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Present Status of the Quebec Fishing Industry, January, 1991

Economic and Commercial Analysis Report n° 84

Pêches et Océans | Fisheries and Oceans

Canada

Present Status of the Quebec Fishing Industry, January, 1991

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INTRODUCTION

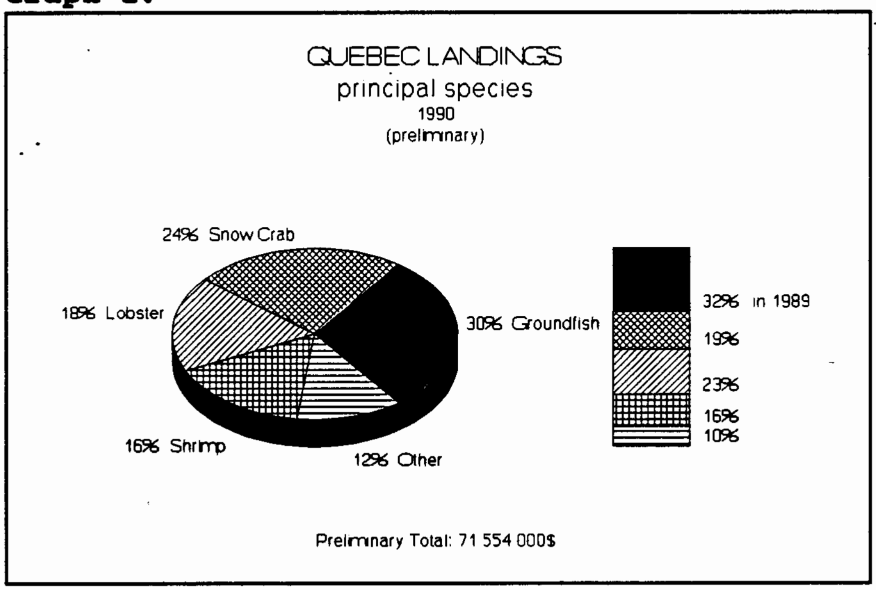
In 1990, the Quebec fishing industry involved nearly 10 500 direct jobs, 1536 active boats[1] which landed more than 71 million dollars in fish stock, and 124 buyers whose output was valued at 170 million dollars. In the Atlantic as a whole, Quebec accounts for 10% of the value landed. Although this industry represents less than 1% of Quebec's gross domestic product, it deserves close attention because behind this purely economic picture is a very special social context, which gives this industry all of its importance.

Considered to be the spearhead of the maritime regions of Quebec, fishing generates 80% of jobs in the Lower North Shore, 46% in the Magdalen Islands and 25% in the southwest part of the Gaspé. This is an industry of primary importance in these areas as it contributes to the survival of a multitude of communities where the unemployment rate is among the highest in Quebec.

Quebec is also, and foremost, a fish exporter. In 1989, nearly 65% of its production was sent to external markets. In this context, market as well as resource fluctuations exert a major influence on the future of the Quebec industry.

Groundfish, crab, lobster and shrimp make up the backbone of the Quebec fishing industry. In 1990, they represented 88% of the value of landings, compared to 90% in 1989. These species, along with aquaculture, will be used to study this industry.

Graph 1:



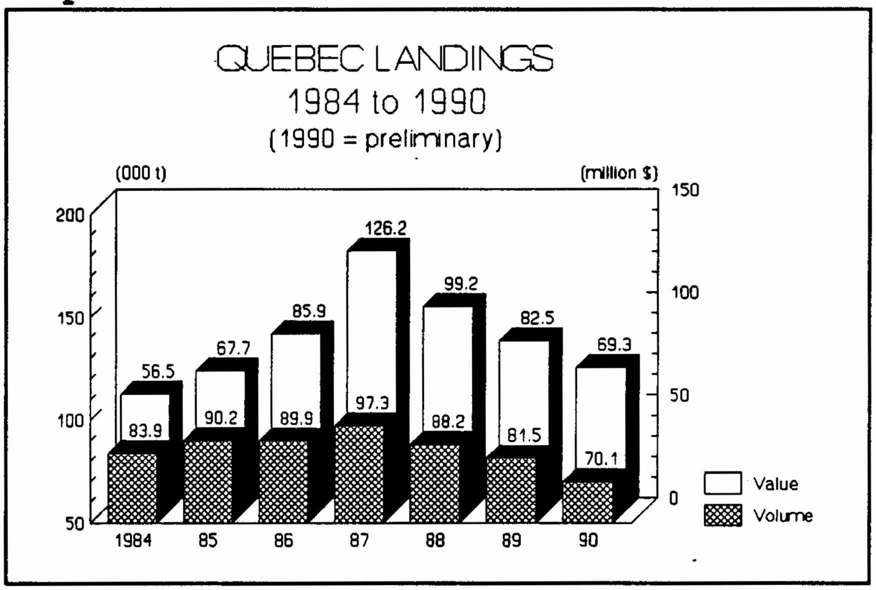
[1] Boat having recorded at least one landing in the reference year.

1.0 GENERAL EVOLUTION

For the past few years, the Quebec industry has been faced with depleting resources which, once processed, are hit with the effects of the successive drops in prices recorded on the principal markets.

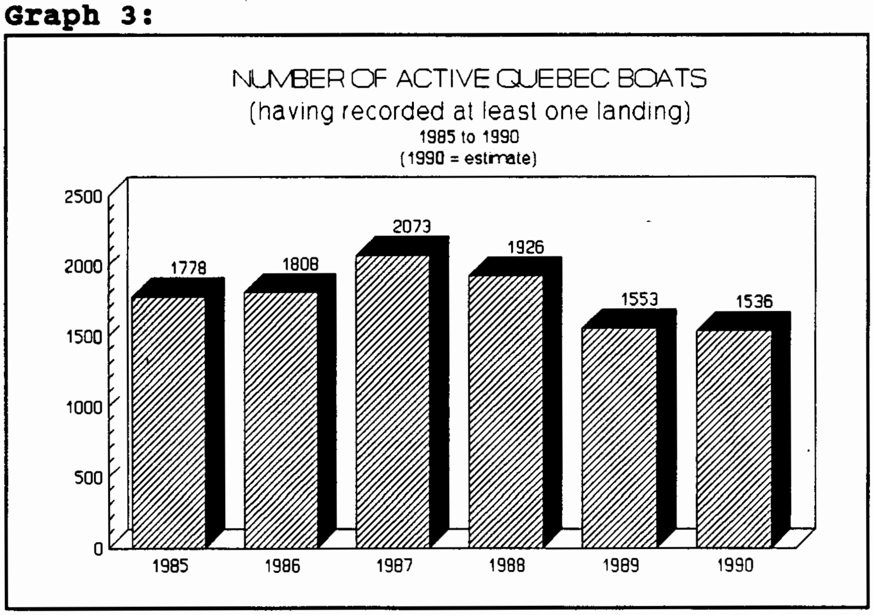
The volume of landings fell by 26% between 1987 and 1990. This decrease is mainly due to groundfish and snow crab, which recorded drops of 38% and 31% respectively during this period. The value of landings in 1990, on the other hand, represented no more than 57% of the value attained in 1987. The combined decline in volume and price is well reflected in this figure.

Graph 2:



Resource fluctuations have a direct impact on the number of people involved in fishing. Between 1984 and 1987, for example, the number of active boats climbed by 17% in accordance with the increase in the value of landings. Between 1987 and 1990, the opposite phenomenon was observed. When the value of landings was on a downward trend, the number of active boats fell by 25%.

Graph 3:



2.0 GROUNDFISH

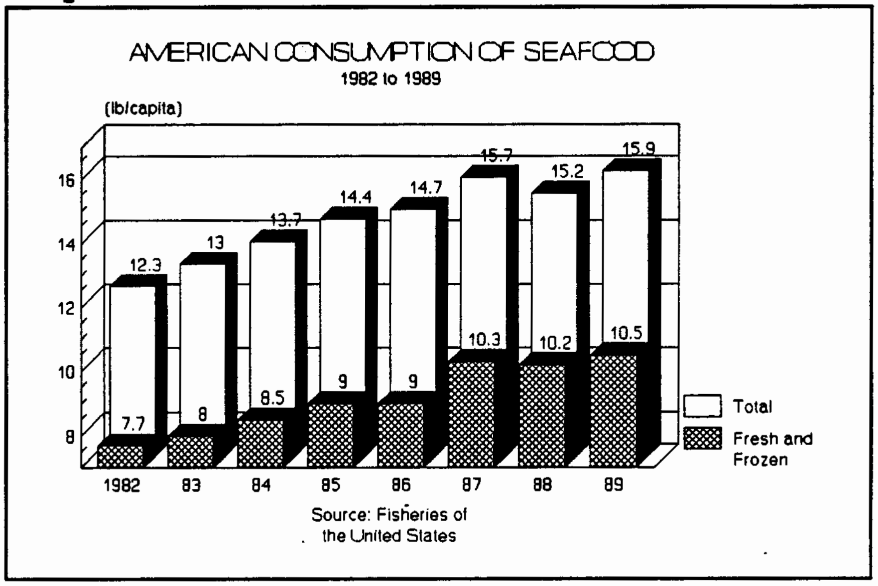
A sector running out of resources!

The Quebec groundfish fishing industry involves 484 active boats, 1400 fishermen and 1600 plant workers. It is also a sector of the industry which, because of its makeup, must pursue social and economic objectives simultaneously.

2.1 Tertiary Sector

For the past two years now, a turnaround has been observed on the American market. This revival, illustrated by the increase in American consumption, does not solely benefit Quebec and Canadian products. The competition, therefore, has to be monitored.

Graph 4:



New supply sources are beginning to compete with our products and are bringing about significant changes in American dietary habits. Some examples are the americanization of Alaskan fisheries, which provides the United States with a very important source of raw materials; increased aquacultural production, in particular of catfish and shrimp; and substitute species such as hoki, orange roughy and Antarctic queen from New Zealand, Australia and South America.

2.2 Secondary Sector

Meanwhile, the Quebec industry must deal with reduced resources. This decrease in stocks has repercussions on plant employment. An estimated 810 jobs (one job out of three) were lost in this sector between 1987 and 1990.

Although some turnaround in prices has been observed on the principal markets, the financial situation of plants is far from enviable at the present time. It is therefore not surprising that rationalization has become a preoccupation for everyone involved.

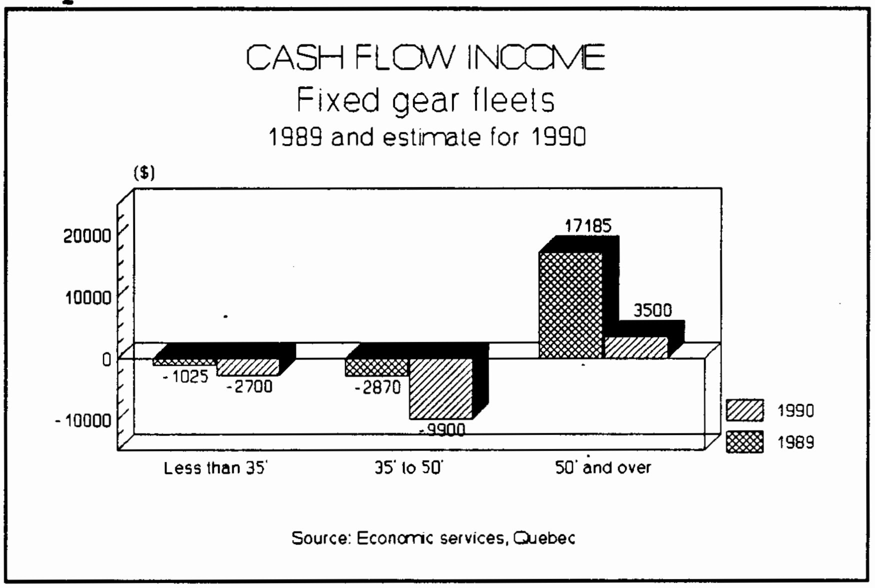
2.3 Primary sector

Mobile gear fishing (trawl and Scottish seine) involves 9% of boats and 20% of fishermen. Most of these boats are currently the focus of a fishing allocation program. The accelerated renewal of this fleet which has been taking place over recent years (especially in the 45' to 65' category) coincides with a significant market slowdown. The cash flow[2] of this fleet has dipped to approximately $23 000 over the past two years. Some companies have been unable to meet their financial obligations and the provincial government, the main financial backer, has been forced to step in.

The situation of fixed gear fishing boats is cause for greater concern. Accounting for 91% of boats and 80% of fishermen, these fleets were only responsible for 23% of groundfish landings in 1990, compared to 45% in 1984.

The pronounced decrease of their landings places these boats in a very critical financial situation. Over the past two years, the fleets of boats under 50' have shown a loss in cash flow. It is easy to assess the social impact such a situation can have on regions which are economically dependant on fishing and have a very high unemployment rate.

Graph 5:



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[2] Income of the owner-captain after covering all expenses before taxes.

3.0 SNOW CRAB

The snow crab has lost its golden claws...

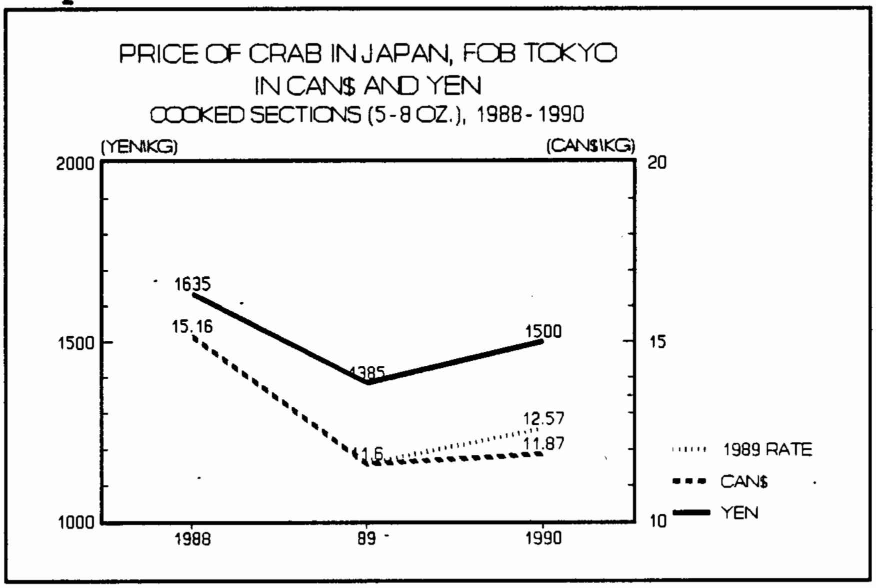
Accounting for 25% of the landing value, snow crab fishing in Quebec is the main source of income for 750 fishermen and 1100 plant workers.

3.1 Tertiary Sector

Being the largest consumer of crab, Japan is in a position to influence the world market. In 1988, after four years of steady growth, Japan reduced its imports. The all-too-sudden rise in prices and the depreciation of the yen are the reasons behind the shrinking demand.

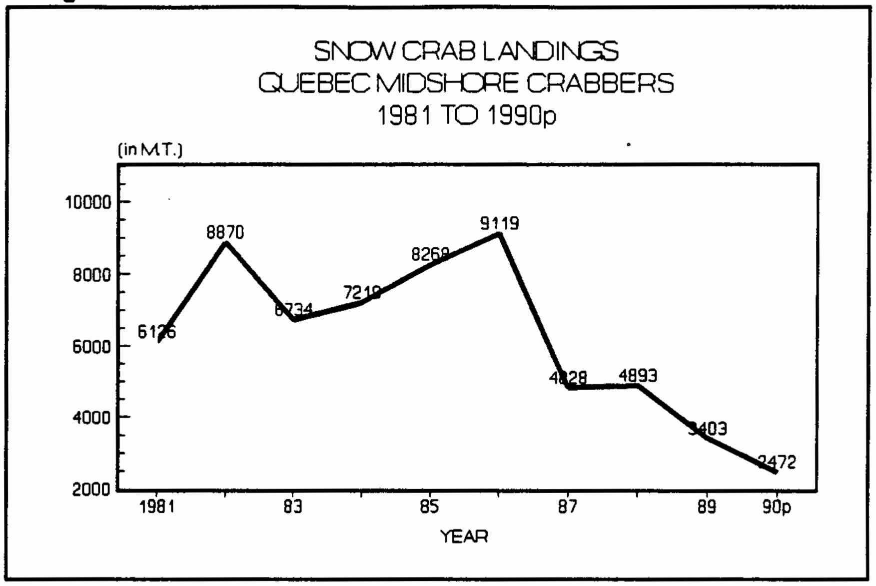
Following the 1989 correction period (a 23% price drop in Japan), the situation stabilized in 1990. On the Japanese crab sections market, a 2% price increase in Canadian dollars was recorded while in the United States, the price of crab meat continued its downward trend, recording a 3% decrease in 1990.

Graph 6:



3.2 Secondary Sector

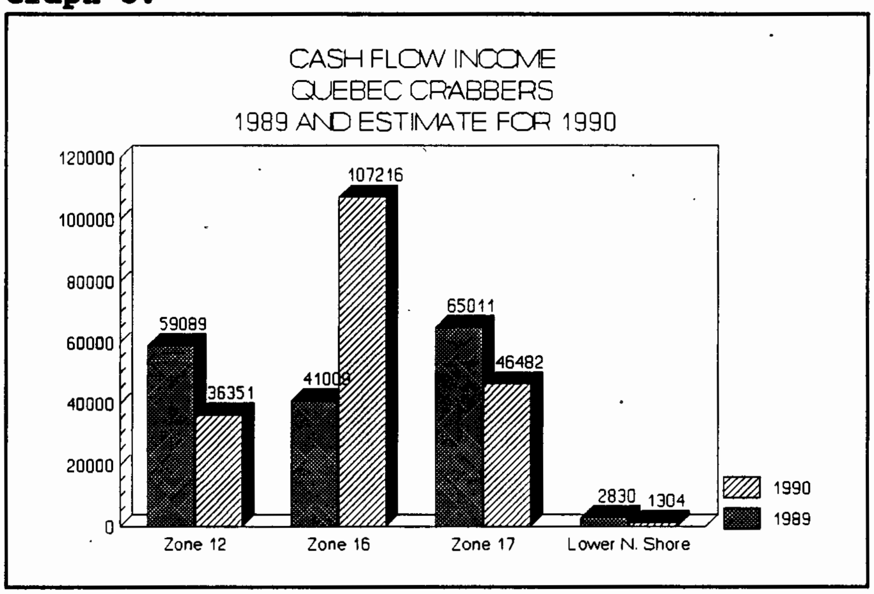
Graph 7:



This was another difficult year for plant workers who received their stock from the southwest area of the Gulf of Saint Lawrence since the size of landings fell again in 1990. Workers in this category were not eligible for unemployment insurance. Aggravated by the increased production of sections, to the detriment of crab meat, this sector of the fishing industry has lost more than 900 jobs (1 job out of 3) since 1986.

3.3 Primary Sector

Graph 8:



The landing price dropped for the second year in a row. It fell from $2.66\kg in 1989 to $2.45\kg in 1990, resulting in negative repercussions on the cash flow for crabbers in Quebec as a whole. The remarkable financial performance of one of the crabber fleets, however, is an exception to the rule, given the overall situation of this category of fishing in 1990.

Its 89% recorded increase in landings ranked the Mid North Shore (Zone 16) crabber fleet as the most productive in the Quebec fisheries in 1990. Its cash flow jumped from $41 000 in 1989 to more than $107 000 in 1990, some $65 000 higher than the second most important fleet.

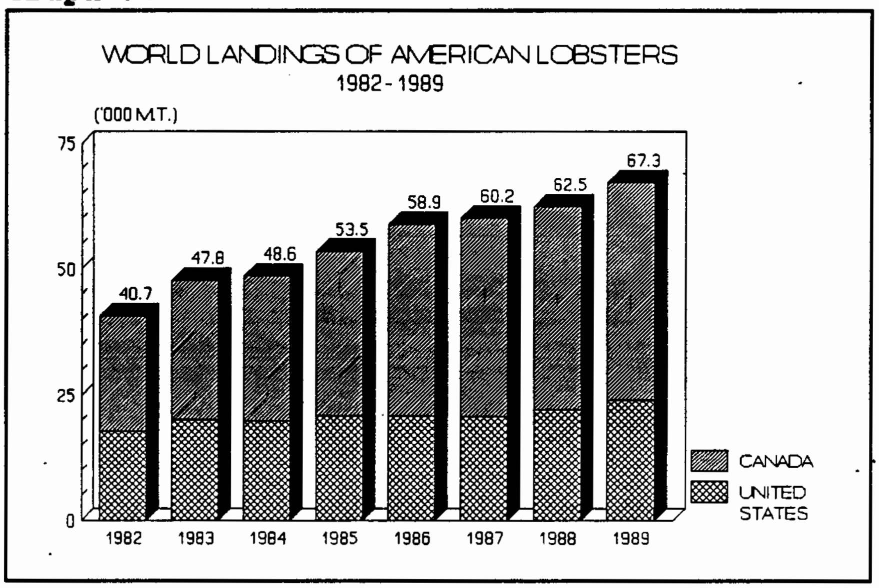
4.0 LOBSTER

When the supply is greater than the demand

In 1990, the lobster industry followed the trends identified during the previous years: a steady increase in world supply and a drop in prices on main export markets (United States and France). The larger legal size in the United States and its growing impact on the quantities of lobster available on the Canadian market has been added to the problems encountered by the Quebec fishing industry, which provides the livelihood for 1440 active fishermen and 200 plant employees.

4.1 Tertiary Sector

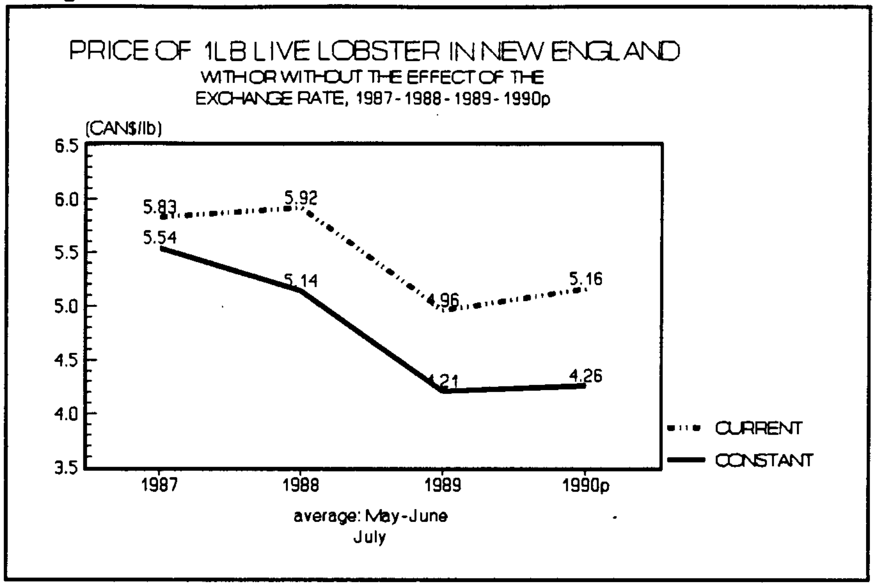
Graph 9:



The continuous rise in world landings of American lobster during the period between 1982 and 1989 represents an increase of 65% over eight years. These increases are largely due to Canadian landings, which now account for 65% of world landings, compared to 56% in 1982. Yet another increase in Canadian landings was anticipated for 1990.

The slide in prices that began in April on the New England market was followed by a brief $0.24/lb increase in July. This turnaround enabled the price to reach its 1989 level, although it represents a decrease of nearly 18% compared to the price received in 1988.

Graph 10:



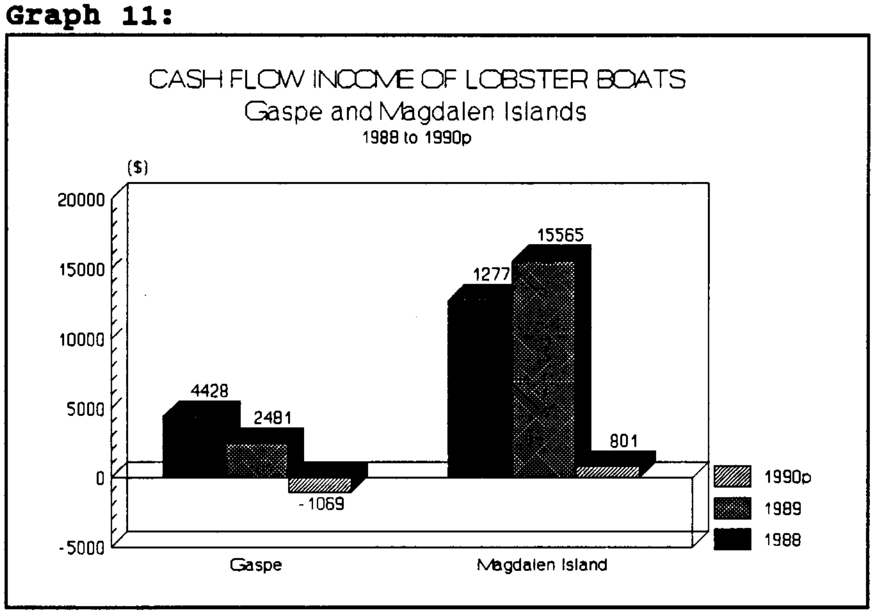
4.2 Secondary Sector

In 1989, the lobster processing industry in Quebec generated 24.9 million dollars, for a production volume of 2.746 t. This outcome was the highest it had been over the 6 previous years, during which time the produced lobster value more than doubled. However, the fall in market prices brought about a reduction in the value of lobster production in 1990.

4.3 Primary Sector

A downward trend in the landing price, influenced by a favourable Quebec consumer market, explains the decline in revenue for fishermen in the Gaspé as well as the Magdalen Islands in 1990. The previous season put lobster boats in the Gaspé in the red for this fiscal period, while the average salary of owner-captains in the Islands was $801 before taxes.

Graph 11:



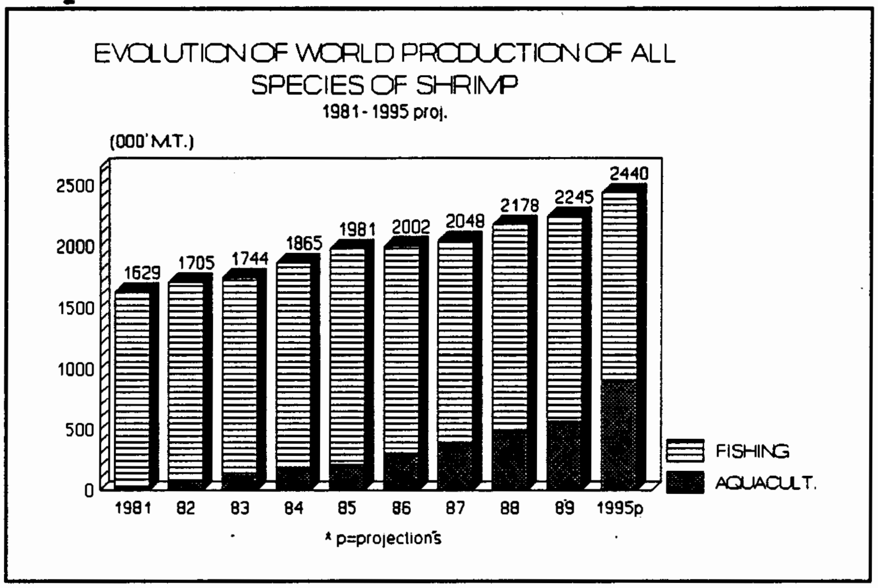
5.0 SHRIMP

Aquacultural or cold-water shrimp?

Accounting for 16% of the landed value, shrimp fishing in Quebec involves 51 boats and provides the livelihood for 205 fishermen and 1000 plant workers throughout the Gaspé and the North Shore.

5.1 Tertiary Sector

Graph 12:

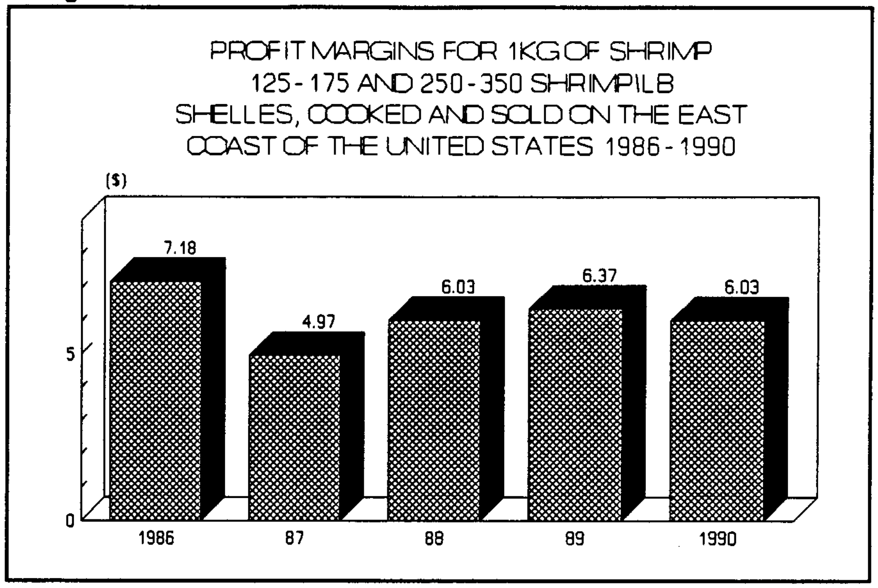


World shrimp production rose by 50% in nine years. This increase, which can be attributed to aquaculture, has been reshaping the shrimp market over recent years. Tropical shrimp produced by aquaculture is prevalent at every sales outlet. In the United States, the principal destination of Quebec exports, the price of cold-water shrimp is following the downward trend of the price of tropical shrimp. However, in Europe, and especially in Japan, where cold-water shrimp is in great demand, cold-water shrimp prices indicate interesting opportunities for Quebec exporters.

5.2 Secondary Sector

For producers, the fluctuation of market prices, combined with the price offered to fishermen, has stabilized the profit margin of plants over the last few years. Therefore, a producer who sold in the United States recorded a slight decrease in 1990.

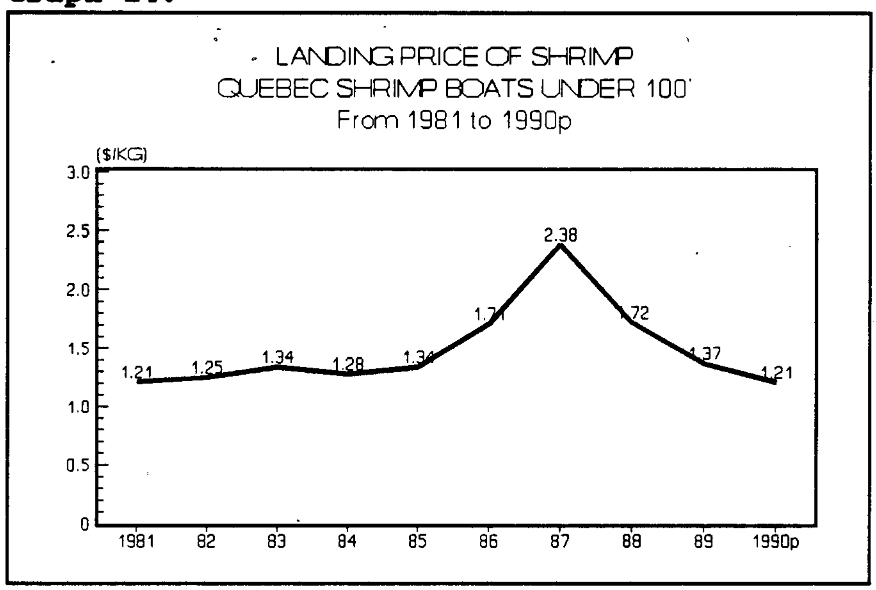
Graph 13:



5.3 Primary Sector

After ten years, the price of shrimp paid to fishermen dropped back to its starting point. It came back down to its 1981 level of $1.21\kg. Over the years, it has become evident that the evolution of the price paid to fishermen is the true reflection of cold-water shrimp price trends on the American market.

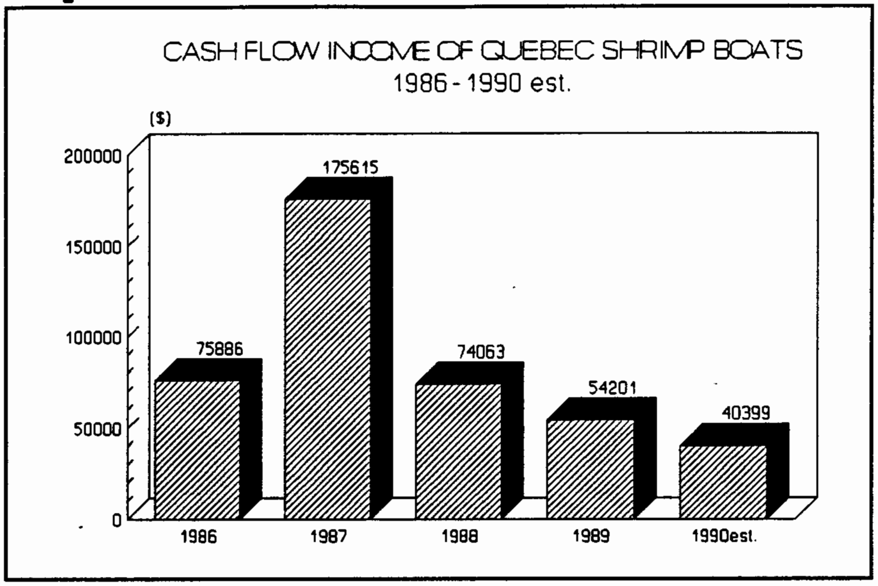
Graph 14:



By combining the recorded decline in landing prices and the fluctuations of the landed volume, it was possible to project the financial performance of Quebec shrimp boats for 1990.

For the third consecutive year, the earnings of owner-captains of Quebec shrimp boats declined in 1990, despite increased landings. Given that the cash flow of shrimp boats was $54 201 in 1989, we projected it to be $40 399 for 1990.

Graph 15



6.0 Aquaculture

What hope for a Quebec Norway?

World demand for seafood products is on the rise but it appears unlikely that traditional fishing will be able to meet it. In this context, aquaculture seems to be the appropriate alternative. Aquacultural production already represents 12% of world supply of seafood products. In 1988, the Quebec aquacultural industry accounted for only 1% of the volume of commercial landings. This output, which is not very diversified, consists exclusively of rainbow trout, brook char, blue mussels and Atlantic salmon. Taking into account only mussel and salmon farming, mariculture represented a mere 0.1% of the Quebec landings in 1988.

Despite the strong aquacultural potential attributed to the maritime regions of Quebec and the investments which have already been made, aquaculture is not developing as quickly as expected. Why?

Mussels

Although there are mussel producers in the Magdalen Islands and the Gaspé, few of those have reached the marketing stage.

The accumulated delays in marketing have caused financial problems for mussel breeders in the Islands. The main private financial backers have lost confidence in this young industry and are no longer willing to provide it with their needed financing.

The current output of 20 pounds per growing sock does not, on the other hand, make mussel production in the Magdalen Islands profitable. The mortality of two-year old mussels is also one of the present concerns of mussel breeders. The viability of mussel farms in the Islands currently depends on money which has been and will be invested by governments in this sphere of activity.

Salmon

The presence of ice in Quebec forces salmon farms to be located on very costly land sites. Given the present context of falling market prices, is salmon production in Quebec feasible under these conditions? This is one question that must be answered before investing in new firms wishing to establish themselves as land-farm operations.

Potential Species

Cod

Breeding cod spawned from cod which have been caught in traps is an activity that is gaining more and more popular interest. The setting up of a Newfoundland enterprise to farm this species is an indication of this popularity. So far, several million dollars of public funds have been injected into this company. According to a study conducted by the Quebec Region, the conditions that currently prevail are not conducive to profitable cod breeding in Quebec. The main problem concerns nutrition. The challenge is to find a foodstuff that, on the one hand, involves little cost, but on the other hand, yields a profitable rate of earnings for future commercial enterprises.

The new FFDP, the Federal Fisheries Development Program, for the Quebec Region announced by Minister Valcourt in August, 1990, will put efforts into finding a solution to this problem.

Scallops

For the past few years, many biological and technological research projects on giant scallop breeding have been carried out by different Canadian and Quebec groups. There are no commercial farms currently operating in Quebec. Although the reputation of this seafood product forecasts a strong economic potential, there is little convincing proof to date of the profitability of scallop farming in Quebec.

These are the four species with technical and biological potential, but none has yet reach its profitability level. What is the future of Quebec aquaculture? A question that would have to be jointly answered by the industry and researchers.

SUMMARY

Coastal groundfish fishing is in serious difficulty and this situation has important social repercussions, which are liable to cripple the development of the geographical areas strongly dependant on the fishing industry.

The snow crab industry saw an excellent performance from the fleet on the Mid North Shore. The increased landings in this area enabled the Quebec Region to record a rise in crab landings for 1990. Unfortunately, this is an exception because the other areas are, as in recent years, grappling with the problems caused by depleted resources.

The growing lobster supply, the introduction of substitute species on the markets and finally, the enforcement of American legislation on legal size are the principal factors currently shaping this industry. The search for new products and new prospects for lobster are some of the elements of a new balance on the various markets.

The competition created by aquacultural shrimp on the commercial fishing industry can only intensify in the years to come. Therefore, the industry has to adjust to these new game rules and devise a development strategy based on the specificity of the product.

Aquaculture is undoubtedly an avenue of development for the maritime regions of Quebec. Mariculture is technologically and biologically feasible. From the economic point of view, however, it has not yet been shown that this activity can be profitable and viable. The development of Quebec aquaculture -- certainly -- but at what price!?

All in all, we can discuss the challenge of the 21st century: globalization of markets, development of aquaculture, Europe 1992, emergence of new parties becoming involved worldwide, etc. Our industry will have to evolve in this context over the next few years.

DIVISION DES SERVICES ECONOMIQUES

ECONOMIC SERVICES DIVISION

Ministère des Pêches et des Océans - Région du Québec
Department of Fisheries and Oceans - Quebec Region

(FÉVRIER 1991)

	Liste des rapports d'étude		List of studies
1982		**1982**	
82-1	Répertoire des programmes d'aide gouvernementale à l'industrie des pêches au Québec; 101 pages (non disponible).	82-1	-
1983		**1983**	
83-1	Processus d'évaluation et de prise de décision pour l'attribution des permis de pêche pour les bateaux de 45 pieds et plus; Document de travail; 13 pages: (non disponible).	83-1	-
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1984		**1984**	
84-1	Répertoire des programmes d'aide gouvernementale destinés à l'industrie des pêche maritimes du Québec; ISBN 0-662-92919-5; 67 pages (non disponible);	84-1	Guide to Government Assistance Programs for the Québec Marine Fishing Industry, ISBN 0-662-92919-5; 60 pages (not available).
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1985

85-1 L'industrie des pêches maritimes du Québec: Description statistique; ISBN 0-662-93183-1; 134 pages.

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86-10 -

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