

NSW TOTAL ALLOWABLE FISHING COMMITTEE

EASTERN ROCK LOBSTER FISHERY

DETERMINATION FOR THE 2025/26 FISHING PERIOD

9 June 2025

Executive Summary

Preamble

The New South Wales (NSW) Total Allowable Fishing Committee (TAFC) has statutory responsibilities set out in Part 2A of the *Fisheries Management Act 1994* (the Act) to determine the Total Allowable Commercial Catch (TACC) or Total Allowable Commercial Effort (TACE) by NSW fishers holding the relevant endorsement in some commercial fisheries. Various fishing regulations under the Act also contain provisions requiring the making of fishery determinations.

The TAFC is an independent statutory body established under Schedule 2 of the Act. In making a determination on catch or effort in a commercial fishery, the TAFC must consider the ecological, economic and social issues associated with each fishery and make determinations that 'on balance' pursue the objectives of the Act.

The TAFC is not subject to the control or direction of the Minister as to any determination made. However, the Minister may direct the TAFC on the procedures to be followed and the matters to be taken into account in making a fishing determination. A Harvest Strategy is in place for the Eastern Rock Lobster Fishery and the TAFC has given due consideration to this strategy in determining the TACC.

This determination is for Eastern Rock Lobster for the period 1 August 2025 to 31 July 2026.

Management recommendations & supporting actions

The TAFC provides the following recommendation to the Minister, NSW DPIRD and the fishing industry towards improving the management of the fishery:

1. DPIRD and industry work together to explore alternative sources of reliable price data from other markets to improve GVP estimates.

Determination

The Total Allowable Fishing Committee, pursuant to Part 2A of the *Fisheries Management Act 1994*, determines that the commercial catch of Eastern Rock Lobster should be controlled and allocated through the following measure:

- A TACC of **206.7 tonnes** during the fishing period 1 August 2025 to 31 July 2026.

Introduction

The Eastern Rock Lobster (ERL) Fishery operates across all waters managed by NSW, with the exception of those areas closed to fishing. Management of the commercial fishery uses a range of input and output controls, including a total allowable commercial catch (TACC) with individual transferable quotas (ITQs); a maximum (180 mm) and minimum (104 mm) size limit; prohibition on the taking of berried females and fishing gear restrictions (traps). Tags must be fitted to each lobster landed in the commercial fishery, immediately after landing or prior to transferring lobster into a pen, to another boat or consigning to a market.

Although considered a single species fishery, there is a reasonable level of retained by-catch in the fishery, with the top four species being Ocean Jacket, Grey Morwong, Snapper and Octopus.

Shareholders in the ERL Fishery are eligible for an endorsement if holding a minimum of 55 shares in the fishery (if a new entrant) and may take the lobster themselves or nominate another licensed commercial fisher to operate their fishing business. Shares were first allocated for this fishery in 2000 and were automatically renewed for a further 10-year period in 2010 and 2020. During February 2023, the maximum shareholding for the fishery was increased from 350 shares to 3,848 lobster shares (40% of fishery shares), consistent with the basis for the maximum shareholding that applies in each of the five multi-species share management fisheries. The total number of shares in the fishery is currently 9,621. In 2024/25, there were 95 lobster fishery shareholders¹.

The ERL Fishery is assessed as **Sustainable**. Gross value of production for 2024/25 (predicting that the 200 tonne TACC will be taken) is estimated at approximately \$13.9 million.

The TAFC met with DPIRD and a number of shareholders in the ERL Fishery on-line on 22 May 2025 to discuss fishery biology, catch and associated management issues. Written submissions by shareholders on the stock status for the fishery and other fishery management issues were provided to the Committee by DPIRD. A current stock assessment report on the fishery was also provided to the Committee by DPIRD².

¹ DPIRD (2025) Lobster fishery management report. Total Allowable Catch Determination 2025/26.37pp

² G.W. Liggins, M.E. Miller & G. Ballinger (2025) RESOURCE ASSESSMENT: Eastern Rock Lobster (*Sagmariasus verreauxi*). Prepared for the Total Allowable Fishing (TAF) Committee process for the determination for the Total Allowable Commercial Catch of NSW Lobster for the 2025/26 season. NSW Department of Primary Industries and Regional Development. 77pp

Biological considerations

Eastern Rock Lobster (ERL) range from Queensland to Victoria. They can live for more than 30 years, grow up to 260 mm carapace length (CL), and females mature at around 167 mm carapace length (CL). Minimum legal size of ERL is 104 mm CL and the stock is managed with an upper maximum legal size of 180 mm CL. Small lobsters are found in inshore waters <10 metres depth and medium size lobsters occur across the continental shelf in depths up to 200 metres. The spawning stock and lobsters greater than the maximum legal length (oversize) are concentrated on the north coast of NSW in depths of 10-120 metres. Larvae progress through an extended pelagic phase to a post-larval puerulus stage, which then settle on nearshore rocky reefs throughout NSW.

Fishery catch and effort

ERL commercial catches have been documented in a variety of reporting system since 1885, although reporting was substantially incomplete prior to about 1994/95. Industry surveys provided estimates of substantial unreported catches over 1970 – 1993, with unreported catch being at least as large as reported catch. These estimates have been extrapolated backwards to provide estimates of total commercial catch over 1885 – 1970, adding ~40% to the reported catches. Since 1995, catches have been well reported in daily logbooks, with low unreported catches assumed to have been constant at 11.951 tonnes (t) since 2010/11.

This reconstructed catch history indicates that commercial catches peaked at ~500 t in 1929/30 and again in 1949/50 before declining to ~150 t in 1979/80. Catches increased to an estimated 375 t in 1983/84, over half of which was unreported. During the recent logbook reporting period, commercial catches have increased steadily from ~100 t in 1995/96 to 200 t by 2022/23. Estimates of recreational catch are highly uncertain but, based on three surveys over 2000 – 2018, a constant recreational annual catch of 8.6 t is assumed since 1969/70 for assessment purposes. Aboriginal catches are unknown, but considered to be low on the available evidence.

A quota system for commercial ERL catch was introduced in 1994, with annual quotas starting at 91.6 t and increasing steadily to 200 t in 2022/23. Over 2004/05 - 2022/23 the quota has been fully caught (96% - 100%). However, estimated catch in 2023-24 was 165.7 t, 82.9% of the TACC. This reduced catch coincided with a dramatic increase in the occurrence of Maori octopus in traps in the southern areas of the fishery, which is considered to have resulted in trap-avoidance by lobsters and reduced catchability³.

Between 1994/95 - 1999/2000, fishing effort remained steady before increasing from 208,414 trap-lifts in 1999-00 to a peak of 263,378 trap-lifts in 2000/01. Over the recent period of increasing catches since 2000/01, reported fishing effort has

³ G.W. Liggins, M.E. Miller & G. Ballinger (2025) Resource Assessment - Eastern Rock Lobster *Sagmariasus verreauxi*. Prepared for the Total Allowable Fishing (TAF) Committee process for the determination for the Total Allowable Commercial Catch of NSW Lobster for the 2025/26 season.

decreased steadily from ~260,000 trap-lifts in 2000/01 to 58,461 trap-lifts in 2022/23, the lowest on record. Effort increased slightly to 67,485 trap-lifts in 2023/24.

Stock assessment and stock status

The stock assessment of ERL uses a length-based integrated assessment model with numerous data inputs, including: CPUE indices of abundance based on commercial catch rates; puerulus (post-larval) abundance from larval collector surveys; abundance of juvenile sub-legal-size lobsters recorded in commercial catches; and fishery independent surveys of abundance of the spawning stock. A deterministic implementation of the model is used to examine sensitivity to key input parameters and historical catches. A stochastic implementation of the model accounts for uncertainties associated with catch and CPUE between 1969/70 and the present. The stochastic model is projected one year into the future to provide estimates of future biomass at the start of 2025/26 for use in the harvest control rule to determine the recommended TACC for the coming year.

Most indices used in the model continue to show positive indications for stock status seen in 2024, and have been positive for several years:

- Information on recruitment of post-larvae (pueruli) to the population collected using puerulus collector surveys showed that in 2024/25 puerulus abundance at three of the four locations (Tuncurry, Sydney and Ulladulla) was greater than long-term average levels. Abundance of pueruli was greater than or about equal to the long-term average for four of the past five years with abundance in the 2023/24 survey only marginally below the long-term average. Despite significant inter-annual fluctuations in the abundance of settling pueruli, there has been a trend of increasing rates of catch of pueruli across the 30-year time-series.
- The catch rate of sub-legal-size lobsters in depths < 10 metres during 2024/25 of 1.34 lobsters per trap-lift predicts a catch rate of 0.83 lobsters per trap-lift in 2025/26. The catch rate of sub-legal-size lobsters during 2024/25 is approximately double the catch rate observed in 2023/24 and is of similar magnitude to the six preceding years. Contrary to the concerns expressed in 2024, this indicates that the major rainfall and floods experienced by NSW in February and March of 2021 and 2022 did not result in any substantial mortality of pre-recruits.
- Catch rates during the 2022/23 fishery-independent survey of spawning stock at eight sites on the north coast of between Tuncurry and Iluka indicate the greatest abundance of spawning stock observed during the 27-year history of the survey. Abundance increased from the early 2000s to 2014/15 and then remained stable through to 2020/21, before increasing again in 2022/23 and 2024/25. The catch rate for lobsters > 180 mm CL, females > 167 mm CL and berried females during the 2024/25 survey were the highest observed over the 27-year history of this time-series and indices of spawning stock abundance in 2024/25 were approximately 12 times greater than observed during the first 10 years of the survey.

Using these indicators and data inputs in the stock assessment, spawning biomass at the start of 2024/25 was estimated to be 34.7% (90% CI: 28.1 – 44.6%) of the pre-exploitation biomass, significantly greater than both the 20% limit reference point and 25% trigger reference points specified in the Harvest Strategy for the fishery. All sensitivity analyses done using the deterministic version of the model estimated current spawning biomass to be greater than the limit reference point. Exploitable biomass (in the legal-size range 104 – 180 mm CL) at the start of 2024/25 was estimated to be 53.8% (90% CI: 48.2 – 61.6%) of the pre-exploitation level. A maximum sustainable yield (MSY) of 216.2 t and Optimum Sustainable Yield (OSY) of 210.7 t were estimated using the deterministic base-case model, with harvest rate (exploitation rate) at OSY estimated to be 0.163.

Under the approved Lobster Fishery Harvest Strategy, the recommended Total Allowable Catch (TAC) and Total Allowable Commercial Catch (TACC) are estimated by applying the agreed harvest control rule to the projected estimate of exploitable biomass from the stock assessment. Estimated exploitable biomass at the start of 2025/26 was 1,396 t and the harvest rate at optimal sustainable yield (OSY) was 0.163 resulting in a TAC determination of 227.55 t. Subtracting the estimated unreported commercial catch (11.95 t) and non-commercial catch (8.9 t) results in a TACC of 206.7 t, an increase of 6.7 t over the 2024/25 TACC of 200 t. This increase is greater than the five-tonne small-change limiting rule in the harvest strategy and so the recommended TACC for 2025/26 is 206.7 t.

There are no signals in the auxiliary indicators presented in the assessment that suggest that there have been substantial changes that are out-of-step or not well fitted by the model, or that there are problems with underlying model assumptions. There are therefore no reasons to deviate from the recommended TACC presented in the assessment report.

Economic considerations

The ERL fishery predominantly supplies the NSW domestic market. Around 30-40% of the commercial catch is sold through Sydney Fish Market (SFM). Other domestic markets include co-operatives and direct sales. From data collected in 2020/21, exports comprise a relatively small proportion of total commercial catch estimated at just under 8% (BDO EconSearch, 2023). It should be noted that this data is now becoming dated and incorporates a period impacted by management and limitations associated with Covid-19. Further, the fishery is now MSC certified, which potentially expands export options in the long-term. However, the main market for the fishery remains the NSW domestic market with a substantial amount of harvest sold through SFM.

Beach prices of ERL have been trending upwards since the early 2000s peaking in 2018/9 at \$80.42/kg after which prices fell. Covid-19 and more recently, reductions in consumer spending are likely contributing factors for this reduction. Since 2018/19, annual average prices have ranged from \$62.82/kg to \$76.46/kg. The estimated average price for the 2024/25 fishing period is \$69.47/kg.

GVP for the fishery is estimated by using the average annual price of all ERL sold at SFM. For the periods 2020/21, 2021/22, 2022/23 and 2023/24 fishing periods, real GVP is estimated to be \$11.87m, \$11.25m, \$12.57m and \$11.7m respectively. Using average real price data up to May 2025 and assuming the current 200 tonne TACC is fully caught, GVP for 2024/25 is forecast to increase to \$13.9m.

Commercial ERL fishers have reported that prices obtained in domestic and export markets have been lower than SFM prices. For example, the BDO EconSearch (2023) survey results of fishers in 2020/21 estimated average price for that year as 16% lower than SFM price for the same period). However, in the absence of reliable price data from other markets, SFM data is the only available consistent index of price over time which can be used to estimate GVP.

Recommendation

- NSW DPIRD and industry work together to explore alternative sources of reliable price data from other markets to improve GVP estimates.

Share and quota trading

The total number of shareholders has remained relatively static over the last 10 years with shares tending to consolidate to larger shareholders- generally consistent with a mature quota fishery. In the 2024/25 fishing period, there were 95 shareholders, which is the same number as the 2023/24 fishing period and only one less than the 2022/23 fishing period. Due to reported limitations in available data for the 2024/25 fishing period, the number of authorised and nominated fishers is not available. However, for the 2023/24 period there were 68 authorised fishers, of which 29 are nominated fishers, authorised to operate the business on the shareholders behalf.

Between 2013/14 and 2018/19, the real share transfer (sale) price increased substantially, which is indicative of confidence in the fishery and healthy economic returns. Since that period, it has been relatively stable at high values except for 2019/20 where a fall was recorded, but with subsequent recovery. This fall is likely associated with uncertainties associated with Covid-19 and government responses to it. It should be noted that share prices are indicative only, because information is provided voluntarily, and in some cases, reported prices are for trades between related businesses and may not reflect market price. Nevertheless, the trend in the available price series is likely to reflect trends in market price. Due to confidentiality, further quantitative information cannot be presented in this report.

Quota units (expressed in kgs) are allocated to each shareholder depending on the number of shares they hold. Quota can be traded within each fishing period, with a maximum of twice the shareholders initial allocation able to be transferred to their shareholding. The trend in quota price is a simple indicator of short-term expectations of the economic performance of the fishery.

DPIRD Fisheries has requested quota price information from shareholders on a voluntary basis since 2003/04. Whilst the number of trades with price being reported varies between fishing periods, the long-term average is that around 23% of all

transferred quota units have reported price since 2009/10. As with share price information, these quota prices may not accurately reflect the average market price in each fishing period, but the trend is likely to be indicative of trend in market prices. Reported prices (in real terms) have increased since data collection began. Increased reporting on share and quota prices would provide more robust indicators of fishery economic performance.

Conclusion

One of the strategic objectives of the 2022 Harvest Strategy is to support profitability of the commercial fishery over the long term. Secondary economic indicators for this strategic objective include market conditions, economic surveys and share and quota trading.

Based on the economic considerations described above, the 2025/26 TACC of 206.7 t (if close to fully caught) would be expected to lead to a very small increase in profitability as it will allow a small increase in catch per quota share held. It is an increase of 6.7 t from the previous year and this increase is unlikely to significantly influence the value of shares or quota units. The increase though does send a market signal of a stable fishery which may encourage further investment on the back of healthy economic returns.

Fishery management considerations

In the early 1990s, the ERL Fishery was considered overfished with the stock at around 10% of initial biomass and a TACC set at around 90 t. Since then, regulatory and management reforms in the commercial fishery have brought about a recovery of the stock and associated fishery. The ERL stock is now assessed to be above the target reference level, the spawning stock is considered abundant and resilient, and a rising trend of puerulus recruitment is indicated in fishery independent surveys. Surveys also indicate strong numbers of undersized lobsters and spawning lobsters in the fishery, both of which are also being observed by industry.

The TACC has been fully caught (greater than 95%) since 2004/05, except in 2023/24, where catchability was affected by large numbers of octopus found in traps in the south coast deep-water fishery in particular. Industry have reported that octopus numbers returned to normal levels in most parts of the fishery in the 2024/25 season, with the only factor potentially impacting full utilisation of the 2024/25 TACC being weather, including recent flooding in the north of the fishery.

The fishery is a share managed fishery and is managed through a suite of input and output controls including lobster tags, minimum and maximum size limits, and individual transferable quotas (ITQs). Since 2022, the TAFC has been guided in setting the TACC by the Lobster Fishery Harvest Strategy, which includes specific TACC decision rules for the harvest of ERL in NSW, based on agreed management objectives. This robust management framework contributed to the certification of the fishery by the Marine Stewardship Council in 2023. Consultation with industry and other stakeholders is an important element of sustainable fisheries management, including as part of the TAFC process, and the TAFC encourages DPIRD to continue to ensure effective consultation processes are implemented in the fishery.

The ERL stock is subject to mortality from the recreational and Aboriginal cultural fishing sectors, and as bycatch and unreported catches in other commercial fisheries. The recreational harvest of lobster is managed through a minimum and maximum size limit, and a daily possession limit of three, which has been adjusted over time in response to changes in stock status. Recreational catch is estimated, for the purposes of the harvest strategy, to be 8.9 t, which is the mean of the last five recreational surveys since 2000. The TAFC notes that DPIRD is attempting to refine the recreational sampling framework, with the aim of collecting more precise recreational catch information and supports the general direction being taken.

There are a number of arrangements in place that allow for non-commercial harvest of lobster by Aboriginal people in NSW. Lobster can be taken under the statewide Aboriginal Cultural Fishing Interim Access Arrangement, where the daily possession limit is six. One active Aboriginal cultural fishing authority allows for the take of lobster in the 2025/26 fishing season, and there are also two Aboriginal Cultural Fishing Local Management Plans that allow for the harvest of lobster by Aboriginal community members in those local areas. There are no reliable estimates of the Aboriginal harvest of lobster, however catches in this sector are likely to be low.

Catches of lobster also occur in the demersal fish and prawn trawling sectors, and there have been incidents of illegal take by trawl vessels. Improvements in vessel monitoring of NSW and Commonwealth vessels should enable better monitoring and compliance, and may over time allow better estimation of lobster bycatch and bycatch trends in these fisheries. Estimated illegal, unreported and illegal (IUU) catches of 11.95 t are included in the harvest strategy for the purposes of calculating the TACC, and given that compliance rates remain relatively high (97% in the commercial sector), there is no indication that IUU catches have increased. The TAFC continues to encourage DPIRD to regularly update and refine the estimates for recreational, Aboriginal and IUU catches, to ensure that the management of the commercial and non-commercial fisheries are appropriately responsive.

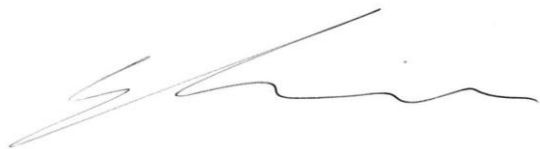
Determination

The Total Allowable Fishing Committee, pursuant to Part 2A of the *Fisheries Management Act 1994*, determines that the commercial catch of Eastern Rock Lobster should be controlled and allocated through the following measure:

- A TACC of **206.7 tonnes** during the fishing period 1 August 2025 to 31 July 2026.

Species	Catch Limit 2024/25 (tonnes)
Eastern Rock Lobster (<i>Sagmariasus verreauxi</i>)	206.7

Signed (for and on behalf of the TAFC)



William Zacharin
Chair, TAFC

Alice McDonald – Fisheries Management member

Andrew Penney – Deputy Scientific member

Daryl McPhee – Natural Resource Economist member

9 June 2025