



Draft

Socio-Economic Profile

Eastern Shore Islands AOI

Marine Harvesting Activities



Sept, 2018



Background

- Analysis based on landings data from 2013 to 2017.
- Values of harvesting activity when landed and excludes additional value-added activities such as processing or transportation.
- Does not represent the socio-economic impacts of a Marine Protected Area (MPA) designation on the area.
- Any impacts of an MPA designation are dependent on the finalized boundaries of the area and specific conservation measures (eg: zones, restrictions).





Landed Values

- Ranged from \$6 million to \$18 million per year.
- Averaged just over \$12 million per year.
- Lobster represented over 95% of the total.
- Less than \$300,000 for all the other fisheries.

Landed Species	Landed Value (\$)	Landed Weight (kg)
Lobster	\$11,900,000	853,095
Halibut	\$125,000	8,738
Herring	\$96,000	197,089
Other (<i>Scallop, Tuna, Swordfish, Mackerel, Crab</i>)	\$47,500	30,200
Total	\$12.2 million	1.1 million kg





Active Licence Holders

- There were on average 145 licence holders landing catch from the area each year (130-170).
- Roughly 85% of all active licence holders fished for Lobster.

Licence Species	Average number of FINs per year
Lobster	119
<u>Groundfish</u>	25
Herring	14
Other	Less than five

Note: Some licence holders hold licences in more than one fishery.





Dependency

Share of annual landed value from the AOI.

(FINs with LV >\$10/yr)

- Most licence holders are quite dependent on the area.
- The majority received more than 75% of their total landed value from the AOI.

Dependency	Share of FINs
Light (<25%)	24%
Moderate (25-75%)	26%
Heavy (75%+)	51%



Communities

- Landings from the AOI represented approximately 8% of the total average landed value of Halifax and Guysborough Counties combined.
- Dependency was higher in Halifax County at 13% and lower in Guysborough County at less than 5%.

Nova Scotia County	Landed Value from AOI Area per year	Total Landed Value from All Areas per year	% of Total Landed Value from AOI
Halifax	\$8.1 million	\$63.5 million	13%
Guysborough	\$3.8 million	\$92.0 million	4%





Ports

- Vessels landed in over 65 ports in the region.
- Approximately half of the total landed value occurred in just 5 ports; Ecum Secum, East Jeddore, Marie Joseph, Mushaboom, and Owl's Head (approx \$1+ million each).
- 25 ports account for 95% of the LV from the AOI.





Other Harvesting Activities

- Potentially take place in or near the proposed AOI.
- How much specifically within the AOI is not currently known.
- Annual landed value in NAFO area 4Wk.
(which extends from Country Harbour to Sambro)

Licence Species	Landed Value (\$)
<u>Eel/Elver</u>	\$5 million
Clams	\$500,000
<u>Alewives/Gaspereau</u>	\$35,000
Marine Plants	*

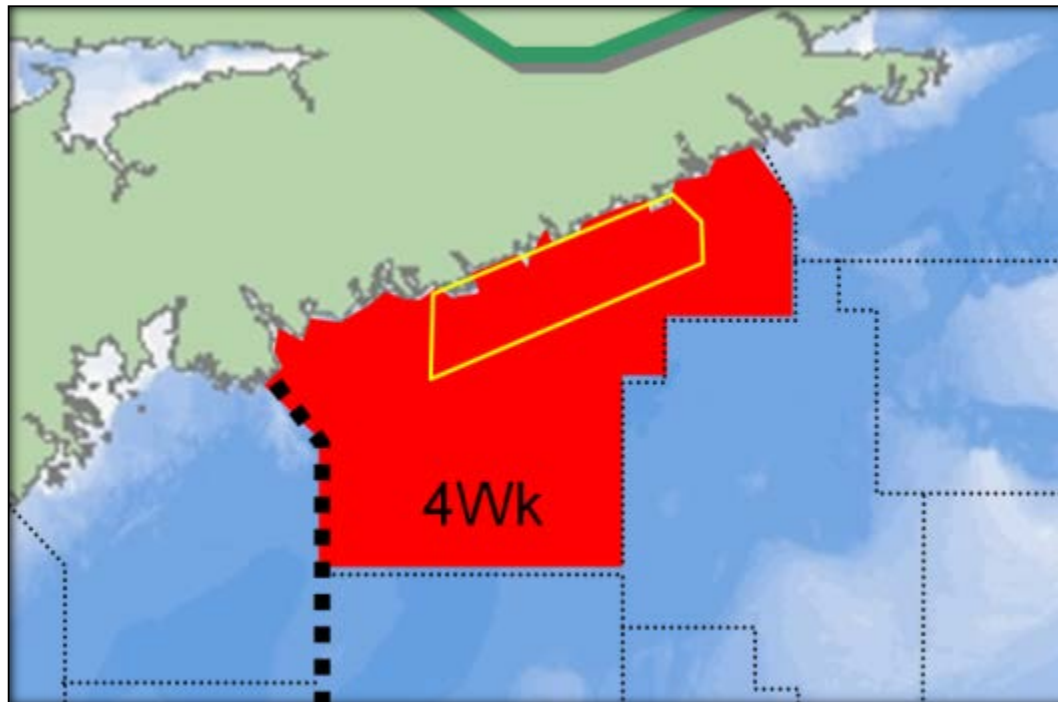
* Note: Not currently available.





Historical Activities

Annual landed value in 4Wk





Historical Activities

NAFO Area 4Wk

- In late 1980's: Cod, Haddock, Pollock (CHP=\$4m), White Hake. Lobster \$2.5m.
- In late 1990's: (CHP<\$500k), Silver Hake, Snow Crab. Lobster \$5m.
- Current: (CHP < \$100K), LOBSTER \$30m, Elvers, Halibut, Silver Hake, Swordfish.



Aquaculture

- Four aquaculture companies / 15 leases within or near the AOI.
- Located in: Marie Joseph Harbour, Sheet Harbour, and two areas around Ship Harbour (inner harbour and outer harbour).
- Include shellfish (3 sites – one site is dormant) and finfish (2 sites – currently dormant). Two shellfish leases also include marine plants.





Key Findings

- Over \$12 million worth of landings are harvested from the area each year.
- The vast majority of the area's landed value comes from the Lobster fishery.
- Approximately 145 harvesters fish within the AOI each year.
- Most harvesters have lobster licences.
- The majority of harvesters in the area are heavily dependent on landings from the AOI.



Next Steps

- Finalize the analysis and produce “AOI Overview”.
- After MPA measures are proposed (e.g. boundaries, zoning, allowable activities, etc), undertake socio-economic impact analysis (cost/benefit).
- Support consultation activities.
- Provide socio-economic input into the formal MPA designation process.