SPC/Fisheries 15/WP.13
21 July 1983
ORIGINAL : ENGLISH

SOUTH PACIFIC COMMISSION

FIFTEENTH REGIONAL TECHNICAL MEETING ON FISHERIES
(Noumea, New Caledonia, 1-5 August 1983)

COUNTRY STATEMENT - AUSTRALIA

I SUMMARY

1. Total landings by the Australian fishing fleet increased in 1981/82. Although landings of prawns fell these were more than offset by increased landings of tuna, rock lobsters, scallops and abalone. Domestic landings of finfish were about the same as the previous year.

2. There was some moderation in the rate of increase in costs during the year. However, the advantage of this was more than offset by weak market conditions. Some major fisheries, notably tuna and abalone, faced marketing difficulties and overseas market prices for rock losters and abalone declined. The market for prawns and fresh and frozen finfish improved somewhat from depressed 1981 levels.

3. The introduction or revision of management arrangements for a number of Australian fisheries are currently under consideration.

4. During 1982 fisheries agreements were re-negotiated between the Australian Government and the Government of Japan and with Taiwanese commercial fishing interests. One feasibility fishing operation was undertaken during the year as part of Australia's resource assessment program.

II GOVERNMENT

(a) Policy

5. Australia's basic policy of developing the resources of the Australian fishing zone (AFZ) to the benefit of Australia and its fishing industry in particular has not changed. Preference is for development by Australian fishermen. However, consideration can be given to joint fishing arrangements between Australians and foreign interests. The Government is also willing, in accordance with its international responsibilities, to consider access to the zone by foreign fishing interests under bilateral arrangements where there are fisheries resources surplus to Australia's harvesting capacity. However, as Australian fishing activities expand the Government requires a phasing out of foreign operations. This policy is reflected in the fisheries agreements negotiated since 1979.

6. The Government, in September 1980, announced guidelines for joint fishing arrangements (including joint ventures) which seek to facilitate maximum Australian content at the earliest possible time.

7. The guidelines provide for a program for phasing out foreign vessels and crews. In addition the proponents are advised that the Government normally requires a minimum of 50% Australian equity in the joint venture company.

8. Australia remains committed to assisting Pacific States to develop their fishery resources and continues to provide a 1/3 contribution to the annual budgets of both the South Pacific Commission (SPC) and the Forum Fisheries Agency (FFA). In addition Australia has contributed towards specific projects (including the SPC Skipjack Tuna Tagging Programe) and participated in the Australian/New Zealand Civil Coastal Surveillance Advisory Team (ANZCCSAT).

(b) Management

9. Several of Australia's domestic fisheries continue to give cause for concern. For the most part the fish stocks themselves are not regarded as being under immediate threat, but the number of boats operating has forced down the average catch per boat to a level where considerable economic hardship has resulted

- in the northern prawn fishery, which has had limited entry since 1977, serious consideration is being given to the introduction of a buy-back scheme to reduce boat numbers and a more restrictive boat replacement policy to reduce the potential for increased fleet capacity that has resulted from increasing boat size

- in the east coast prawn fishery the Australian Government, in concert with the NSW and Queensland State Governments, has recently announced restrictions on the entry of additional boats. This is seen as a preliminary step towards the introduction of a comprehensive limited entry management scheme for the fishery

- in the southeastern trawl fishery the Australian Government in collaboration with the State Governments of NSW, Victoria, Tasmania and SA has been developing the framework for a management system based on limited entry.

10. Officials and scientists from Australia, Japan and New Zealand have reached agreement on the status of southern bluefin tuna stocks and the need for management of the fishery. In addition, the main fishing countries, Australia and Japan, have indicated their intention to restrain growth of their fisheries pending the development of detailed management arrangements. Further discussions between Australia, Japan and New Zealand on the development and implementation of these arrangements are proposed for late 1983 in Australia.

11. The Australia/Japan Subsidiary Agreement on tuna longline fishing was re-negotiated and operates for one year from 1 November 1982. The Agreement which is substantially unchanged from the 1981/82 Agreement provides for an increase in access fees from $1.377m to $1.44m despite declining Japanese catch trends in the AFZ. The maximum number of longline vessels to fish in the AFZ is still limited to 350 and existing permanent and/or seasonal closures off Western Australia, South Australia, Victoria, New South Wales and Queensland have also been maintained.

12. An agreement with the Kaohsiung Fishing Boat Commercial Guild covering the operations of Taiwanese trawlers and gillnetters off northern Australia was re-negotiated to operate for a further 9 months from 1 November 1982. Areas open to Taiwanese fishing and the number of vessels licensed remain the same as for 1980/81. Quotas were set at the same annual rate as for the previous year: ie 15,000 tonnes for the trawl fleet and 5,250 tonnes for the gillnetters over the 9 month period. Discussions on the renewal of the Agreement have been held.

13. During 1982 a feasibility fishing operation undertaken on the north west shelf using the dropline fishing method was completed. Preliminary results point to the existence of commercial quantities of demersal fish.

14. Two proposals for joint fishing arrangements to exploit demersal and pelagic species in waters adjacent to the Northern Territory and north-west Western Australia are under consideration by Commonwealth, State and the Northern Territory Governments. Taiwanese and Thai fishing interests are involved.

15. Work is still proceeding on preparation for ratification of the Torres Strait Treaty which Australia and Papua New Guinea signed on 18 December 1978. The main provisions of the Treaty so far as fisheries are concerned are:

- delimitation of jurisdiction in relation to the seabed and waters between the two countries;

- establishment of a Torres Strait Protected Zone to preserve the way of life of traditional inhabitants of both countries living in the zone or adjacent coastal areas;

- principles for the management of commercial fisheries within and in the vicinity of the Protected Zone, including catch sharing, licensing and enforcement. Each country will exercise sovereign y within its jurisdiction in accordance with agreed conservation and management arrangements in respect of particular fisheries.

16. Following agreement on maritime boundaries with France in respect of the continental shelf and 200 nautical mile zones in 1982, steps have been taken to conclude a similar agreement with the Solomon Islands. Since agreement was reached with Indonesia in 1981 on interim fisheries arrangements, negotiations have been continuing on maritime boundaries.

(c) Assistance for Fisheries Research

17. Grants totalling $2,319,839 for 1983/84 were allocated from the Fishing Industry Research Trust Account for a range of research projects, including biological and scientific research, gear technology, exploratory fishing, education and extension, the tropical disease cigautera and seafood handling and marketing.

18. Exploratory surveys, funded from the Fisheries Development Trust Account, will be undertaken during the 1983/84 financial year. Major projects again include exploratory deep water trawling to 1000 metres for orange roughy off Southern Australia and assessment of the commercial potential of handline and pole fishing for yellowfin tuna off northern Queensland.

(d) Taxation

19. A special depreciation allowance of 33 1/3% was available for plant used wholly and exclusively in fishing operations. This special 33 1/3% prime cost rate was available for new fishing vessels, fishing equipment and shore based plants purchased after 19 July 1982. This rate was reduced to 20% from 20 May 1983.

20. An investment allowance up to a maximum of 18% is available for all new plant and equipment used wholly and exclusively in fishing operations.

III PRODUCTION

(a) Fleet

21. In 1982/83 approximately 12,600 boats were licensed to fish commercially, however, only about 4,500 were licensed to operate beyond twelve miles from the coast. Boat numbers have not increased markedly in recent years but fishing effort has risen significantly due to an upgrading of the fleet.

(b) Operations

22. During 1982/83 season for southern bluefin tuna (SBT) about 22,000 tonnes were landed, which represents a record Australian catch. This figure would probably have been exceeded but for a sustained period of inclement weather at the height of the South Australian season. Notwithstanding this factor, about 15,500 tonnes of SBT were taken in the south eastern sector of the fishery, the remainder being taken off Albany and Esperance, WA. The latter catch represents a significant increase in landings off that State. An unusual element of the past season was the presence of substantial quantities of large SBT in the area of the Great Australian Bight, where previously little fishing had been undertaken.

23. The south east demersal trawl fleet continued to operate in deeper waters adjacent to New South Wales, Victoria, South Australia and Tasmania. The main species taken in these waters included gemfish (*Rexea solandri*), king dory (*Cyttus traversi*), blue grenadier (*Macruronus novaezelandiea*), and deep water ling (*Lotella callarias*).

(c) Results

24. Total landings by Australian vessels in 1981/82 were estimated at 163,500 tonnes liveweight, valued at $390m. This is an increase of 8% both in volume and 3% in value compared with 1980/81. Production of crustaceans fell by 10% in volume but this was more than offset by increases of 37% and 5% respectively in the volume of molluscs and fish.

IV PROCESSING AND MARKETING

(a) Utilisation

25. During the year ending June 1981, 83% of marine produce caught by commercial fishermen was used in fresh and frozen form; 13% was canned, 2% was cured and 2% reduced to meal. No more recent figurs are available.

(b) Demand

26. Seafood consumption was estimated at 7.4kgs per person for the year ending June 1982, slightly higher than the previous year. The rise could be contributed to relative retail price rises for seafood over the year being smaller than those for competing food stuffs.

27. Landings of finfish were about the same as the previous year the average annual wholesale price received for them was about $A1.25kg, an increae of about 4% over the previous year.

(c) External

28. The value of Australia's imports of marine produce in the year ended June 1982 was a record $A221m, an increase of 11% over the previous twelve months. Exports were valued at $A323m, an increase of 29%.

29. Whole fresh and frozen fish imports totalled 7,500 tonnes and were valued at $A12m in 1981/82 a decrease of 26% in quantity over the preceding year. New Zealand supplied 67% of these imports followed by South Africa with 17% and Japan with 6%. Imports of chilled and frozen fillets rose by 1,400 tonnes to 24,100 tonnes, the major suppliers being New Zealand (32%), South Africa (25%), Japan (20%), and the United Kingdom (5%). Fish finger imports fell by 40% to 2,100 tonnes, with 35% coming from Japan, 26% from New Zealand, 13% from the USA and 6% from Norway. Imports of smoked fish increased in 1981/82 by 11% to 3,400 tonnes with South Africa the main supplier.

30. Canned fish imports fell by 200 tonnes to 16,400 tonnes, the main products being salmon (9,400 tonnes), sardines (3,000 tonnes) and tuna (1,200 tonnes). Salmon was imported mainly from the United States (40%) and Canada (18%) and tuna came mainly from Japan (42%), Thailand (29%), New Zealand (16%) and Taiwan (9%). Norway, Thailand, United Kingdom, Japan and Canada were the principal source of sardine imports.

31. Australia's main exports in 1981/82 were frozen prawns (15,600 tonnes valued at $A141m), frozen rock lobsters (5,800 tonnes valued at $A91m), abalone (4,000 tonnes valued at $A42m) and scallops (2,000 tonnes valued at $A11m). Nearly all prawns and whole rock lobsters and two thirds of the abalone exports went to Japan. The United States took nearly all of the rock lobster tails; Hong Kong took almost a quarter of the abalone exports and France took about a third of the scallops exported.

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TABLE I

LANDINGS AND VALUES 1980-81 and 1981-82 (prov)

	1980/81(a) Quant. tonnes	1980/81(a) Val. $'000	1981/82(a) Quant. tonnes	1981/82(a) Val. $'000
Total landings (b)	151,600	378,000	163,500	389,800
Fish				
Species				
Tuna	18,200	16,100	21,700	14,000
Whiting) Mullet) Australian Salmon) Snappers) Morwong) Flathead) Shark) All other species (c))	56,000	66,400	56,000	70,000
Crustaceans				
Species				
Rock lobster	15,200	85,000	16,500	101,300
Prawns, shrimps	26,900	127,000	21,400	109,100
Other	1,000	3,400	1,000	3,500
Molluscs				
Species				
Oyster (d)	8,300	21,000	8,500	23,000
Scallops	17,000	14,000	29,000	18,100
Abalone	7,200	24,000	7,600	27,800
Others	1,800	2,200	1,800	3,000

(a) Department of Primary Industry Estimates.

(b) All species including crustaceans and molluscs, and the value includes confidential items such as pearling. Figures for the remaining small proportion of the landings were not available at time of drafting.

(c) Includes fish caught for reduction to fish meal.

(d) Excludes production in Queensland and South Australia.

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TABLE II

EXTERNAL TRADE IN FISH AND FISH PRODUCTS 1981 AND 1982

Quantity: product weight
Value: FOB

	IMPORTS				EXPORTS			
	1980/81		1981/82		1980/81		1981/82	
	Quantity tonnes	Value $000	Quantity tonnes	Value $000	Quantity tonnes	Value $000	Quantity tonnes	Value $000
Total fish and fish products		198,064		220,549		249,941		323,231
of which:								
Total Edible		188,951		211,435		229,561		306,622
Fish								
Fresh, Chilled or Frozen	38,950	70,111	37,346	75,289	6,176	8,554	12,719	14,519
Smoked, Dried or Salted	4,039	9,986	4,482	12,149	7	155	4	30
Canned	14,497	52,642	16,396	58,179	137	575	1,007	3,855
Other Prepared or Preserved	344	1,301	1,351	4,152	13	137	85	504

Crustaceans and Molluscs								
Fresh, Chilled or Frozen:								
Prawns and Shrimps	5,680	33,781	6,852	41,673	11,617	97,624	15,639	141,034
Lobster	508	3,320	417	2,755	5,700	71,526	5,774	91,096
Crab	207	1,020	89	607	*	*	*	*
Abalone	*	*	*	*	1,877	17,306	2,761	25,264
Scallops	*	*	*	*	1,936	12,631	1,959	11,044
Other	2,584	7,427	2,374	6,565	297	1,087	423	2,930
Canned:								
Crab	429	2,098	445	1,844	*	*	*	*
Prawns and Shrimps	592	2,002	598	1,914	*	*	*	*
Smoked Molluscs	734	2,748	837	3,318	*	*	*	*
Abalone	*	*	*	*	1,767	19,853	1,220	16,198
Other	466	1,036	549	1,344	16	113	30	149
Other:	141	1,478	143	1,646	-	-	-	-
Fish Meal		3,458		3,168		145		16
Marine Oil		441		375		9		9
Pearls		2,673		2,511		18,500		14,981
Other (incl. Shell)		2,540		3,060		1,727		1,604

* no figure, if any then included under "other" of same sub-group.