BDO ECONSEARCH FISHING AND AQUACULTURE COMPLETED PROJECTS

Client: PIRSA Aquaculture
Summary: Estimates of Gross Value of Production (GVP) are provided for each of South Australia’s major aquaculture sectors: tuna, oysters, abalone, mussels, barramundi, yabby/marron farming and other aquaculture enterprises. Estimates of economic impact by aquaculture sector are also provided at the state and regional (Eyre Peninsula and balance of South Australia) levels. Economic impacts are expressed in terms of jobs, gross regional product and household income.
Report: Click here to access the PIRSA Aquaculture website and the reports.

Project: Economic Indicators for the Commercial Fisheries of South Australia (1998 - 2017)
Client: PIRSA Fisheries
Summary: To meet PIRSA’s legislative requirements under the Fisheries Act 2007, EconSearch has developed annual economic indicators to track the performance of the commercial fisheries in South Australia. For each fishery, the indicators reported annually include the gross value of production, cost of management, financial performance (indicators including profit at full equity, cash operating surplus, return on investment, etc), determination of major cost increases, regional economic impacts and economic rent. The annual series of economic indicators has been prepared for Northern and Southern Zone Rock Lobster, Abalone, Charter Boats, Marine Scale, Blue Crab, Lakes and Coorong and Sardine fisheries.
Reports: (these reports need to be uploaded each year)
- Economic Indicators for the South Australian Abalone Fishery, 2015/16
- Economic Indicators for the South Australian Blue Crab Fishery, 2015/16
- Economic Indicators for the South Australian Charter Boat Fishery, 2015/16
- Economic Indicators for the Gulf St Vincent Prawn Fishery, 2015/16
- Economic Indicators for the Lakes and Coorong Fishery, 2015/16
- Economic Indicators for the South Australian Marine Scalefish Fishery, 2015/16
- Economic Indicators for the South Australian Northern Zone Rock Lobster Fishery, 2015/16
- Economic Indicators for the South Australia Sardine Fishery, 2015/16
- Economic Indicators for the South Australian Spencer Gulf Prawn Fishery, 2015/16
- Economic Indicators for the South Australian Southern Zone Rock Lobster Fishery, 2015/16
- Economic Indicators for the Commercial Fisheries of South Australia Summary Report, 2015/16
Alternatively, to access the PIRSA website for more information on each fishery click here.

Client: Primary Industries and Resources South Australia
Summary: A Fishery Gross Margin modelling framework has been developed to aid the harvest strategy in the Lakes and Coorong Pipi fishery. The model was proposed as an alternative to more complex bio-economic models that enable calculation of Maximum Economic Yield.

EconSearch was commissioned by Primary Industries and Regions South Australia (PIRSA) to update the model and analysis to assist in the implementation of the harvest strategy for the Lakes and Coorong (L&C) Pipi fishery’s forthcoming fishing season.

Project: Illuminating common and conflicting social and economic objectives in multi-stakeholder fisheries (2016)
Client: FRDC
Collaborators: University of Adelaide, Marine Fishers Association and Fish Focus Consulting
Summary: As part of a team led by Dr Melissa Nursey-Bray of the University of Adelaide, EconSearch carried out analysis associated with the FRDC project ‘Illuminating common and conflicting social and economic objectives in multi-stakeholder fisheries’. The aims of the project were to identify the common and conflicting social and economic objectives for MSF stakeholders. EconSearch extended analysis of existing EconSearch data (Economic Indicators survey data) on the social aspects of the fishery and contributed multi-criteria analysis to the project by carrying out the Analytic Hierarchy Process (AHP) on newly collected survey data. The results can be accessed through the project website.

Report: Click here to visit the website for more information or to download a copy of the report.

Project: Economic Analysis of the NSW Commercial Fisheries reform (2016)
Client: NSW Department of Primary Industries
Summary: The Department of Primary Industries (NSW) contracted AgEconPlus in association with EconSearch and Gillespie Economics to undertake an economic analysis of the NSW Commercial Fisheries Reform Package. Reform options have been proposed for five state based fisheries based on linkage of licence holder shares to catch, effort or minimum shareholdings. This study examined the return on investment of the five fisheries; and analysed the impact of the share linkage options on fishing businesses in 15 share classes.

Report: Click here to download the NSW Commercial Fisheries report

Project: A best practice protocol and methodology for economic data collection in Australian fisheries (2016)
Client: Australian Seafood Cooperative Research Centre
Summary: Funded by the Australian Seafood CRC, EconSearch has developed a set of guidelines called A best practice protocol and methodology for economic data collection in Australian fisheries. These guidelines cover:

- identifying appropriate fisheries economic indicators for different purposes
- collecting primary data, including guidance on questionnaire design and the survey process
- storing and processing data
• reporting economic data in a way that they can be used effectively for economic performance monitoring and decision-making for harvest strategies purposes.

The guidelines were promoted at a workshop on “The use of bio-economics and role of government in achieving economic objectives for key decision makers” held in Queenscliff, Victoria, 23-24 February 2015 to an audience of Fisheries Managers from each of the states, the Northern Territory and AFMA, and academics from various Australian and overseas universities.

Project: Cost of Fishing Regulation in Commonwealth Fisheries (2015)

Client: Australian Fisheries Management Authority

Summary: The Australian Fisheries Management Authority (AFMA) contracted EconSearch to provide a preliminary analysis of the set up and on-going costs to the commercial fishing industry of dealing with government regulation along the supply chain. The study was limited to two case study fisheries, i.e. Commonwealth fishers that fish in the Southern and Eastern Scalefish and Shark Fishery (SESSF) and Commonwealth fishers that fish in the Northern Prawn Fishery (NPF). The study did not consider of the broader regulatory compliance costs faced by all Australian businesses such as the costs of complying with Australian taxation legislation (e.g. GST reporting), companies legislation (e.g. audit and annual reporting), workplace relations and occupational health and safety legislation.

The analysis was based on surveys of SESSF and NPF concession holders to gain insight into the time and effort, as well as financial costs of meeting government regulatory and red tape demands. Some secondary data were provided by AFMA to enable the survey sample data to be extrapolated to the fishery as a whole. Data were analysed by point in the value chain (i.e. process) by agency and were expressed as regulatory costs per kg of landed fish and regulatory costs per $1 million gross value of production (GVP). It is anticipated the information will assist government to understand which processes in which step of the supply chain may present the best opportunity to reduce regulatory burden or unnecessary red tape.

Project: Regional Economic Impact of the Snapper Spawning Spatial Closure 2013-2014 (2014)

Client: Primary Industries and Resources South Australia Fisheries & Aquaculture

Summary: In order to provide greater opportunities for spawning success, spatial (area) closures are considered to be important for minimising the disturbance to spawning aggregations by fishing activities (including recreational, charter and commercial fishing) during this critical reproductive period.

The purpose of the analysis was to update, at a broad level, the regional economic and social impact assessment of the final PIRSA spatial management arrangements for Snapper, which apply to the recreational, charter and commercial fisheries. The objectives of this work were to:

Determine the economic impacts for the Commercial and Charter Boat Fisheries from spatial closures in 2013/14.

Undertake a survey to inform understanding of local business in the towns near the closures and likely impacts.

Undertake consultation with local councils, industry associations and Tourism bodies to inform the report.
Compare these results to those estimated in the 2013 report - ‘Regional economic and social impact of Snapper spawning spatial closure options 2012-2013.’

In July 2013, the State Government announced the introduction of Snapper spawning spatial closures in Spencer Gulf and Gulf St Vincent. The 2013-14 closures encompassed five areas in the gulfs that were closed to the possession and take of Snapper between 15 December 2013 and 31 January 2014. Other Snapper spawning aggregation sites remained open to fishing to ensure fishing practices could continue.

EconSearch prepared a regional economic impact assessment of PIRSA’s Snapper spawning spatial closures. A survey was undertaken to gather stakeholder input into the regional impact assessment. Input was sourced from representatives of the commercial fishing sector, recreational fishing sector, charter boat fishing sector, tourism industry and Local Government sector.

Project: Economic Impact of Zoning in SA Marine Parks on Commercial Fishing (2014)
Client: Department of Environment, Water and Natural Resources
Summary: In 2009, the SA Government established 19 marine parks and subsequently prepared draft management plans for each park. In 2011 the Department of Environment, Water and Natural Resources (DEWNR) contracted EconSearch and its project partners to provide impact statements for each of the 19 marine parks. The final marine park zoning (and finalised management plans) came into force in November 2012.

For this project, EconSearch was commissioned by DEWNR to update the regional impact analysis of marine park zoning for the commercial fishing sector, taking into consideration the revised zoning and the SA Governments’ Commercial Fisheries Voluntary Catch/Effort Reduction Program.
Report: To download a copy of the report click here.

Client: Gippsland Ports
Collaborator: Roberts Evaluation
Summary: EconSearch in collaboration with Roberts Evaluation were contracted by Gippsland Ports to undertake an assessment of the value of the contribution of the commercial fishing conducted from the Port of Gippsland Lakes (Lakes Entrance) to the local and state economies.

The direct and flow-on GRP in the East Gippsland region generated from commercial fishing and related processing and food service sectors was estimated to be around $29.3 million, $20.0 million generated directly and $9.3 in flow-on activity. The GRP impact represents 15 per cent of total GRP in the Lakes Entrance SA2 region ($188.3 million in 2011/12) and 2.0 per cent of total GRP in the East Gippsland region ($1.48 billion in 2011/12). For Victoria, fishing industry activity based on commercial fishing out of Lakes Entrance is estimated to generate gross state product (GSP) of around $48.4 million which represents 0.01 per cent of the state’s total ($328.6 billion in 2011/12).

Total (direct plus flow-on) employment in the East Gippsland region as a result of the commercial fishing and related processing and food service sectors is estimated to be 278 fte jobs, 168 fte jobs generated directly by the fishing industry and 110 fte jobs through flow-on activity. The direct plus flow-on employment represents approximately 12 per cent of the estimated employment (fte) in the Lakes Entrance SA2 region (2,233 fte in 2011/12) and 1.8 per cent of the estimated
employment (fte) for the East Gippsland region (15,570 fte in 2011/12). For Victoria, direct and indirect employment is estimated to be 394 fte jobs. This represents 0.02 per cent of Victoria’s total employment (approximately 2.4 million fte in 2011/12).

Report: To access the Gippsland Port Website and download a copy of the report click here.

Other completed projects. Contact us for more information.
Bioeconomic decision support tools for Southern Abalone (2013)
Oyster Basket Recycling Feasibility Study (2013)
Regional Economic & Social Impact of Snapper Spawning Spatial Closure Options 2012-2013 (2013)
Bioeconomic decision support tools for Southern Rock Lobster (2012)
Lakes and Coorong Pipi Fishery Gross Margin Model Development (2012)
Marine Parks Regional Impact Statements (2012)
On-Board Electronic Data Capture System (Deckhand) Cost Benefit Analysis (2012)
Evaluations of Proposals for Seafood Industry Co-investment Funding for “End-user Driven Research Partnerships” (2011)
Northern Australia Land and Water Science Review (2009)
Horticulture and Seafood Scorecard Information (2008-2009)
Economic Performance of Rock Lobster Fisheries (2009)
Economic Analysis of Research Vessel Replacement (2009)
The Australian Ornamental Fish Industry in 2006/07 (2008)