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COUNTRY STATEMENT - NEW ZEALAND

SUMMARY

The rapid growth which has characterised the New Zealand fishing industry in recent years has slowed during the past 12 months. For some preferred species catches have declined even though catching effort continues to increase. Just how much additional fishing many stocks will sustain and still support economic operations is uncertain. The pressure in some instances is thought to be excessive and further work is needed to more accurately establish fish stock size and to allow appropriate management strategies to be developed.

The latest available fisheries statistics for the 1981 calendar year indicate that a fleet of 5 380 vessels (5 067 domestic, 108 joint venture, 205 licensed) fished. Joint venture vessels took over 100 000 t, the major species being deep sea perch, oreo dory, hoki, barracouta, and squid. Licensed vessels took over 87 000 t. Details of the domestic catch were not available.

Exports of fisheries produce totalled more than 128 000 t valued at over \$190 m (NZ). The bulk of the exports were of finfish although rock lobsters and squid were also major earners. A significant quantity of exports was purchased by Pacific States.

Over \$24 m worth of fisheries products were imported.

The Government has instituted various budgetary measures to assist the fishing industry. Fisheries research and management are proceeding. The future of the fishing industry is considered to be favourable in the medium to long term.

NEW ZEALAND
COUNTRY STATEMENT

I. INTRODUCTION

The rapid growth which has characterised the New Zealand fishing industry in recent years has slowed during the past 12 months. For some preferred species catches have declined even though catching effort continues to increase. Just how much additional fishing many stocks will sustain and still support economic operations is uncertain. The pressure in some instances is thought to be excessive and further work is needed to more accurately establish fish stock size and to allow appropriate management strategies to be developed.

Since the introduction of the 200 mile exclusive economic zone (EEZ) in 1978, capacity to catch fish in offshore waters has increased greatly and this capacity now exceeds the estimated sustainable yield of some of the high-valued deep water species. Initially foreign vessels were licensed to harvest the resource and cooperative ventures were introduced to allow New Zealand (NZ) firms to partner overseas operators and thereby develop the skills and technology to exploit the deep water resources themselves. A number of medium-sized NZ-owned vessels are now able to successfully fish in deep waters and this year the Government approved the importation of two large deep water vessels. With the pressure on the resource increasing and joint venture approvals due to expire next year a reappraisal of the deep water fleet is required. A clear policy for future NZ involvement has yet to be agreed upon, but work on the form of such a policy is continuing. In the

meantime species limits have been revised with preference going to domestic fishermen, followed by joint ventures and foreign licensed vessels.

Coastal waters are under extreme fishing pressure and a moratorium on the issue of further permits was imposed in March 1982. This is a short-term measure to stabilise the industry while longer-term fisheries management plans are developed in consultation with industry and other groups using marine resources. Regional Fisheries Management Committees are being established at major fishing ports to allow participation of local groups. A National Fisheries Management Advisory Committee was established in February 1982 to allow full industry involvement in fisheries management at a national level.

The Fisheries Act 1908 is being rewritten to cater for developments in the industry over recent years and to allow effective management of the resources.

II. PRODUCTION

1. Fishing fleet

The latest available statistics are for 1981 when a fleet of 5 380 vessels fished including 5 067 domestic vessels, 108 joint venture vessels, and 205 licensed vessels. The breakdown of vessels by size is not available for 1981 but an indication of the vessel size distribution can be gained from 1980 statistics (Table 1). Foreign involvement in licensed and joint venture fishing in New Zealand in 1981 is indicated in Table 2.

Vessels which fished for tuna in 1981 included 176 domestic (128 albacore surface trolling vessels, 41 southern bluefin trolling vessels, 7 skipjack purse seiners), 12 joint venture (purse seiners fishing for skipjack), and 95 licensed (84 Japanese longliners fishing for southern bluefin, 11 Korean longliners targeting for albacore and yellowfin tuna).

2. Catches by joint venture vessels

Joint venture trawl catches in 1981 are shown in Table 3. Over half of the catch was made up of 5 species including deep sea perch (23 727 t), oreo dory (21 468 t), hoki (15 310 t), barracouta (10 177 t), and squid (7 883 t).

The joint venture squid catch (jigging) was about 32 000 t.

The joint venture skipjack catch by purse seine vessels was 4 743 t.

3. Catches by licensed vessels

The 1981 catches are listed in Table 4. Japan was the major licensed fishing country followed by Russia and Korea. The catch was made up largely of finfish followed by squid and tuna.

4. Catches by New Zealand domestic vessels

These data are not yet available.

III. PROCESSING AND MARKETING

A programme to ensure internationally recognised hygiene standards for fish-packing houses and vessels licensed to process at sea is proceeding. Processing methods, the control of fish temperatures, transport, and export procedures come under a programme administered by the Ministry of Agriculture and Fisheries (MAF). Routine supervision of premises and products is done and all fish exported is certified as complying with certain standards.

1. Fisheries exports

Exports of fisheries produce in 1981 totalled more than 128 000 tonnes (t) valued at over 190 million dollars (NZ) (Table 5). These exports were up about 17% in both quantity and value over 1980 when 110 000 t earned \$162 m.

The bulk of the 1981 exports were of finfish (92 000 t, \$117.2 m) with big earners being snapper (7 000 t, \$20.1 m), skipjack (7,000 t, \$8.4m), warehou (3,500 t, \$5.6 m), deep sea perch (3 600 t, \$7.6 m), and hoki (8 400 t, \$6 m).

Rock lobsters were a major export earner (2 300 t, \$35.6 m), as were squid (32 000 t, \$27.8 m), and paua (296 t, \$4.2 m).

Fisheries exports include both domestic and joint venture catches.

2. Exports to Pacific Ocean States

These are listed in Table 6 for 1981. These data have been presented because of their particular relevance

to participants at the South Pacific Commission Fourteenth Regional Technical Meeting on Fisheries. Countries which purchased major quantities of New Zealand fish produce in 1981 included Australia, American Samoa, Papua New Guinea, and Fiji.

3. Exports to other countries

(a) Southeast Asia and Far East

Fish and fish preparations \$50.7 m, Rock lobsters \$5.1 m, Shellfish \$29 m.

(b) North and Central America

Fish and fish preparations \$7.5 m, Rock lobsters \$25.8 m, Shellfish \$646 000.

(c) Europe

Fish and fish preparations \$6.7 m, Rock lobsters \$255 000, Shellfish \$2.5 m.

(d) Middle East

Fish and fish preparations \$2.9 m, Rock lobster \$115 000, Shellfish \$707 000.

(e) Africa

Fish and fish preparations \$2.4 m, Shellfish \$40 000.

(f) USSR

Fish and fish preparations \$3.6 m, Shellfish \$1.2 m.

(g) Other

Shellfish \$83 000.

4. Imports

Total imports of fisheries products in 1981 weighed 5 392 t valued at \$24.4 m (Table 7). This was up on the 1980 volume by over 30% and in value by almost 5%. Major

items imported included canned salmon, sardines, herrings and pilchards, and fresh crustacea and molluscs.

IV. GOVERNMENT

1. Budget

In recent years over 50% of the volume of fisheries exports has come from joint venture fishing. This type of fishing activity is expected to level off.

In the next few years the industry will undergo a period of adjustment to such factors as inshore resource limitations and the high costs of fuel and fishing equipment.

The 1981 budget introduced the following measures to assist the domestic industry and to encourage restructuring where appropriate to enable expansion into underexploited fisheries:

- (a) One million dollars to support a finfish price stabilisation scheme;
- (b) The addition of chilled bluefin and albacore to the list of fish species qualifying for export performance taxation incentives;
- (c) One hundred thousand dollars for deep-sea training for commercial fishermen;

The budget also extended to 31 March 1983:

- (d) The investment allowance for new fishing vessels;
- (e) The tax concession for development of rock oyster, mussel and freshwater fish farms.

2. Fisheries Research and Management

(a) Deep water Fishery

At the time that NZ formally introduced its 200 mile EEZ (1 April 1978), the deep water fishery was widely viewed as a source of substantial new overseas earnings from exports and an attraction for overseas investment. What followed was dramatic expansion in the fishing industry through the introduction of joint venture and cooperative fishing and marketing, the importation of a number of large vessels, and the continuation of licensing of foreign fishing vessels.

Research and fishing experience have shown that many of the stocks of deep water species are limited in size, and there are indications that fleet development has continued to the point where there is excess catching capacity. Catch limits on some species have been introduced and others are required. Further, there would appear to be a need to reduce catching capacity.

For the 1981/82 season (to 31 March 1982 for finfish, to 31 August 1982 for trawl-caught squid) the total allowable catches (TACs) from the EEZ were 379 000 t for finfish and 50 000 t for squid.

Research is being conducted on many of the deep water species including deep sea perch, oreo dories, ling, silver warehou, squid, and barracouta, to enable assessments of stock density on which to base recommendations for management strategies.

(b) Coastal fishery

Several coastal fisheries are under stress. Consequently a moratorium on the issue of further fishing permits (excluding fishing for tunas) was declared in March 1982. This measure has been implemented to stabilise the industry while other management measures are introduced.

Measures being considered are controlled fisheries (already in place for the NZ rock lobster fishery and others), and fisheries management plans which allow for specific management measures at the local level developed in consultation with industry.

Research is progressing in 4 areas:

- * Tuna: where there are several developing fisheries with considerable export potential;
- * Coastal pelagic fish: where there are some under-utilized resources as well as some species under threat or over-exploited;
- * Coastal demersal fish: where there is over-exploitation and the need to limit effort and catches in many areas;
- * Aquaculture and genetic studies: where work can have implications for stock management or for farming of selected species.

3. Joint venture and foreign licensed fishing

A 12-month extension of joint venture and foreign licensed deep water demersal fishing was announced by Government in October 1981 pending the completion of a major review by mid 1982 to determine optimal use of the deep water resource. The extension has been modified to run to March 1983.

V. CONCLUSION

There is a basic long-term reason for optimism in the future of the fishing industry which is that all projections of future international supply and demand indicate that, on a global basis, demand for fish and fisheries products will exceed supply. Developing fishing industries must expect initial difficulties as they move to build the necessary infrastructure and fund the high cost of investment, but the expectation is that realisations from the sale of good fish will meet the costs of exploiting them. The outlook is therefore considered to be favourable in the medium to long term.

VI. STATISTICS

The statistics presented in the tables are the most recent available and apply to the 1981 calendar year unless specified otherwise. The sources of the data in each of the tables are as follows: Table 1, NZ Ministry of Agriculture and Fisheries, Economics Section; Table 2, MAF, Fisheries Research Division logbook records; Table 3, NZ Fishing Industry Board Annual Report for 1982; Table 4, as for 3; Table 5, MAF; Table 6, as for 3; Table 7, NZ Department of Statistics.

VII. AUTHORSHIP

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TABLE 1: SIZE DISTRIBUTION OF 1980
NEW ZEALAND FISHING FLEET *

Vessel length range (overall)	No. of Vessels
Less than 6 m	2 640
6 - 9 m	1 247
9 - 12 m	725
12 - 15 m	360
15 - 18 m	116
18 - 21 m	59
21 - 24 m	37
24 - 27 m	7
27 - 30 m	20
30 - 33 m	5
More than 33 m	131
* Domestic and joint venture vessels	Total No. vessels 5 347

TABLE 2: FOREIGN INVOLVEMENT IN LICENSED AND JOINT VENTURE FISHING IN NEW ZEALAND IN 1981

Fishing Method	Country					U.S.A.	Total
	Japan	Russia	Korea	Taiwan	Poland		
Trawl/Licensed	11	23	1	-	-	-	35
Trawl/Joint Venture	12	26	2	-	1	-	41
Squid/Licensed	71	-	4	-	-	-	75
Squid/Joint Venture	17	-	3	31	-	-	51
Squid netting/Joint Venture	-	-	-	4	-	-	4
Longlining/Licensed	84	-	11	-	-	-	95
Purse seining/Joint Venture	-	-	-	-	-	12	12
Total *	195	49	21	35	1	12	313

* Not all vessels fished at the same time or for the full year, largely because the seasons for the different species of fish are different in both timing and length. Therefore actual presence of vessels at any particular time was considerably less than the total indicated in Table 2.

TABLE 3: JOINT VENTURE TRAWL CATCH BY SPECIES
IN THE 1981 NEW ZEALAND FISHERY

Species	Catch (t)
Deep Sea Perch (Orange Roughy)	23 727
Oreo Dory	21 468
Hoki	15 310
Barracouta	10 177
Jack Mackerel	3 825
Hake	3 324
Ling	2 226
Southern Warehou	2 046
Southern Blue Whiting	1 940
Common Warehou	1 877
Kingfish	1 367
Gemfish	416
Shark	315
Red Cod	289
Tarakihi	270
White Warehou	220
Groper	60
Snapper	54
Other	3 531
Squid	7 883
Total	100 325

TABLE 4: CATCHES BY COUNTRY AND METHOD MADE BY FOREIGN
LICENSED VESSELS IN THE NEW ZEALAND FISHERY
IN 1981

	Japan	Russia	Korea	Total
Finfish - trawl catch	28 842	14 365	1 188	44 395
Squid - trawl catch	7 090	6 570	428	14 088
Squid - jig catch	20 570	-	1 527	22 097
Tuna - longline catch *	6 559	-	-	6 559
Total	63 061	20 935	3 143	87 139

* Includes southern bluefin (5 074.24 t), bigeye (385.21 t), yellowfin (73.67 t), albacore (471.04 t), and swordfish (554.87 t).

TABLE 5: TOTAL WEIGHT AND VALUE OF FISHERIES PRODUCE
EXPORTED FROM NEW ZEALAND FOR 12 MONTHS
ENDED DECEMBER 1981

Species	12 Months to December	
	Weight Kg	F.O.B. \$
<u>FINFISH - Fresh, excluding fillets</u>		
Blue Cod	7 420	57 832
Eels - Live	254 859	630 285
- Other	305 189	570 870
Flounder and Sole	165 335	458 199
Groper	188 091	618 668
John Dory	405 060	1 217 724
Snapper	2 464 582	7 519 488
Tarakihi	3 579	11 417
Southern Bluefin Tuna	900	5 389
Other	813 802	677 928
Total	4 608 817	11 767 800
<u>FINFISH - Frozen, excluding fillets</u>		
Blue cod	21 169	20 854
Deep Sea Perch	1 693 242	1 681 475
Eels	529 769	1 242 406
Flounder	491 745	1 060 173
Groper	77 759	194 867
Gurnard	33 977	45 632
John Dory	129 348	196 638
Hake	1 151 157	1 951 781
Oreo Dory	5 642 473	2 368 634
Hoki	6 571 635	3 791 948
Kahawai	1 167 335	621 182
Kingfish	1 153 931	1 543 214
Ling	1 363 768	2 202 501
Mackerel - Jack	5 353 316	3 552 794
- Blue	1 579 870	684 786
Moki	4 420	2 072
Monkfish	404 378	660 236
Sth Blue Whiting	763 014	266 238
Red Cod	245 772	110 778
Snapper	4 388 023	11 848 365
Sole	1 092 551	2 552 529

TABLE 5: (continued - 2)

Species	Weight	F.O.B.
<u>FINFISH - Frozen, excluding Fillets</u> (Cont'd)		
Tarakihi	205 696	343 136
Trevally	2 385 697	2 643 381
Tuna - Albacore	2 050 158	3 185 736
- Skipjack	7 121 819	8 380 417
- Sth Bluefin Tuna	165 577	1 291 568
- Other	121 424	206 588
Warehou	3 424 928	5 448 786
Fishbait	304 572	181 492
Fish Blocks	74 203	77 215
Barracouta - Green	2 493 793	967 398
- H & G	6 331 051	2 786 168
Other	11 970 111	8 848 281
Total	70 507 681	70 959 269
<u>FINFISH - Fillets, Fresh</u>		
Deep Sea Perch	245 567	727 708
Blue Cod	28 774	26 385
Hake	885	2 398
Flounder	10 657	26 456
Oreo Dory	878 618	381 134
Groper	271 920	1 320 137
Gurnard	40 163	97 596
John Dory	22 624	130 209
Snapper	57 374	224 617
Sth Bluefin Tuna	315	1 638
Sth Blue Whiting	-	-
Tarakihi	112 579	326 718
Trevally	215 589	227 865
White Fillets	4 262	15 835
Other	169 535	340 547
Total	2 058 862	3 849 243
<u>FINFISH - Fillets, Frozen</u>		
Deep Sea Perch	1 630 848	5 238 691
Blue Cod	6 181	8 972
Eels	29 747	135 720
Flounder	16 317	42 141
Groper	179 840	635 991
Gurnard	155 672	328 355

TABLE 5: (continued - 3)

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Species	Weight	F.O.B.
<u>FINFISH - Fillets, Frozen</u> (Cont'd)		
Hoki	1 881 914	2 288 168
John Dory	54 700	195 050
Hake	91 365	186 230
Kahawai	101 085	93 424
Ling	795 850	2 052 180
Mackerel - Jack	37 139	34 246
- Blue	51 040	36 576
Moki	80	293
Monkfish	205 040	625 903
Red Cod	367 515	605 134
Snapper	147 166	509 560
Trevally	94 294	153 038
Sole, Brill	48 150	151 079
Tarakihi	468 926	1 286 647
Oreo Dory	25 110	45 961
Warehou	109 113	137 265
White Fillets	259 495	968 595
Sth Blue Whiting	19 760	21 980
Barracouta	2 492 784	1 666 487
Other	2 643 172	7 095 864
Total	11 912 303	24 543 550
<u>FINFISH - Dried, Salted or in Brine</u>		
Fish Meal	793 964	449 358
Blue Cod	2 320	5 822
Eels	50 385	249 723
Red Cod	28 609	52 867
Snapper	2 892	10 895
Tarakihi	625	2 097
Barracouta	5 853	5 247
Split & Salted	76 370	59 969
Other	28 398	92 788
Total	989 416	928 766

TABLE 5: (continued - 4)

Species	Weight	F.O.B.
<u>FINFISH - Prepared or Preserved, Canned or Otherwise Processed</u>		
Pastes & Pate	1 172	9 401
Fish Fingers	521 666	1 126 022
Dinners Prepared	217 478	744 825
Barracouta Fish Cakes	3 900	7 195
Other Cakes	3 487	7 248
Eels	120	1 036
Tuna	328 685	1 552 960
Whitebait	168	2 290
Fish Balls	403 538	528 699
Herrings	644	1 594
Kahawai	334 808	781 544
Barracouta	113 322	151 862
Other Kinds	54 672	93 971
Otherwise Packed	85 788	160 020
Total	2 069 448	5 168 667
TOTAL FINFISH	92 146 527	117 217 295
<u>ROCK LOBSTER - Fresh, or Frozen</u>		
Whole - Live	59 189	620 042
- Fresh	13 589	158 114
- Cooked	693 870	5 789 058
- Frozen	308 369	3 478 469
Tails - Frozen	1 176 473	24 998 935
- Other	2 200	45 197
Canned etc.	22 185	602 971
TOTAL ROCK LOBSTER	2 275 875	35 692 786

TABLE 5: (continued - 5)

Species	Weight	F.O.B.
<u>OTHER CRUSTACEA AND MOLLUSCS</u> <u>- Fresh or Frozen</u>		
Oysters	629 800	1 373 298
Mussels	217 169	2 488 614
Scallops	58 484	454 549
Octopus	77 356	119 338
Squid	32 376 064	27 786 462
Tuatua	323	1 189
Flour	550	942
Fish Bait	8 411	28 204
Other	138 904	494 033
Total	33 507 061	32 746 629
<u>OTHER CRUSTACEA AND MOLLUSCS</u> <u>- Canned or Otherwise Processed</u>		
Oysters	849	5 422
Mussels	13 233	149 202
Paua	295 894	4 195 047
Scallops	- 6 617	-73 783
Paste & Pate	9 323	111 141
Other	16 970	130 264
Total	329 652	4 517 293
<u>OTHER CRUSTACEA AND MOLLUSCS</u> <u>- Soups</u>		
Mussels	1 984	5 206
Other	17 119	41 727
Total	19 103	46 933
TOTAL CRUSTACEA	33 855 816	37 310 855
GRAND TOTAL	128 278 218	190 220 936

TABLE 6: NEW ZEALAND EXPORTS OF FISHERIES PRODUCE BY
VALUE AND COUNTRY OF DESTINATION IN THE PACIFIC
OCEAN IN 1981 (FIGURES IN \$NZ)

	Fish & fish preparations	Rock lobster	Shellfish	Total
American Samoa	7 634 702	3 940	21 359	7 660 001
Australia	34 305 812	4 069 488	2 518 742	40 894 042
Cook Islands	67 150	9 399	34 930	111 479
Fiji	400 959	11 706	39 771	452 436
French Polynesia	42 753	106 214	199 971	348 938
Nauru	4 575	-	1 003	5 578
New Caledonia	46 861	73 310	138 212	258 383
Niue	13 414	-	5 192	18 606
Norfolk Island	7 692	28 850	26 279	62 821
Papua New Guinea	1 091 325	8 105	93 969	1 193 399
Solomon Islands	17 892	-	7 766	25 658
Tonga	16 392	-	5 120	21 512
US Miscellaneous Pacific Islands	1 832	-	2 414	4 246
Vanuatu	16 272	16 487	14 010	46 769
Western Samoa	26 801	-	8 054	34 855
Total	43 694 432	4 327 499	3 166 792	51 138 723

TABLE 7: IMPORTS OF FISHERIES PRODUCTS FOR
NEW ZEALAND IN 1981

	Weight (tonnes)	Value NZ \$ C.I.F.
<u>Fish</u>		
Live		186 754
Frozen	3.0	8 133
Fillets frozen	0.3	1 414
Meal		92
Smoked, salted, dried	12.0	96 068
Prepared or preserved		
- pastes, etc	180.5	885 649
- herrings, pilchards	379.9	1 046 588
- sardines	1 363.3	3 452 643
- salmon	1 330.5	6 954 050
- other	422.6	818 192
- caviar	7.4	56 029
<u>Crustacea and molluscs</u>		
Fresh, chilled, frozen	308.5	2 465 365
Salted	5.7	47 969
Boiled	24.8	230 744
Prepared or preserved		
- pastes, etc	486.0	2 315 310
- canned	268.2	1 454 825
- soups	32.6	35 799
- other	566.9	4 338 948
	5 392.2	24 394 572