12,597	21,465	46,771	27,185	33,211	39,874

TITLE: THE FISHING COMMUNITIES OF THE BRITISH COLUMBIA COAST - TRENDS

DESCRIPTION: APPENDIX E

FILE: REID C:\COMMUNIT\APPENDE.WK1

TABLE E-1

SIZE OF THE FISHING FLEETS - MINOR PORTS - 1975 TO 1984

COMMUNITY	SIZE OF THE FLEET		1975 RANK	1976 NUMBER	1976 PERCENT	1976 RANK	1979 NUMBER	1979 PERCENT	1979 RANK
	1975 NUMBER	1975 PERCENT							
Ahousat	21	0.35	26	36	0.56	22	47	0.68	21
Banfield	58	0.98	13	66	1.03	13	52	0.75	18
Chemainus	17	0.29	29	15	0.23	30	17	0.25	32
Coal Harbour	7	0.12	41	14	0.22	32	13	0.22	35
Cortes Island	12	0.20	32	11	0.17	37	23	0.33	28
Denman Island	0	0.00	50	2	0.03	50	4	0.16	45
Egmont	18	0.30	28	20	0.31	27	17	0.25	31
Fanny Bay	4	0.07	45	7	0.11	44	8	0.12	44
Gabriola Island	9	0.15	35	20	0.31	28	27	0.39	26
Galiano Island	23	0.39	24	29	0.45	24	27	0.39	27
Gibsons	23	0.39	25	27	0.42	26	29	0.42	24
Hartley Bay	4	0.07	46	10	0.16	38	7	0.10	49
Hornby Island	2	0.03	48	4	0.06	47	8	0.12	43
Kelsey Bay	4	0.07	44	4	0.06	46	9	0.13	41
Kitimat	13	0.22	31	13	0.20	33	13	0.23	34
Kitkatla	14	0.24	30	15	0.23	31	15	0.19	36
Klemtu	8	0.13	37	11	0.17	36	18	0.16	38
Kyuquot	21	0.35	27	16	0.25	29	21	0.56	23
Lasqueti Island	8	0.13	38	13	0.20	34	16	0.23	33
Lund	24	0.40	23	29	0.45	25	39	0.30	29
Metlakatla	3	0.05	47	5	0.08	45	3	0.10	46
Porcher Island	9	0.15	36	11	0.17	35	16	0.19	37
Port McNeill	2	0.03	49	3	0.05	48	10	0.12	42
Quatsino	12	0.20	33	8	0.12	41	11	0.26	30
Sechelt	7	0.12	39	8	0.12	40	7	0.04	47
Secret Cove	7	0.12	40	8	0.12	42	11	0.10	48
Tahsis	7	0.12	42	7	0.11	43	7	0.06	39
Texada Island	5	0.08	43	3	0.05	49	2	0.03	50
Winter Harbour	10	0.17	34	9	0.14	39	8	0.14	40
MINOR PORTS	619	10.41		628	9.81		727	10.52	
MAJOR PORTS	1,918	32.26		2,333	36.43		2,574	37.24	
COASTAL REGION	2,537	42.67		2,961	46.24		3,301	47.76	
METRO REGION	3,409	57.33		3,443	53.76		3,610	52.24	
TOTAL FLEET	5,946	100.00		6,404	100.00		6,911	100.00	

COMMUNITY	SIZE OF THE FLEET		1980 RANK	1983 NUMBER	1983 PERCENT	1983 RANK	1984 NUMBER	1984 PERCENT	1984 RANK
	1980 NUMBER	1980 PERCENT							
Ahousat	45	0.72	18	38	0.62	23	35	0.59	22
Banfield	45	0.72	19	44	0.71	21	32	0.54	23
Cheamainus	20	0.32	30	16	0.26	30	25	0.42	25
Coal Harbour	12	0.19	36	15	0.24	31	10	0.17	39
Cortes Island	21	0.33	29	18	0.29	28	16	0.27	30
Denman Island	3	0.05	49	5	0.08	46	7	0.12	46
Egmont	20	0.32	31	22	0.36	26	22	0.37	26
Fanny Bay	10	0.16	39	4	0.06	48	8	0.13	44
Gabriola Island	28	0.45	26	14	0.23	32	13	0.22	33
Galiano Island	24	0.38	27	13	0.21	33	13	0.22	34
Gibsons	35	0.56	22	24	0.39	25	27	0.45	24
Hartley Bay	4	0.06	47	4	0.06	49	6	0.10	50
Hornby Island	11	0.17	37	9	0.15	42	10	0.17	40
Island Bay	12	0.19	34	19	0.31	27	22	0.37	27
Island	10	0.16	40	11	0.18	37	14	0.23	31
Kitkatla	12	0.19	35	12	0.19	35	10	0.17	41
Klemtu	10	0.16	38	10	0.16	40	12	0.20	35
Kyuquot	22	0.35	28	17	0.28	29	21	0.35	28
Metlakatla	15	0.24	32	10	0.16	41	9	0.15	42
Metlakatla	29	0.46	25	27	0.44	24	21	0.35	29
Metlakatla	3	0.05	48	3	0.05	50	6	0.10	48
Porcher Island	14	0.22	33	10	0.16	38	14	0.23	32
Port McNeill	9	0.14	42	11	0.18	36	11	0.18	37
Quatsino	10	0.16	41	10	0.16	39	12	0.20	36
Sechelt	7	0.11	45	7	0.11	45	6	0.10	49
Secret Cove	8	0.13	44	8	0.13	43	7	0.12	45
Tahsis	8	0.13	43	4	0.06	47	7	0.12	47
Texada Island	0	0.00	50	7	0.11	44	9	0.15	43
Winter Harbour	7	0.11	46	13	0.21	34	11	0.18	38
MINOR PORTS	677	10.76		598	9.68		559	9.36	
MAJOR PORTS	2,366	37.62		2,490	40.31		2,488	41.68	
COASTAL REGION	3,043	48.38		3,088	49.99		3,047	51.04	
METRO REGION	3,247	51.62		3,089	50.01		2,923	48.96	
TOTAL FLEET	6,290	100.00		6,177	100.00		5,970	100.00	

TABLE E-2

LANDED VALUE OF THE FISHING FLEETS - MINOR PORTS - 1975 TO 1984

COMMUNITY	LANDED VALUE		1975 RANK	1976 \$'000	1976 PERCENT	1976 RANK	1979 \$'000	1979 PERCENT	1979 RANK
	1975 \$'000	1975 PERCENT							
Ahousat	116	0.15	28	389	0.28	26	1873	0.58	22
Bamfield	333	0.44	18	649	0.47	21	1280	0.40	23
Chemainus	72	0.10	33	140	0.10	34	339	0.10	36
Coal Harbour	46	0.06	41	560	0.41	23	574	0.18	33
Cortes Island	53	0.07	40	80	0.06	42	556	0.17	34
Denman Island	0	0.00	50	14	0.01	50	62	0.02	49
Egmont	107	0.14	30	149	0.11	32	242	0.07	41
Fanny Bay	32	0.04	44	94	0.07	41	218	0.07	42
Gabriola Island	57	0.08	36	128	0.09	38	630	0.19	30
Galiano Island	155	0.21	25	345	0.25	27	646	0.20	29
Gibsons	326	0.44	18	795	0.58	16	1,010	0.31	24
Hartley Bay	15	0.02	47	137	0.10	36	153	0.05	47
Hornby Island	46	0.06	41	78	0.06	43	271	0.08	38
Kelsey Bay	23	0.03	45	30	0.02	48	254	0.08	40
Kitimat	59	0.08	36	223	0.16	30	256	0.08	39
Kitkatla	134	0.18	26	179	0.13	31	694	0.21	27
Kleatu	60	0.08	36	61	0.04	45	186	0.06	44
Kyuquot	162	0.22	23	279	0.20	28	771	0.24	26
Lasqueti Island	116	0.15	28	402	0.29	25	794	0.25	25
Lund	138	0.18	26	235	0.17	29	586	0.18	32
Metlakatla	17	0.02	47	37	0.03	46	624	0.19	31
Porcher Island	69	0.09	34	131	0.10	37	384	0.12	35
Port McNeill	1	0.00	49	34	0.02	47	167	0.05	45
Quatsino	79	0.11	31	139	0.10	35	280	0.09	37
Sechelt	60	0.08	36	69	0.05	44	161	0.05	46
Secret Cove	83	0.11	31	144	0.10	33	666	0.21	28
Tahsis	34	0.05	43	103	0.07	39	123	0.04	48
Texada Island	21	0.03	45	22	0.02	49	60	0.02	50
Winter Harbour	67	0.09	34	97	0.07	40	192	0.06	43
MINOR PORTS	4,696	6.27		8,231	5.99		20,306	6.28	
MAJOR PORTS	25,262	33.73		48,336	35.16		122,384	37.86	
COASTAL REGION	29,958	40.00		56,637	41.20		142,690	44.14	
METRO REGION	44,962	60.00		80,828	58.80		180,541	55.86	
TOTAL LANDED VALUE	74,900	100.00		137,465	100.00		323,231	100.00	

ABLE E-2 CTD

COMMUNITY	LANDED VALUE		1980 RANK	1983 \$'000	1983 PERCENT	1983 RANK	1984 \$'000	1984 PERCENT	1984 RANK
	1980 \$'000	1980 PERCENT							
Ahousat	660	0.39	22	425	0.21	26	477	0.20	27
Banfield	515	0.30	25	369	0.18	28	623	0.26	26
Chemainus	129	0.08	42	107	0.05	41	187	0.08	43
Coal Harbour	260	0.15	33	346	0.17	29	300	0.13	35
Cortes Island	255	0.15	34	248	0.12	32	437	0.18	28
Denman Island	93	0.05	47	91	0.04	44	297	0.12	36
Egmont	131	0.08	41	205	0.10	35	256	0.11	37
Fanny Bay	225	0.13	36	407	0.20	27	384	0.16	32
Gabriola Island	374	0.22	28	218	0.11	34	340	0.14	33
Galiano Island	380	0.22	27	241	0.12	32	390	0.16	31
Gibsons	995	0.58	19	1,993	0.97	14	2,553	1.07	14
Hartley Bay	163	0.10	38	104	0.05	41	148	0.06	46
Hornby Island	188	0.11	37	78	0.04	44	198	0.08	42
Island Bay	299	0.17	30	497	0.24	24	700	0.29	24
Island	137	0.08	40	202	0.10	35	320	0.13	34
Kitkatla	244	0.14	35	113	0.06	39	133	0.06	47
Klemtu	116	0.07	44	47	0.02	48	124	0.05	48
Kyuquot	353	0.21	29	346	0.17	29	698	0.29	25
Lasqueti Island	605	0.35	23	881	0.43	19	960	0.40	23
Island	495	0.29	26	476	0.23	25	422	0.18	29
Metlakatla	94	0.05	46	41	0.02	48	152	0.06	45
Orcher Island	286	0.17	32	289	0.14	31	422	0.18	30
Port McNeill	161	0.09	39	96	0.05	41	243	0.10	39
Quatsino	109	0.06	45	73	0.04	44	246	0.10	38
Sechelt	91	0.05	48	114	0.06	39	121	0.05	49
Secret Cove	291	0.17	31	180	0.09	37	180	0.08	44
Tahsis	126	0.07	43	60	0.03	47	120	0.05	50
Texada Island	0	0.00	50	29	0.01	50	201	0.08	41
Winter Harbour	79	0.05	49	136	0.07	38	241	0.10	40
MINOR PORTS	11,124	6.51		11,909	5.8		14,147	5.94	
MAJOR PORTS	69,288	40.52		81,251	39.61		93,959	39.47	
COASTAL REGION	80,471	47.06		93,160	45.41		108,325	45.51	
METRO REGION	90,522	52.94		111,985	54.59		129,722	54.49	
TOTAL LANDED VALUE	170,993	100.00		205,145	100.00		238,047	100.00	

TABLE E-3

AVERAGE LANDED VALUE OF THE FISHING FLEETS - MINOR PORTS - 1975 TO 1984

COMMUNITY	AVERAGE LANDED VALUE (\$)					
	1975	1976	1979	1980	1983	1984
Ahousat	5,524	10,806	39,851	14,674	10,237	13,616
Bamfield	5,741	9,832	24,615	11,455	14,748	19,479
Chemainus	4,235	9,314	19,941	6,451	8,732	7,465
Coal Harbour	6,571	40,005	44,154	21,670	37,338	30,017
Cortes Island	4,417	7,312	24,174	12,143	4,468	27,332
Denman Island	0	6,776	15,500	30,922	2,710	42,495
Egmont	5,944	7,442	14,235	6,532	6,766	11,657
Fanny Bay	8,000	13,435	27,250	22,517	23,512	48,036
Gabriola Island	6,333	6,417	23,333	13,346	9,167	26,178
Galiano Island	6,739	11,895	23,926	15,816	26,535	30,038
Gibsons	14,174	29,460	34,828	28,421	33,143	94,561
Hartley Bay	3,750	13,670	21,857	40,825	34,174	24,738
Hornby Island	23,000	19,563	33,875	17,114	8,695	19,790
Kelsey Bay	5,750	7,424	28,222	24,933	1,563	31,831
Kitimat	4,538	17,167	19,692	13,688	20,288	22,890
Kitkatla	9,571	11,964	46,267	20,315	14,955	13,346
Klemtu	7,500	5,562	10,333	11,628	6,118	10,328
Kyuquot	7,714	17,447	36,714	16,061	16,420	33,222
Lasqueti Island	14,500	30,932	49,625	40,329	40,212	106,630
Lund	5,750	8,094	15,026	17,074	8,693	20,106
Metlakatla	5,667	7,486	208,000	31,322	12,477	25,251
Porcher Island	7,667	11,874	24,000	20,401	13,061	30,144
Port McNeill	500	11,435	16,700	17,909	3,119	22,057
Quatsno	6,583	17,406	25,455	10,873	13,925	20,513
Sechelt	8,571	8,581	23,000	12,993	9,807	20,126
Secret Cove	11,857	17,957	60,545	36,329	17,957	25,672
Tahsis	4,857	14,654	17,571	15,738	25,645	17,185
Texada Island	4,200	7,320	30,000	ERR	3,137	22,336
Winter Harbour	6,700	10,728	24,000	11,276	7,427	21,871