



Lobster Industry in Canada

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The Lobster Council of
Canada

The Lobster Academy 2010

Background and History

- Reacting to falling prices the Lobster Summit is held in Halifax in October of 2007
- Issues discussed included **sustainability, quality, supply, price, human resources, marketing, communication and co-ordination**
- Broad segment of lobster industry from Canada and USA attended and spent two days working through these issues



Conclusions of Lobster Summit

- Collaboration is vital to tackle key issues
- Industry must be managed sustainably
- Industry must become pro-active
- We must explore new markets
- We must improve product quality and product development

Mandate of the Lobster Council

- Strengthen the sector's competitive position and enhance Canada's overall capacity to meet the changing demands of lobster markets
- Lead market access issues including sustainability certification, food safety and traceability
- Lead sustained marketing initiatives regionally, nationally and internationally promoting all segments of the Canadian lobster industry
- Lead industry/government relations

Lobster Council Mandate

- Communicate internally to industry to create improved awareness of the key issues, challenges and opportunities and to build trust and confidence
- Communicate externally to customers by highlighting the positive attributes of lobster to further build the Canadian “brand” through promotional and educational campaign’s to “tell our story”.
- Facilitate efforts to improve returns to the industry through innovation and the identification and implementation of changes that will improve the overall value-chain

How is the Council organized?

Lobster Council of Canada-48 Total

36 members

13 Ex-officio's



Board of Directors-22 members selected from Council as a whole



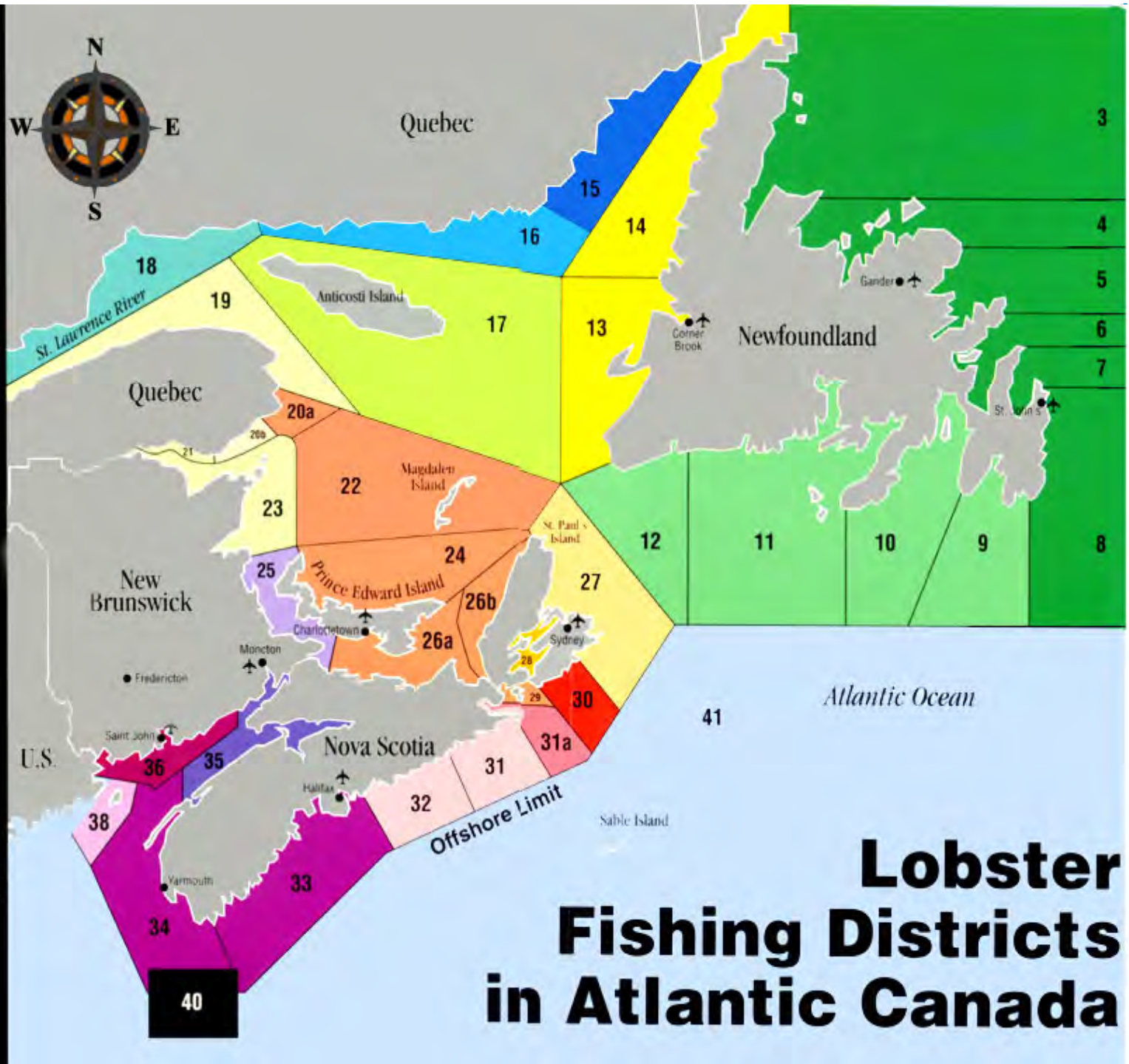
**Executive-5 members plus Executive Director
Chairman, Vice-Chairman, Secretary, Treasurer and Past
Chairman**

Board of Directors Composition

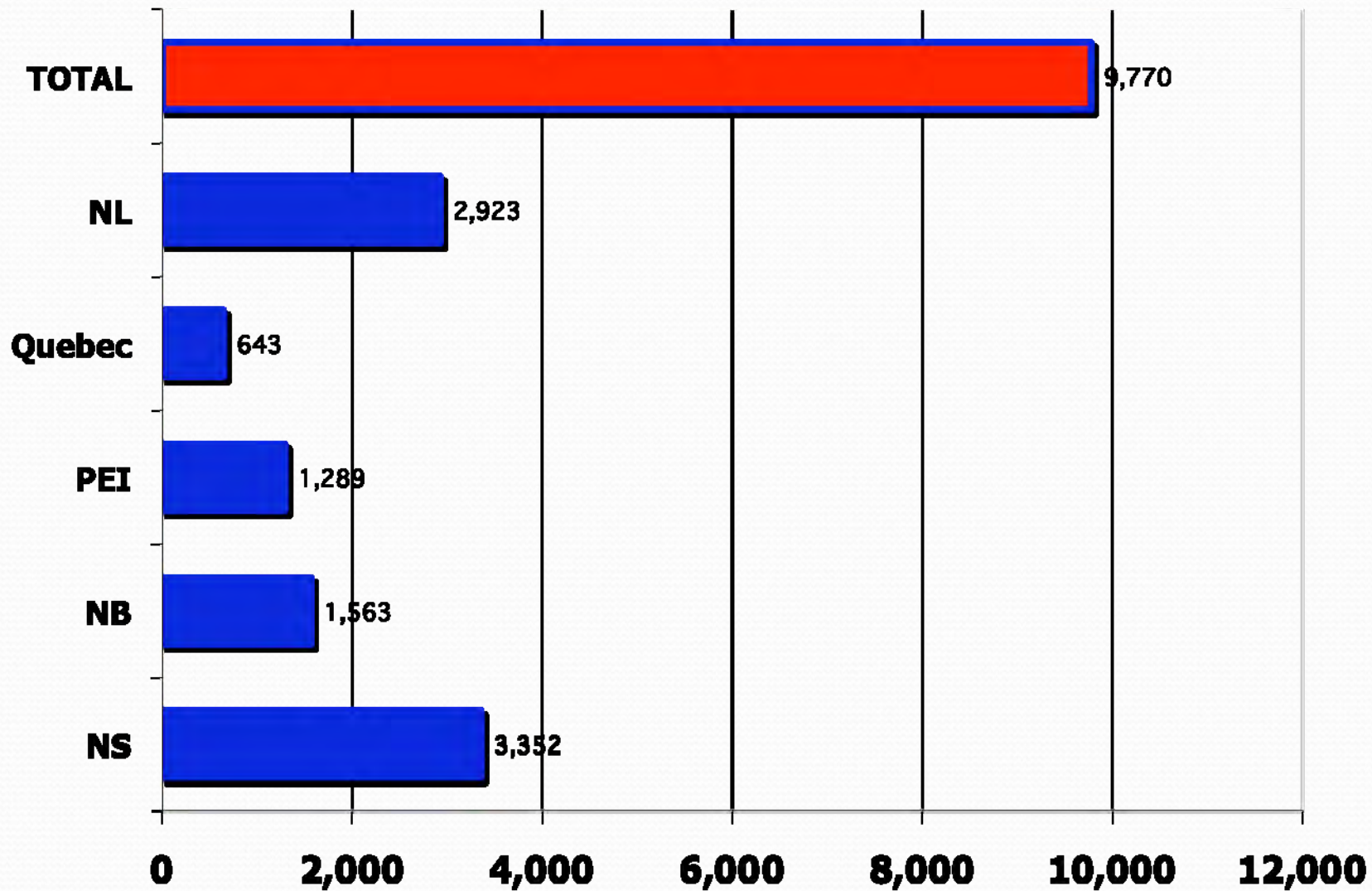
- 2 First Nation members
- 2 Harvesters from Newfoundland region
- 2 Harvesters from Quebec region
- 3 Harvesters from Gulf region
- 3 Harvesters from Maritime region
- 10 members from the Processing and Live Shipping sectors

Seasons

3-8	April 20 – July 15
9-12	April 20 – July 30
13	April 20 – July 5
14	May 5 – July 10
15	June 1 – August 12
16	May 20 – August 10
17	June 5 – August 5
18	May 20 – July 31
19/21/23	May 9 – July 9
20a/22/24 25a/26b/29	May 1 – June 30
20b	May 8 – July 7
25	August 10 – October 10
27	May 16 – July 15
28	May 10 – July 9
30	May 20 – July 20
31a	April 30 – June 30
31 – 32	April 20 – June 20
33 – 34	Last Monday in November – May 31
35	March 1 – July 31 and October 15 – December 31
38	April 1 – June 29 and 2nd Wednesday in November – January 14
38	2nd Wednesday in November – 4th Thursday in June
40	Closed to inshore-offshore lobster fishing
41	Area open all year



Lobster Licences by province



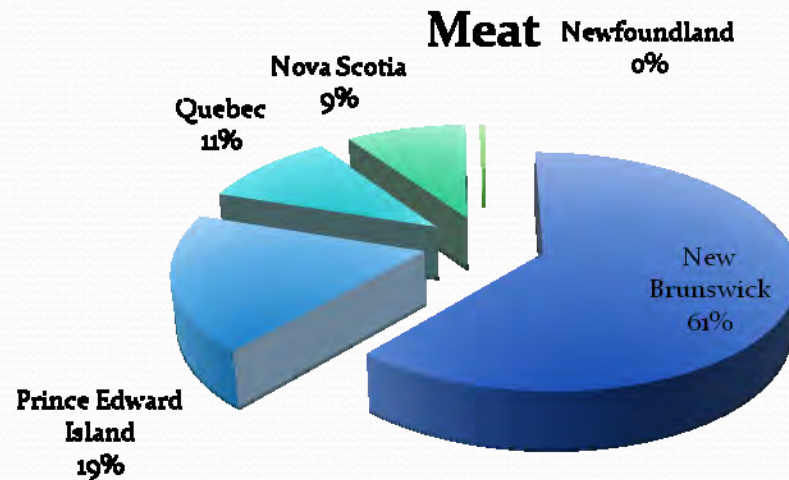
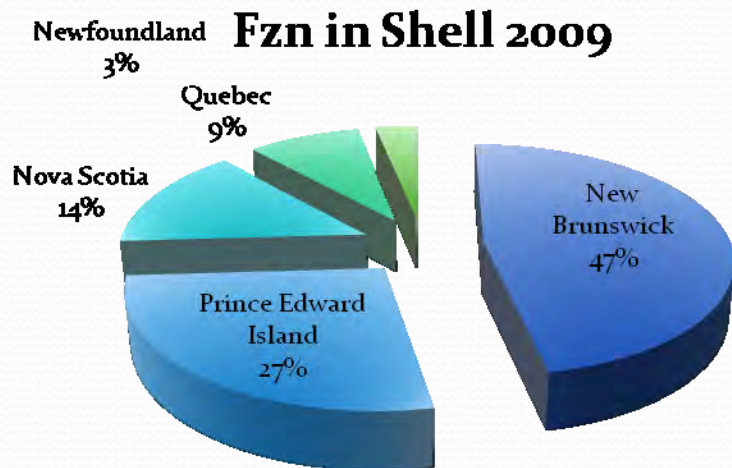
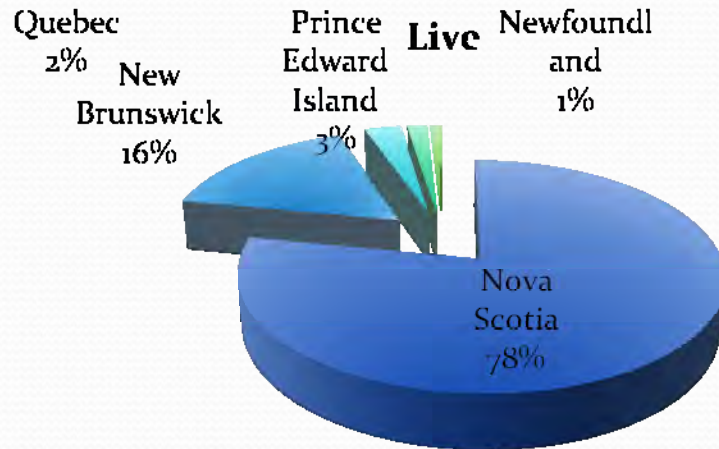
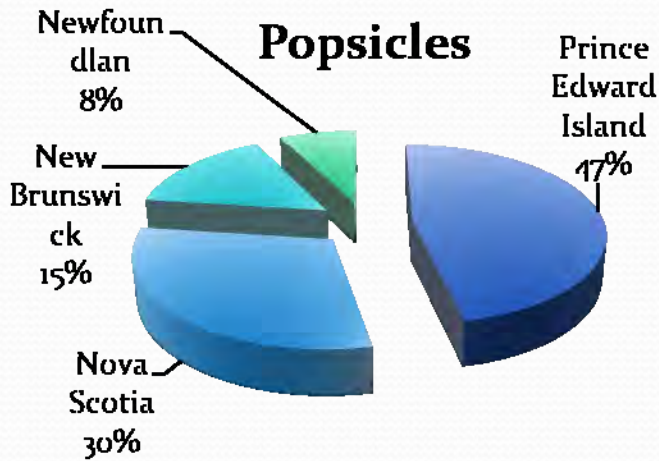
Lobster Industry Employment

Rural, Coastal & Aboriginal Opportunities

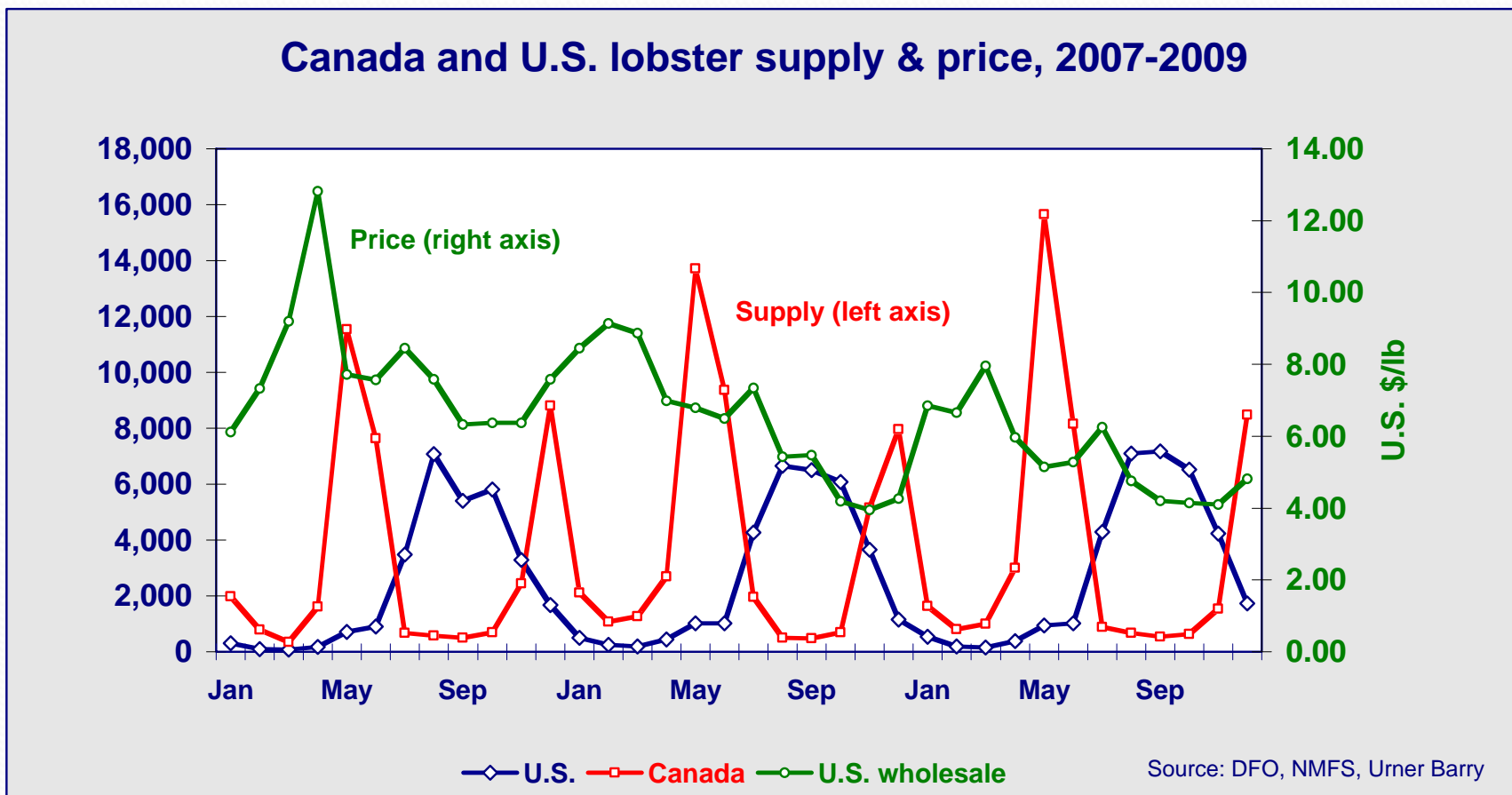
- **9,700 fishing enterprises**
- **25,000 skippers & crews**
- **Thousands of jobs in 400 processing & shipping companies**
- **Hundreds of spinoff support & supply companies**
- **The social fabric of many east coast communities throughout Atlantic Canada and Quebec**



Provincial product market share

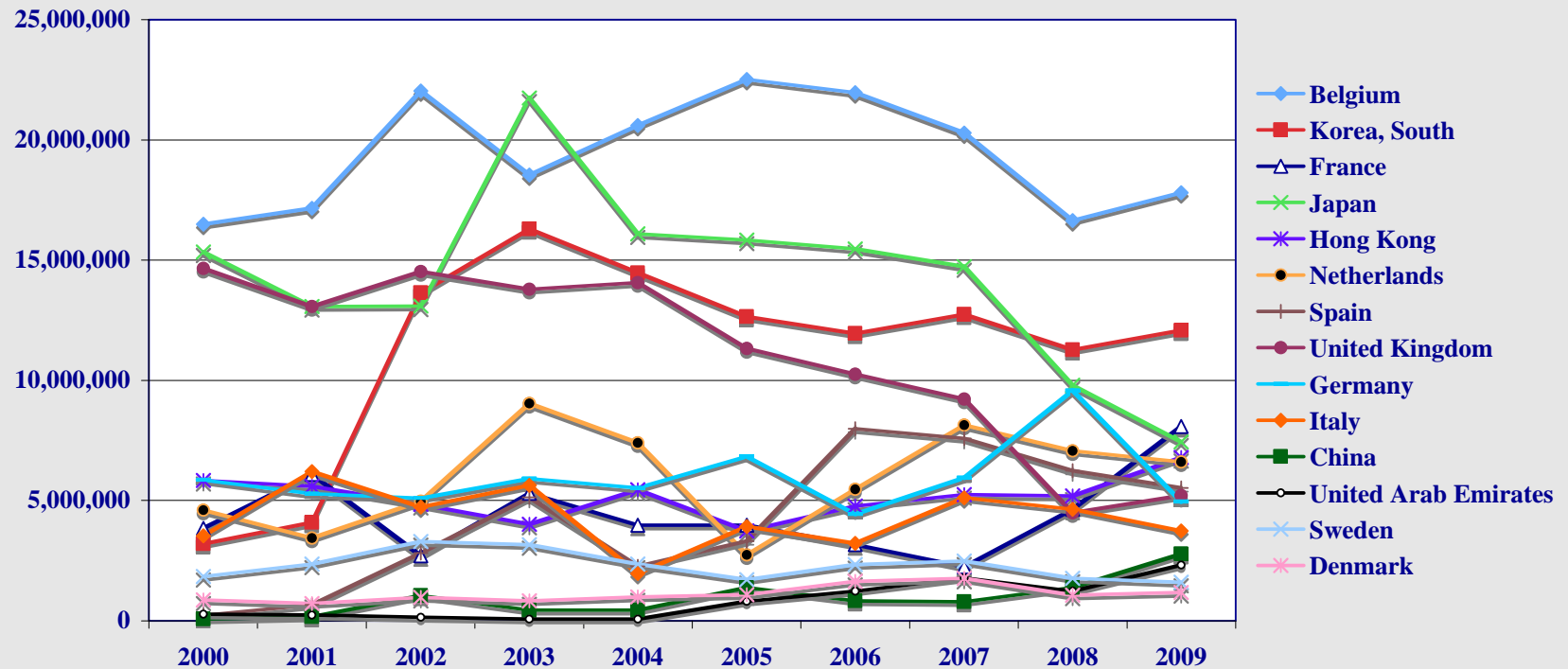


Price sensitive to supply



Export markets for Live product

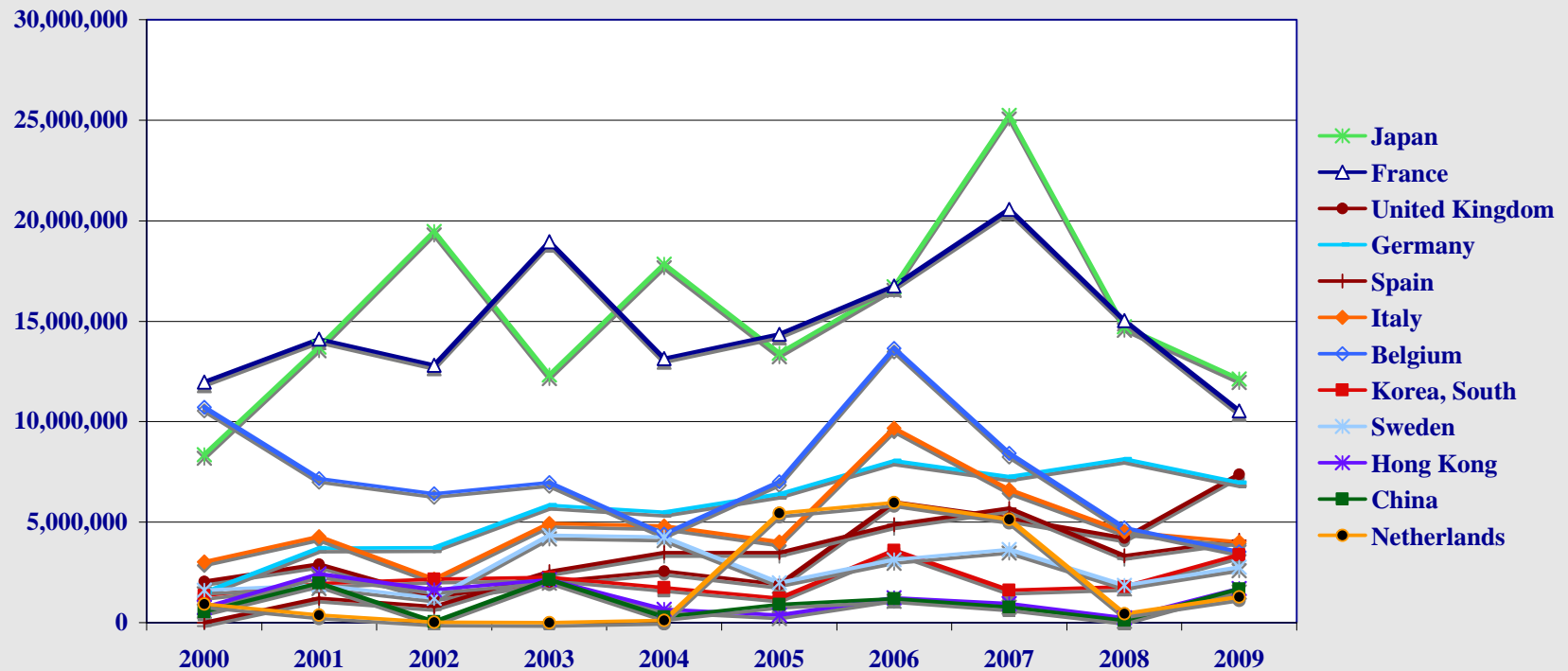
Canada live lobster exports by country (excl U.S.)



Source: Statistics Canada

Export markets for processed

Canada frozen lobster exports by country (excl U.S.)



Source: Statistics Canada

Eco-certification Update

- Prince Edward Island has completed pre-assessment for MSC, planning to go for full assessment
- Maritime region reviewing pre-assessment report, plan to go for full assessment
- Newfoundland likely to do a pre-assessment
- Quebec has mixed views
- Gulf NS ready to go to pre-assessment
- Gulf NB on the fence
- Offshore is MSC certified

Canadian sustainability measures

- **Length of fishing seasons**
- **Limited entry licenses**
- **Size of vessels**
- **# of traps by area (41 Lobster fishing areas in Canadian waters)**
- **Size and design of traps**
- **Minimum length of lobster carapace is different by area based on scientific research with a goal of taking only 50 % of female lobsters that have been allowed to produce eggs at least once**

Canadian sustainability measures

- **Return of all females with eggs, V notching in tails**
- **Escape vents to allow for release of small lobster**
- **Biodegradable panels that help limit “ghost fishing” on lost traps**
- **Sinking trap lines to limit whale entanglements**
- **New DFO measures introducing the “Precautionary approach” to all fisheries**
- **New Integrated Fisheries Management Plan being finalized for lobster fishery**

Each fishing area has a different minimum size measure



Checking for egg bearing female



Finding one and putting it back



The Lobster Academy 2010

Escape vents in traps to allow small lobster to exit



A large crew fishing off Yarmouth



The Lobster Academy 2010

A smaller boat off Prince Edward Island



Fishing off Sambro, Nova Scotia



Our industry challenge





The Future

- More science
- Development of a brand
- Co-ordinated marketing approach
- New market and product development
- Industry structural reform
- License rationalization
- Eco-certification
- Industry co-operation



Questions?

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