SPC/Fisheries 26/Country Statement 13
24 July 1996

ORIGINAL: ENGLISH

SOUTH PACIFIC COMMISSION

TWENTY-SIXTH REGIONAL TECHNICAL MEETING ON FISHERIES
(Noumea, New Caledonia, 5 - 9 August 1996)

COUNTRY STATEMENT

AUSTRALIA

509/96

COUNTRY STATEMENT for the SOUTH PACIFIC REGIONAL TECHNICAL MEETING ON FISHERIES

AUSTRALIA
1996

I. SUMMARY

Total estimated production from Australian domestic fishing and aquaculture in 1994/95 was 218,000 tonnes, with an estimated gross value of production of approximately A$1.7 billion. This is an increase of 5.8% over 1993/94. A$419 million of this figure came from aquaculture, an increase of 38.4% over 1994. The highest value fisheries are rock lobster and prawns.

The Australian fishing industry experienced a period of stability in 1995 and there is evidence that this will continue with the potential for growth across a number of sectors of the industry. Issues that continue to present a challenge to the management of fish resources include over-fishing, over-capacity, increased community awareness of conservation issues, the realisation of benefits from value-adding; and growing recreational fishing representations.

The industry and Australian Fisheries Management Authority continued to build on the progress that has been made in the last few years, with an emphasis on implementing management regimes based on the principles of ecologically sustainable development. At the same time, steps are being taken to utilise fisheries resources in the most efficient way, including the introduction of appropriate harvesting technology.

Through the Asia Pacific Economic Co-operation forum (APEC), Australia has identified a need to promote the liberalisation of fisheries trading policies in the region, improve transport infrastructure and the quality of seafood market information, and to encourage the mutual recognition and harmonisation of processing and inspection regimes with our trading partners.

II. GOVERNMENT ACTION

The Commonwealth Government established the Australian Fisheries Management Authority (AFMA) as a Commonwealth Statutory Authority in 1992 under the *Fisheries Administration Act* 1991. AFMA is responsible for the management of Commonwealth fisheries under the *Fisheries Management Act 1991*.

AFMA's objectives are met through the employment of a partnership approach which actively involves a range of interested parties in the process of developing and implementing fisheries management arrangements. This approach includes establishing and operating Management Advisory Committees (MACs) or Consultative Committees (CCs) for each major Commonwealth fishery. AFMA also consults regularly with the national peak industry body for Commonwealth fisheries, the Australian Seafood Industry Council (ASIC).

The Department of Primary Industries and Energy (DPIE) provides the Government with a central point for policy development (including the principles of multiple resource access), advice and coordination on national and international fisheries management issues and other matters affecting the development of the industry.

Research relevant to Commonwealth fisheries management is carried out by the Commonwealth Scientific and Industrial Research Organisation (CSIRO), Bureau of Resource Sciences, Australian Bureau of Agricultural and Resource Economics, Australian Institute of Marine Science, universities and State agencies. Funding for fisheries research at the Commonwealth level originates primarily from the Department of Primary Industries and Energy, but comes also from the Departments of Industry, Science and Tourism (DIST), Employment, Education, Training and Youth Affairs (DEETYA), State Government departments and the fishing industry.

Resource Management

Australia declared a 200nm Exclusive Economic Zone (EEZ) on 1 August 1994, augmenting the Australian Fishing Zone (AFZ) of 200 nautical miles (nm) declared in 1979.

Details of the main Commonwealth managed fisheries are as follows:

- During 1995 Management Plans introduced for the Northern Prawn Fishery and the Southern Bluefin Tuna Fishery brought these fisheries under the *Fisheries Management Act 1991* in line with other Commonwealth fisheries.

- The Northern Prawn Fishery is the most valuable fishery under Commonwealth jurisdiction. The 1994/95 catch of 9096 tonnes represented a gross value of A$130 million for 125 boats. Limited entry, vessel and gear size restrictions and closed seasons are the management tools that are used to keep the fishery at a sustainable level. Since undergoing a major restructure, which culminated in 1993 with a substantial reduction in fleet size, catches have remained at around the estimated maximum sustainable yield and individual share of the catch has increased significantly.

- The Southern Bluefin Tuna (SBT) Fishery, which had a gross value of production of around A$86 million in 1994/95, went through some significant infrastructural and legislative changes in 1995, including introduction of the SBT Fishery Management Plan 1995. AFMA also established the

Southern Tuna and Billfish Fishery Management Advisory Committee (Southern Tuna MAC) and extended its area of responsibility to include advising on management of other tuna and billfish species within the area of the Southern Tuna Fishery. Domestic SBT fishing operations have changed with a significant increase in the amount of SBT caught for placement into holding cages around Boston Bay near Port Lincoln for fattening.

- Internationally, the global quota established by the Convention for the Conservation of Southern Bluefin Tuna (CCSBT) was retained at the same level as in previous years, 11,750 tonnes, with the national allocations being Australia 5265t, Japan 6065t and New Zealand 420t. Australian scientists and Government have continued to express their concerns about the low SBT parental biomass and the uncertainties that surround stock recovery.

- The Eastern Tuna and Billfish Fishery was formally established in 1988. Marketing opportunities for pelagic longline caught fish have since grown. In particular, fresh chilled yellowfin and bigeye tuna are exported to Japan for sashimi.

- The domestic longline and minor line fishery is comprised of 222 longline and 126 minor line boats, catching primarily yellowfin, bigeye and albacore tuna. Billfish such as striped marlin and broadbill swordfish, and pelagic sharks are also taken as incidental bycatch. In 1994-95, this sector caught 1,024 tonnes, valued at A$6.48 million dollars. The purse seine fleet consists of 19 boats, targeting skipjack tuna off New South Wales, Victoria and Tasmania for domestic canning. In 1994-95, this sector caught 1,135 tonnes, valued at A$1.15 million dollars.

- The major management and policy issues addressed in this fishery in 1995 were the finalisation of arrangements for a plan of management (to be implemented in 1997), reduction of latent effort in the pelagic longline sector and the developmental fishery issues in the Coral Sea.

- Interest in the domestic tuna fishery off the west coast of Australia has increased recently. The fishery remains in a developmental state with catches of tuna and billfish increasing to over 150 tonnes in 1995. The Western Tuna and Billfish Fishery Management Advisory Committee was established by AFMA in 1995 to provide early input to the development of management arrangements for the fishery, ensuring controlled development within established sustainability objectives.

- The Torres Strait Protected Zone (TSPZ) commercial fisheries are prawn, tropical rock lobster, line fishing (mainly Spanish mackerel), pearl shell, bêche-de-mer and trochus. The gross value of production of the fisheries was A$27 million in 1994/1995, with 96 prawn and 405 combined lobster, pearl shell and/or Spanish mackerel licences issued. These fisheries have continued to be managed in a sustainable manner which seeks to maximise the opportunities for traditional inhabitants of the region to participate in all sectors of the industry.

- During the year measures were taken to conserve dugong stocks by restricting the method of capture to traditional spears. In addition, the Torres Strait Task Force was established to review arrangements in Torres Strait including the community licensing system, the cost sharing agreement between the Commonwealth and Queensland, recovery of management costs from industry, management and surveillance arrangements and jurisdictional issues.

- The South East Fishery covers waters managed by the Commonwealth off southern Queensland, NSW, Victoria, Tasmania and South Australia and includes fishing methods for taking demersal scalefish species. The fishery is the main source of Australian caught fish for the metropolitan markets of Sydney and Melbourne. It is managed as two sectors, trawl and non-trawl, covering demersal meshnets and lines. The estimated total catch for both sectors was 25,400 tonnes valued at A$55 million.

- The Southern Shark Fishery is based on several species of temperate sharks inhabiting the continental shelf and slope of southern Australia. In 1994/1995 the fishery landed an estimated 3272 tonnes (carcass weight) of shark, principally consisting of gummy shark and school shark. The estimated value of the catch was A$15.6 million. The fishery is managed through a range of input controls and access is currently restricted to 160 vessels.

- The Great Australian Bight Trawl Fishery is based on demersal catches from the shelf, upper slope and deepwater slope of southern Australia. In 1994/95 the fishery landed an estimated 2,091 tonnes of fish valued at A$3 million, mainly deepwater flathead and bight redfish.

- The Jack Mackerel Fishery is based on five mackerel-like species taken in southern and eastern Australia. In 1994/95 the fishery landed an estimated 13,000 tonnes of fish worth A$2.6 million. The fishery is subject to a total allowable catch (TAC) and competitive fishing up to the level of the TAC.

State and Territory fisheries management.

The south Australian Government is changing its policy focus from protection of fish stocks toward the maximisation of sustainable economic development of fisheries. A newly implemented managerial structure is designed to reflect the change in focus and includes Shellfish, Scalefish, Fish Habitat and Bio-Diversity.

Tasmania has introduced new legislation requiring management planning for wild fisheries and development planning for marine farming to allow for ecologically sustainable development of these industries.

The Fisheries Department of Western Australia has been restructured in the past year. Formal management plans have not been changed, but ten new managed or interim fisheries have been introduced following new State/Commonwealth agreements in February 1995.

In New South Wales new legislation and structure aims to give fishers a greater sense of ownership in their fishery and provides greater flexibility for restructuring of fishing operations. Share Managed Fisheries (SMFs), allow for the allocation of property rights to fishers in the form of tradable shares based on catch history. The rock lobster and abalone fishery are SMFs.

Recreational Fishing

In Australia there are around 37,000 km of coastline and thousands of kilometres of streams and waterways which offer an important leisure activity for over 4.5 million Australians annually and support for about 90,000 jobs. The Australian fishing tackle and bait industry has an annual turnover in excess of A$170m. The recreational boating industry accounts for another A$500m in turnover, around 60% being fishing related. It is estimated that international tourists spend over A$210 million on fishing in Australia each year.

Economic Efficiency

Restructuring of the Northern Prawn, South East and Southern Shark fisheries is continuing, with the aim of reducing fishing effort or fishing capacity and improving profitability. There is a further need to reduce fishing effort in several fisheries through restructuring but the pace of adjustment is slow. The industry-preferred management measure is one that allows market forces to operate, and in general this favours the use of individual transferable quotas (ITQs) over other management controls.

Regional Management Arrangements

Australia is a signatory to the Convention for the Conservation of Southern Bluefin Tuna (CCSBT), together with New Zealand and Japan. The Convention aims to ensure, through appropriate management, the conservation and optimum utilisation of southern bluefin tuna. The CCSBT establishes a global total allowable catch (TAC) on southern bluefin tuna (SBT) each year, in an effort to maintain and hopefully re-establish the parental biomass of the SBT stock.

The Commonwealth is currently developing an Australian position in relation to accession to the Indian Ocean Tuna Commission (IOTC). The States and Territories, in addition to AFMA and the Commonwealth Scientific and Industrial Research Organisation have supported an active participation by Australia in the Commission as a forum in which to address management issues and stock concerns on an international basis. This would augment Australia's involvement with the CCSBT.

Australia and Indonesia have been working together to address the problem of illegal fishing through a Fisheries Co-operation Agreement. Indonesian fishing boats apprehended within the Australian Fishing Zone are predominantly fishing for bêche de mer and trochus. Australian concerns focus on the harm being done to fisheries and wildlife by Indonesian fishers, and the quarantine and customs risks from Indonesian access to the Australian mainland. Widespread targeted surveillance by Coastwatch and the Royal Australian Navy is employed to curtail this illegal activity. Access for traditional Indonesian fishers to certain offshore areas is allowed.

Environmental Problems

Awareness of environmental problems is growing throughout Australia, as in the rest of the world. The main fisheries related environmental issues in Australia are: coastal zone development and degradation of fisheries by coastal and land-based marine pollution; responses to environmental emergencies; the impact of introduced species through ballast water; and the effects of fishing, particularly trawling, on marine communities.

During 1995 there was an increased focus on applying conservation measures for Australian and Japanese tuna longline operations through the strengthening of "codes of conduct" for the handling of marlin, sharks and the incidental take of seabirds. Research is continuing on the use of turtle exclusion devices (TED's) in prawn trawls and advances in technology such as the use of GPS, sonar and net sondes, are improving selectivity and reducing by-catch.

Indigenous Fishing Activities

During the year there were a number of claims under the *Native Title Act* in relation to offshore areas, none of which have yet been determined. At this stage it is not clear how Native Title applies to these areas. This is a complex issue as the concept of ownership of offshore areas or of living marine resources is not clear in national or customary law. Discussions between officials and representatives of native claimants are continuing.

III. AQUACULTURE

Production

In 1994/95 Australian aquaculture production of 23,507 tonnes realised a farmgate value of A$418.7 million. Over the past four years the value of Australian aquaculture has increased on average, by 17% per annum, making aquaculture one of the fastest growing primary industries in Australia.

Relatively small by world standards, Australian aquaculture production is dominated by a few sectors. In 1994/95 the major farmed species by value were pearls ($206m), salmon ($67m), tuna ($50m), edible oysters ($42m), and prawns ($27m).

Australia has the ability to produce a wide range of species due to the existence of different climatic conditions. Emerging industries considered to have good potential include abalone, mussels, eels, freshwater crayfish and an array of marine finfish.

IV. PRODUCTION FROM CAPTURE FISHERIES

The majority of fisheries in the Australian region are fully exploited, and some fisheries, such as the Southern Bluefin Tuna fishery, are over exploited. A few fisheries still have some ability to expand wild production, but within management controls. These include the western tuna, southern jack mackerel and squid fisheries, and Torres Strait lobsters.

Around $1.3 billion came from fish caught in the wild, and A$419 million from aquaculture. Actual tonnage was an increase of 4.2% over 1994. Australia's most valuable seafood products, based on 1994/95 data, are:

- rock lobster A$435 million
- prawns A$329 million
- tuna A$115 million
- other fin fish A$363 million
- abalone A$148 million
- pearls A$206 million