Department of Agriculture, Fisheries and Forestry

Ross Lobegeiger Report to Farmers

Aquaculture production summary for Queensland 2011-12

Dedication

In 2011 there was widespread support for the renaming of this report to the *Ross Lobegeiger Report to farmers*. This change was to help acknowledge and honour the pivotal role that Ross played in developing and supporting the Queensland aquaculture industry. As Supervising Extension Officer, Ross provided the aquaculture industry with almost 20 years of dedicated service. Ross was responsible, as co-author, for producing the very first annual edition of this report in 1991. He then went on to produce a total of 19 issues. As such, Ross Lobegeiger's name has become intrinsically linked with the report and it seems only fitting for the publication to continue to carry his name.

Tragically, Ross Lobegeiger passed away on Saturday 9 October 2010. Ross was such a well-known and enormously liked individual that his loss has been felt deeply by a great many people from all facets of Ross' extensive social and professional network, including the aquaculture industry.

This publication has been compiled by Michael Heidenreich of Fisheries Queensland, Department of Agriculture, Fisheries and Forestry.

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1.0 Overall value and production

The total value of the Queensland aquaculture industry increased 0.3%, with the value of production increasing from $86.3million in 2010-11 to $86.6 million in 2011–12. Although this was a slight increase, it must be stressed that the industry was still recovering from the adverse climatic events that occurred in 2010-11.

In 2011–12, the total value of fisheries production in Queensland, including aquaculture, increased by 0.3% to $274.6 million. While the total value of aquaculture production has increased slightly in 2011–12, the wild harvest fishery in Queensland had also increased slightly to $190.2 million in 2011–12 (Table 1). Therefore, the relative importance of aquaculture to Queensland's total fisheries production has only increased marginally, from 31.3% in 2010–11 to 31.5% in 2011–12. Similar trends in Queensland's fisheries and aquaculture production can be seen in the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) figures (Note: difference in ABARE figures to Queensland figures due to ABARE exclusion of hatchery production that is sold to supply aquaculture grow out operations).

Table 1: Queensland fisheries production – gross value (2007-08 to 2011-12).

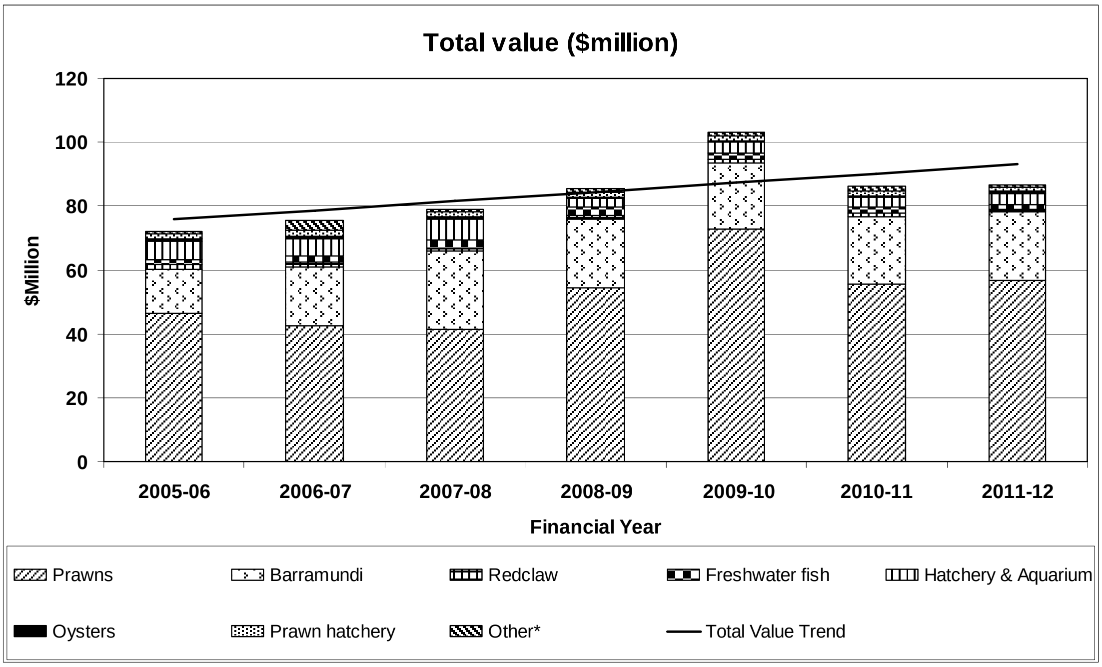
	Queensland figures [1]		
Year	**Total fisheries ($m)**	**Aquaculture ($m)**	**Aquaculture (%)**
2006-07	261.1	77.4	27.4
2007–08	288.5	80.3	27.8
2008–09	308.5	85.5	27.7
2009–10	325.7	103.0	31.6
2010–11	275.9	86.3	31.3
2011-12	276.8	86.6	31.5
	ABARES figures [1]		
Year	**Total fisheries ($m)**	**Aquaculture ($m)**	**Aquaculture (%)**
2006-07	276.9	71.9	26.0
2007–08	283.5	75.3	26.6
2008–09	306.6	83.6	27.3
2009–10	323.3	100.6	31.1
2010–11	273.5	83.9	30.6
2011-12	275.7	83.1	31.3

(1) The Queensland figures include hatchery production for farm stocking and impoundment stocking. Farm stocking details and product supplied to aquaculture growout operations are excluded from the figures used by ABARES.

Sources: ABARES and Fisheries Queensland, part of the Department of Agriculture Fisheries and Forestry

The trend of aquaculture industry growth in Queensland over the past six (6) years can be seen in Figure 1. The most valuable sectors of the Queensland Aquaculture Industry continues to be prawns and barramundi (*Lates calcarifer*) respectively. Actual dollar value of each sector is given in Table 2. Acknowledging that there will always be some degree of fluctuation between years (due to climatic issues etc.), there is still a clear trend that the overall industry value has been increasing at a rate of 4.5% per annum since1999 -2000

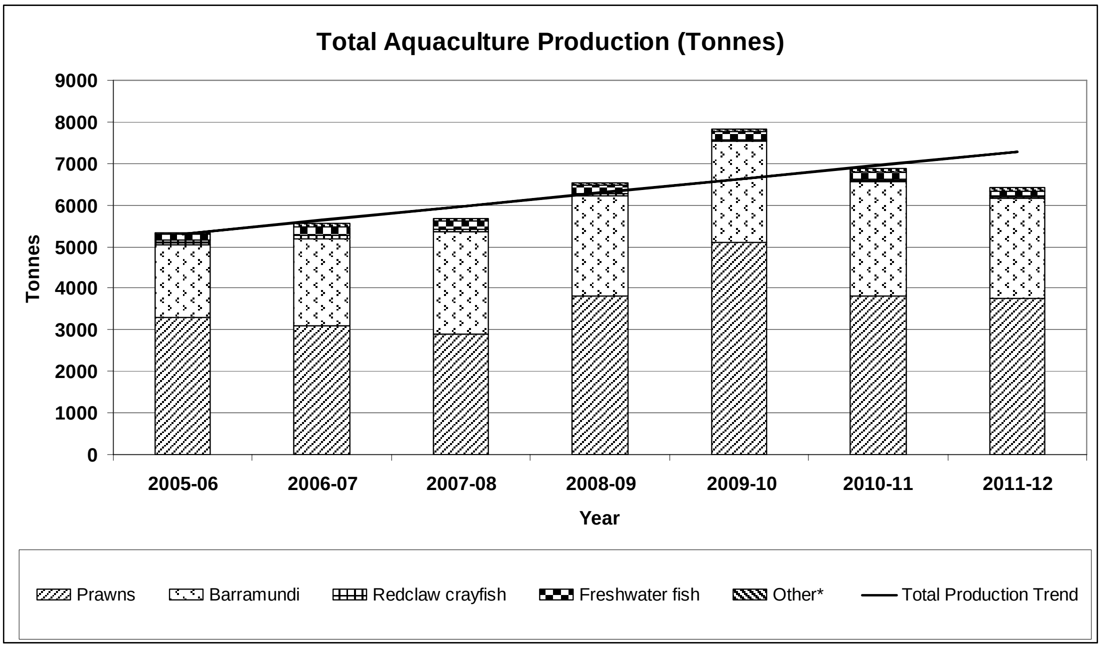
(Figure 1). Gains in value in the 2011-12 financial year has been in the prawn, barramundi, Hatchery and aquarium and edible oyster sectors, with redclaw crayfish holding steady and value falling for the freshwater fish and Other sectors.



*'Other' includes pearls, crabs, sea scallops, marine fish and eels.

Figure 1: Trend in value ($million) of Queensland aquaculture production.

While the overall production tonnage has decreased in the last two (2) years, the longer term thirteen (13) year average has the industry still increasing at a rate 9.0% per annum (Figure 2). Actual production figures (tonnes) for each sector are given in Table 3.



*'Other' includes crabs, sea scallops, marine fish and eels.

Figure 2: Trend in Queensland aquaculture total production (tonnes).

2.0 Aquaculture sector production and value

Queensland's marine prawn industry produces three species of prawns—black tiger (*Penaeus monodon*), banana (*P. merguiensis*) and kuruma (*P. japonicus*). The kuruma prawn sector is currently represented by just two small farms. Production in the Prawn sector decreased by 1.9% (from 3822 tonnes in 2010–11 to 3751 tonnes in 2011–12), while the value increased by 1.8% (from $56.9 million in 2010–11 to $57.9 million in 2011–12). This increase in value was helped by the average price increasing slightly from $14.54/kg in 2010–11 to $14.95/kg in 2011–12. Hatchery sales of prawns for the year were $1.1 million, which was slightly less from the previous year. The area harvested increased by 4.8%, from 659 hectares in 2010–11 to 692 hectares in 2011–12. The number of producing farms remains the same as the previous year with 20 farms in 2011–12.

Barramundi production decreased by 4.4%, with 2746 tonnes sold in 2010–11 and 2416 tonnes sold in 2011-12. Whilst, the value of the barramundi sector increased by 0.5%, from $21.2 million in 2010–11 to $21.3 million in 2011–12. Over this period the average price (whole fish basis) increased by 14.5%, from $7.70/kg to $8.82/kg. The majority of barramundi production is in pond-based systems. Over the last 2 financial years, the number of producing pond-based farms decreased from 26 to 17. There were no barramundi produced from the tank-based systems or the sea cage operation in 2011-12.

Table 2: Queensland aquaculture production – gross value by sector ($ million).

	2006-07	2007–08	2008–09	2009–10	2010–11	2011-12
Prawns (includes prawn hatchery)	$44.4	$43.0	$55.8	$74.3	$56.9	$57.9
Barramundi	$18.5	$24.3	$21.4	$20.7	$21.2	$21.3
Redclaw crayfish	$1.4	$1.1	$1.1	$1.0	$0.9	$0.9
Freshwater fish	$2.2	$2.3	$2.6	$2.2	$2.2	$1.7
Hatchery and aquarium	$3.5	$6.6	$2.7	$3.2	$2.9	$3.4
Edible oysters	$0.5	$0.6	$0.5	$0.5	$0.5	$0.5
Other (1)	$6.9	$2.4	$1.5	$1.2	$1.7	$0.9
Total	**$77.4**	**$80.3**	**$85.5**	**$103.0**	**$86.3**	**$86.6**

* Not available for publication (included in 'Other')
(1) Includes marine fish, eels, crabs and pearls in some years.

Redclaw crayfish (*Cherax quadricarinatus*) production has continued to decline since 2004–07, where annual harvests totalled around 100 tonnes. Since that time there has been a sharp decline in production, with harvests falling to 41 tonnes in the current reporting period. Value of the redclaw sector decreased to $862 000 (down from $908 000 in 2009–10). The number of producing farms in 2011–12 was 28; one more than in 2010–11. Average prices decreased from $17.58/kg in 2009–10 to $16.71/kg.

The freshwater fish growout sector currently produces silver perch (*Bidyanus bidyanus*), jade perch (*Scortum barcoo*), Murray cod (*Maccullochella peelii peelii*) and sleepy cod (*Oxyeleotris lineolatus*). The total production of freshwater fish (species other than barramundi) was 135 tonnes, which has decreased from the 176.6 tonnes produced in 2010–11. The value of the sector also decreased to $1.7 million, down from $2.23 million 2010-11.

Table 3: Queensland aquaculture production (tones) by sector.

	2006–07	2007–08	2008–09	2009–10	2010–11	2011-12
Marine prawns	3085	2888	3821	5115	3822	3751
Barramundi	2091	2464	2400	2410	2746	2416
Redclaw crayfish	100	65	68	57	52	41
Freshwater fish	210	198	192	177	177	135
Other *	64	58	39	63	101	73
Total	**5550**	**5673**	**6520**	**7822**	**6898**	**6416**

* 'Other' includes marine fish, eels, sea scallops and crabs.

Silver perch production has fallen significantly this reporting season to 75 tonnes, down from 113.5 tonnes for 2010-11. The value of the Silver perch sector also decreased from $1.36 million in 2010-11 to $886,000 in 2011-12. Jade perch production increased considerably from 18.7 tonnes in 2010–11 to 30.7 tonnes for 2011-12. The value of jade perch sales totalled at $367, 000, with an average price of $11.95/kg. While Murray cod remains a significant contributor to the freshwater fish sector, in 2011–12 only a few growers produced Murray cod and detailed production data cannot be published due to client confidentiality. Queensland's eel farming sector relies on wild caught individuals of two species of eel; the long-finned eel (*Anguilla reinhardtii*) which accounts for the majority of eel production, and the short-finned eel (*A. australis*) which is produced in much smaller quantities. Production in this sector increased by 13.9 % (from 63.3 tonnes 2010-11 to 72.1 tonnes 2011-12), while the value of the sector decreased by 2% (from $839,000 in 2010 -11 to $822,000 for 2011-12).

The hatchery sector, producing native fish fingerlings and ornamental aquarium species, sold 10.4 million fish during 2011–12; this was 5.6% more than the 9.85 million fish sold during 2009–10. The value of the hatchery sector decreased slightly, from $3.07 million in 2010–11 to $2.9 million for 2011-12.

Total edible oyster production has seen a significant increase by nearly 43%, from 90 000 dozen in 2010–11 to 129,500 dozen in 2011-12. The value of the edible oyster industry also increased from $473 000 in 2010 -11 to $513 000. But the average price per dozen of oysters has decreased from $5.25 to $3.97.

The combined Queensland aquaculture industry employed 668 full-time equivalents (FTEs)—calculated by combining numbers of permanent and casual labour. This equates to 89 more FTEs than in 2010–11. The prawn farming sector was the largest employer at 431.4 FTE workers or 64.5% of the industry's total labour force.

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