

A preliminary analysis of South African lobster landing and trade records

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This paper provides an analysis of international trade in lobster from South Africa and reported lobster landings in South Africa for the period 2000 - 2015. Comparisons are made between South African exports of lobster to the World, World imports of lobster from South Africa, and lobster landings. These analyses are intended to provide insight into international trade dynamics for lobster caught illegally in South Africa.

METHODOLOGY AND DATA

Trade data

Trade data, incorporating annual export figures (kg) of lobster products from South Africa to the World and World imports of lobster products from South Africa, were sourced from UN COMTRADE for the period 2000 - 2015. UN COMTRADE records reflect data provided by the national customs, statistical or similar agencies of all UN Member States.

The following HS codes and associated descriptions are used under the Harmonised System to record the import and export of the various lobster products in international trade. As the code descriptions are at a genus level, it is not possible to determine the proportional trade in the three South African lobster species that are traded internationally.

030611	Rock lobster and other sea crawfish (PALINURUS SPP., PANULIRUS SPP., JASUS SPP.) frozen
030612	Lobsters (HOMARUS SPP.) frozen
030621	Rock lobster and other sea crawfish (PALINURUS SPP., PANULIRUS SPP., JASUS SPP.) not frozen
030622	Lobsters (HOMARUS SPP.) not frozen

Conversion of frozen lobster trade records to whole mass

Frozen lobster exports from South Africa are comprised of whole or tailed products. For West Coast Rock lobster, the majority of exports are in live form and exports of frozen West Coast Rock lobster are predominantly whole. The majority of frozen lobster exported from South Africa is South Coast Rock lobster and this is tailed prior to export. In order to be able to compare lobster trade records for all species exported from South Africa with landing figures, the proportion of frozen lobster exported from South Africa estimated to be comprised of frozen lobster tails was converted to whole mass. Based on estimates from DAFF, 96% of frozen lobster traded from South Africa were accordingly converted to whole mass using a conversion factor of 2.222223.

Landings

Data on South African landings of lobster were sourced from FAO (FAO Fishstat) for all species (cape rock lobster, natal spiny lobster, and Southern spiny lobster) for the period 2000 to 2013, and from DAFF for 2014 and 2015.

Estimated illegal trade

Estimates of illegal trade in rock lobster were determined by subtracting South African reported exports of lobster from World imports of lobster from South Africa for each calendar year.

RESULTS

Landings (annual) of lobster have only been greater than exports and imports in 2002. In all of the other years, World imports of lobster from South Africa and South African exports of lobster to the World have exceeded the reported landings. In 2015, lobster landings are almost equivalent to World imports, while South African lobster exports exceed the reported landings.

Imports (annual) of fresh and frozen lobster by the World from South Africa show a steady increase in the period of 2001 to 2004, but this is only after an initial drop in quantity between 2000 (3,3901 MT) and 2001 (2,990 MT). The 5,211 MT quantity in 2004 steadily declines in 2005 (4,580 MT) and 2006 (4,130 MT). World imports of lobster peaks in 2007 with 5,416 MT, which offsets the declining trend. This is followed by a steep drop between 2007 and 2008 (3,539 MT) that remains relatively steady until 2013, with the exception of a drop in 2012 (2,827 MT). The period of 2013 to 2015 shows a decline. The imports of frozen lobster are always greater than imports of fresh lobster, except in the period of 2010-2013 where the reverse is true.

Exports (annual) of lobster from South Africa to the World follow a slow increasing trend from 2000 to 2005. In 2006 there is a drop to 3,305 MT followed by an increase in 2007 to 3,937 MT, a drop in 2008 to 2,883 and an increase in 2009 (3,659 MT). This is followed by a steady decline through 2010 (3,112 MT) and 2011(2,921 MT). From 2011, there is an increase in 2012 (3,352 MT) and 2013 (3,463 MT) followed by a slow decrease in 2014 (3,200 MT) and a sharp decrease in 2015 (1,952 MT).

Estimated illegal trade (annual) in lobster (World imports less South Africa exports) peaked in 2007 with an estimate of 1,118 MT and decreased to 401 MT in 2008. A slight increase in 2009 to 622 MT slowly declines in 2010 and 2011. The period between 2012 and 2014 shows that South African exports exceeded world imports, but steadily moved towards equilibrium. In 2015, the data shows a spike of 423 MT of estimated illegal trade.

DISCUSSION

South African landings of lobster have only been greater than World imports of fresh and frozen lobster and South African exports of fresh and frozen lobster in 2002. In 2015, landings are almost equivalent to World imports, but South African exports exceed the reported landings (Table 1, Figure 1).

World imports of fresh and frozen lobster have significantly exceeded South African exports of fresh and frozen lobster in 2000, 2001, 2003, 2004, 2006, 2007, 2008, 2010, 2011, and 2013. However, even in 2009 and 2015 where South African exports are more than World imports, the amount of frozen lobster

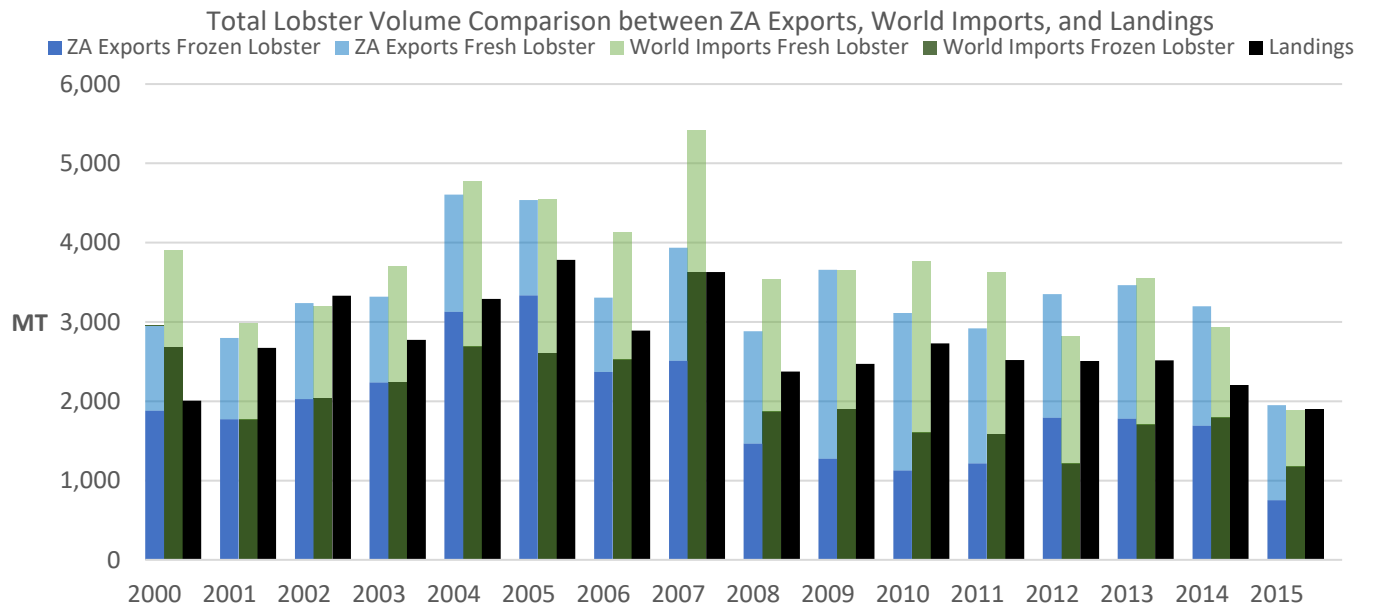
that the World imported exceeds the amount of frozen lobster that South Africa exported (Table 1, Figure 1).

Table 1: The quantitative differences between exported South African lobster that has exceeded total lobster landings, the amount of South African imported to the world that has exceeded total lobster landings, and the general difference between World imports and South African exports for frozen lobster

	South African Exports less South African Landings (MT)	World Imports less South African Landings (MT)	World Imports less South African Exports (MT) Frozen only	World Imports – South African Exports (MT) All Lobster
2000	950	1,895	802	513
2001	122	316	-1	194
2002	-91	-137	11	-51
2003	544	923	4	376
2004	1,314	1,484	-436	406
2005	753	796	-729	436
2006	415	1,239	154	741
2007	307	1,786	1118	876
2008	508	1,164	401	439
2009	1,186	1,176	622	-345
2010	384	1,045	480	402
2011	403	1,107	373	503
2012	846	320	-580	-213
2013	949	1,041	-75	133
2014	993	726	105	-324
2015	49	-19	423	-296
Average	602	929	167	237

Source: UN COMTRADE and FAO

Figure 1: South African exports of fresh and frozen lobster, World imports of fresh and frozen lobster, and landings of South African lobster.



Source: UN COMTRADE and FAO