**INDUSTRY HIGHLIGHTS**

- There are two lobster seasons in PEI: the Spring season and the Fall fishery. There were 22.9 million pounds of lobster landed in 2009, and about 19.5 million (85%) was landed in the Spring.

- In 2008, there were a total of 4,200 commercial fishermen in the province, and 1,294 were licensed to fish lobster.

- Lobster, mussels and snow crab comprise the top three most valuable species in PEI, and collectively make up around 85-90% of the total landed value of the fishery.

- In 1988, there were 6.6 million pounds of aquaculture production in PEI (oysters comprised 3.4M and mussels 3.2M). In 2008, a total of 43 million pounds were produced (5.7M of oysters and 37.3M of mussels).

- The volume of mussel production expanded by an average annual rate of 21% throughout the 1990’s. Since 2001, there has been no growth in mussel production in PEI.

- There are two Bluefin tuna seasons in PEI: in 2009, the early season began on August 3 and the late season, October 10. There were a total of 287 tuna fishers who shared a 139 mt quota in 2009. A total of 368 bluefin tuna was landed.

- There are currently 44 processing plants operating in the province: 18 are in seafood processing and 26 are shellfish processing operations.

---

**Did you know...???

- ...that PEI is the largest producer of mussels in Canada and accounts for 85-90% of Canadian exports?

- ...there were about 1,300 in-shore fishing vessels in 2008?

- ...that lobster made up two-thirds of the total value of fish landings in 2008; but only 20% of landed weight?

- ...by weight, there are more mussels landed/harvested than any other species in the Island fishery?

- ...that the Spring lobster fishery runs from May 1-June 30; and the Fall fishery, August 9-October 10?

- ...that there were 2.8 million pounds of Irish moss landed in 2008?

- ...that the price of market sized lobsters was around $3.50/lb. in 2009; about half of their wharf price in 2008?

- ...the average weight of a Bluefin tuna landed by PEI fishers was 666 lbs?

- ...in June 2009, snow crab sold for about $1.75/lb. and rock crab, 25 cents?

- ...that there are 2 processing companies that employ over 250 employees?
INDUSTRY CHARACTERISTICS

The top 3 fish species measured by value are lobster, mussels and snow crab.

<table>
<thead>
<tr>
<th>LOBSTER</th>
<th>MUSSELS</th>
<th>SNOW CRAB</th>
<th>OYSTERS</th>
<th>OTHER</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Share of fishery:</strong>&lt;br&gt; (2008; By value)&lt;br&gt; 65%</td>
<td>14.5%</td>
<td>7.5%</td>
<td>3.6%</td>
<td>9.4%</td>
<td>100%</td>
</tr>
<tr>
<td><strong>Prices:</strong>&lt;br&gt; (Per lb.)&lt;br&gt; $3.50 (2009) $6.50 (2005)</td>
<td>$0.65 (2009) $0.65 (2005)</td>
<td>$1.75 (2009) $2.00 (2005)</td>
<td>$22/peck (2009) $24/peck (2005)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Season(s):</strong>&lt;br&gt; Spring, Apr 30-Jun 29&lt;br&gt; Fall, Aug 9-Oct 10</td>
<td>All year</td>
<td>May 2-July 18&lt;br&gt; (Subject to quota)</td>
<td>Sep 15-Nov 30&lt;br&gt; (Commercial)</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Method:</strong>&lt;br&gt; Lobster traps</td>
<td>Hand tools; long line releases</td>
<td>Crab traps</td>
<td>Tongs</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td><strong>Export Markets:</strong>&lt;br&gt; (2008; By volume)&lt;br&gt; U.S. (75%), France(6%), Belgium(3%)</td>
<td>U.S. (92%) Japan(7%)</td>
<td>U.S. (96%) Japan(4%)</td>
<td>U.S. (100%)</td>
<td>-</td>
<td>-</td>
</tr>
</tbody>
</table>

The PEI lobster fishery has three lobster fishing areas (LFA) and ten fishing districts:

**Lobster Fishing Area**
- **LFA 24**
  - North Cape-East Point
- **LFA 26A**
  - East Point-Victoria
- **LFA 25**
  - Victoria-North Cape

**Lobster Fishing Licenses**
- **District 92**: 288
- **District 93**: 63
- **District 95**: 72
- **District 96**: 32
- **District 88**: 287
- **District 87**: 289
- **District 86**: 30
- **District 85**: 17
- **District 83**: 35
- **District 82**: 141
- **Total**: 1,254
The fishing industry makes up an important piece of the Island's economy

Based on Statistics Canada’s Gross Domestic Product by industry estimates, the value added associated with the traditional fishing industry in PEI made up about 3% of total economic activity in the province in 2008. The share increases to about 4% when fish processing activity is accounted for. Value added in this context includes wages and salaries paid out to employees in exchange for labour services; self-employment income for fishermen/women; business profits; etc. Although a seemingly small piece of the overall pie, Census 2006 estimates show that there were 3,800 persons that comprised the labour force of the traditional fishery, and an additional 1,800 in fish processing. The economic benefit of the fishing industry extends beyond the waters and into other industries such as accommodation and food services; transportation; manufacturing; finance; retail and wholesale trade, etc.

INDUSTRY TRENDS

Fishing industry is the most seasonal industry in the province

The fishing industry is subject to the highest degree of seasonality in the province. Over the past decade, the labour force has fluctuated from as low as 2,500 in the Winter months to as high as 3,400 during the busy Summer months, on average. This translates into seasonal variation of about 40%, significantly higher compared to 15% associated with the goods-producing sector, and 8% for service-sector industries.

Labour force in fishing is largely comprised of males, aging workforce

The employment composition of the fishing industry is predominantly male, comprising about 85% on average over the past decade. The share of men in the core-age group 25-54 years has shown little change over the past twenty years, however a greater share of the employed workforce are in the 55+ age category. For example, from 2006-08, males aged 55+ years made up a quarter of the employed workforce which is up by close to 10 percentage points compared to the late 1980’s. There has been a declining trend in the number of youths (persons aged 15-24 years) employed in the fishing industry over this period.

Shipments of processed fish products have been in decline, US recession

In the first three quarters of 2009, shipments of manufactured fish products valued $98.9 million in PEI, which is down by nearly 50% compared to the same period last year. In fact, this was the
lowest Quarter 1 to Quarter 3 total since 1994 for processors. The U.S. market for lobster, a luxury commodity, has been seriously affected by the recession South of the border.

**INDUSTRY CHALLENGES**
(The following summaries were derived from industry consultations)

**U.S. economic conditions and high dependency on the U.S. market**
The U.S. is the industry’s largest trading partner, accounting for about 75-80% of total exports of seafood products. Economic conditions in the U.S. can greatly influence seafood production in PEI. During periods of poor economic conditions, there tends to follow a reduced level of demand for luxury products, such as lobster, as consumers substitute for cheaper consumables.

**Exchange rate pressures**
The high exchange rate puts pressure on profit margins of processors. Contracts are priced in American dollars so when the Canadian dollar appreciates, this results in lower Canadian dollar values when converted from US currency.

**Reduced processing activity and low prices**
Given the existing economic climate of the U.S., low demand has left seafood manufacturers in PEI to process for orders only, with little to no inventory build-up. That is, processors are only buying from fishermen what they can sell to market. This results in surplus product and ultimately lower prices. Lobster prices in particular have been the lowest in quite some time, around the $3.50/lb. mark in 2009, which compares to over $6.00 in recent years.

**Increased operating expenditures further impact margins**
In addition to reduced demand dynamics (i.e. lower shipments and prices), fishermen are contending with higher operating expenditures, particularly in the areas of fuel, labour, maintenance, bait, and so forth.

**Mussels industry: Invasive species tunicate**
The managing of the invasive species (such as the vase and clubbed tunicate) results in higher production costs for mussel growers. The federal-provincial Productivity Improvement Fund provides funding for the purchase of new equipment and technologies to enhance the productivity of the mussel sector on farms.

**INDUSTRY INITIATIVES**
(The following summaries were derived from industry consultations)

**Lobster license rationalization**
A federal-provincial initiative, this is a plan to reduce the number of Fall lobster licenses in Lobster Fishing Area 25. The plan includes low interest loans, a marketing and promotions campaign, and new product development.

**Expansion of export markets**
The industry has been looking at expanding export markets to reduce dependency on the U.S. market. The PEI Government in association with industry representatives participated in a number of promotions and trade missions, i.e. promoting Atlantic lobster in Central Canada; and in the Fall 2009, a trade mission to China to promote new markets for lobster products. With respect to the mussel industry, a company in PEI developed the Modified Atmospheric Pressure (MAP) package which increases the shelf-life of live mussels. This has enabled producers to broaden their geographical bases with respect to potential export markets.

**Development of value added seafood products**
Part of the Lobster Council of Canada initiatives includes the research and development of value-added seafood products (i.e. raw frozen lobster tails; frozen raw split lobster body and tail; etc.).
### OCCUPATIONAL HIGHLIGHTS

**P.E.I. Job Futures: Occupations related to the fishing industry**

<table>
<thead>
<tr>
<th>Occupation</th>
<th>Employment Outlook to 2011</th>
<th>Average annual income</th>
<th>Employed (2006 Census)</th>
<th>Age composition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fishing Skippers and Fishermen/women (NOC 8262)</td>
<td>Limited</td>
<td>$47,130</td>
<td>2,385</td>
<td>15-24(9%);25-54(72%);55+(19%)</td>
</tr>
<tr>
<td>Fishing Masters and Officers (NOC 8261)</td>
<td>Fair</td>
<td>n/a</td>
<td>175</td>
<td>15-24(10%);25-54(72%);55+(17%)</td>
</tr>
<tr>
<td>Fishing Vessel Deckhands (NOC 8441)</td>
<td>Limited</td>
<td>n/a</td>
<td>495</td>
<td>15-24(31%);25-54(59%);55+(10%)</td>
</tr>
<tr>
<td>Labourers in Fish Processing (NOC 9618)</td>
<td>Good</td>
<td>$18,905</td>
<td>465</td>
<td>15-24(36%);25-54(52%);55+(12%)</td>
</tr>
<tr>
<td>Fish Plant Workers (NOC 9463)</td>
<td>Good</td>
<td>$30,540</td>
<td>595</td>
<td>15-24(24%);25-54(63%);55+(13%)</td>
</tr>
<tr>
<td>Aquaculture and Marine Harvest Labourers (NOC 8613)</td>
<td>Good</td>
<td>n/a</td>
<td>175</td>
<td>15-24(17%);25-54(77%);55+(6%)</td>
</tr>
<tr>
<td>Supervisors, Food Processing (NOC 9213)</td>
<td>Fair</td>
<td>$45,460</td>
<td>185</td>
<td>15-24(10%);25-54(81%);55+(8%)</td>
</tr>
<tr>
<td>Agri and Fish Products Inspectors (NOC 2222)</td>
<td>Fair</td>
<td>$50,735</td>
<td>100</td>
<td>15-24(9%);25-54(82%);55+(9%)</td>
</tr>
</tbody>
</table>
### INDUSTRY PARTNERS AND RESOURCES

#### PEI INDUSTRY ASSOCIATIONS

<table>
<thead>
<tr>
<th>Association</th>
<th>Address</th>
<th>Telephone</th>
<th>Fax</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>PEI Fishermen’s Association</td>
<td>420 University Avenue, Suite 102</td>
<td>1-902-566-4050</td>
<td>1-902-368-3748</td>
<td><a href="http://www.peifa.org/">http://www.peifa.org/</a></td>
</tr>
<tr>
<td>PEI Shellfish Association</td>
<td>Website: <a href="http://peishellfish.ca/">http://peishellfish.ca/</a></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### LOCAL INDUSTRY RESOURCES

<table>
<thead>
<tr>
<th>Resource</th>
<th>Address</th>
<th>Telephone</th>
<th>Fax</th>
<th>Email</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dept. of Fisheries, Aquaculture &amp; Rural Dev.</td>
<td>Fifth Floor, Jones Building, 11 Kent Street, P.O. Box 2000</td>
<td></td>
<td></td>
<td><a href="mailto:lobster@upei.ca">lobster@upei.ca</a></td>
<td><a href="http://www.lobsterscience.ca/">http://www.lobsterscience.ca/</a></td>
</tr>
<tr>
<td>AVC Lobster Science Centre</td>
<td>Telephone 902-894-2884, Fax 902-894-2885</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### EXTERNAL INDUSTRY RESOURCES

<table>
<thead>
<tr>
<th>Resource</th>
<th>Address</th>
<th>Telephone</th>
<th>Fax</th>
<th>Email</th>
<th>Website</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fisheries Council of Canada</td>
<td>900 - 170 Laurier Avenue West, Ottawa, ON K1P 5V5</td>
<td>(613) 727-7450</td>
<td>(613) 727-7453</td>
<td><a href="mailto:info@fisheriescouncil.org">info@fisheriescouncil.org</a></td>
<td><a href="http://www.fisheriescouncil.ca/">http://www.fisheriescouncil.ca/</a></td>
</tr>
<tr>
<td>Fisheries Resource Conservation Council</td>
<td>P.O. Box 2001, Station D, Ottawa, ON, K1P 5W3</td>
<td>(613) 998-0433</td>
<td>(613) 998-1146</td>
<td></td>
<td><a href="http://www.frcc-ccrh.ca/eindex.htm">http://www.frcc-ccrh.ca/eindex.htm</a></td>
</tr>
<tr>
<td>Canadian Centre for Fisheries Innovation</td>
<td>P.O. Box 4920, St. John's, NL, A1C 5R3</td>
<td>709-778-0517</td>
<td>709-778-0516</td>
<td><a href="mailto:ccfi@mi.mun.ca">ccfi@mi.mun.ca</a></td>
<td><a href="http://www.ccfi.ca/">http://www.ccfi.ca/</a></td>
</tr>
<tr>
<td>Lobster Council of Canada</td>
<td>PEI Seafood Processers Association</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

For more information on relating to this report, please contact: Jamie Dooks, Labour Market Economist, Service Canada Regional Office, 85 Fitzroy Street P.O. Box 8000, Charlottetown, PE C1A 8K1; Tel 902.566.7750, Fax 902.368.0925; jamie.dooks@servicecanada.gc.ca
Prince Edward Island
Seafood Processing Plant Locations

- Angle-Tignish
  - Shea Seaweeds Inc.
  - Malpeque
  - Cabot Fishermen's Co-op Association Ltd.
  - Malpeque Manhattan Seafood
  - New London
  - Prince Edward Aqua Farms
  - North Partriec
    - Dorion Fisheries Ltd.
  - Covehead Harbours
    - Richard's Seafoods Inc.
- Tignish
  - Killar Star Foods Ltd.
- Kildare
  - Kildare Fisheries
- Minicogash
  - Rita Sea Products Ltd.
  - eastside Seaweeds Ltd.
- Pouchet
  - South Shore Seafoods Ltd.
- Cape Wife
  - Red Cove
- Avalon Village
  - Acadian Fishermen's Co-op Association Ltd.
- Borden
  - Confederation Cove Mussel
  - Captain Cooke's Seafood
- Summerside
  - & E Fisheries
  - MK Fish Mart
  - Summerside Seafood Supreme
- Victoria
  - Ocean Choice International (LP)
    - Morningstar Division
  - True North Salmon (FS Division)
  - MacEwan's Lobster Pound Ltd.
  - PEI Oyster Company
  - Queen Street Meat Market
  - The Water Prince Corner Shop
- Charlottetown
  - Seven Mile Creek
    - Rodney's Oyster Depot LP
  - Starboard
    - Starboard & Area Lions Club
  - Glenburn
    - East River Shellfish
  - Fort Augustus
    - Kentucky MacWilliams Seafoods
  - Orwell Cove
    - Atlantic Aqua Farms Partnership
  - Belle River Enterprises Ltd.