TASMANIAN SCALEFISH FISHERY

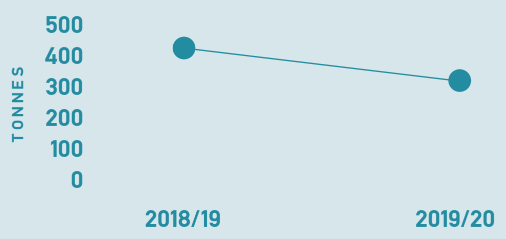
The Tasmanian Scalefish Fishery (TSF) is a multi-gear and multi-species fishery. The commercial sector is predominantly made up of small owner operated fishing businesses. Species targeted include a range of finfish and cephalopod (e.g., squid, octopus) species.

The Scalefish Fishery is managed under the *Living Marine Resources Management Act 1995* and the *Fisheries (Scalefish) Rules 2015*.

The commercial sector of the Tasmanian Scalefish Fishery is primarily managed using input controls, including species and/or gear specific licensing, limited entry, gear restrictions, and spatial and temporal fishing closures. Output controls apply in the Banded Morwong fishery, which is managed using an Individual Transferable Quota system, and as trip catch limits for selected species (e.g., Striped Trumpeter). For further information see the NRE Tas Wild Fisheries Management Branch TSF webpage.

THE COMMERCIAL FISHING FLEET

PRODUCTION



There is no dominant species that most fishers catch. Across the 2018-2020 fishing seasons, over 70% of fishers caught more than one species. On average, fishers caught four different species within a fishing season. Southern Calamari, Wrasse and tiger flathead were caught by the highest share of fishers (42–53%).

See Scalefish Species – Tasmanian Wild Fisheries Assessments (tasfisheriesresearch.org) for information on assessed species.

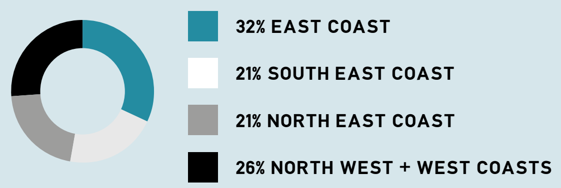
FISHING ACTIVITY

FISHER NUMBERS

117 PERSONS

The fishery consists of approximately 117 highly diverse individuals who use different combinations of gear to target varying mixes of species. At the same time, the number of fishers who are active in the TSF in a given month is relatively small (< 60 across 2018–2020).

FISHERS BY REGION



Technical efficiency of TSF fishers is high. For more than 60% of fishers, it is not possible for these fishers to increase their catch using the current mix of permitted gears or without investing in new technologies.

ACCESS

Operators must hold a fishing licence (personal) or FLP, as well as a licence package with a fishing licence (vessel) and gear licence and/or a species licence.

Currently there are ten gear type licences, three species licences and three licence types that allow access to a specific species and the use of specific gear to take that species. These licence types are described in the *Operational Guide for the commercial Scalefish Fishery*.

Fewer licences are being utilised over time, noting that some licences are non-transferable. As a result, levels of latent capacity (that is, unused licences) are high at approximately 50%.

Holders of a Fishing Licence (rock lobster) are also able to operate in the TSF although with gear restrictions.

ECONOMIC AND SOCIAL CHARACTERISTICS

LIVELIHOOD STRATEGIES

Current active fishers are generating positive earnings but there is no evidence of economic rent (or 'above-normal' profit) being generated.

Fishers operating in the TSF pursue diverse livelihood strategies in which fishing itself may be a major or minor activity, and fishing in the TSF may likewise be major or minor in terms of time commitment and proportion of overall earnings. Based on survey findings:

35%

of TSF fishers who also hold another job invest a higher percentage of their time in the TSF than the TSF accounts for percentage of their income. This suggests motivations for continuing to fish in the TSF are not primarily about maximising earnings for this group.

35%

of TSF fishers were currently working in other fisheries.

40%

of TSF fishers were working concurrently in non-fishing jobs, commonly in trades or small businesses.

20+ YEARS

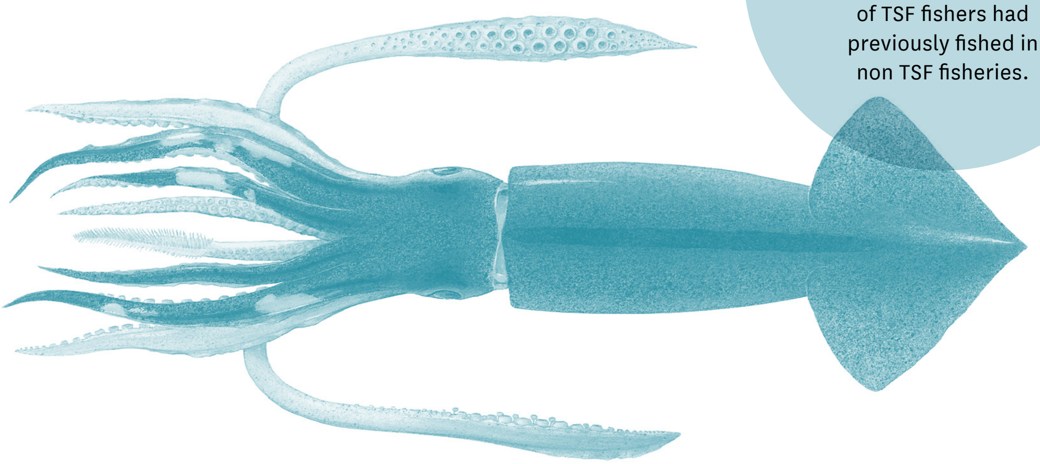
The majority of TSF fishers have fished in the fishery for more than 20 years and most intend to stay active in the fishery in the short to medium term.

70%

of TSF fishers had previously fished in non TSF fisheries.

HOUSEHOLD INCOME CONVERSION

For the 2020-21 year, it was estimated that ~63 cents from each dollar of scalefish purchased from Tasmania is ultimately earned by Tasmanian households in wages, supporting demand for housing and consumer spending within the State.



Nototodarus gouldi © R.Swainston/anima.fish

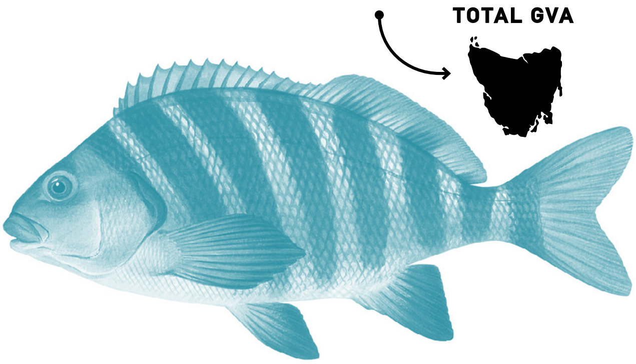
FLOW–ON BENEFITS TO TASMANIA

As TSF fishers are Tasmanian based, expenditure in the fishery and payment of wages to crew and earnings by skippers is recirculated in the Tasmanian economy. Relative to its economic size, the TSF makes a greater relative economic contribution to the Tasmanian economy, household income and employment generation that other larger but more economically efficient fisheries in Tasmania (see Rust and Ogier 2021).

ECONOMIC CONTRIBUTION TO TASMANIA

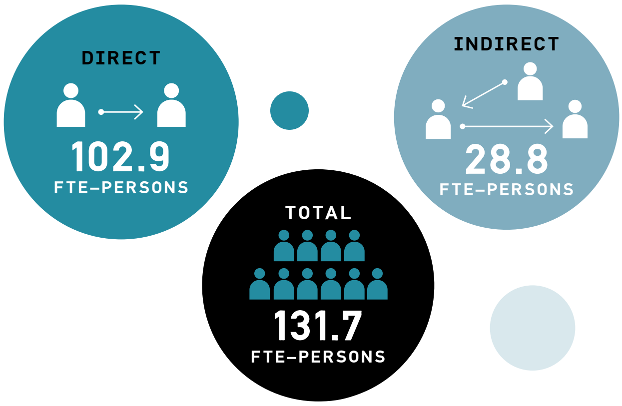
In 2020/2021, the Tasmanian Scalefish fishery contributed $6.3 million dollars (total GVA) to the Tasmanian economy.

$6.3 MILLION



CONTRIBUTION TO EMPLOYMENT IN TASMANIA

In 2020/21, the Tasmanian Scalefish Fishery contributed 131.7 FTE-persons (total employment) in Tasmania.



Employment (FTE) represents the number of full-time equivalent jobs associated with skippers and crew. We consider 1 FTE as being 37.5 hours of work per week. Note: the number of FTEs is further pro-rated by the portion of total seasonal catch caught under endorsement for each endorsed fisher.

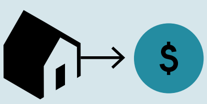
ADDING VALUE

DIRECT GVA, 2020/21

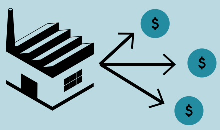
$2.6 MILLION
FROM CATCH IN THE TASMANIAN SCALEFISH FISHERY

INDIRECT GVA

$3.6 MILLION



$2.1M
FROM HOUSEHOLD RE–SPENDING OF INCOME



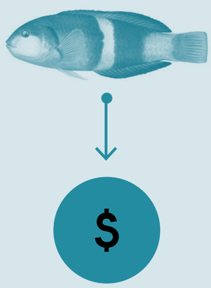
$1.5M
FROM BUSINESS RE–SPENDING IN OTHER SECTORS

Gross Value Added (GVA) represents the value of all goods and services produced in an industry, minus the cost of all inputs and raw materials consumed to produce those products and provides a measure of the net contribution of an activity to the economy (excluding net taxes).

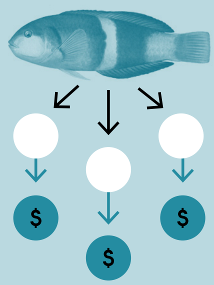
HOUSEHOLD INCOME

TOTAL HOUSEHOLD INCOME, 2020/21

$3.9 MILLION
FROM THE TASMANIAN SCALEFISH FISHERY



$1.8M
EARNED DIRECTLY AS INCOME BY FISHING HOUSEHOLDS



$2.1M
EARNED IN OTHER TAS HOUSEHOLDS AS A RESULT OF TASMANIAN SCALEFISH FISHING

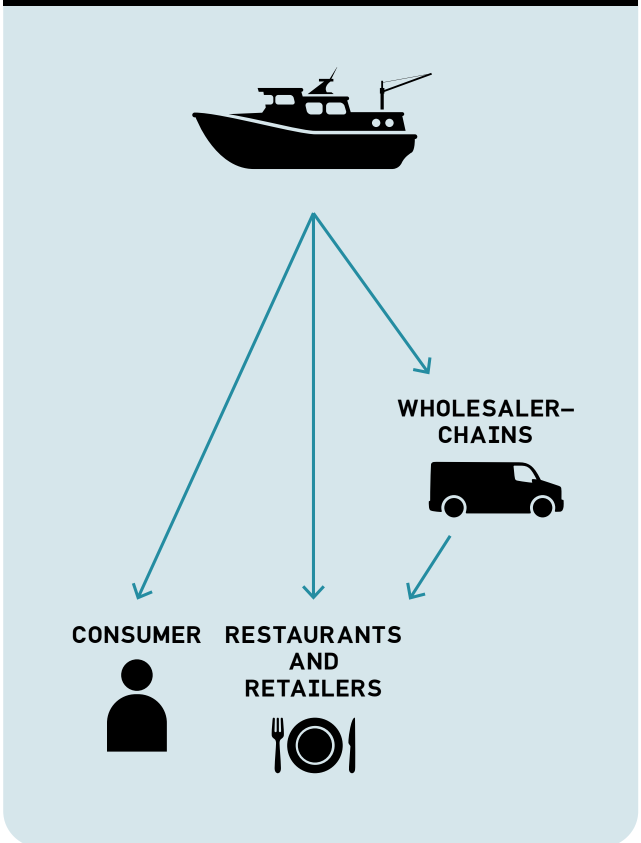
Household income represents wages and salaries paid in cash and in kind, drawings by owner operators and other payments to labour including overtime, employer's superannuation, and income tax, but excluding payroll tax.

Chirodactylus spectabilis and *Notolabrus tetricus* © R.Swainston/anima.fish

LOCAL SEAFOOD VALUE CHAINS

TSF supply chains include Direct-to-Consumer; Direct-to-Final Market (local restaurants and retailers); and Wholesaler-chains (where product is largely on-sold to Melbourne or Sydney fish markets or final markets).

SUPPLY CHAINS, TASMANIAN SCALEFISH FISHERY, 2018–2020

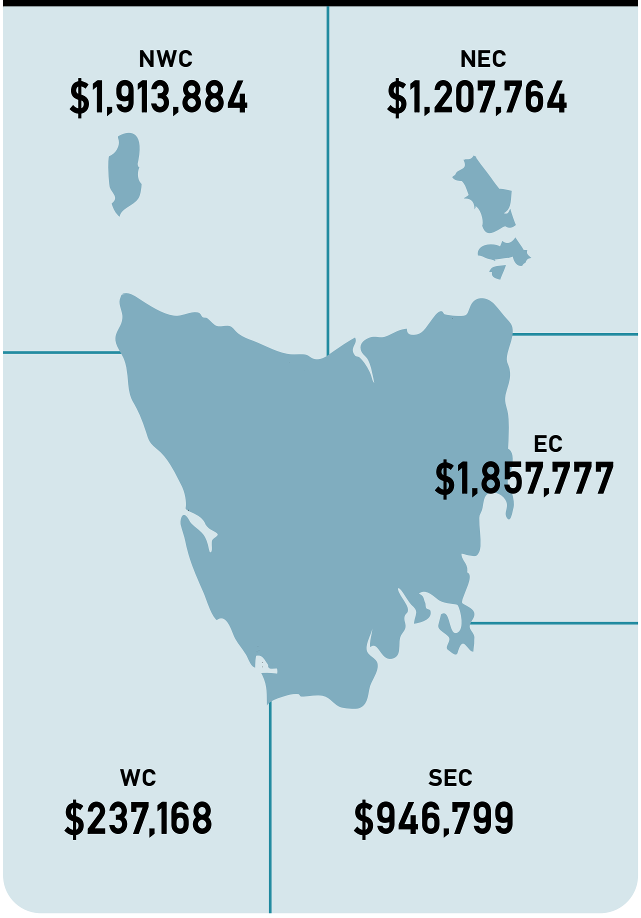


The three major classes of buyers are wholesale (60%), restaurant (20%) and retail (14%), accounting for 94% of the total sales across the years 2018-2020.

Reported sales volumes to Tasmanian consumers, restaurants and retailers represents between 17-24% of reported volumes sold in the financial years 2018/19 and 2019/20. However, the proportion of TSF product consumed in final local markets is likely to be far higher due as some portion of product sold to TSF wholesalers is on-sold locally to consumers and the Tasmanian hospitality sector.

REGIONAL CATCH VALUES

REGIONAL CATCH VALUES, TASMANIAN SCALEFISH FISHERY, 2020-2021



Catch proportion is based on logbook fishing records for the 2019-20 and 2020-21 fishing years and apportions the recorded GVP for scale-fish and shark species caught in Tasmanian waters for 2020-21.

Ogier, E., Lyle, J. Rust, S., Krueck, N., Yamazaki, S., Cosentino, T., Tinch, D., Seaborn, F., Harrington, J., Spanou, L. (2022) Socio-economic characterisation of a small-scale commercial fishery: *Opportunities to improve viability and profitability in the Tasmanian Scalefish Fishery.* FRDC Project No 2018-067. Institute for Marine and Antarctic Studies, University of Tasmania. Hobart, CC BY 3.0.