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The Fishing Industry in Quebec

Maritime Areas Profile

2015

Strategic Services

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Production Team

Editorial Staff

Florence Boucher Boisclair, SS, DFO, Quebec Region
Martial Ménard, SS, DFO, Quebec Region

Contributor

Ali Magassouba, SS, DFO, Quebec Region
Audrey Fournier, SS, DFO, Quebec Region
Mona-Molina Ith-Tek, SS, DFO, Quebec Region

Photos on cover page

Harrington Harbour : Pêches et Océans Canada, C. Renaud
Rivière-au-Renard : Pêches et Océans Canada, R. Côté
Grande-Entrée : Pêches et Océans Canada, M. Papageorges

Acronyms

DFO : Fisheries and Oceans Canada
RCM : Regional county municipality
SS : Strategic Services

Symbols and abbreviations

$M : millions of dollars
p : preliminary
t : tonnes (metric tons)

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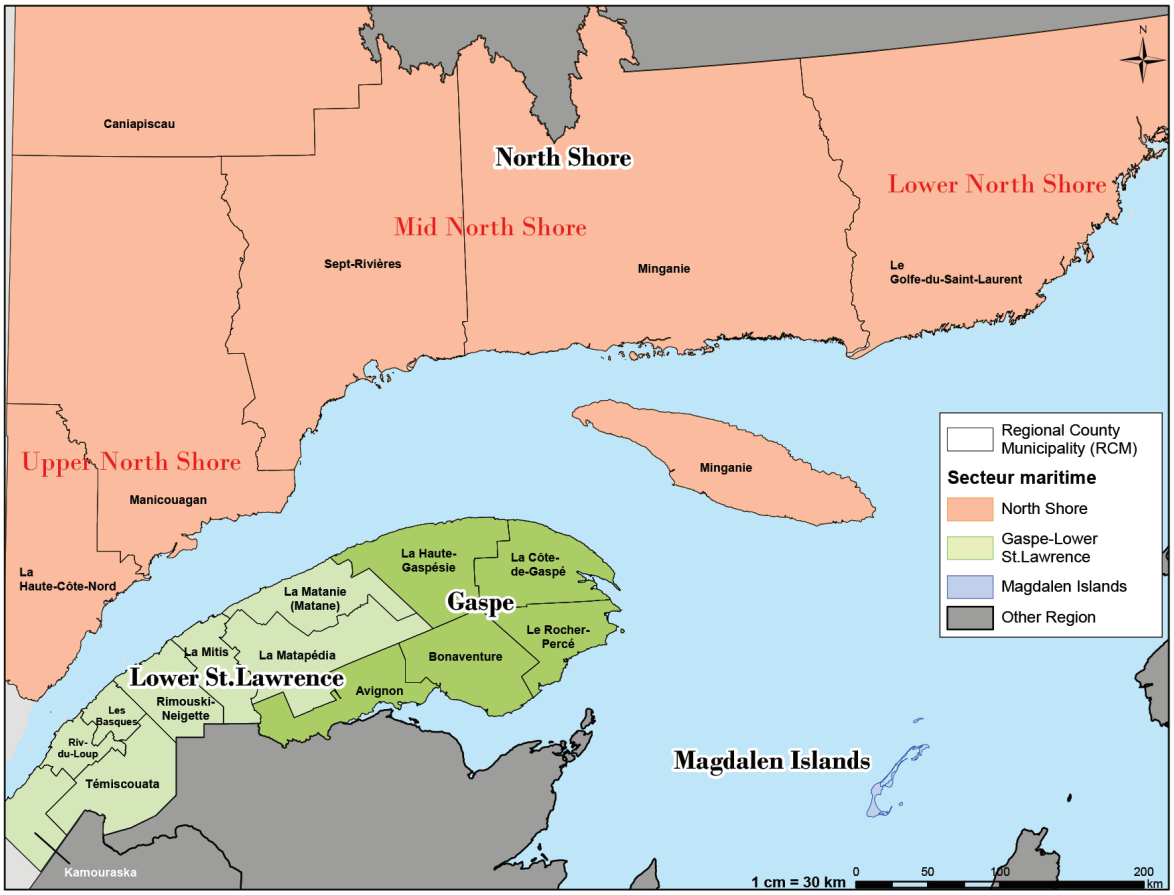
Introduction

This document presents a portrait of the fishing industry in the three maritime areas of Quebec: the Gaspé-Lower St. Lawrence, the North Shore and the Magdalen Islands. Each of these maritime areas is described in its own section.

The first part of each section provides a brief look at the socio-economic and demographic context of the maritime area in question. The second part is devoted to the primary fisheries sector. Detailed information is provided on the evolution of captures, species landed (by regional county municipality, or RCM, and fishing port), and the workforce (fishers, licences, boats and fleets). The last part deals with marine resources processing, describing data on processing methods, the value of production, the number of jobs, and business profiles.

Map 1: The three maritime areas, showing sub-area and RCM limits



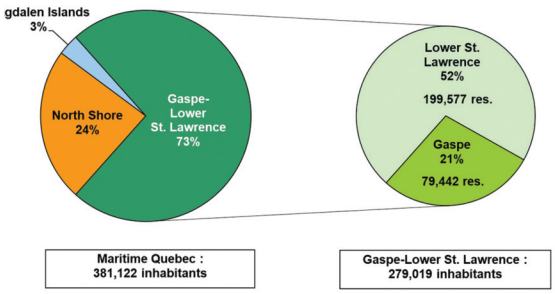
Source: MENR, DFO, Quebec Region

1 Gaspé-Lower St. Lawrence

1.1 Socio-economic profile

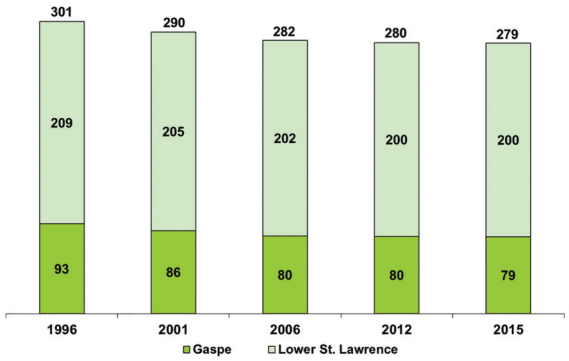
With a population of 279,019 in 2015, the Gaspé-Lower St. Lawrence maritime area[1] accounted for 73% of the total population of maritime Quebec (Graph 1). Like the other maritime areas, but contrary to Quebec as a whole,[2] the Gaspé-Lower St. Lawrence saw its population decrease by 9.6% between 1986 and 2015. Between 1986 and 2015, the demographic weight of this maritime area, in relation to Quebec as a whole, went from 4.7% to 3.4%.

Graph 1: Distribution of the population in maritime Quebec by maritime area and of the Gaspé-Lower St. Lawrence area, 2015



Source: Statistics Canada

Graph 2: Evolution of the population of the Gaspé-Lower St. Lawrence area, 1986-2015 (thousands of residents)



Source: Institut de la statistique du Québec

The Gaspé subarea showed the greatest decrease in population since 1986. It went from 97,923 in 1986 to 79,442 in 2015, a decline of 19%. During the same period, the population decrease in the Lower St. Lawrence subarea was only 5.3% (Graph 2). In Gaspé and the Lower St. Lawrence, the Institut de la statistique du Québec expects a population decrease of 2.2% over the next 25 years. This rate is significantly slower than that observed over the past two decades.

[1] The Gaspé–Lower St. Lawrence maritime area corresponds to the administrative region of the Lower St. Lawrence joined with the Gaspé section of the Gaspé-Magdalen Islands administrative region.

[2] The population of Quebec increased by 20% between 1991 and 2015, from 6.9 million to 8.3 million.

Table 1 provides socio-economic data for the Gaspé-Lower St. Lawrence by RCM. It shows that despite its smaller population, the Gaspé Peninsula accounted for many more fishing-related jobs than the Lower St. Lawrence area (3073 vs. 317). However, the socio-economic statistics for it are generally less positive. For example, the unemployment rate in the Gaspé Peninsula was 14.6% in 2015, compared to 6.7% in the Lower St. Lawrence area. The incidence of low-income families[3] there was also higher, at 8.2% compared to 5.3%.

Table 1: Socio-economic data of the Gaspé-Lower St. Lawrence area, by RCM

RCM name (sub-area)	Population 2015	Demographic outlook (2011-2036)	Average land value for single-family dwellings (2015)	Incidence of low-income families (2012)	Number of fishing-related jobs (2015)[4]	Unemployment rate (2015)
Avignon	15,150	+4.1%	$130,119	11.7%	52	
Bonaventure	17,727	+0.1%	$127,376	5.8%	419	
La Côte-de-Gaspé	17,676	−5.7%	$142,342	4.9%	734	
La Haute-Gaspésie	11,665	−8.7%	$98,431	11.0%	204	14.6%[5]
Le Rocher-Percé	17,224	−8.0%	$99,298	9.0%	1,664	
Total Gaspé	**79,442**	**−3.5%**		**8.2%**	**3,073**	
Kamouraska	20,992	−6.0%	$133,496	−6.0%	0	
La Mitis	18,452	−4.3%	$124,881	−4.3%	27	
Matane	21,423	−7.1%	$132,046	−7.1%	192	
Les Basques	8,799	−11.3%	$109,911	−11.3%	12	
Rimouski-Neigette	57,191	+7.4%	$193,372	7.4%	80	6.7%
Rivière-du-Loup	34,523	+2.4%	$169,717	4.2%	6	
Non-maritimes RCMs: Matapédia and Témiscouata	*38,197*	*– 10.8%*	*$121,377*	*6.5%*	*0*	
Total Lower-St. Lawrence	**199,577**	**−1.8%**		**5.3%**	**317**	
Total Gaspé–Lower-St. Lawrence	**279,019**				**3,390**	

Source: Institut de la statistique du Québec

[3] The number of low-income families is based on the threshold established by Statistics Canada.

[4] The number of fishing-related jobs corresponds to the number of fishers in 2015 and the number of marine resource processing factory workers in 2014.

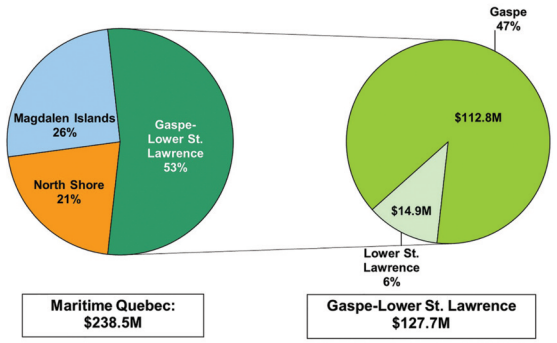
[5] Unemployment rate for the Gaspé/Magdalen Islands administrative region.

1.2 The fishing industry

1.2.1 Evolution of landings

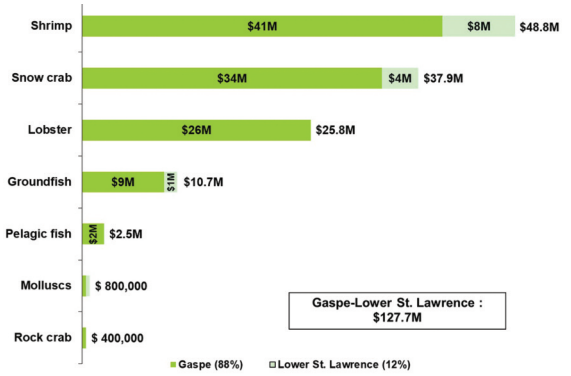
In 2015, Gaspé-Lower St. Lawrence area landings totalled 35,131 tonnes, for a value of $127.7M[6] (Graph 3). This repre-sented 61% of the total landings in Quebec by quantity and almost half (54%) by value. The Gaspé subarea accounted for 88% of landings in the Gaspé–Lower St. Lawrence area.

Graph 3: Distribution of the value of landings in Quebec and the Gaspé-Lower St. Lawrence area, 2015



Source: DFO, Quebec Region

Graph 4: Distribution of the value of landings in the Gaspé-Lower St. Lawrence area, by main species and maritime sub-area, 2015



Source: DFO, Quebec Region

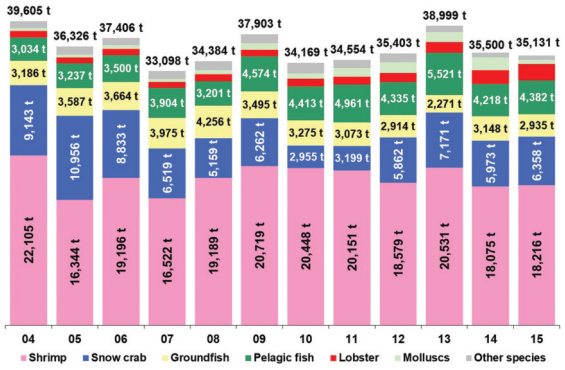
As in the other Quebec maritime areas, shrimp, snow crab, and lobster accounted for the vast majority of the landed value in the area. In 2015, shrimp was the most landed species in the area, with a value of $48.8M (almost 99% of the total value for Quebec). This was slightly higher than the $37.9M total value for snow crab. Lobster ranked third, with a value of $25.8M. Unlike shrimp and snow crab, some of which are offloaded at the Lower St. Lawrence ports, lobster is landed exclusively in the Gaspé Peninsula. Groundfish accounted for 8.4% of the total value, with landings totalling $10.7M. Lastly, pelagic fish, molluscs and rock crab represented just over 3% of the landed value, at $3.8M (Graph 4).

[6] This amount includes landings by fishers from outside of Quebec, which totalled $4.3M in 2015, or 3.4%.

The evolution of landings in Gaspé-Lower St. Lawrence in graphs 5 and 6 shows that landed values did not vary much (between 33,000 and 40,000 tonnes) since 2004. These variations are mainly explained by those in shrimp and snow crab quotas.

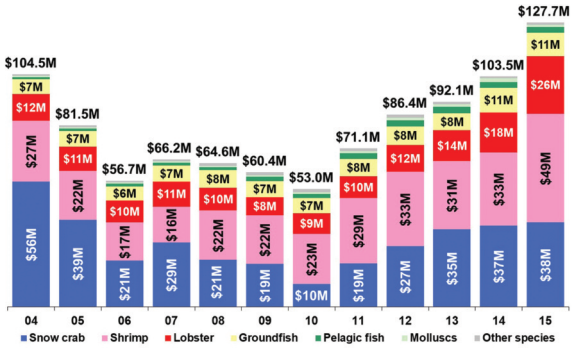
With respect to total landed value, it has increased noticeably since 2010. Increase in shrimp and snow crab quotas, combined with price increase of shrimp, snow crab and lobster, are responsible for this gradual rise in the landed value of these three species. Similarly, the price of these same crustaceans, now on the decline, explains the decrease observed between 2004 and 2010,

Graph 5: Evolution of quantities landed by fishers in the Gaspé-Lower St. Lawrence area, by main species, 2004-2015



Source: DFO, Quebec Region

Graph 6: Evolution of the landed value of Gaspé-Lower St. Lawrence area fishers, by main species, 2004-2015

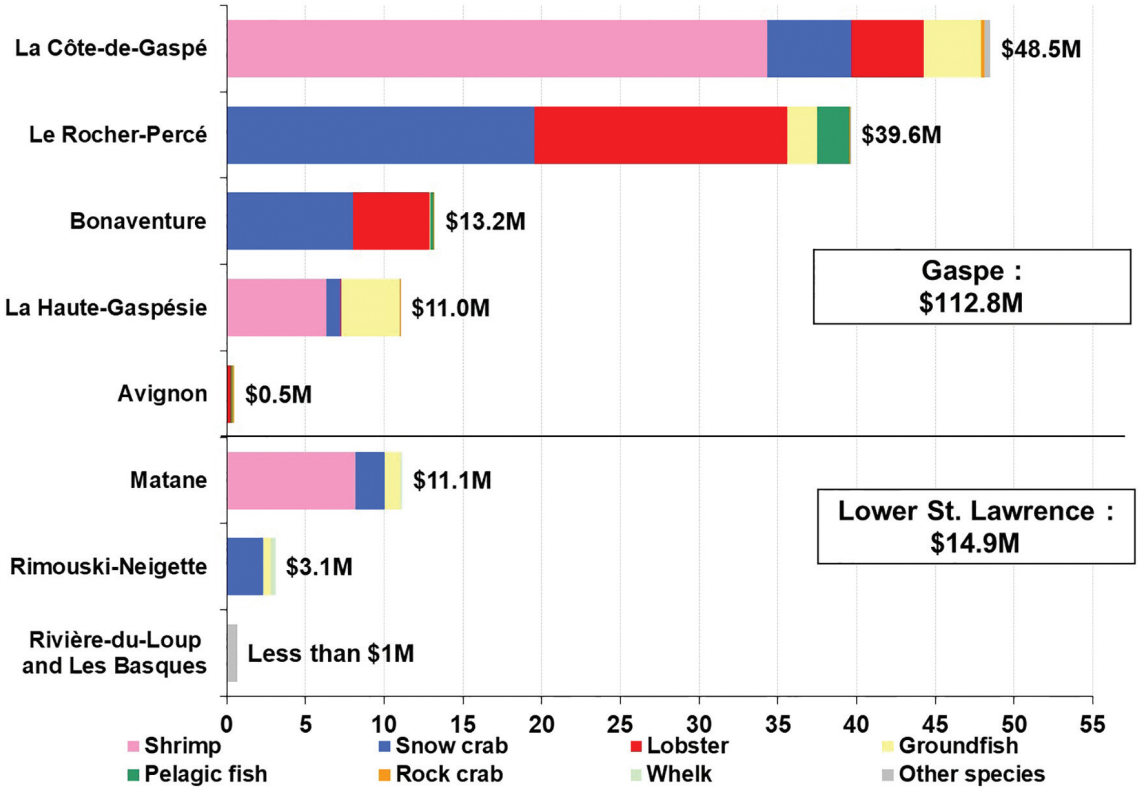


Source: DFO, Quebec Region

1.2.2 Landings by RCM and by fishing port

In 2015, the RCMs of Rocher-Percé and Côte-de-Gaspé, at the eastern tip of the Gaspé Peninsula, were responsible for about 69% of the landings in the area. However, as illustrated in Graph 8, the profile of species landed in these two RCMs varies greatly. In Rocher-Percé, snow crab and lobster are the most landed species while in Côte-de-Gaspé, shrimp and groundfish make up almost 90% of the landings. On a smaller scale, the RCMs of Matane (4th) and Haute-Gaspésie (5th) have a landed species profile similar to that of Côte-de-Gaspé, while the RCM of Bonaventure (3rd) looks more like Rocher-Percé with respect to landed species (Graph 7 and Map 2).

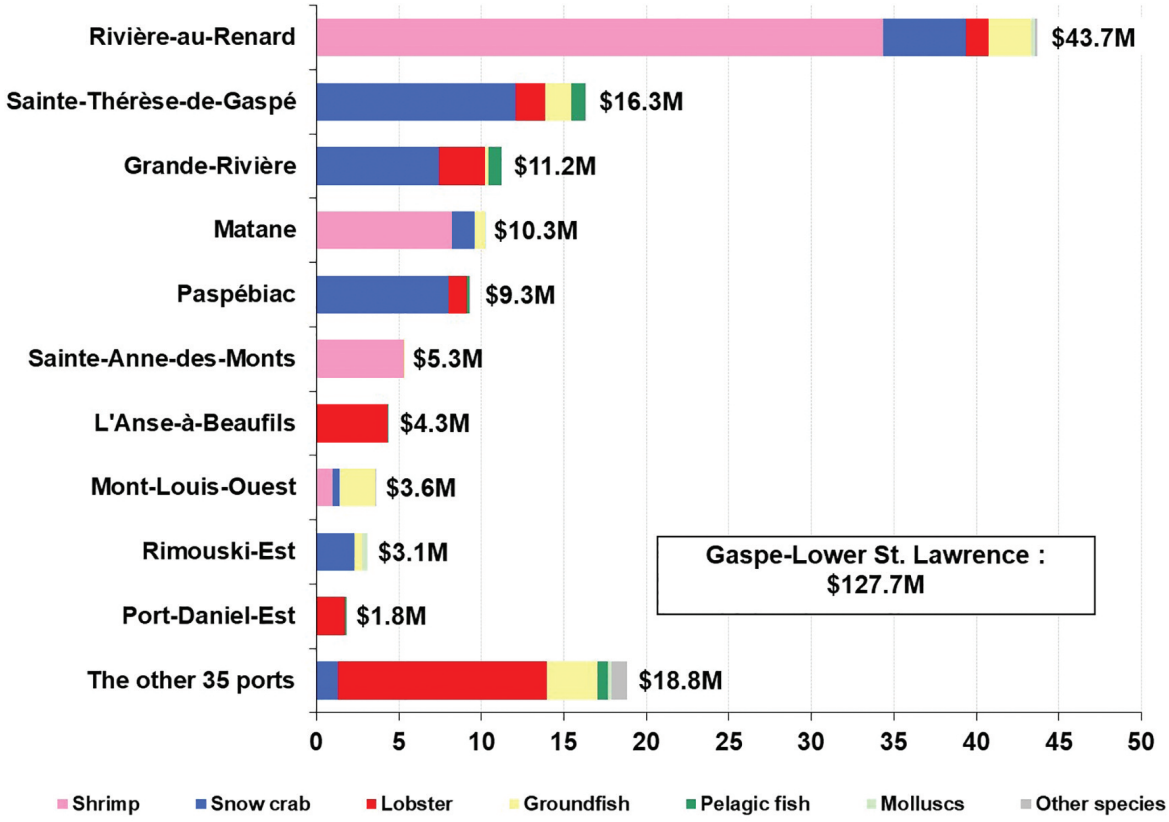
Graph 7: Distribution of the value of landings in the RCMs of the Gaspé-Lower St. Lawrence area, by main species, 2015



Source: DFO, Quebec Region

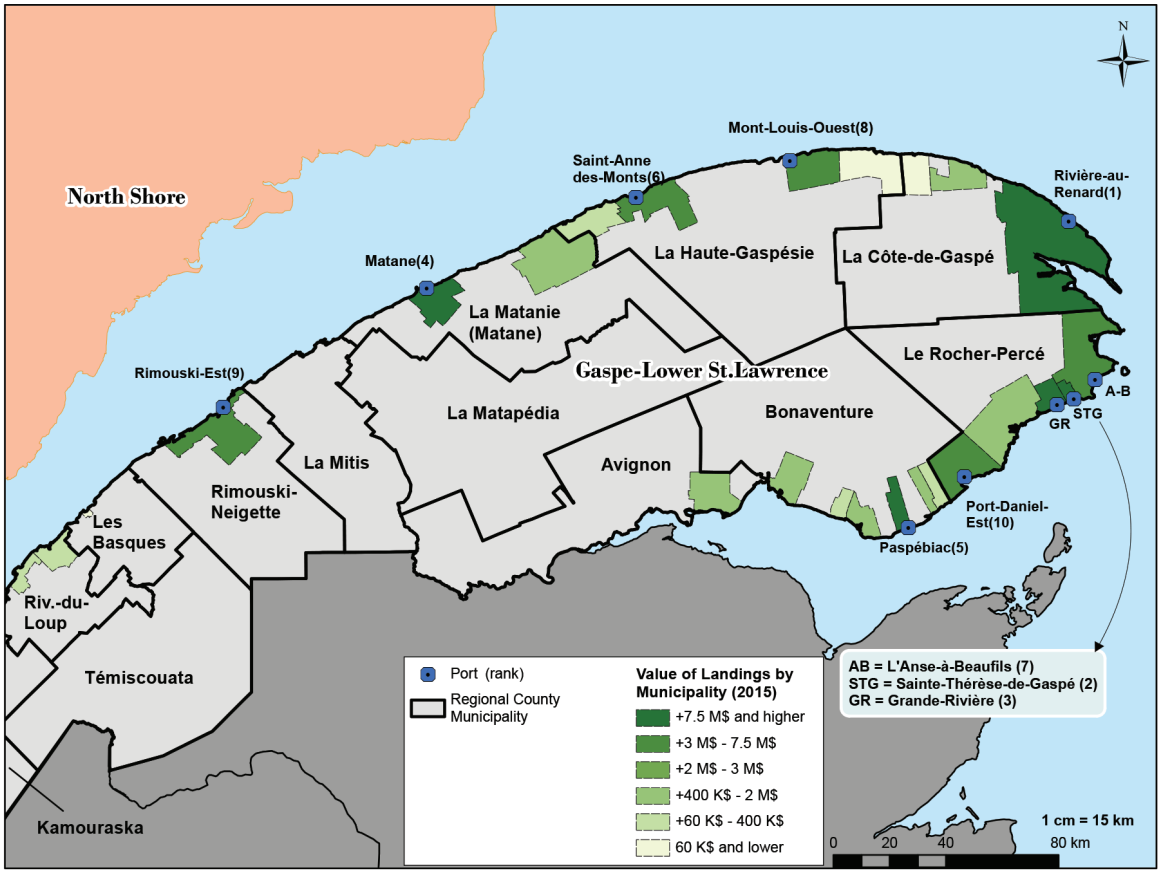
Landings in the Gaspé-Lower St. Lawrence area were carried out at 45 different fishing ports. The 10 largest accounted for 85% of the total landed value in this maritime area. In terms of quantity and value, the ports of Rivière-au-Renard and Sainte-Thérèse-de-Gaspé led the area in 2015. The port of Rivière-au-Renard also ranked first in Quebec, with landings totalling $43.7M, of which almost 80% were shrimp. At the port of Sainte-Thérèse-de-Gaspé ($16.3M), the third largest in Quebec in value terms, snow crab was the main species landed (Graph 8 and Map 2).

Graph 8: Distribution of the value of landings at the 10 main ports of the Gaspé-Lower St. Lawrence area, by main species, 2015



Source: DFO, Quebec Region

Map 2: Value of landings by municipality and the 10 main ports of the Gaspé-Lower St. Lawrence area in 2015



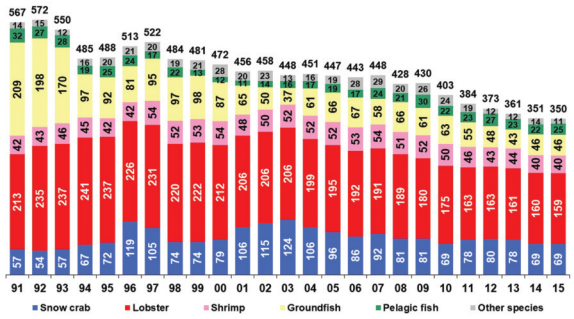
Source: DFO, Quebec Region

1.2.3 Workforce

As illustrated in Graph 9, the number of active fishing businesses in the Gaspé-Lower St. Lawrence area has decreased since 1991, dropping 39% from 567 to 350. Given the decrease in groundfish stocks and the implementation of moratoria at the start of the 1990s, it is not surprising that the number of specialized groundfishing businesses has decreased by 78% since 1991.

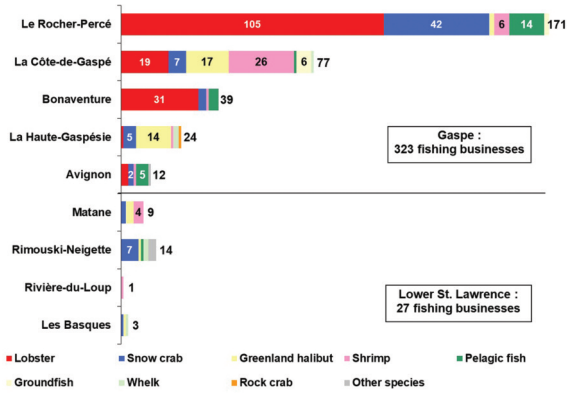
It can be observed that the number of businesses that mainly land lobster has also decreased since 1994—from 241 to 159 (34%). Lobster licence retirements that occurred between 2009 and 2015 largely explain this decline.

Graph 9: Evolution of the number of active fishing businesses by main species, Gaspé-Lower St. Lawrence, 1991-2015



Source: DFO, Quebec Region

Graph 10: Distribution of the number of active fishing businesses by main species landed and RCM, Gaspé-Lower St. Lawrence, 2015



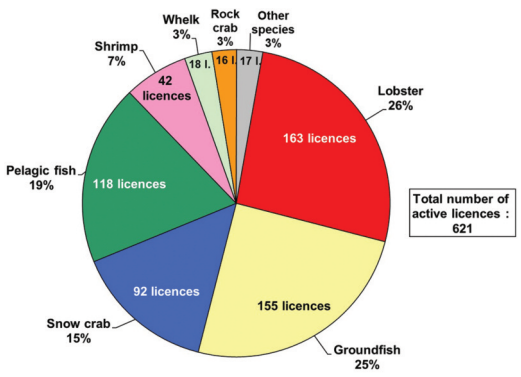
Source: DFO, Quebec Region

Nevertheless, almost half of the 350 active fishing businesses in the Gaspé-Lower St. Lawrence area mainly fished lobster in 2015 (159); however, this species represented only 20% of the landed value. Conversely, shrimp fishing businesses numbered only 40, 11% of the total, but were responsible for 38% of the landed values. There were 69 snow crab fishing businesses (20% of the total) representing 30% of the landed value. There were 46 groundfish fishing businesses (13% of the total) accounting for 8% of the landings.

The Rocher-Percé RCM, where two thirds (66%) of the lobster businesses are located, includes almost half of the active fishing businesses in the Gaspé-Lower St. Lawrence area (Graph 10).

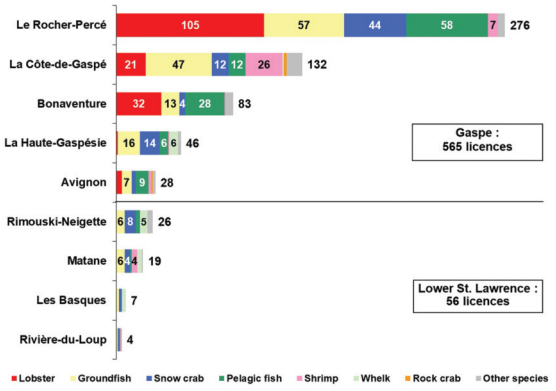
The distribution of the number of active licences by species presents a rather different picture (Graph 11). To begin with, the number of active licences is higher than the number of businesses (621 compared to 350). This means that in 2015, each active fishing business in the Gaspé-Lower St. Lawrence area had utilized, on average, 1.8 licences. It is therefore normal for there to be a higher number of pelagic fishing licences (118) than businesses specialized in this type of fishing (25). Similarly, 92 businesses had caught some snow crab in 2008 while only 69 specialized in this species. This is explained by allocations (temporary or permanent) of snow crab quotas that provide income support for fishers of groundfish and other less profitable species. Graph 12 shows that most active licences (slightly more than 90%) are held by businesses in Gaspé Peninsula RCMs.

Graph 11: Distribution of the number of active licences by main species, Gaspé-Lower St. Lawrence, 2015



Source: DFO, Quebec Region

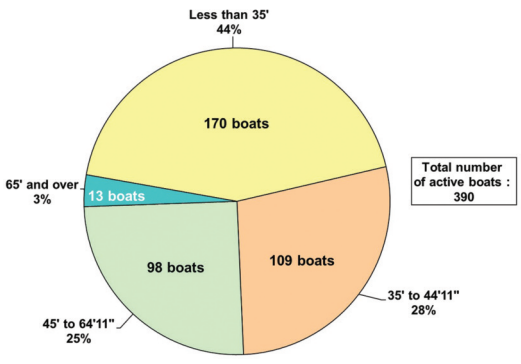
Graph 12: Distribution of the number of active licences by main species and RCM, Gaspé-Lower St. Lawrence, 2015



Source: DFO, Quebec Region

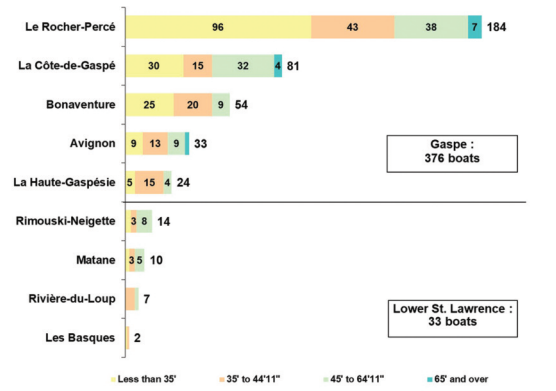
Graphs 13 and 14 illustrate the number of fishing vessels in the Gaspé-Lower St. Lawrence area by length and RCM. These show that of 390 boats in 2015, almost half (44%) were less than 35 feet long. This is a much higher proportion than in Quebec as a whole (35%). Due to the importance of midshore and offshore fishing in this area, boats 45 feet long or more were also well represented (28% compared to 18% for Quebec as a whole). Conversely, boats of medium size (between 35 and 45 feet) are significantly lower in number in the Gaspé-Lower St. Lawrence area compared to the other maritime areas (28% for Gaspé-Lower St. Lawrence compared to 47% for Quebec as a whole).

Graph 13: Distribution of the number of fishing vessels by length, Gaspé-Lower St. Lawrence, 2015



Source: DFO, Quebec Region

Graph 14: Distribution of the number of fishing vessels by length and RCM, Gaspé-Lower St. Lawrence, 2015

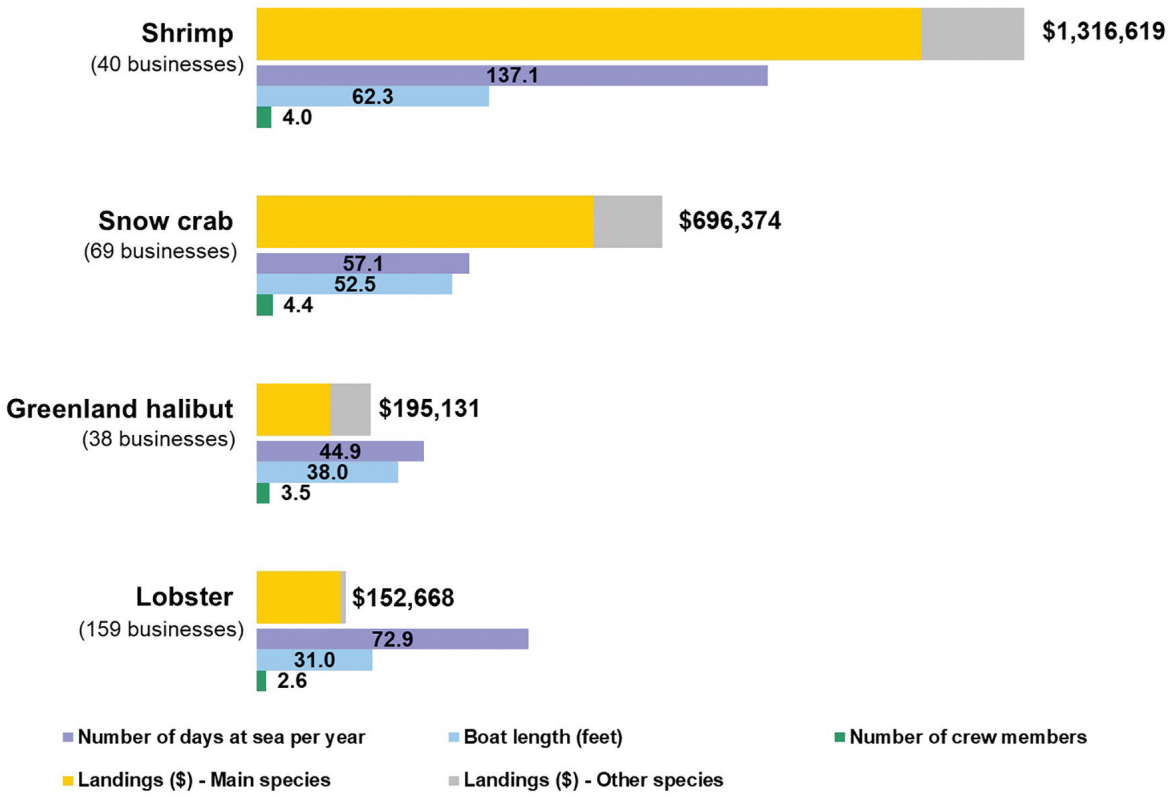


Source: DFO, Quebec Region

1.2.4 Fishing fleets

In 2015, 87% of the 350 Gaspé fishing businesses were included in one of the following four fleets:[7] shrimpers (40 businesses), crabbers (69 businesses), turbot fishers[8] (38 businesses) and lobster fishers (159 businesses). Graph 15 illustrates several characteristics of these fleets. Shrimpers[9] and crabbers have the highest average landed value per business, with $1,316,619 and$696,374 respectively. Turbot and lobster fishers, who have more modest incomes, also have smaller boats and crews.[10]

Graph 15: Distribution of the average characteristics of the main fishing fleets in the Gaspé-Lower St. Lawrence area, by main species landed, 2015



Source: DFO, Quebec Region

[7] For purposes of this profile, a fleet is a group of fishers who fish the same principal species (by value). The shrimper and crabber fleets are relatively heterogeneous because they include fishers with very high individual quotas and those with small quotas.

[8] Turbot fishers are from businesses with Greenland Halibut as the principal species landed.

[9] The shrimp fishery differs from the other fisheries in that its operating costs are significantly higher than those in the other fleets.

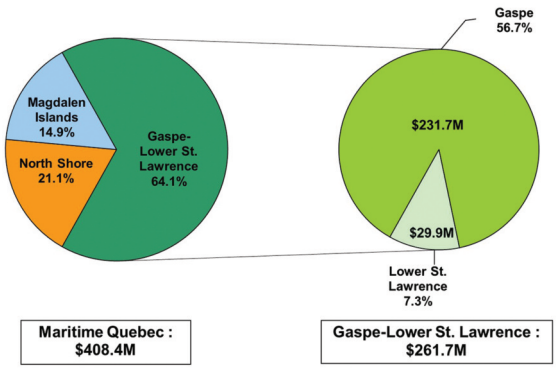
[10] The number of crew members includes the captain.

1.3 Processing of marine resources

1.3.1 Production value and number of jobs

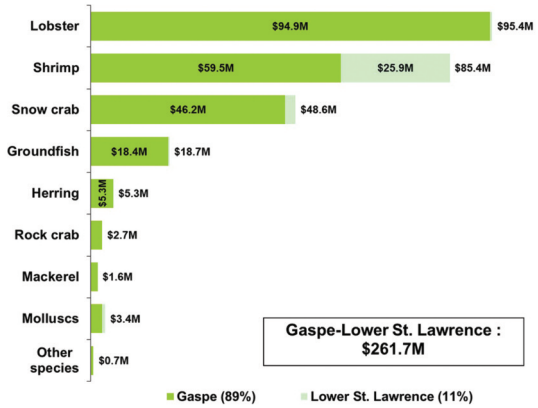
The marine resources processing industry in the Gaspé-Lower St. Lawrence area comprises approximately 50 businesses that generally buy their fish and seafood directly from fishers and export or resell these products on the local market. Most of the time these businesses carry out initial processing (freezing, salting, cooking, packaging, etc.) before sale. In 2014, fish and seafood purchases from these businesses totalled $99.5M while their production totalled $261.7M, 64.1% of that for maritime Quebec (Graph 16).

Graph 16: Distribution of the value of marine resources processing in Quebec and the Gaspé-Lower St. Lawrence area, 2014



Source: DFO, Quebec Region

Graph 17: Distribution of the value of marine resources processing in the Gaspé-Lower St. Lawrence area, by main species processed and by maritime sub-area, 2014

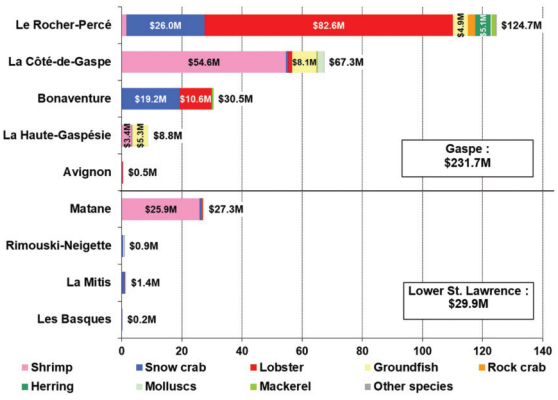


Source: DFO, Quebec Region

The main species in terms of production value in 2014 was lobster ($95.4M). Lobster purchased locally is generally sold fresh. As regard shrimp and snow crab, these species ranked second and third with production value of $85.4M and $48.6M respectively (Graph 17).

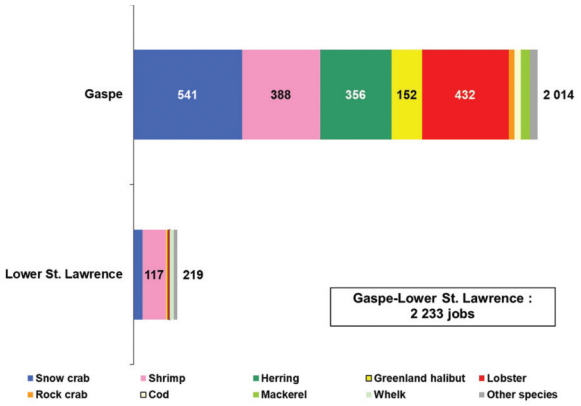
In 2014, Rocher-Percé was the RCM with the highest production ($124.7M). Lobster is the main species processed there (66%) (Graph 18). That same year, there was a maximum of 2,233 workers[11] in marine product processing businesses in the Gaspé-Lower St. Lawrence area. Of this number, it is estimated that 586 jobs were related to the processing and sale of snow crab, 506 to shrimp, 443 to lobster, 356 to herring, and 220 to groundfish, including 157 for Greenland halibut (Graph 19).

Graph 18: Distribution of the value of marine resources processing in the Gaspé-Lower St. Lawrence area, by main species and by RCM, 2014



Source: DFO, Quebec Region

Graph 19: Distribution of the number of jobs in the marine resources processing industry in the Gaspé-Lower St. Lawrence area, by main species processed and by maritime sub-area, 2014



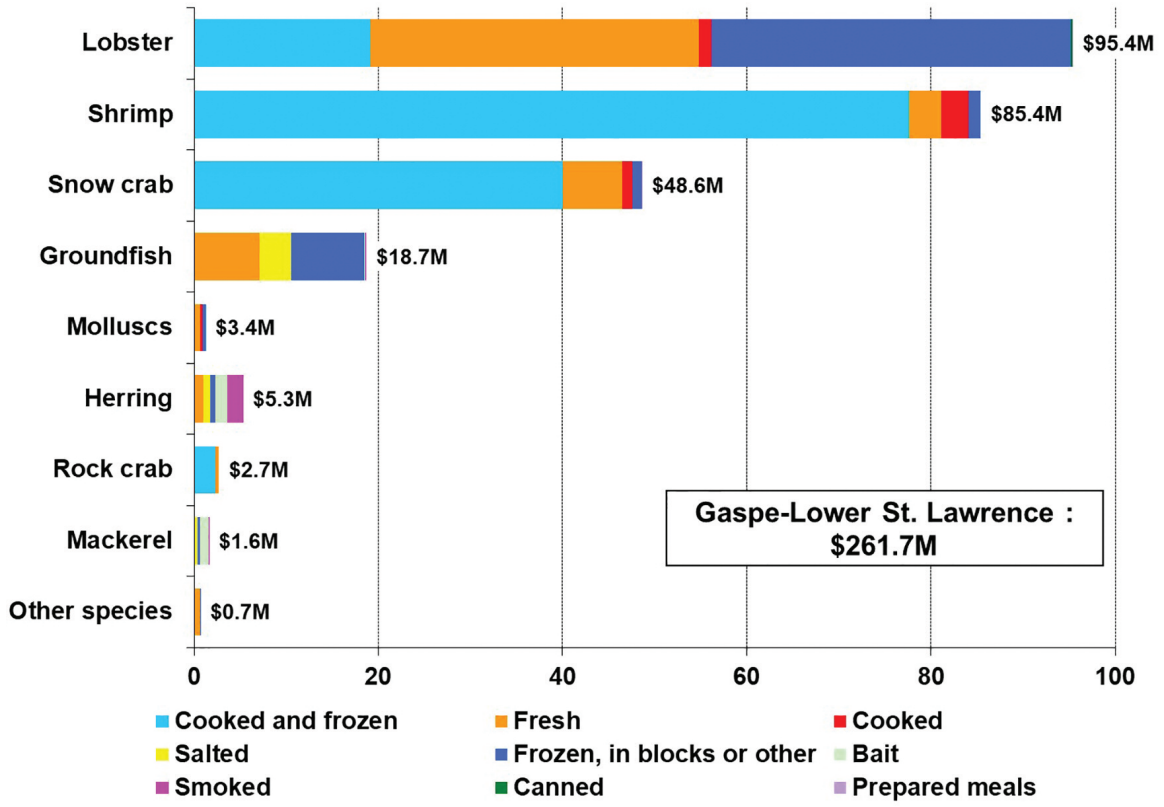
Source: DFO, Quebec Region

[11] It is worth noting that the statistics on number of jobs represent the maximum number of workers over the course of a year and that most of these jobs are seasonal.

1.3.2 Types of processing

In 2014, the processing industry in the Gaspé-Lower St. Lawrence area produced lobster ($95.4M), shrimp ($85.4M), snow crab ($48.6M), and groundfish ($18.7M). These four species or groups of species accounted for almost 95% of production. As illustrated in Graph 20, most of the marine products were sold cooked and frozen (53%), fresh (21%) or simply frozen with no other treatment (19%). Cooked dishes, canned goods, bait, and smoked, salted or marinated products represented only 3.4% of production (Graph 20).

Graph 20: Distribution of the value of marine resources processing in the Gaspé-Lower St. Lawrence area, by main species processed and by product type, 2014



Source: DFO, Quebec Region

1.3.3 Businesses

In 2014, of the 51 businesses in the Gaspé-Lower St. Lawrence processing sector, the eight principal businesses accounted for 82% of production and for approximately 73% of jobs in the industry. Table 2 provides basic information on these businesses. It should be noted that only businesses with sales greater than $1,000 were considered for this analysis.

Table 2: Principal marine resources processing businesses of the Gaspé-Lower St. Lawrence area in 2014

Name of buyer	Community	RCM	Sales figures	Number of jobs
E. Gagnon & Fils	Sainte-Thérèse-de-Gaspé	Le Rocher-Percé	$25M +	300 +
Les Pêcheries Marinard	Rivière-au-Renard	La Côte-de-Gaspé	$25M +	200-300
Unipêche M.D.M.	Paspébiac	Bonaventure	$25M +	200-300
Les Fruits de Mer de l'Est du Québec	Matane	Matane	$25M +	100-200
Crevettes du Nord Atlantique	L'Anse-au-Griffon	La Côte-de-Gaspé	$25M +	100-200
Poisson Salé Gaspésien	Grande-Rivière	Le Rocher-Percé	$25M +	200-300
Distributions J.M. Bernatchez	Grande-Rivière	Le Rocher-Percé	$20 M-$25M	less than 100
Lelièvre Lelièvre et Lemoignan	Sainte-Thérèse-de-Gaspé	Le Rocher-Percé	less than $15M	100-200
The other 43 businesses			$46.7M	610
TOTAL			**$261.7M**	**2,233**

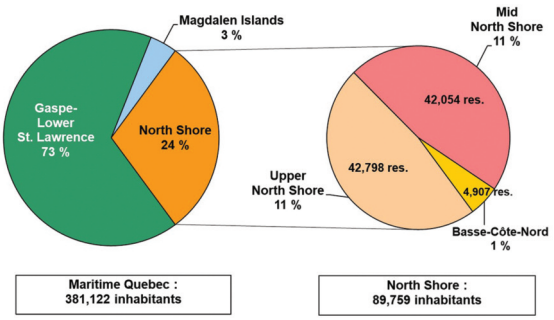
Source: DFO, Quebec Region

2 North Shore

2.1 Socio-economic profile

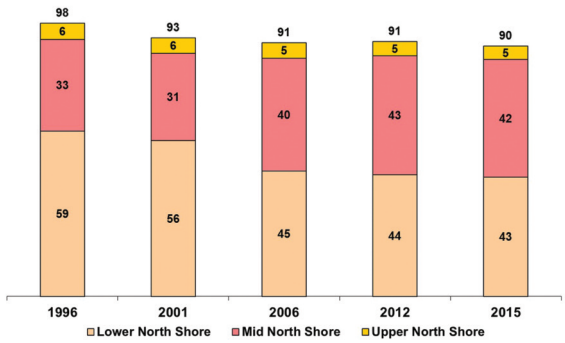
With 89,759 citizens in 2015, the North Shore accounted for 24% of the total population of maritime Quebec. Like the other maritime areas, but unlike Quebec as a whole[12], the population of the North Shore decreased by 10% between 1986 and 2015. The demographic weight of this maritime area in comparison to Quebec as a whole fell from 1.5% to 1.1% between 1986 and 2015.

Graph 21: Distribution of the population in maritime Quebec by maritime area and of the North Shore area, 2015



Source: Statistics Canada

Graph 22: Evolution of the population in the North Shore area, 1986-2015 (thousands of residents)



Source: Institut de la statistique du Québec

The Upper North Shore (UNS) has shown the greatest decline in population since 1986. It went from 59,994 in 1986 to 42,798 in 2015, a drop of 29%. Over the same period, the population of the Lower North Shore (LNS) decreased by 18%, from 5,959 to 4,907, while that of the Mid North Shore (MNS) increased by 26%, from 33,265 to 42,054.[13] The Institut de la statistique du Québec predicts a demographic decline of 12.2% for the Lower North Shore and 11.3% for the Upper North Shore between 2011 and 2036, whereas a demographic increase of 6.5% is expected on the Mid North Shore in the same time frame.

[12] The population of Quebec increased by 27% between 1986 and 2015, from 6.5 million to 8.3 million.

[13] Note that the Mid North Shore population experienced the bulk of its growth between 2001 and 2012 when iron ore mining companies were operating at full capacity to meet the strong world demand for iron ore, especially from China.

Table 3 provides some socio-economic data for the North Shore by RCM. It can be seen that the Lower North Shore accounted for more jobs connected to the fishing industry (705) than did the Mid North Shore (673) and the Upper North Shore (381). In terms of relative importance, the fishery is a major employer on the Lower North Shore, employing 14% of the population, whereas this number is much lower in the other marine subareas (UNS: 1.5%; MNS: 1%). Socio-economic statistics on it were also less favourable. For example, the number of low-income families was higher on the Lower North Shore (16.6%) than on the Upper North Shore (6.5%) and the Mid North Shore (7.3%).

Table 3: Socio-economic data of the North Shore area by RCM

RCM name (sub-area)	Population 2015	Demographic outlook (2011-2036)	Average land value for single-family dwellings (2015)	Incidence of low-income families (2012)	Number of fishing-related jobs (2015)[14]	Unemployment rate (2015)
Upper North Shore	11,187	–15.0%	$103,640	5.0%	151	
Manicouagan	31,611	–10.0%	$158,705	7.0%	230	
Total Upper North Shore	**42,798**	**–11.3%**		**6.5%**	**381**	
Sept-Rivières	35,466	+5.5%	$234,513	6.8%	272	**9.7%**
Minganie	6,588	+12.0%	$153,639	9.8%	401	
Total Middle North Shore	**42,054**	**+6.5%**		**7.3%**	**673**	
Lower North Shore	4,907	–12.2%	$68,734	16.6%	705	
Total North Shore	**89,759**	**–2.7%**		**7.5%**	**1,759**	

Source: Institut de la statistique du Québec

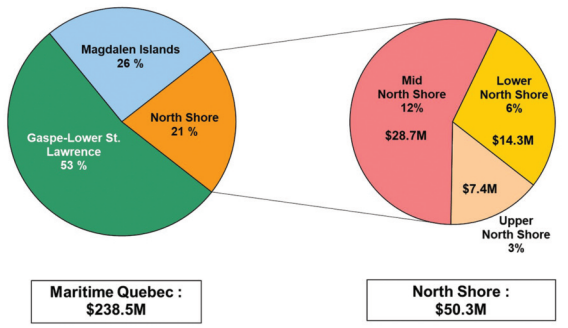
[14] The number of fishery-related jobs corresponds to the number of fishers in 2015 and to the number of marine resource processing factory workers in 2014.

2.2 The fishing industry

2.2.1 Evolution of landings

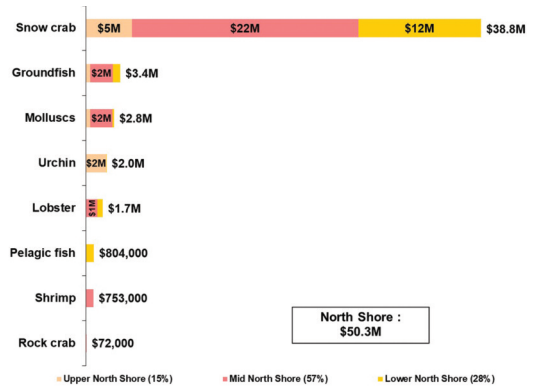
In 2015, landings on the North Shore totalled 15,274 tonnes for a value of $50.3M.[15] This represented 27% of the total landings in Quebec in terms of quantity and 21% in terms of value. Together the Mid North Shore and the Lower North Shore accounted for 85% of the landed value in the area, with 57% and 28% respectively (Graph 23).

Graph 23: Distribution of the value of landings in Quebec and the North Shore area, 2015



Source: DFO, Quebec Region

Graph 24: Distribution of the value of landings in the North Shore, by main species and sub-area, 2015



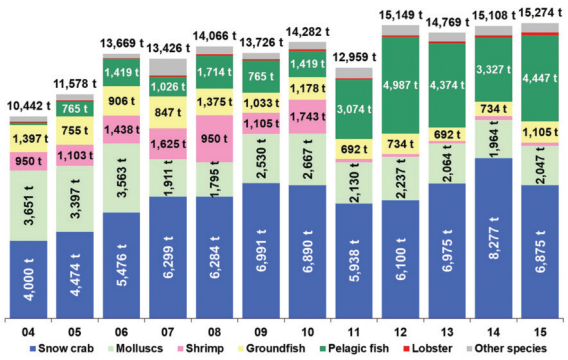
Source: DFO, Quebec Region

On the North Shore snow crab alone accounted for 77% of the landed value in 2015 ($38.8M). Groundfish, of which almost 88% were Greenland and Atlantic halibut, ranked second among species landed, with landings valued at $3.8M (6.8%). Shellfish ranked third, with landings valued at $2.8M, or 5.6% of the total. Shellfish species such as whelk ($1.0M), Stimpson's surf clam ($706,200) and scallop ($381,500) were landed mainly on the Mid North Shore and the Upper North Shore. The urchin ranked fourth with total landed value of $2.0M. Pelagic fish, consisting of herring, mackerel and capelin, were mainly landed on the Lower North Shore (Graph 24). Pelagic fish landings may vary greatly from one year to the next. Landings of pelagic fish , lobster, shrimp and rock crab, were relatively marginal together accounting for only $3.3M, about 7% of total landings value on the North Shore in 2015. However, since 2004, we have seen a sharp increase in lobster landings on the North Shore (188% in volume and 193% in value).

[15] Ce montant inclut les débarquements des pêcheurs non québécois, soit 325 300$ en 2015 (ou 0,6 %).

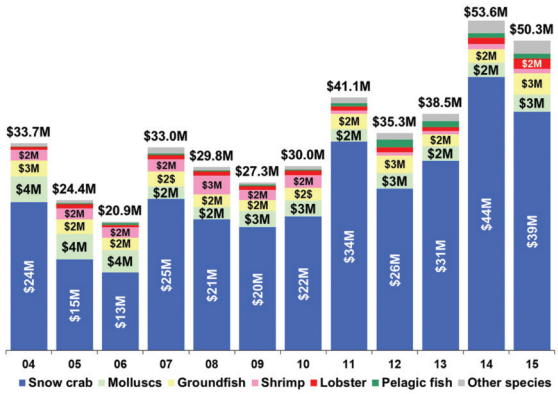
Graphs 25 and 26 illustrate the evolution of landings on the North Shore between 2004 and 2015. Between 2007 and 2010, the value of landings on the North Shore was relatively stable, totalling between $27M and $30M. Since 2014, it was over $50M because of a sharp increase in snow crab landed value. From year to year, landed value on the North Shore have been highly dependent on the landed volume and average landed price of snow crab, the main species landed in terms of volume and value. Shellfish landing values also significantly decreased—by 33%—from 2004 to 2015, from $4.2M to $2.8M, caused mainly by a significant reduction in scallop landings.

Graph 25: Evolution of quantities landed by fishers in the North Shore area, by main species, 2004-2015



Source: DFO, Quebec Region

Graph 26: Evolution of the landed value of North Shore area fishers, by main species, 2004-2015

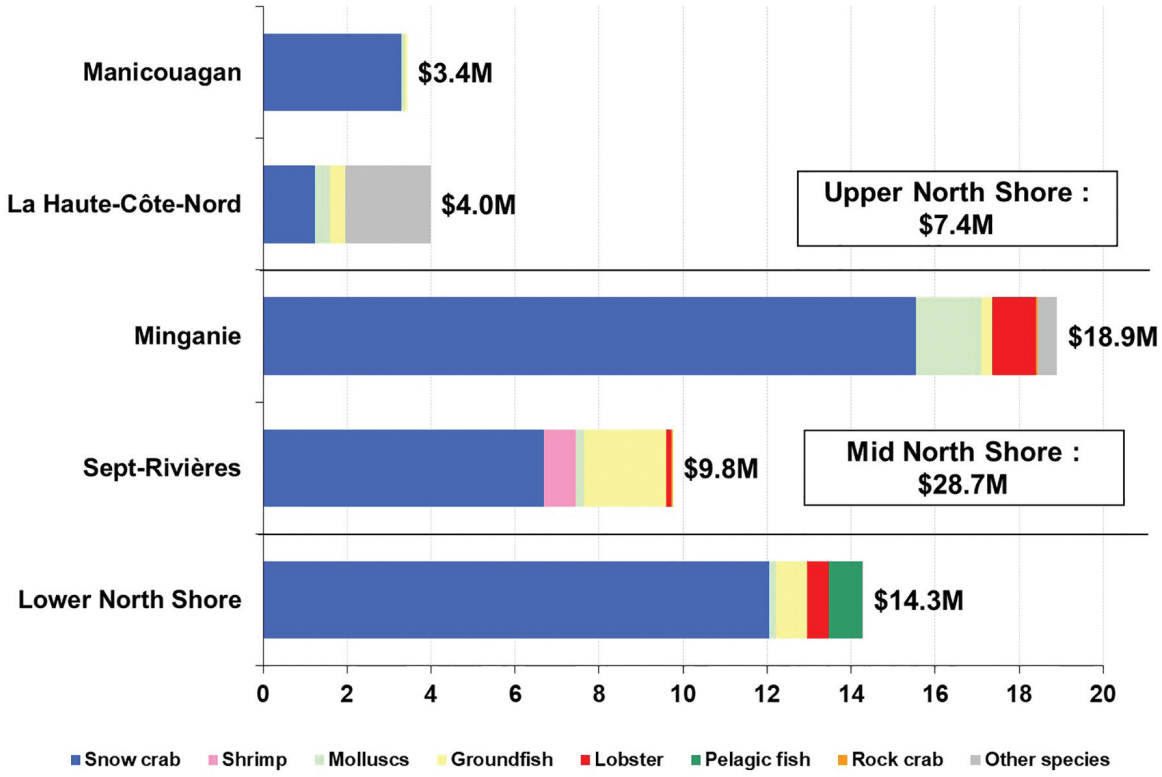


Source: DFO, Quebec Region

2.2.2 Landings by RCM and by fishing port

In 2015, the top two North Shore RCMs in terms of fishing were Mingan and the Lower North Shore, both located in the eastern half of the territory and responsible for 66% of the total landed value in this area. In Mingan and on the Lower North Shore, snow crab was by far the most landed species (82% and 84% of the total, respectively). However, as illustrated in Graph 27, the profile of secondary species landed in these two RCMs is different. In Mingan, shellfish (8%) and lobster (6%) were the main species after crab. On the Lower North Shore, it was pelagic fish (6%) and groundfish (5%). The Sept-Rivières RCM, where the Sept-Îles port accounted for 97% of the landings, was ranked third among the North Shore RCMs. Snow crab (69%) was the main species landed there, followed by groundfish (20%) and shrimp (8%). Landed value in the two RCMs on the Upper North Shore (Manicouagan and La Haute-Côte-Nord) was much lower, at $3.4M and $4.0M, respectively. These landings were comprised of snow crab (61%), sea urchin (27%, concentrated in the La Haute-Côte-Nord RCM), groundfish (6%) and shellfish (6%).

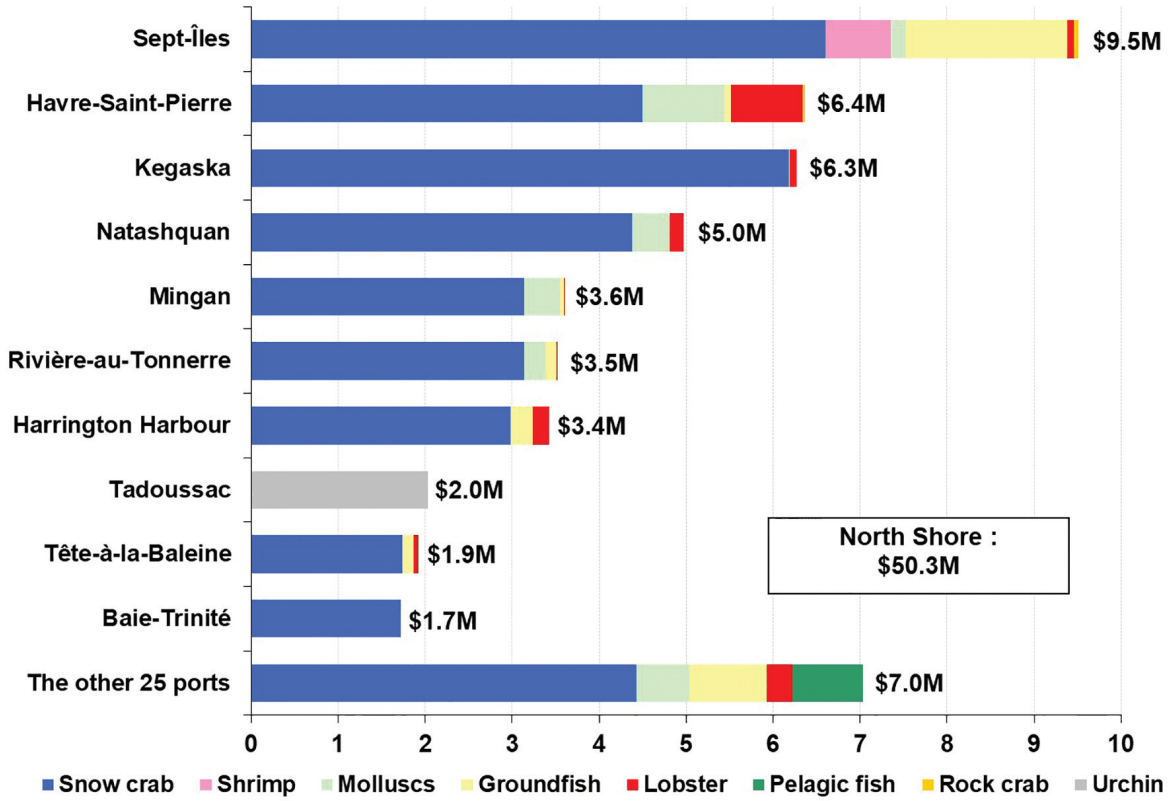
Graph 27: Distribution of the value of landings in the RCMs of the North Shore, by main species, 2015



Source: DFO, Quebec Region

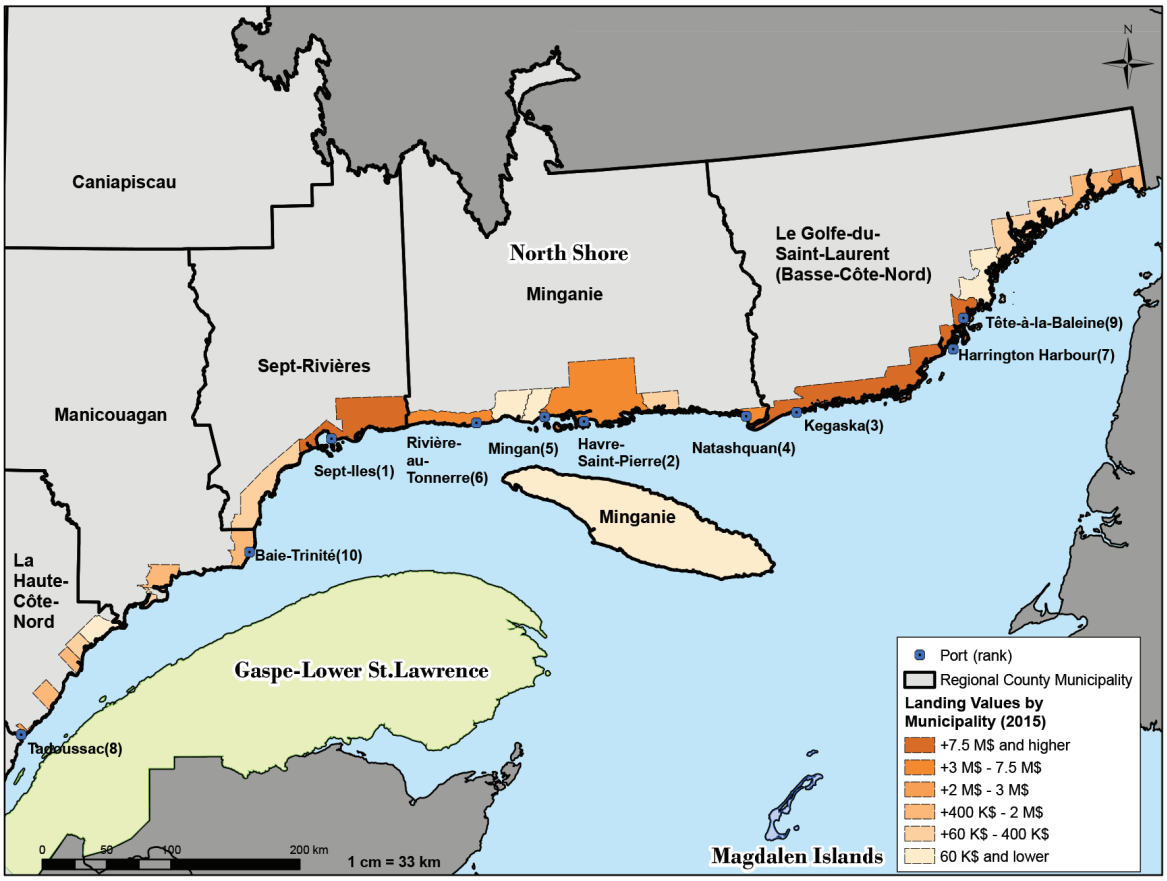
Landings on the North Shore were carried out at 35 fishing ports, the 10 largest of which accounted for 86% of the landed value. The four principal ports were those of Sept-Îles ($9.5M), Havre-Saint-Pierre ($6.4M), Kegaska ($6.3M) and Natashquan ($5M). These ports ranked 7th, 11th, 12th and 14th, respectively, for Quebec as a whole in 2015. Snow crab was the main species landed in these four fishing ports (Graph 28).

Graph 28: Distribution of the value of landings in the 10 main ports of the North Shore, by main species, 2015



Source: DFO, Quebec Region

Map 3: Value of landings by municipality and the 10 main ports of the North Shore area in 2015

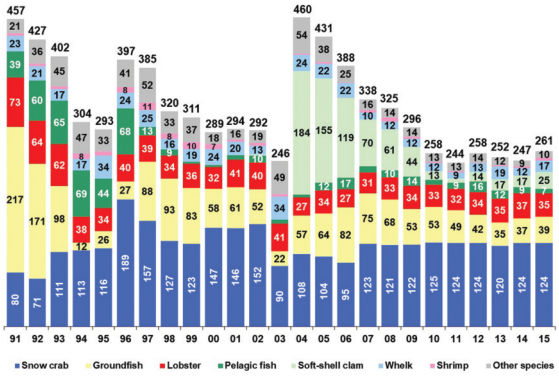


Source: DFO, Quebec Region

2.2.3 Workforce

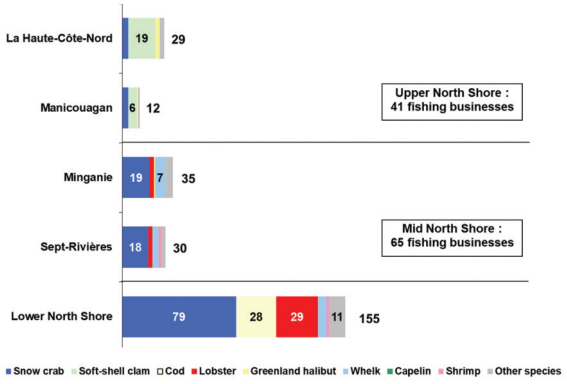
In 2015, there were 261 active fishing businesses on the North Shore, 43% fewer than in 1992 and 53% fewer compared to 1988. Given the decrease in groundfish stocks and the moratoria implemented at the start of the 1990s, it is not surprising that the numbers of specialized groundfish businesses decreased the most during this period. They fell by 82%, from 217 to 39 (Graph 29). However, it should be noted that in 2004, Fisheries and Oceans Canada began requiring fishers to be licensed to gather soft-shell clams. The 184 soft-shell clam gatherers who obtained licences in 2004 explain why the number of fishing businesses on the North Shore jumped from 246 in 2003 to 460 in 2004. Subsequently, a large number of soft-shell clam gatherers ceased operations between 2004 and 2015 because of falling prices for that shellfish. This explains the decrease in the number of licences from 184 to 25 observed over this period.

Graph 29: Evolution of the number of active fishing businesses by main species, North Shore, 1991-2015



Source: DFO, Quebec Region

Graph 30: Distribution of the number of active fishing businesses, by main species landed and RCM, North Shore, 2015

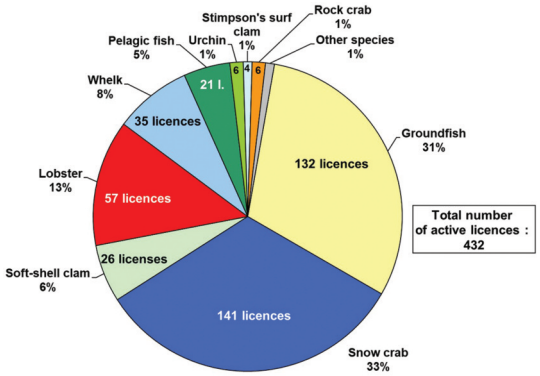


Source: DFO, Quebec Region

In 2015, snow crab fishers (124) made up the most numerous group of fishers, followed by groundfish fishers (39) and lobster fishers (35). Soft-shell clam gatherers (25) and pelagic fish fishers (7) ranked fourth and fifth, respectively (Graph 30). Although landing value was highest in Mingan in 2015 ($18.9M), the Lower North Shore ($14.3M) had the largest number of fishing businesses (155). Thus, 59% of the North Shore fishing businesses were located on the Lower North Shore even though this subarea accounted for only 28% of landed values.

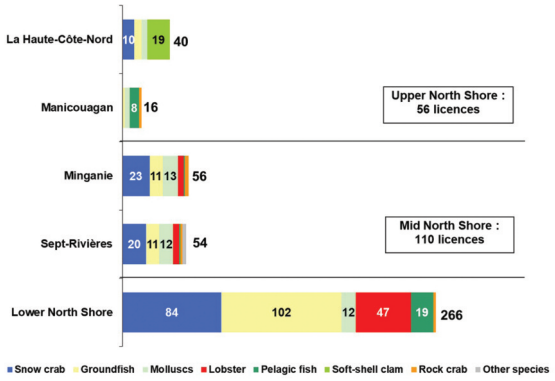
Graph 31 illustrates the distribution of the number of active licences by species. To begin with, it shows that the number of active licences is higher than the number of businesses (432 compared to 261). Thus, in 2015, each active fishing business in the North Shore area had utilized, on average, 1.7 licences. It is therefore normal, for example, to see a higher number of groundfish licences (132) than businesses specializing in that fishery (39).

Graph 31: Distribution of the number of active licences by main species, North Shore, 2015



Source: DFO, Quebec Region

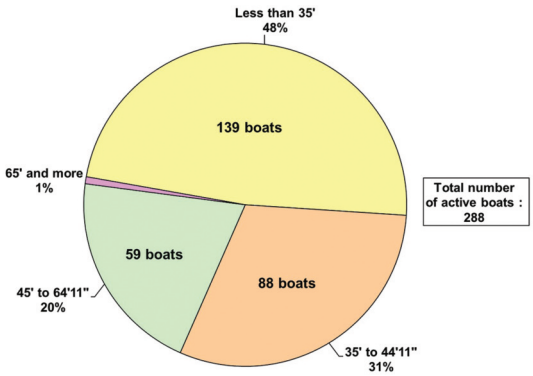
Graph 32: Distribution of the number of active licences, by main species and RCM, North Shore, 2015



Source: DFO, Quebec Region

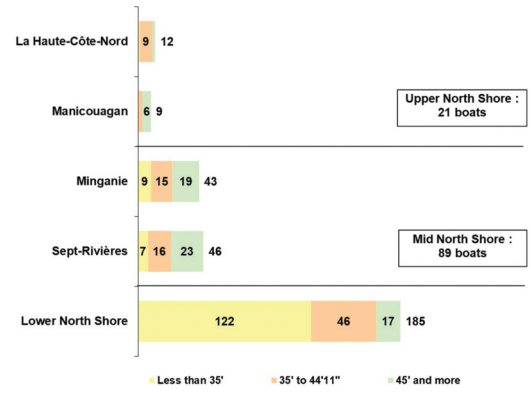
Graphs 33 and 34 illustrate the number of boats on the North Shore. They indicate that in 2015, almost half (48%) of a total of 288 vessels were under 35 feet long. This is explained by the fact that fishers use these small boats to go fishing for groundfish, which takes up a significant portion of the fishing activities in the region. This is also a much higher proportion than in Quebec as a whole (35%). Conversely, medium-sized boats (between 35 and 45 feet long) were less numerous on the North Shore than in the other maritime areas (31% compared to 47% for Quebec as a whole).

Graph 33: Distribution of the number of fishing vessels by length, North Shore, 2015



Source: DFO, Quebec Region

Graph 34: Distribution of the number of fishing vessels by length and RCM, North Shore, 2015

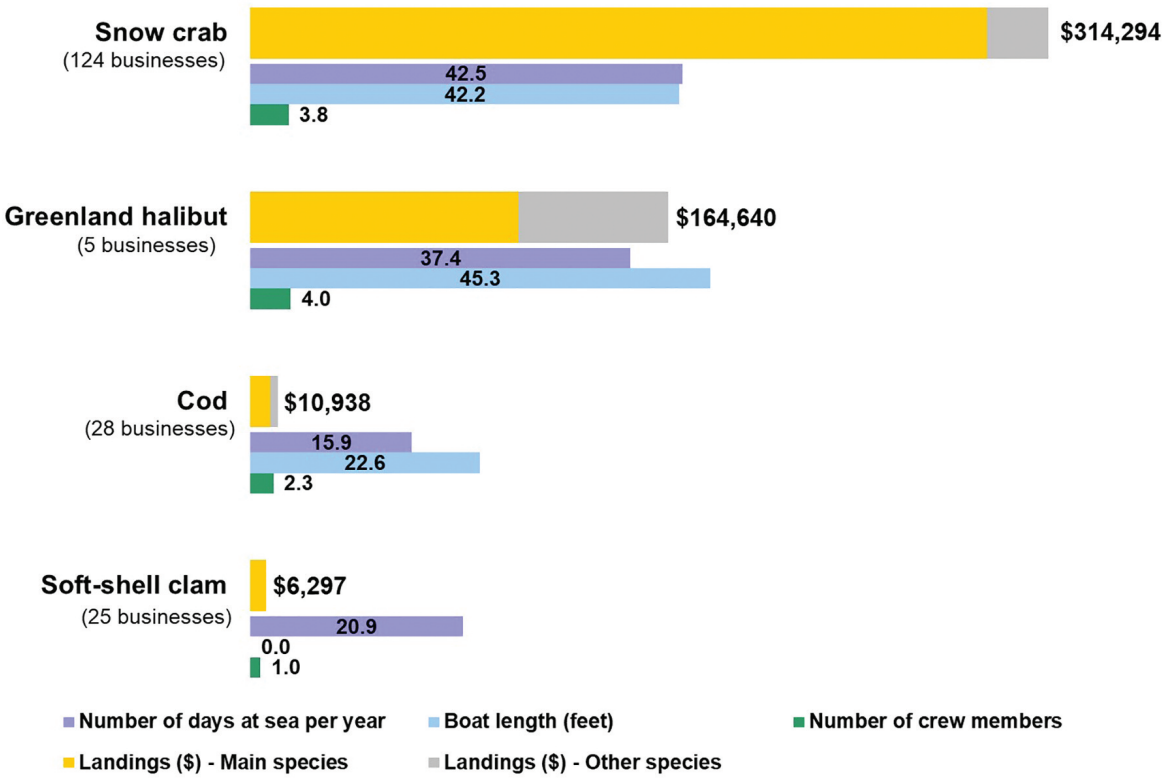


Source: DFO, Quebec Region

2.2.4 Fishing fleets

In 2015, 182 of the 261 fishing businesses on the North Shore were included in one of the following four fleets[16]: crabbers (124 businesses), turbot fishers[17] (5 businesses), cod fishers (28 businesses) and soft-shell clam gatherers (25 businesses). Graph 35 illustrates several characteristics of these fleets. Crabbers and turbot fishers have the highest average landed values ($314,294 and $164,640 respectively). Cod fishers, whose average income is much lower ($10,938), also have smaller boats and crews.[18] Soft-shell clam gatherers, however, did not use boats or crews. Their average income was calculated at $6,297 for 20.9 days of gathering, an average of $301 per day.

Graph 35: Distribution of the average characteristics of the main fishing fleets in the North Shore area, by main species landed, 2015



Source: DFO, Quebec Region

[16] Group of fishers who share the same principal species landed (by value). Certain fleets, such as crabbers, are relatively heterogeneous.

[17] Turbot fishers are from businesses with Greenland halibut as the principal species landed.

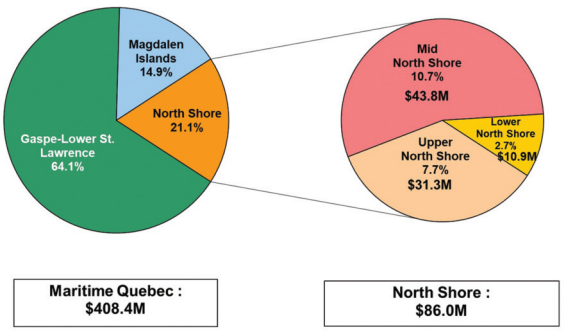
[18] The number of crew members includes the captain.

2.3 Processing of marine resources

2.3.1 Production value and number of jobs

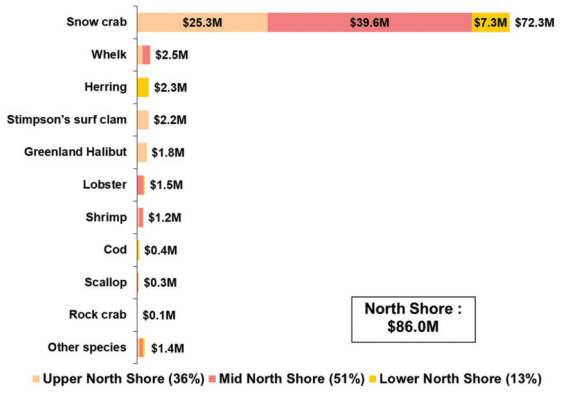
The marine resources processing industry on the North Shore consists of almost 20 businesses that generally buy their fish and seafood directly from fishers and export or resell these products on the local market. Most of the time these businesses carry out initial processing (freezing, salting, cooking, packaging, etc.) before sale. In 2014, fish and seafood purchases from these businesses totalled $50.0M while their production value totalled $86.0M, or 21% of the total for maritime Quebec (Graph 36).

Graph 36: Distribution of the value of marine resources processing in Quebec and the North Shore area, 2014



Source: DFO, Quebec Region

Graph 37: Distribution of the value of marine resources processing in the North Shore area, by main species and by maritime sub-area, 2014

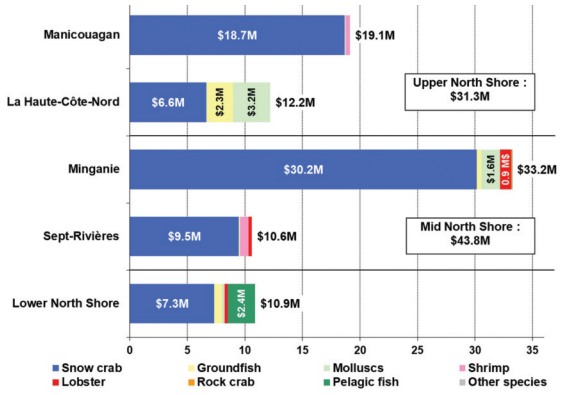


Source: DFO, Quebec Region

In 2014, the production value of snow crab on the North Shore was $72.3M, accounting for almost 84% of the total production in the area. Whelk ranked second, with a value of $2.5M (2.9%). Herring and Stimpson's surf clam were third and fourth, respectively, with production values of $2.3M (2.6%) and $2.2M (2.6%) (Graph 37). The Mingan RCM was where the largest marine resource production on the North Shore occurred, with $33.2M, or 38.6% of the area (Graph 38).

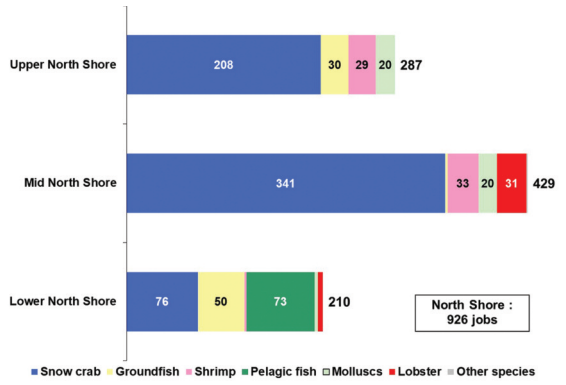
In 2014, it is estimated that a maximum of 926 people[19] worked in North Shore marine resource processing businesses. Of that number, 287 worked on the Upper North Shore, 429 on the Mid North Shore, and 210 on the Lower North Shore. It is estimated that 624 jobs were related to the processing and sale of snow crab, 82 to groundfish, 73 to pelagic fish, 65 to shrimp and 44 to shellfish (Graph 39).

Graph 38: Distribution of the value of marine resources processing in the North Shore area, by main species and by RCM, 2014



Source: DFO, Quebec Region

Graph 39: Distribution of the number of jobs in the marine resources processing industry in the North Shore area, by main species and maritime sub-area, 2014



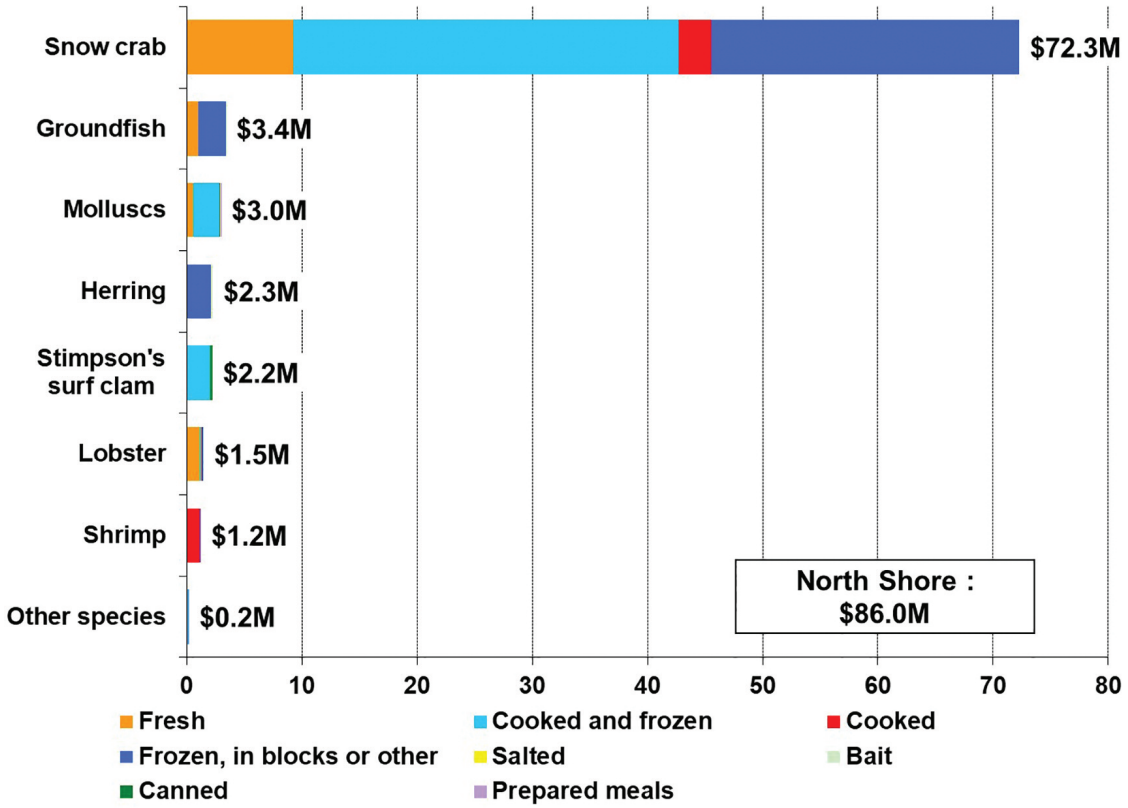
Source: DFO, Quebec Region

[19] It is worth noting that the statistics on number of jobs represent the maximum number of workers over the course of a year and that most of these jobs are seasonal.

2.3.2 Types of processing

As illustrated in Graph 40, most marine products from factories on the North Shore, mainly snow crab (84%), are sold frozen[20] (80.8%), fresh (14.0%) or cooked (4.7%). Bait, canned goods; smoked and salted products, as well as cooked or marinated dishes, represent less than 1% of production.

Graph 40: Distribution of the value of marine resources processing in the North Shore area, by main species processed and by product type, 2014



Source: DFO, Quebec Region

[20] Including cooked and frozen.

2.3.3 Businesses

In 2014, of the 19 businesses in the North Shore marine products processing industry, the nine principal businesses accounted for 81% of production and 96% of the jobs in the industry. Table 4 provides basic information on these businesses. It should be noted that only businesses with sales greater than $1,000 were considered for this analysis.

Table 4: Principal marine resources processing businesses of the North Shore area, 2014

Name of buyer	Community	RCM	Sales figures	Number of jobs
Posséidon	Longue-Pointe-de-Mingan	Minganie	$15M-$20M	100-200
Crustacés Baie-Trinité	Baie-Trinité	Manicouagan	$15M-$20M	100-200
Poissonnerie du Havre	Havre-Saint-Pierre	Minganie	less than $15M	100-200
Les Crabiers du Nord	Portneuf-sur-Mer	Upper North Shore	less than $15M	less than 100
Groupe Umek	Sept-Îles	Sept-Rivières	less than $15M	less than 100
I & S Seafoods (Coastal Seafood)	Rivière-Saint-Paul	Lower North Shore	less than $15M	less than 100
LNS Community Seafood Coop	Harrington Harbour	Lower North Shore	less than $15M	less than 100
Pêcheries Côte-Nord	Blanc-Sablon	Lower North Shore	less than $15M	less than 100
Poissonnerie Laprise	Chutes-aux-Outardes	Manicouagan	less than $15M	less than 100
The other 10 businesses			$3.2M	176
TOTAL			**$86.0M**	**926**

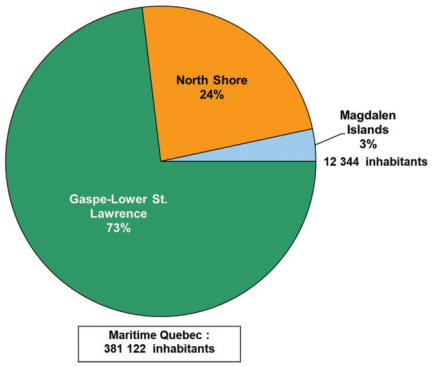
Source: DFO, Quebec Region

3 Magdalen Islands

3.1 Socio-economic profile

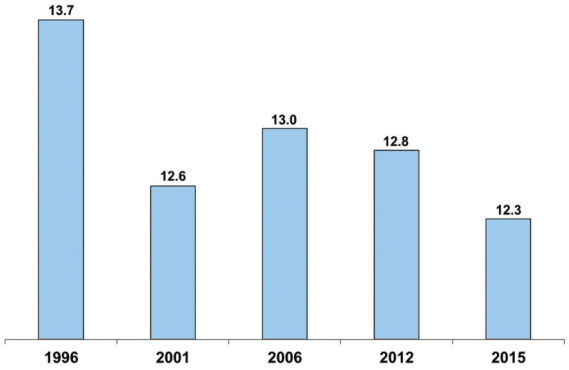
With 12,344 residents in 2015, the Magdalen Islands accounted for 3% of the total population of maritime Quebec. Like the other maritime areas, but contrary to Quebec as a whole, the Magdalen Islands saw its population decrease (-15%) between 1986 and 2015. Furthermore, the Institut de la statistique du Québec foresees a demographic decline of 6.4% between 2011 and 2036.

Graph 41: Distribution of the population in maritime Quebec by maritime area and the Magdalen Islands, 2015



Source: Statistics Canada

Graph 42: Evolution of the population in the Magdalen Islands, 1986 to 2015 (thousands of residents)



Source: Institut de la statistique du Québec

Table 5 provides more detailed socio-economic and demographic data for the Magdalen Islands. **Table**

5: Socio-economic data for the Magdalen Islands

	Population 2015	Demographic outlook (2011-2036)	Average land value for single-family dwellings (2015)	Incidence of low-income families (2012)	Number of fishing-related jobs (2015)[21]	Unemployment rate[22] (2015)
Magdalen Islands	12,344	–6.4%	$132,527	3.3%	1,806	14.6%

Source: Institut de la statistique du Québec

[21] The number of fishery-related jobs corresponds to the number of fishers in 2015 and the maximum number of processing factory employees in 2014.

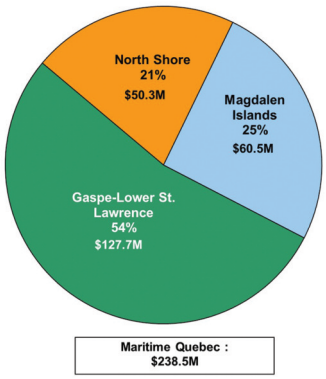
[22] Unemployment rate for the Gaspé/Magdalen Islands administrative region.

3.2 The fishing industry

3.2.1 Evolution of landings

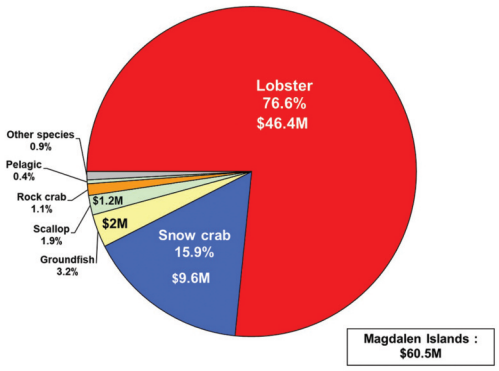
In 2015, landings in the Magdalen Islands totalled 7,164 tonnes for a value of $60.5M.[23] This represented 25% of the total landings in Quebec by value.

Graph 43: Distribution of the value of landings in Quebec and the Magdalen Islands, 2015



Source: DFO, Quebec Region

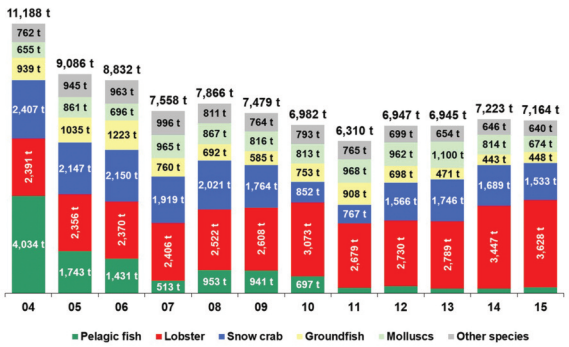
Graph 44: Distribution of the value of landings in the Magdalen Islands, by main species, 2015



Source: DFO, Quebec Region

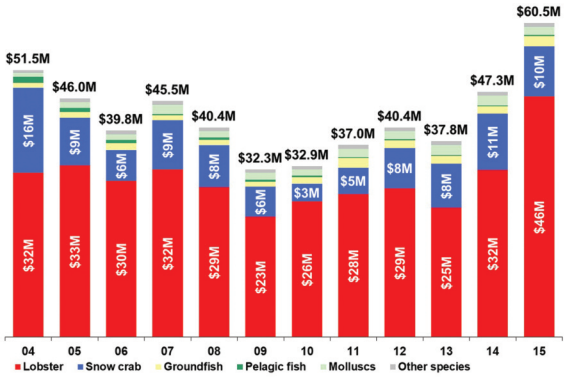
Lobster is the main species landed in the Magdalen Islands. In 2015, the landed value for this crustacean was $46.4M, accounting for 77% of the total value. Snow Crab had a far lower value of $9.6M, that is, 16% of the total value. Other species (groundfish, scallop, Rock Crab, etc.) were relatively marginal. Together, they accounted for approximately 7.5% of the landed value, or $4.5M.

Graph 45: Evolution of quantities landed by fishers in the Magdalen Islands, by main species, 2004 to 2015



Source: DFO, Quebec Region

Graph 46: Evolution of the landed value of Magdalen Islands fishers, by main species, 2004 to 2015



Source: DFO, Quebec Region

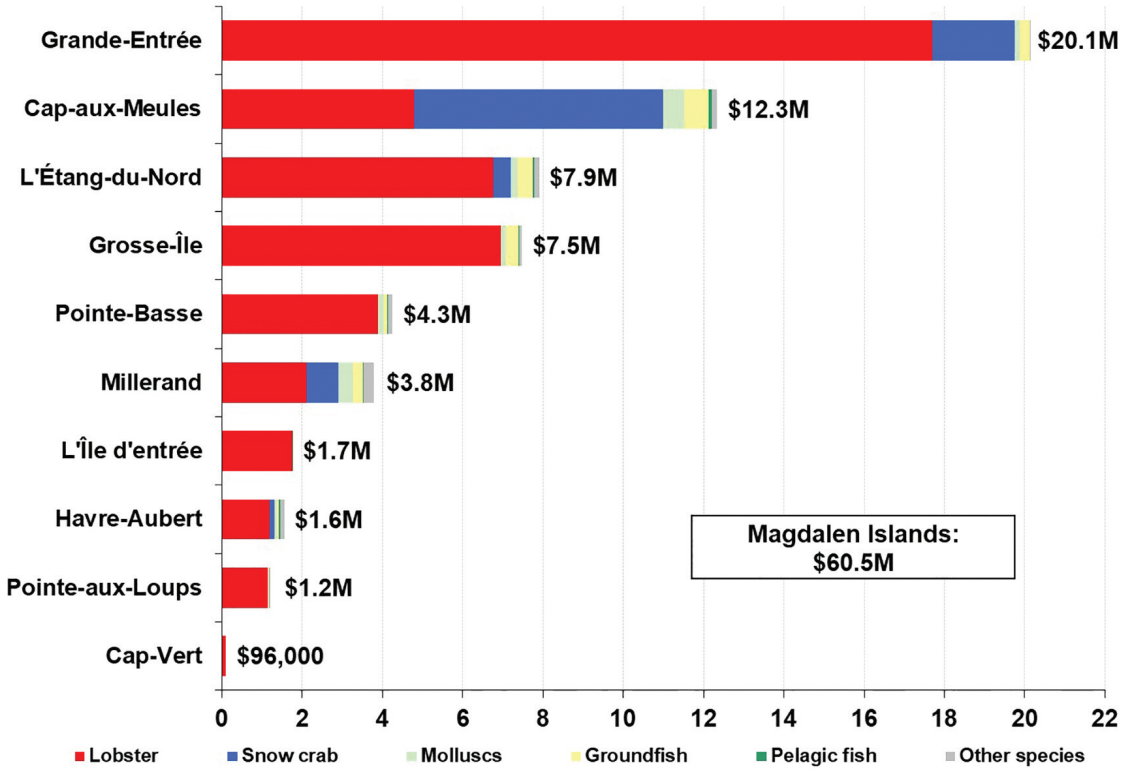
Graphs 45 and 46 show that, for lobster and Snow Crab landed in the Magdalen Islands, rising average landing prices increased landing value since 2013. In 2015, this landing value reached a historical record of $60.5M owing to the combined impact of higher landing quantities and higher average landing prices of lobster.

[23] This amount includes landings by fishers from outside of Quebec, which totalled $203,600.

3.2.2 Landings by fishing port

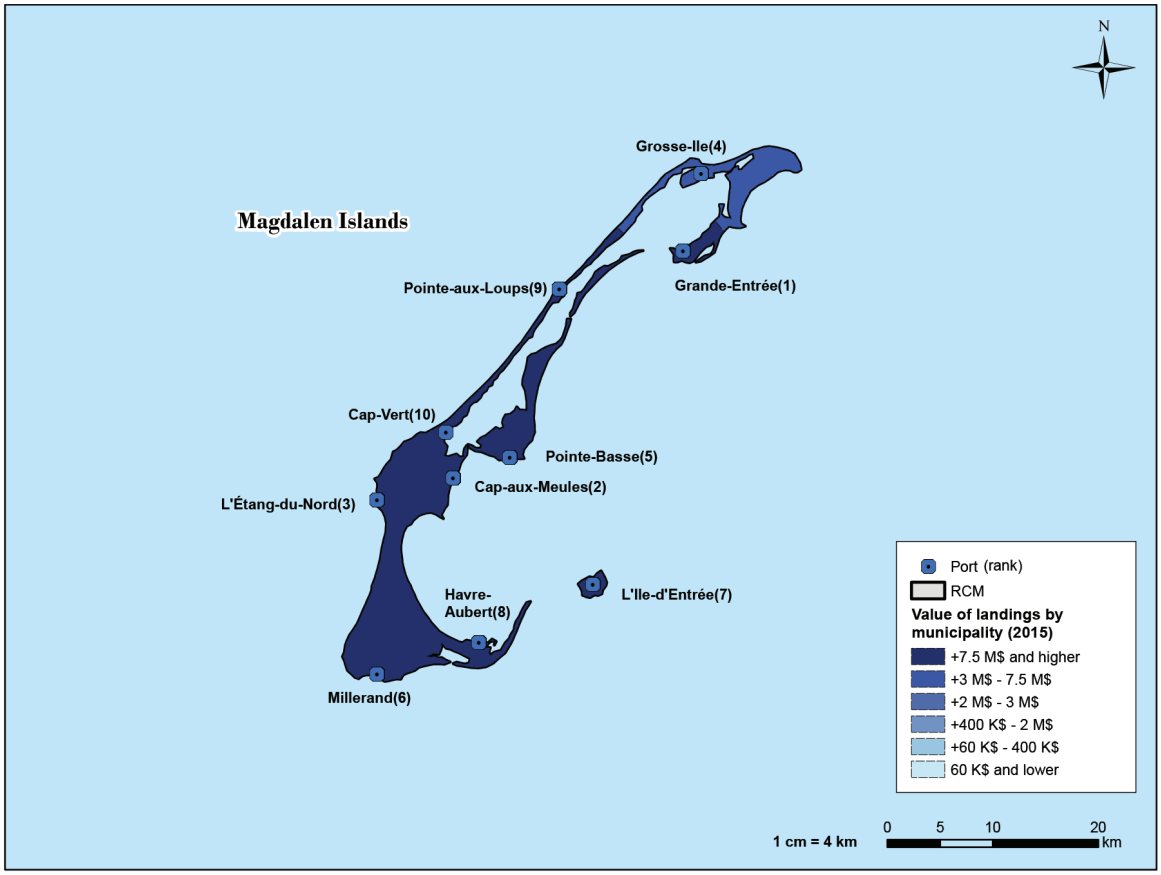
Landings in the Magdalen Islands were carried out at ten different fishing ports. Several of these were among the most significant ports in Quebec, in particular Grande-Entrée (second in Quebec) and Cap-aux-Meules (fourth in Quebec). The Cap-aux-Meules port received most of the landings of Snow Crab (64%), mollusk (35%) and groundfish (31%) in the Magdalen Islands. With the exception of that port, lobster was the main landed species at all Magdalen Islands fishing ports; this included Grande-Entrée, the most significant Quebec port in terms of lobster landings.

Graph 47: Distribution of the value of landings at the 10 Magdalen Islands fishing ports, by species, 2015



Source: DFO, Quebec Region

Map 4: The 10 fishing ports in the Magdalen Islands, 2015



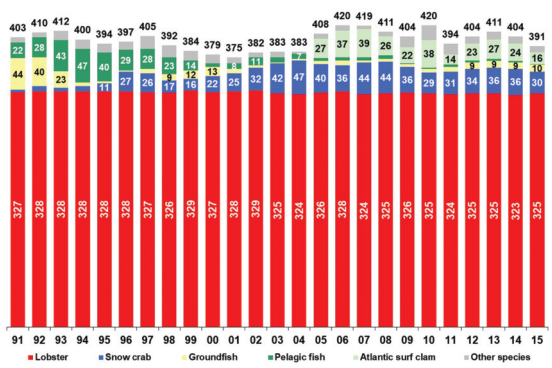
Source: DFO, Quebec Region

3.2.3 Workforce and fishing fleet

In 2015, there were 391 active fishing businesses in the Magdalen Islands, 325 of which specialized in lobster. These lobster boats accounted for 83% of all fishing businesses in the archipelago. Among the 80 other businesses, 30 fished mainly Snow Crab, 16 fished Atlantic Surf Clam and 10 fished groundfish (Graph 48).

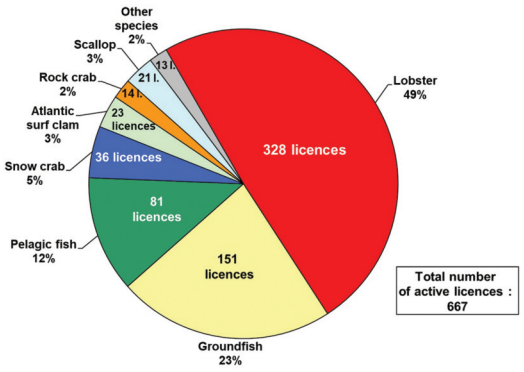
Graph 49 illustrates the distribution of the number of active licences by species. Firstly, the number of active licences is higher than the number of businesses (667 licences compared to 391 businesses). This means that, in 2015, each active fishing business in the Magdalen Islands utilized, on average, 1.7 licences. It is therefore normal, for example, to see a higher number of groundfish licences (151) than businesses specializing in that fishery (30).

Graph 48: Evolution of the number of active fishing businesses by main species, Magdalen Islands, 1999 to 2015



Source: DFO, Quebec Region

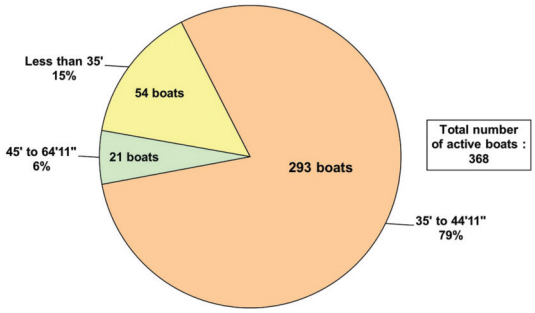
Graph 49: Distribution of the number of active licences by main species, Magdalen Islands, 2015



Source: DFO, Quebec Region

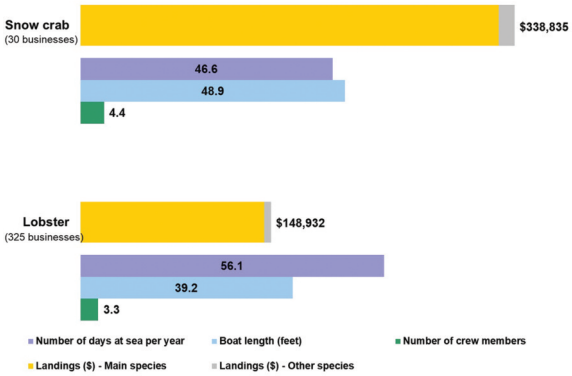
Graph 50 illustrates the number of boats in the Magdalen Islands according to length. The graph shows that, of a total of 379 boats in 2012, more than three quarters (79%) were between 35 and 45 feet long. This is a much higher proportion than in Quebec as a whole (47%). Conversely, boats less than 35 feet long (15%) and more than 45 feet long (6%) were much less numerous in the Magdalen Islands than in Quebec as a whole.

Graph 50: Distribution of the number of fishing boats by length, Magdalen Islands, 2015



Source: DFO, Quebec Region

Graph 51: Distribution of the average characteristics of the main fishing fleets in the Magdalen Islands, by main species landed, 2015



Source: DFO, Quebec Region

In 2015, almost 92% of the 391 Magdalen Islands fishing businesses mainly landed lobster (325 businesses) or Snow Crab (34 businesses). Graph 51 illustrates several characteristics of these two fleets. The average fishing income for crabbers was noticeably higher than that of lobster fishers ($338,835 vs. $148,932). Crabbers' boats were also longer (48.9 feet against 39.2 feet) and supported on average more crew members[24] per business (4.4 vs. 3.3). However, lobster fishers spent, on average, more days at sea than crabbers (56 vs. 47).

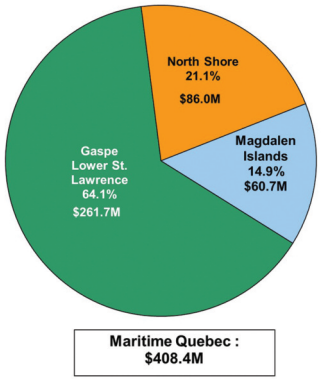
[24] The number of crew members includes the captain.

3.3 Processing of marine resources

3.3.1 Production value and number of jobs

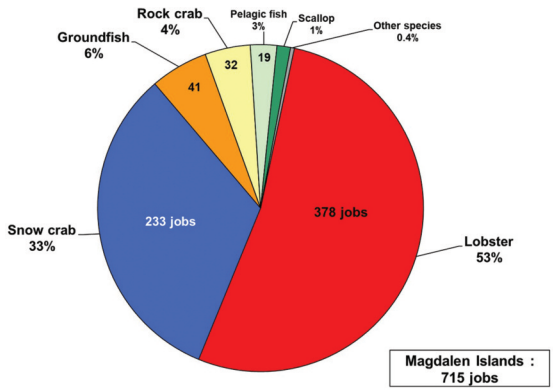
The marine resources processing industry in the Magdalen Islands comprises a dozen businesses that generally buy fish and seafood directly from fishers, then export or sell these products on the local market. These businesses usually carry out initial processing (freezing, salting, cooking, packaging, etc.) before selling their products. In 2014, these businesses' fish and seafood purchases totalled $45.6M whereas production was calculated at $60.7M, or 14.9% of the total for Quebec's maritime areas (Graph 52).

Graph 52: Distribution of the value of marine resources processing in Quebec and the Magdalen Islands, 2014



Source: DFO, Quebec Region

Graph 53: Distribution of the number of jobs in the marine resources processing industry in the Magdalen Islands, by main species processed, 2014



Source: DFO, Quebec Region

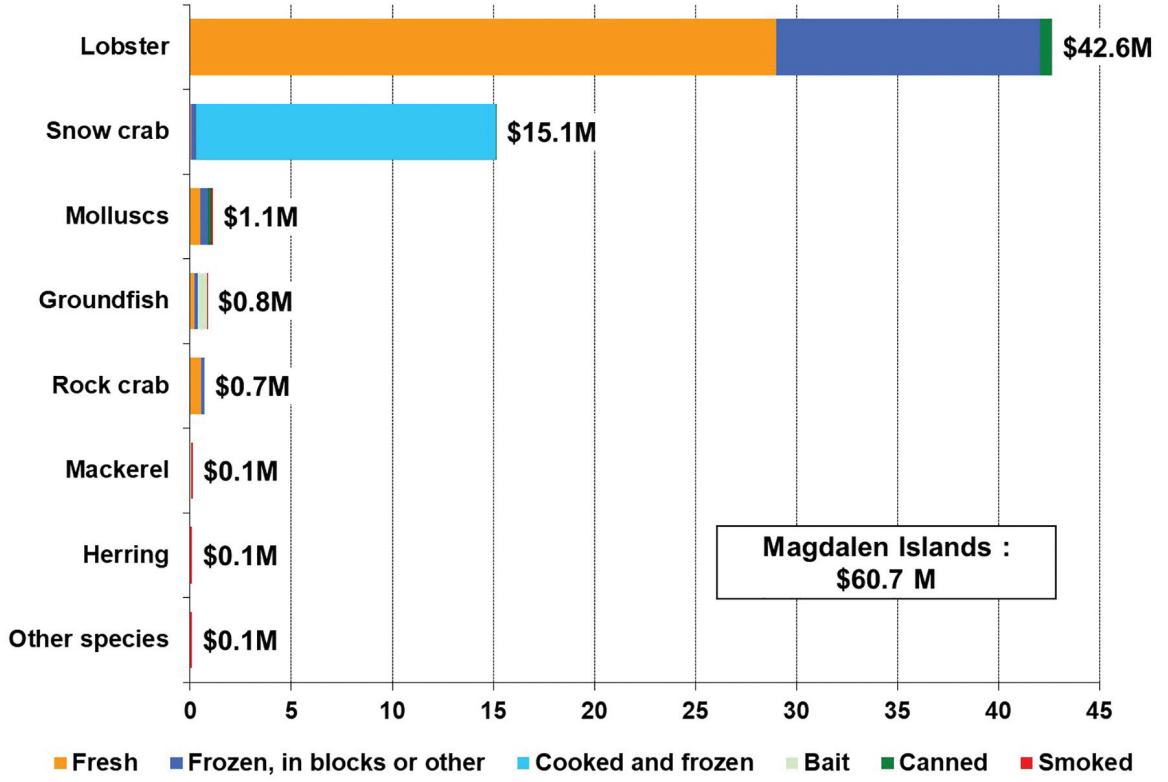
In 2014, there were approximately 715 workers[25] in marine resources processing businesses in the Magdalen Islands. It is estimated that 378 of these jobs were related to the processing and sale of lobster, 233 to Snow Crab, 41 to groundfish, 32 to Rock Crab, 19 to pelagic fish and 12 to mollusk (Graph 53).

[25] It is worth noting that the statistics on the number of jobs represent the maximum number of workers over the course of a year and that most of these jobs are seasonal.

In 2014, the production value of lobster in the Magdalen Islands reached $42.6M, accounting for almost 70% of total production for the area. Snow crab was second with $15.1M (25%). Molluscs and groundfish ranked third and fourth with respective production values of $1.1M and $0.8M. The production value of all other species combined was $1M, representing only 1.7% of the total (Graph 54).

As Graph 54 illustrates, most of the marine products processed by Magdalen Islands factories are sold fresh (50%) or frozen[26] (48%). Canned products, bait and smoked, salted or marinated products represented just 3% of production.

Graph 54: Distribution of the value of marine resources processing in the Magdalen Islands, by main species processed and by product type, 2014



Source: DFO, Quebec Region

[26] Including cooked and frozen products.

3.3.2 Businesses

In 2014, of the 12 businesses in the Magdalen Islands marine resources processing industry, the seven principal businesses accounted for 99% of production and 96% of the jobs in the industry. Table 6 provides basic information on these businesses.

Table 6: Major marine resources processing businesses in the Magdalen Islands, 2012

Name of buyer	Community	RCM	Sales figures	Number of jobs
La Renaissance des Îles	L'Étang-du-Nord	Magdalen Islands	$20M to $25M	300+
Cape Dolphin Fisherman's Coop.	Grosse-Île	Magdalen Islands	less than $15M	les than 100
Les Fruits de Mer Madeleine	L'Étang-du-Nord	Magdalen Islands	less than $15M	100 to 200
Poissons frais des Îles	Millerand Havre-Aubert	Magdalen Islands	less than $15M	les than 100
Homards des Îles Renaud	Havre-Aubert	Magdalen Islands	less than $15M	les than 100
Homards du Golfe Madeleine	Cap-aux-Meules	Magdalen Islands	less than $15M	les than 100
Poissonnerie S.B.L.	Bassin	Magdalen Islands	less than $15M	les than 100
The other 5 businesses			$0.6M	31
TOTAL			**$60.7M**	**715**

Source: DFO, Quebec Region