

ACIL ALLEN

Economic Contribution of the Western Rock Lobster Industry in 2023-24

June 2025



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Report to: Western Rock Lobster

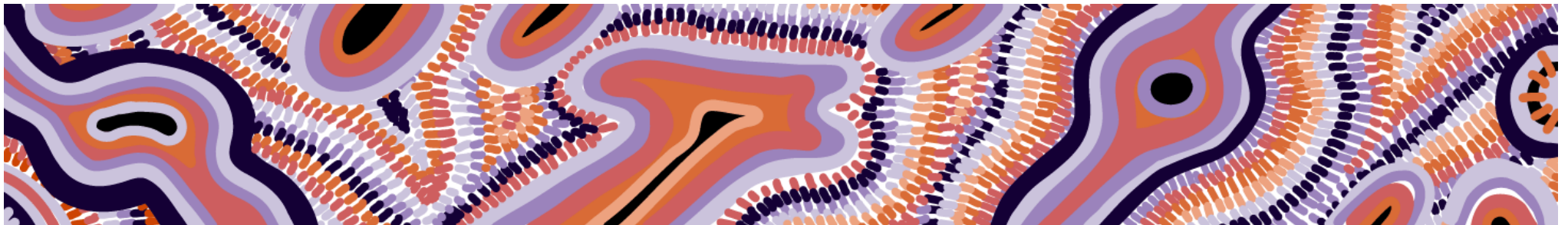
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ACIL Allen acknowledges Aboriginal and Torres Strait Islander peoples as the Traditional Custodians of the land and its waters. We pay our respects to Elders, past and present, and to the youth, for the future. We extend this to all Aboriginal and Torres Strait Islander peoples reading this report.



Excerpt of a painting titled Goomup, by Jarni McGuire

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Glossary

Abbreviation	Definition
%	Per cent
\$m	Million dollars
FTE	Full Time Equivalent
GRP	Gross Regional Product
GSP	Gross State Product
T	Tonnes
DPIRD	Department of Primary Industries and Regional Development
WRL	Western Rock Lobster

Term	Definition
Job creation	<p><i>The jobs supported in the broader economy</i></p> <p>The number of full time equivalent jobs created in the broader economy from the activities of the industry and along the supply chains that support it. Total job creation includes the direct employment in the industry and the indirect (flow-on) employment in the broader economy. Employment is measured on an FTE basis to take into account all the full time, part time, and casual jobs created.</p>
Gross product	<p><i>A measure of the size of an economy</i></p> <p>Gross product is a measure of the output generated by an economy over a period of time (typically a year). It represents the total dollar value of all finalised goods and services produced and is considered as a measure of the size of the economy. At a regional level it is referred to as Gross Regional Product (GRP), at a State level it is referred to as Gross State Product (GSP), and at a National level it is referred to as Gross Domestic Product (GDP).</p>
Northern Zone	The western rock lobster fishery Zone A and Zone B which is the area north of and including the town of Green Head.
Southern Zone	The western rock lobster fishery Zone C which is the area south of the town of Green Head.

Summary Results



The Western Rock Lobster Industry in 2023-24

The western rock lobster industry is Western Australia's most valuable fishery and an important contributor to the State's economy generating \$546.0 million towards Gross State Product (GSP) in 2023-24 and supporting 1,943 FTE jobs.

About this report

This report details the economic contribution of the commercial activities of the western rock lobster industry to Western Australia and its regional economies from the direct contribution it provides to the economy and to jobs. It also details the indirect contribution that is stimulated by the industry in the broader economy. The total direct and indirect contribution to GSP and job creation has been estimated using bespoke Input Output models developed by ACIL Allen of the State and the regional economies in which the industry operates.

This report is based on the profile of the industry today, with an estimated 215 vessels in Western Australia that targeted western rock lobster, with **a catch of 7,403 tonnes** and an estimated gross value of \$284.7 million in 2023-24. The industry is a major export earner, generating \$349 million of sales, primarily from live lobster exports to Hong Kong, Vietnam and Taiwan.

To support this level of activity, it is estimated that there were **1,140 full time, part time and casual people employed in the western rock lobster industry** in fishing, handling, transport, processing, administration, and tourism in 2023-24.

Whilst the report focuses on the contribution from commercial activities of the industry, the role that it plays in the recreational fishing sector is also highlighted. In 2023-24, recreational fishers spent an estimated **502,836 days fishing for western rock lobster, while 15,579 people enjoyed tours** targeting its catch.

Although it has been a challenging period for the western rock lobster industry as a result of four years of sustained low prices associated with the continuation of

China's ban on live lobster imports from Australia; and rising costs of inputs such as bait, fuel, and labour, the industry still generated significant economic value to the State, particularly in regional areas where it provides jobs and economic diversification.

Contribution to the economy

ACIL Allen estimates that in 2023-24, the industry directly and indirectly **contributed \$546.0 million to GSP of Western Australia** from the value added activities across the value chain from fishing, handling, transport and processing of lobsters to the value it generates from tourism activities.

Fishing contributed \$409.0 million of this contribution or 75% of the total contribution. The handling, transport and processing activities of the industry contributed a further \$110.3 million, with boat building and servicing (\$18 million) and tourism (\$8.6 million) also generated economic value to the State.

The industry's role in the regional economies in which it operates is significant. **In 2023-24, the industry contributed an estimated \$399.0 million to Gross Regional Product (GRP)**, with the largest contributions realised in Geraldton where it contributed \$61.6 million. The towns of Dongara and Port Denison contributed a further \$45.1 million, and Cervantes contributed \$36.6 million. Together, these towns accounted for 36% of the total regional contribution, reflecting the investments in port facilities, boat building and servicing businesses, handling facilities, processing facilities, and tourism infrastructure.

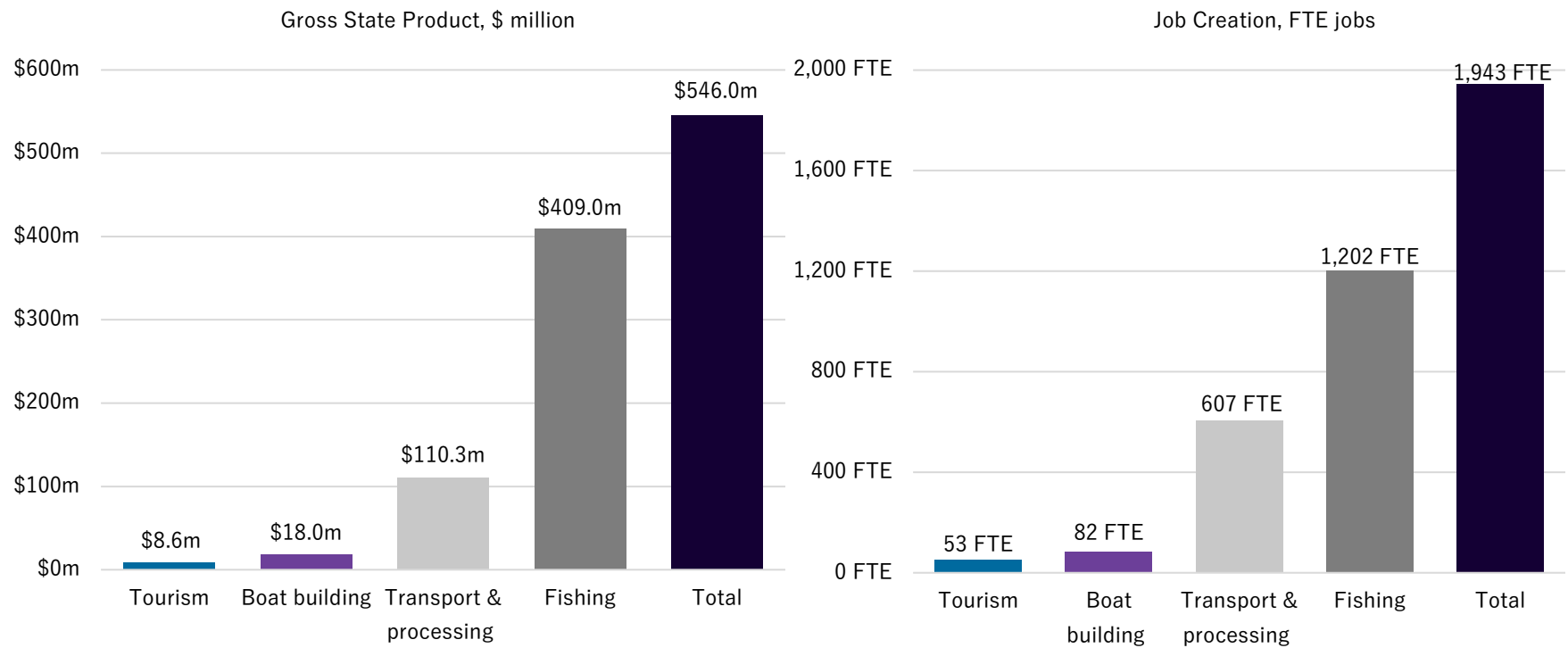
Job creation

The western rock lobster industry provides employment in a range of occupations and skills sets. In 2023-24, the industry directly employed 1,240 people in fishing, processing, transport, boat building and servicing, and tourism – equivalent to around 923 full time equivalent (FTE) jobs.

The economic activities created by the industry in turn generated an estimated **1,020 FTE indirect jobs** across a range of businesses and industries in the

broader economy. Taken together, the industry **created or supported an estimated 1,943 FTE jobs in 2023-24**. This means that **for every FTE person directly employed in the industry, there is another 1.1 FTE job supported** in other parts of the economy.

Figure ES 1 Contribution of the western rock lobster industry to Western Australia’s economy, 2023-24



Source: ACIL Allen

Supporting regional economies

The western rock lobster industry has a significant presence in regional Western Australia, providing economic value and jobs which assists regional economies and communities to remain vibrant and diverse places to live and work. In 2023-24, an estimated **73% of the contribution of the western rock lobster industry to the State economy was realised in regional Western Australia.**

The industry's importance to smaller towns is evident with the industry contributing the equivalent of 75% of the town of Leeman's economy, 67% of the economy of Cervantes, and 44% of the economy of Lancelin.

In 2023-24, the western rock lobster industry **employed an estimated 582 FTE jobs in regional Western Australia.** The economic activities created by the industry in turn generated a further **765 FTE indirect jobs.** Taken together, the industry was estimated to have directly or indirectly created or supported 1,347 FTE jobs in regional Western Australia. This means, **for every FTE person directly employed by the industry in regional Western Australia, a further 1.3 FTE jobs were created in the regions.**

Figure ES 2 Contribution of the western rock lobster industry to the regional economy of Western Australia



	Gross Regional Product	Job Creation
Kalbarri	\$7.9m	20 FTE
Geraldton	\$61.6m	219 FTE
Dongara and Port Denison	\$45.1m	114 FTE
Leeman	\$12.8m	40 FTE
Jurien Bay	\$15.4m	42 FTE
Cervantes	\$36.6m	214 FTE
Lancelin	\$25.4m	103 FTE
Perth	\$147.0m	596 FTE
South West	\$0.6m	1 FTE

Source: ACIL Allen

Main Report



1 Introduction

The western rock lobster industry is a significant contributor to the Western Australian economy and its regional coastal communities. This report profiles the direct contribution the industry makes and the broader contribution it stimulates in the wider economy.

1.1 Report background

The western rock lobster fishery was established in Western Australia in the early 1950's and continues to make an important economic contribution to the State economy and the many regional coastal communities in which the fishery operates. Today the western rock lobster fishery is the most valuable wild caught commercial fishery in Western Australia, generating \$284.7 million in gross value of production and \$349.0 million in exports in 2023-24, as well as supporting other iconic industries including the tourism, and food and beverage industries.

This economic contribution study of the western rock lobster industry in 2023–24 profiles the significant contribution that the industry makes to the towns and regions that it operates in and the broader State economy. It provides an update of economic contribution studies completed in 2020–21 and 2016–17.

1.2 Estimating the economic contribution of the industry

The economic contribution of the industry is defined as the total economic activity required to produce western rock lobster. This includes the contribution of the industry such as from spending, revenue, and employment directly associated with its operations, and the indirect contribution in the broader economy which captures the flow-on effects generated throughout the supply chains that support the industry and its workforce.

The inputs to the analysis have been generated by ACIL Allen based on statistics that describe the volume and value of catch and export sales, and on consultation with industry to understand the cost and employment profile of the fishery, holding facilities, transport operations, and processing facilities.

This data serves as the primary inputs into ACIL Allen's inhouse Input Output modelling framework, which is used to estimate the industry's contribution to Western Australia's GSP, the GRP of the regional communities in which it operates, and the jobs that are created directly and indirectly in the broader State and regional economies.

Note that jobs in fishing have been allocated to each zone and town based on the catch received in those locations. Economic value added has also been allocated to towns based on catch received.

1.3 Report structure

This report is structured to provide an overview of the significant direct contribution that the western rock lobster industry makes to Western Australia's economy including from the key parts of the supply chain and its role in supporting the tourism sector. The final chapter presents the broader contribution that the industry generates to the economy identified through Input Output economic modelling.

2 Western Rock Lobster Industry

The commercial western rock lobster industry is the State's most valuable single species wild capture fishery with a total catch of 7,400 tonnes in 2023-24 and a gross value of production of \$284.7 million.

2.1 Industry profile

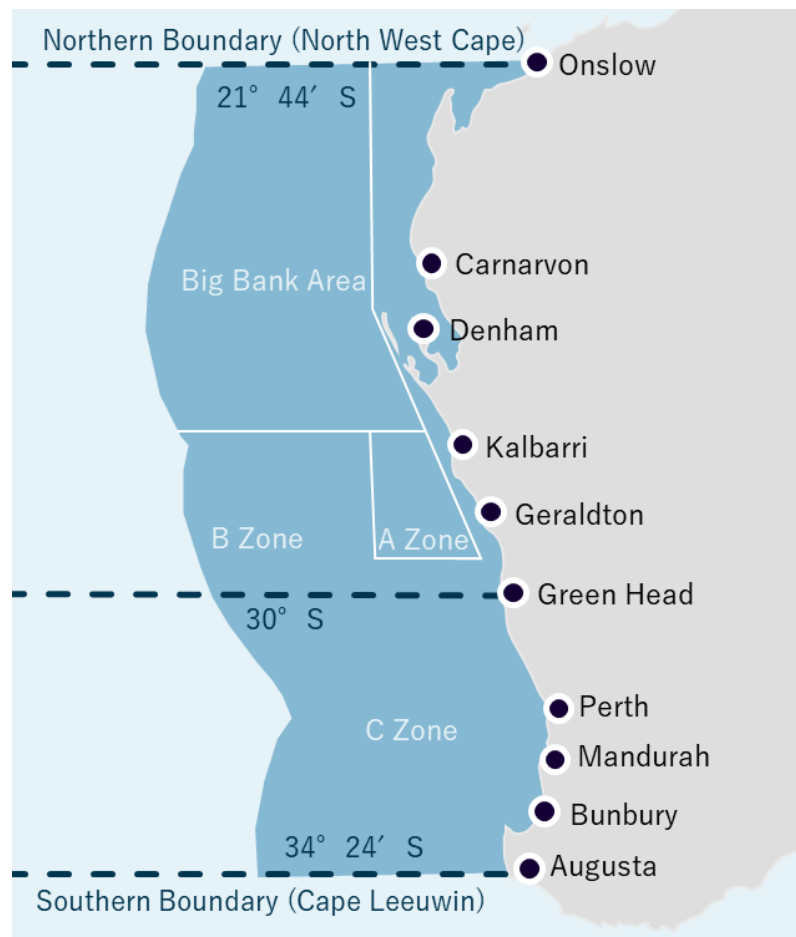
Western rock lobster is the most abundant of eight rock lobster species found in the State. They occur from Shark Bay in the north to Cape Leeuwin in the south however they are most common between Perth and Geraldton which is where the focus of the industry lies.

Commercial fishers harvest western rock lobsters under the management of the Department of Primary Industries and Regional Development (DPIRD). The commercial West Coast Rock Lobster Managed Fishery operates across three zones comprising Zone A (Abrolhos Islands) and Zone B (north of latitude 30°S) referred to in this report as the Northern Zone, and Zone C (south of latitude 30°S) referred to in this report as the Southern Zone (**Figure 2.1**).

While the fishery is central to the industry's identity, a broader value chain supports significant economic activity in regional coastal communities and the wider Western Australian economy. At a high level, the western rock lobster value chain includes fishing, transport, holding facility, processing, and boat building and servicing. The industry also plays a key role in the State's tourism offering attracting visitors to the State and to regional areas through food offerings, accommodation, and tours. A stylised representation of this value chain is presented in **Figure 2.2**, and in further detail below.

The recreational western rock lobster fishery is a managed fishery that provides an important recreational activity for many Western Australians. This report focuses on the economic contribution of the commercial fishery.

Figure 2.1 Western Rock Lobster Managed Fishery



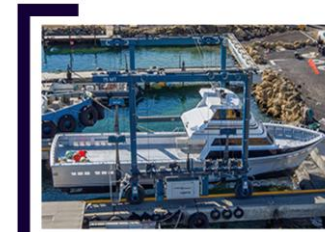
Source: ACIL Allen adapted from WRL

Figure 2.2 Western rock lobster value chain



Source: ACIL Allen

Boat sales, building, and servicing



Boat building and servicing

The boat building and servicing industry supplies new and second hand boats to the fishery and provides servicing and maintenance to the fleet. These include boat lifting businesses, as well as boat builders, refits, repairs, and modifications. Many of the businesses in the industry are located in regional areas including in the towns of

Dongara and Geraldton, providing important economic value and employment.

Fishery



Fishery

At the centre of the western rock lobster industry is the iconic and world class fishery. The industry is managed through a Total Allowable Commercial Catch (TACC) to limit seasonal harvests. Other management measures relate to size limits, protection of breeding females, and area closures. In 2000, the West Coast Rock Lobster Managed Fishery

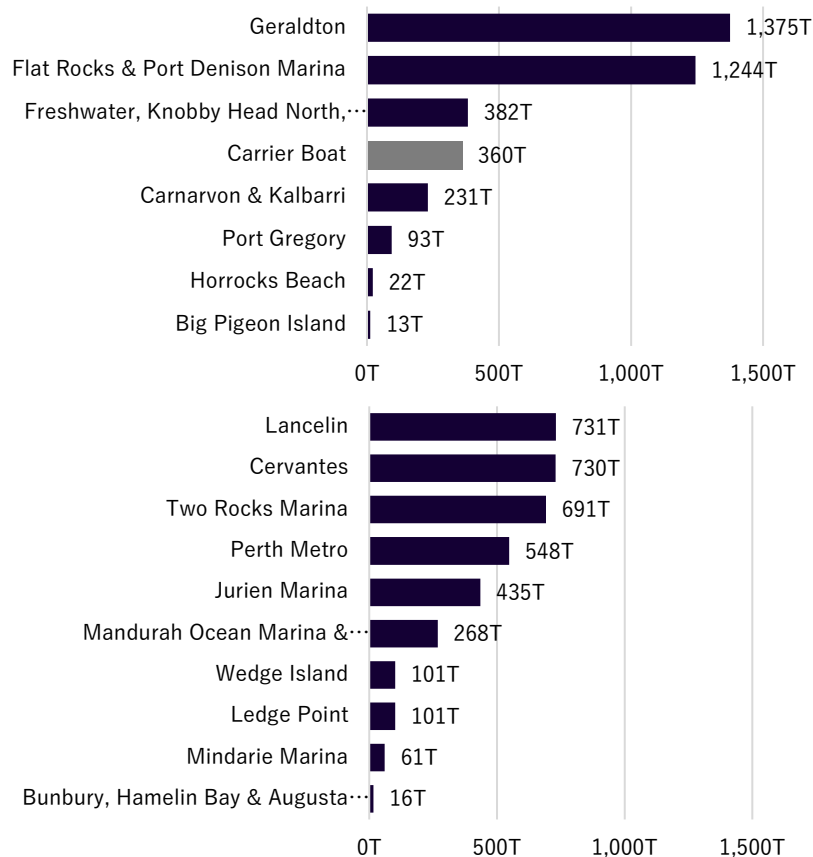
became the first fishery in the world to be certified as ecologically sustainable by the London-based Marine Stewardship Council, and in 2022, it was the first to be certified for a fifth time.

In 2023-24, there were 215 vessels that used baited pots to catch 7,400 tonnes of western rock lobster with an estimated gross value of production of \$284.7 million. The industry is a major employer providing jobs for people in regional areas. In 2023-24, there were an estimated 540 skippers and crew employed on boats operating out of ports between Geraldton and Augusta.

Lobsters are offloaded by fishing vessels at coastal receival points throughout the State where they are picked up by trucks and transported to receival points for storage in spray bed tanks before being transported to processors. The volume of

catch by zone is similar with the Southern Zone receiving 3,701 tonnes of western rock lobster while 3,703 tonnes was received in the Northern Zone.

Figure 2.3 Western rock lobster catch by receival point, tonnes



Source: DPIRD; WRL

In 2023-24, the key receival points were Geraldton Fishing Boat Harbour which received 19% of the State's total catch and Flat Rocks and Port Denison Marina which received 17%. Together they accounted for 70% of western rock lobsters received in the Northern Zone.

The catch by receival point in the Southern Zone is less concentrated, with Lancelin, Cervantes, Two Rocks Marina, and the Perth Metropolitan Area each receiving between 15 and 20% of the catch received in the Southern Zone.

Processing and transport

The processing value chain includes the receipt of lobsters at holding facilities; processing activities such as grading, freezing, and packaging; transport; and head office activities involved with management and administration.



Retrieval and transport

The transport sector provides an essential service to the western rock lobster industry by collecting catch from collection points along the coast and delivering it in specialised trucks to holding facilities in key coastal towns where it is prepared for transport to processing facilities in the Southern Zone for preparation for market.

In 2023-24, there were nearly 44,000 visits by boats to receival points to deliver catches of western rock lobster at ports from Kalbarri in the north to Augusta in the south.

Specialised trucks are also used to transport processed products to their market destination including local restaurants, retail outlets, and to Perth Airport for transport to interstate and export markets.



Processing

The majority of lobsters are prepared for the export market - packaged into specialised boxes for sale as live, cooked, or frozen product. In 2023-24, around 90% of western rock lobsters caught in Western Australia were sold to the export market, 9% were sold to the domestic market, and just under one per cent were sold as back of boat sales directly to the general public.

Tourism

The western rock lobster industry is an iconic Western Australian industry and is an integral part of the State's food and beverage offering. The Lobster Shack in Cervantes is operates a restaurant, factory tours, and charter tours based on the commercial western rock lobster industry. These activities have been included in this report in the contribution to tourism.

Other operators have been successful in building tourism businesses that leverage the industry such as through the provision of tours which enable participants to pull lobster pots. In 2023-24, there were 47 licences granted tour operators targeting rock lobster. The catch from these tours do not form part of the commercial catch of western rock lobster and have therefore not been included in this economic contribution report. The catch of the recreational sector is likewise not included.

Case Study 1 Recreational western rock lobster fishing in 2023-24

Western rock lobster fishing is important recreational activity for many Western Australian's. There is also a growing tour industry based on the experience of diving for western rock lobster or pulling pots. The recreational catch of western rock lobster operates under the management of the Department of Primary Industries and Regional Development (DPIRD) through bag, boat and possession limits, minimum size limits and gear specifications. Recreational fishers must hold a recreational rock lobster licence, and it is prohibited to sell or use recreationally caught rock lobsters for gain or reward.

Recreational fishing for western rock lobster in 2023-24 represented:

51,625 recreational rock lobster licences in Western Australia with most held by fishers in the Perth Metropolitan Area, and a majority of fishing effort taking place between Perth and Geraldton.

502,836 days fishing for rock lobsters with 77% of this time pulling pots and 23% diving for rock lobsters.

469 tonnes of western rock lobster caught with the catch growing from 249 tonnes in 2014.

47 Fishing Tour Operator Licences offering pot-based and dive-based rock lobster fishing.

20 tonnes of western rock lobster caught by tour boats compared to around one tonne in 2014-15 and nine tonnes in 2018-19.

15,579 people joining tours to fish for western rock lobster with 88% of tours using pots to fish.

Source: DPIRD

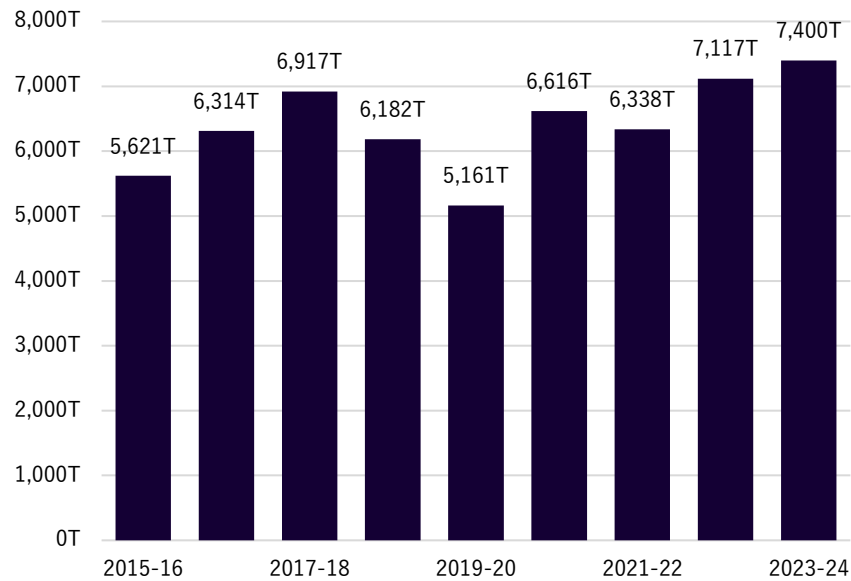
2.2 Industry overview

The commercial western rock lobster industry landed a catch of 7,400 tonnes in 2023-24, with a gross value of production of \$284.7 million and exports of \$349 million.

Catch

In 2023-24, the commercial western rock lobster industry recorded a catch of 7,400 tonnes which is the highest catch recorded in the last decade, and importantly the recovery of the industry from the COVID-19 pandemic (**Figure 2.4**). The Northern Zone accounted for 3,703 tonnes or just over half of the total catch and the Southern Zone accounted for 3,701 tonnes.

Figure 2.4 Western rock lobster commercial catch, tonnes

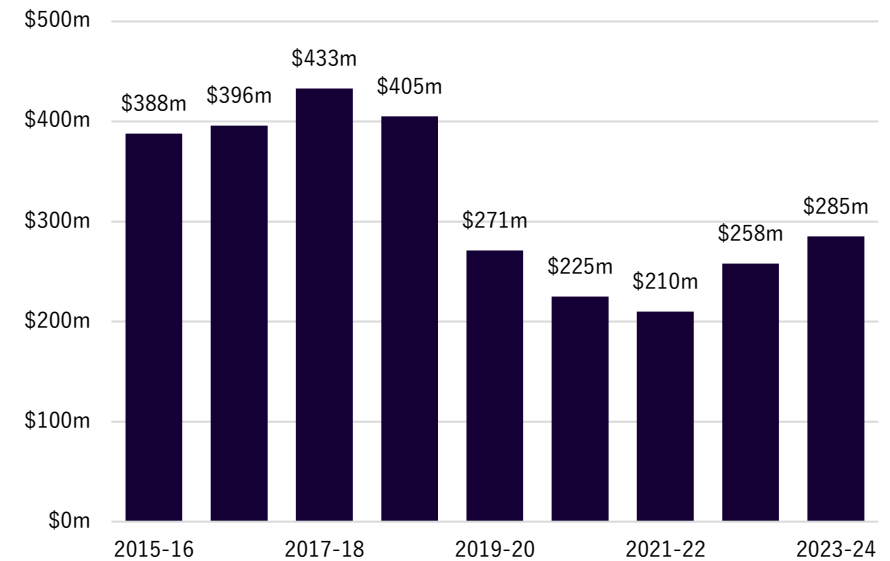


Source: DPIRD; WRL

Gross Value of Production

With a gross value of production of \$284.7 million in 2023-24, the western rock lobster industry is Western Australia's most valuable wild caught commercial fishery and one of its key primary industries. However, its value remains low compared to its peak of \$433 million in 2017-18, with its value declining to \$271 million in 2019-20 with the onset of the COVID-19 pandemic and further to \$210 million in 2021-22 following the closure of the Chinese market.

Figure 2.5 Western rock lobster gross value of production, \$ million



Source: WRL

Exports

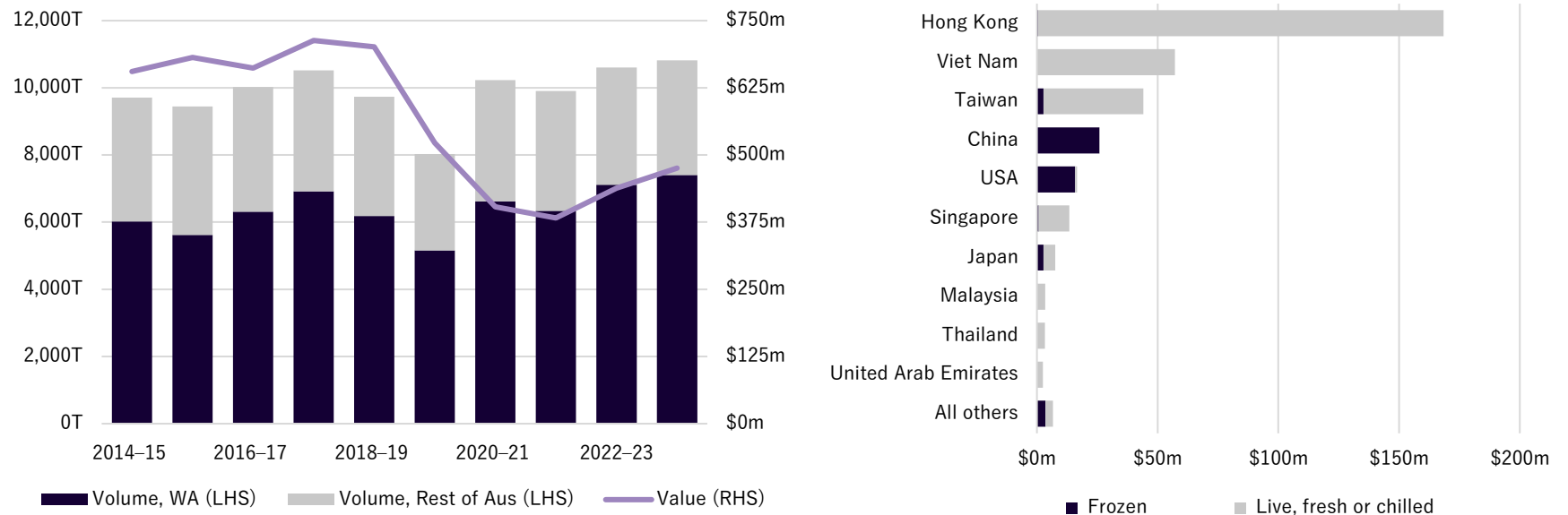
In 2023-24, there was 6,684 tonnes of western rock lobster exported from Western Australia with a value of \$349 million. WA is Australia’s largest exporter of rock lobster, accounting for 76% of national exports and 68% of the value of export sales (**Figure 2.6**). Western Australia accounted for 74% of national live lobster exports and 66% of the value of live lobster export sales.

Major trading partners for Australian rock lobster in 2023-24 were Hong Kong (\$168.4 million), Vietnam (\$57.2 million), and Taiwan (\$44.1 million) which together made up 77% of total export sales compared to previous years when China was the key market.

Frozen product volumes remained historically high, making up almost 13% of the total volume exports, compared to 3% in 2020. The majority of frozen product in 2023-24 was sold to the Chinese and USA markets.

Despite higher export volumes, the value of exports has not returned to pre-COVID-19 highs. In 2017-18, there was \$501.1 million of rock lobster exports from Western Australia compared to \$223.0 million in 2021-22, and \$309 million 2022-23.

Figure 2.6 Lobster exports by volume (tonnes) and value (\$ million); and Western Australian live exports by destination in 2023-24 (\$ million)



Source: DPIRD; WRL

Market value and outlook

Western Australia plays a pivotal role in Australia's rock lobster industry. Between 2014–15 and 2023–24, Australia produced an average of 9,900 tonnes of rock lobster per annum with an average annual value of \$564 million. Western Australia contributes 6,400 tonnes per annum of rock lobster or an average of 64% of the total catch each year. Nearly all of this catch was western rock lobster (**Figure 2.6**).

The outlook for both the gross value of production and export value is positive. The Commonwealth Government has forecast the value of production to recover

gradually over the next four to five years to remain at values returned by the industry prior to 2013–14. The recovery will be led in part by strengthening trade relations with new export markets in north Asia, the ASEAN regions and to the United States. It will also be boosted by a tightening of supply in north America which will support higher forecast export prices in key Asian markets.¹



Image: WRL

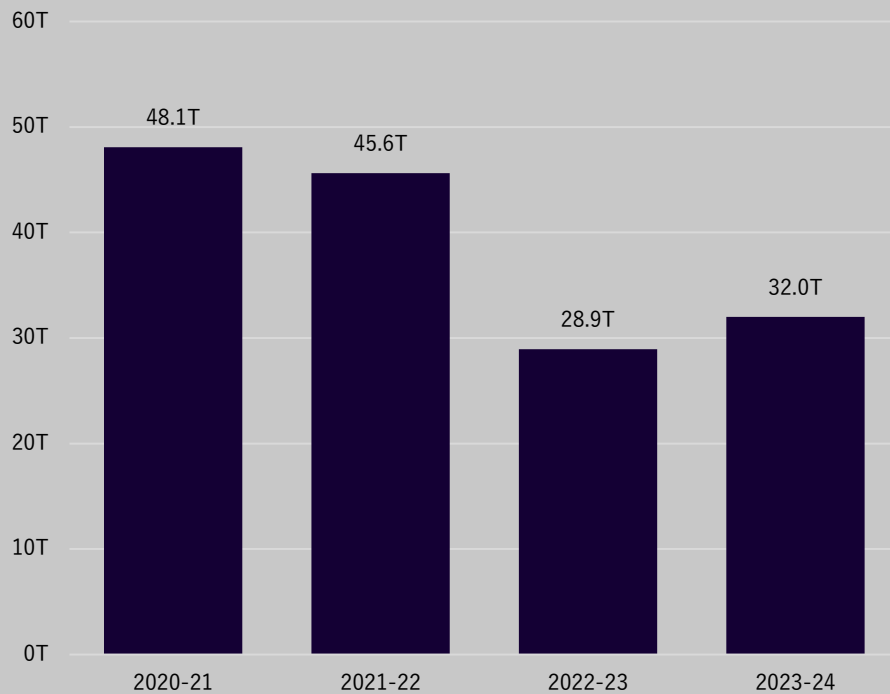
¹ Australian Bureau of Agricultural and Resource Economics and Sciences (2025), Australian fisheries and aquaculture outlook 2024, Outlook for Key Species <https://www.agriculture.gov.au/abares/research-topics/fisheries/fisheries-economics/fisheries-forecasts#rock-lobster>

Case Study 2 Western rock lobster back of boat sales

Back of boat sales were introduced in September 2020 to allow licensed commercial fishers to sell live western rock lobsters directly from fishing vessels to consumers. Since then, more than 109 western rock lobster vessels have participated in the scheme, visiting 21 different ports and recording sales of nearly 260,000 lobsters.

While popular throughout the year, sales typically peak in December to coincide with Christmas festivities when 60% of back of boat lobsters are sold. The majority of sales are from boats located in the Perth Metropolitan Area. The scheme is also important to regional areas with large numbers of sales at Lancelin, Port Denison and Dongara.

Figure 2.7 Western rock lobster back of boat sales, tonnes



Source: DPIRD

While back of boat sales account for a relatively small proportion of total industry sales, representing less than one per cent of the industry catch, they provide important community benefits by strengthening community ties to the fishing industry, and providing recreational enjoyment.

In 2023-24, there were 51,210 lobsters sold through back of boat sales, with a total estimated value of over \$1.4 million.



3 Economic Contribution

The western rock lobster industry provides an important direct economic benefit which further stimulates an indirect benefit to the broader economy. This chapter presents the economic contribution of the western rock lobster industry and its value chain using Input Output modelling. Results have been presented in terms of the direct and indirect contribution to Western Australia's GSP, and FTE job creation across the State.

3.1 Approach

ACIL Allen developed bespoke Input Output models of the Western Australian economy and for the Northern Zone, the Southern Zone and each of the key coastal towns and areas in which the western rock lobster industry operates to estimate the economic contribution of the industry to the economy. Results have been presented in terms of the industry's contribution to:

- **Gross Regional Product (GRP)** and **Gross State Product (GSP)** which is the broadest measure of economic activity and shows the contribution the industry to the value added of the economy
- **Job creation** showing the full time, part time and casual jobs supported directly in the industry and indirectly in the broader economy. Jobs are expressed in FTE terms, to take into account the additional working hours in multiple different businesses and sectors across the workforce.

Further details regarding ACIL Allen's Input Output model framework is presented in Appendix A.



3.2 Modelling assumptions

The inputs to the economic modelling include:

- **Employment:** the number of employees and the hours they have worked have been aggregated to form an FTE basis. An estimate of the workforce has been sourced from Western Rock Lobster and its members on a confidential basis and the numbers in this report have been rounded, and in some cases have not been reported, to protect confidentiality.
- **Spending:** the cost of inputs required to operate the businesses that comprise the western rock lobster supply chain including the cost of bait, pots, fuel, utilities, management and administration, and repairs and maintenance to gear and equipment, packaging, transport, and government fees including details of where these items are likely to have been purchased from. This information has primarily been sourced from

Western Rock Lobster members of the supply chain on a confidential basis.

- Wages: the wages paid to the employees of the western rock lobster industry have been estimated based on information reported by the Australian Bureau of Statistics and through desktop research of recruitment sites.
- Revenue: the revenue generated including from the sale of lobsters to processors, direct to customers through back of boat sales, and to the export market was sourced from Western Rock Lobster. Revenue calculations for tourism were provided through consultation.

Western rock lobster zones

The results in this report are presented by Northern Zone and Southern Zone and the towns within each zone.

Northern Zone

The Northern Zone is defined as the western rock lobster fishery Zone A and Zone B which is the area north of and including the town of Green Head. It includes the major rock lobster fishery ports of Geraldton, and Dongara and Port Denison as well as deliveries to a Carrier Boat.

Supporting the fishery are holding facilities at key locations, transport services to deliver catch from coastal ports to holding facilities, and significant boat building and servicing businesses in Geraldton and Dongara.

In the 2023-24 season, there were 212 lobster vessels were in operation within the Northern Zone, collectively accounting for 3,703 tonnes of catch. This represented just under half of the total western rock lobster catch in the State.

Southern Zone

The economic contribution of the Southern Zone driven by the catch of lobster, processing facilities located at Fremantle and Cervantes, boat building and servicing, and transport. In addition, the Lobster Shack at Cervantes is a major tourism destination attracting large numbers of visitors. This part of tourism has been included in the modelling because it relies on the commercial catch of western rock lobster.

In the 2023-24 season, a total of 141 lobster vessels were in operation within the Southern Zone, collectively accounting for 3,701 tonnes of catch. This represented just over half of the State’s catch of western rock lobster.

Table 3.1 Ports by zone

Northern Zone ports	Southern Zone ports
– Geraldton	– Lancelin
– Flat Rocks & Port Denison Maritime Facility	– Cervantes
– Freshwater, Knobby Head North, Leeman & Greenhead Maritime Facilities	– Jurien Bay Boat Harbour
– Carrier Boat	– Mandurah Ocean Marina & Dawesville
– Carnarvon Boat Harbour	– Wedge Island
– Kalbarri Maritime Facility	– Ledge Point
– Port Gregory Maritime Facility	– Fremantle Fishing Boat Harbour
– Horrocks Beach	– Two Rocks Marina
– Big Pigeon Island	– Mindarie Marina
	– Hillarys Boat Harbour
	– Bunbury, Hamelin Bay & Augusta Boat Harbours

Source: WRL

3.3 Contribution to the Western Australian economy

In 2023-24, the western rock lobster industry directly and indirectly contributed \$546.0 million to the GSP to Western Australia’s economy. This contribution is generated from the value added activities in the industry across the value chain from boat building and servicing, the harvesting, transport, and processing of lobsters, and tourism.

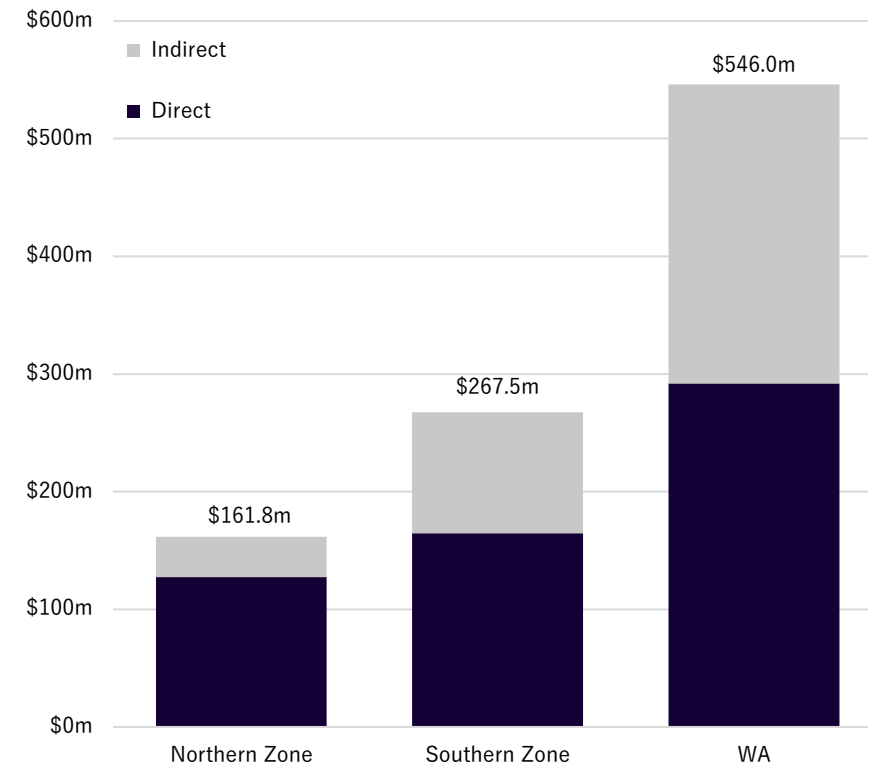
Gross product is a measure of the output generated by an economy over a year. It represents the total dollar value of all finalised goods and services produced and is considered a measure of the size of the economy.

In 2023-24, there were 215 vessels that targeted western rock lobster in Western Australia, which delivered a total catch of 7,403 tonnes with an estimated gross value of production of \$284.7 million. Based on this level of activity, ACIL Allen estimates that in 2023-24 the western rock lobster industry **contributed \$546.0 million to the Western Australian economy**. This contribution is generated from the value added activities in the industry across the value chain from boat building and servicing, the harvesting, transport, and processing of lobsters, and tourism. This is equivalent to 0.12% of the total value of the State economy.

Almost half of this contribution to GSP or \$267.5 million was realised in the Southern Zone from fishing, transport, holding facilities, processing facilities, boat building and servicing, and tourism activities. A further \$161.8 million or 30% was realised in the Northern Zone where fishing, transport, holding facility, and boat building and servicing activities take place, with the remaining 21% realised indirectly across the rest of the State.

Fishing is the largest contributor to the value added generated from the western rock lobster industry, generating \$409.0 million to the State economy in 2023-24 or 75% of the total contribution. Processing and transport contributed \$110.3 million or 20% of the total contribution, while boat building and servicing contributed \$18 million, and tourism \$8.6 million.

Figure 3.1 Contribution of the western rock lobster industry to the GSP of Western Australia, 2023-24, \$ million



Source: ACIL Allen

3.4 Contribution to job creation

In 2023-24, the western rock lobster industry supported 1,943 FTE jobs in the broader State economy including 923 FTE jobs directly employed by the industry.

Job creation captures the number of FTE jobs created or supported as a result of the western rock lobster industry including the direct and indirect (flow on) employment in the broader economy.

The western rock lobster industry provides employment for people in a range of occupations and skills sets including many that are located in regional areas helping these communities remain vibrant and diverse places to live and work.

In 2023-24, the industry directly supported 1,240 full time, part time, and casual jobs in fishing, processing, transport, boat building and servicing, and tourism of the value chain equivalent to **923 FTE jobs**. ACIL Allen estimates that the economic activities across the western rock lobster value chain in turn generated a further **1,020 FTE indirect jobs** across a broad range of businesses and industries in the wider economy.

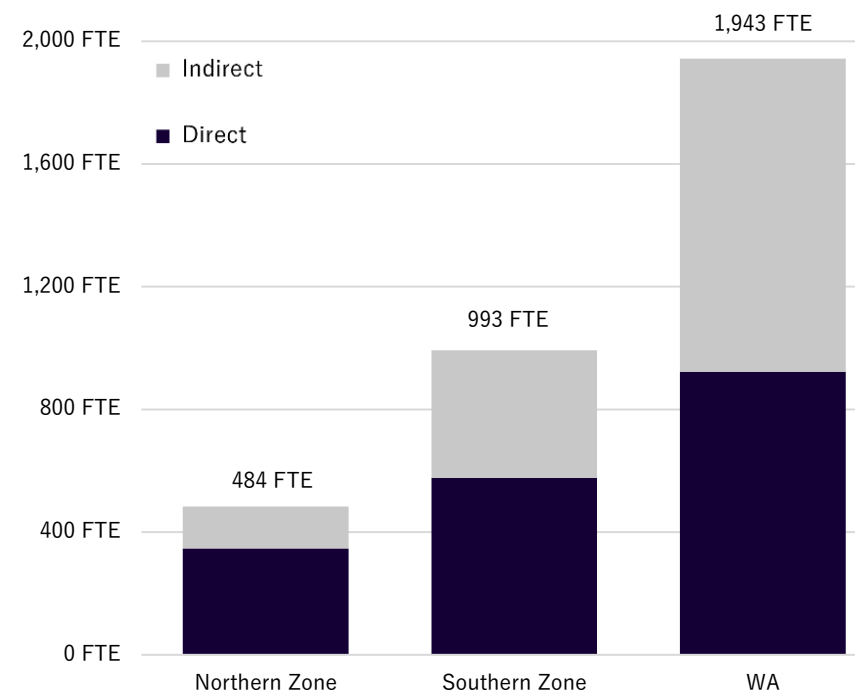
Together, the industry **created or supported 1,943 FTE jobs across Western Australia in 2023-24.**

The role of the industry in supporting jobs in other parts of the economy is significant. **For every person directly employed in the western rock lobster industry on a FTE basis, there are another 1.1 FTE jobs supported** in the broader Western Australian economy.

ACIL Allen estimates that the largest job creation is in the Southern Zone, where 993 FTE jobs or 51% of the total FTE job creation, was created or supported by the western rock lobster industry. This because of the larger direct employment by the industry in this Zone and the diversity of the business sector. A further 484 FTE jobs or 25% of jobs of all jobs, were created or supported in the Northern Zone, with the remainder across other regions and industries in the State.

The fishing part of the value chain created 1,202 jobs or 62% of all jobs created, with the remaining jobs concentrated in transport and processing (607 FTE jobs), boat building and servicing (82 FTE jobs), and tourism (53 FTE jobs).

Figure 3.2 Contribution of the western rock lobster industry to job creation in Western Australia, 2023-24, FTE



Source: ACIL Allen

3.5 Contribution by western rock lobster value chain

Each part of the western rock lobster value chain provides an important economic contribution in the form of the jobs it creates and the value it adds to the economy. Fishing provides the largest contribution to GSP and job creation with significant contributions also realised from the holding, transport and processing of western rock lobster.

Fishing

There were 215 vessels employing an estimated 533 skippers and crew that used baited pots to fish for 7,403 tonnes of western rock lobster in Western Australia in 2023-24.

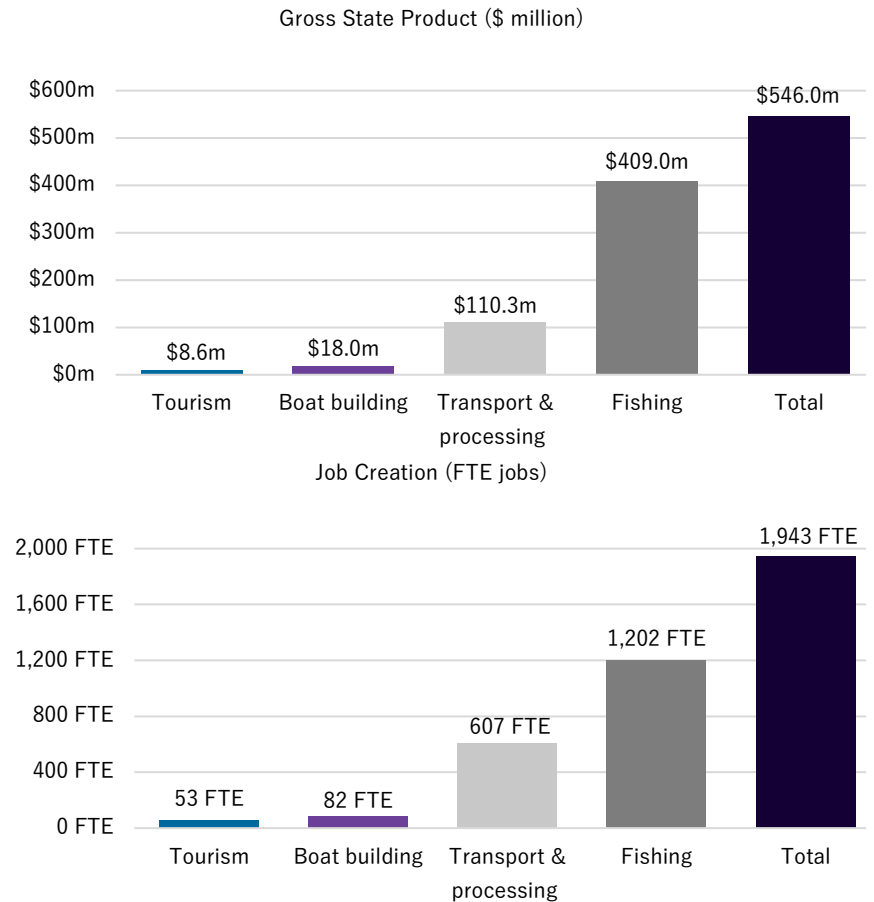
ACIL Allen estimates that in 2023-24, fishing activities contributed \$409.0 million to the GSP of Western Australia or 75% of the total contribution to GSP from the western rock lobster industry. The contribution by Zone is relatively equal reflecting the value of the catch, with the Southern Zone contributing \$159.1 million and the Northern Zone contributing \$144.9 million.

Fishing was a major employer providing jobs for 533 FTE skippers and crew in 2023-24. In addition, the flow on employment created by the industry accounted for a further 669 FTE jobs, resulting in **total employment creation of 1,202 FTE jobs in Western Australia.**

Fishing is the dominant feature of the western rock lobster value chain in the Northern Zone, contributing 90% of the total contribution to Gross Regional Product and 74% of job creation in the Zone.

Fishing is also the major contributor to the GSP of the Southern Zone, accounting for \$159.1 million or 59% of the total value of the western rock lobster economic contribution in the Zone. The industry is the second largest contributor to job creation in the Southern Zone, creating or supporting 425 FTE jobs or 43% of all jobs created by the western rock lobster industry in this Zone.

Figure 3.3 Economic contribution of the value chain of the western rock lobster industry to Western Australia, 2023-24



Source: ACIL Allen

Processing and transport

Live lobsters are prepared for market in processing plants located in Perth and Cervantes, with the majority of processors located in Perth in proximity to Perth Airport as the international gateway for lobster exports.

In 2023-24, 6,684 tonnes of lobster were prepared for the export market generating employment for an estimated 354 FTE staff. The activities of this part of the value chain, and the spending by the employees, created a further 253 FTE jobs across the broader economy. Taken together, this part of the western rock lobster industry value chain created or supported 31% of all direct and indirect FTE jobs in the industry in 2023-24.

Processing and transport is the major job creator in the Southern Zone, accounting for 48% of all FTE direct and indirect jobs. In the Northern Zone this part of the value chain accounts for 20% of all direct and indirect FTE jobs.

Processing and transport added \$110.3 million to Western Australia's GSP in 2023-24, accounting for 20% of the total contribution of the western rock lobster industry to the State. The majority of this contribution is realised in the Southern Zone where the industry accounted for \$72.5 million or one third of the total contribution by the western rock lobster industry in that Zone. It also provides an important part of the economy of the Northern Zone contributing

\$10.7 million to the total economic contribution. Boat sales, building, and servicing.

The boat building and servicing part of the supply chain supplies new and second hand boats to the fishery and provides servicing and maintenance to the fleet. Many of the businesses in the industry are located in regional areas, including Dongara and Geraldton, providing important economic value and employment in these areas.

In 2023-24, it is estimated that **boat building and servicing contributed \$18 million to the economy of Western Australia**, representing three per cent of the total contribution of the western rock lobster industry. This part of the value chain accounted for an estimated **82 direct and indirect FTE jobs** in the Western Australian economy in the same year.

Tourism

It is estimated that tourism contributed \$8.6 million to the Western Australian economy as a result of the activities associated with the western rock lobster industry. All of this value was realised in the Southern Zone. The western rock lobster industry generated 31 FTE jobs from tourism, of which 18 were estimated to be directly employed in tourism.



Images: WRL

3.6 Contribution to regional communities

The western rock lobster industry is a key employer in regional Western Australia, providing jobs for around 745 people in fishing, processing, transport, and tourism. The industry also contributes to regional economies through its spending with local businesses in the production of western rock lobster.

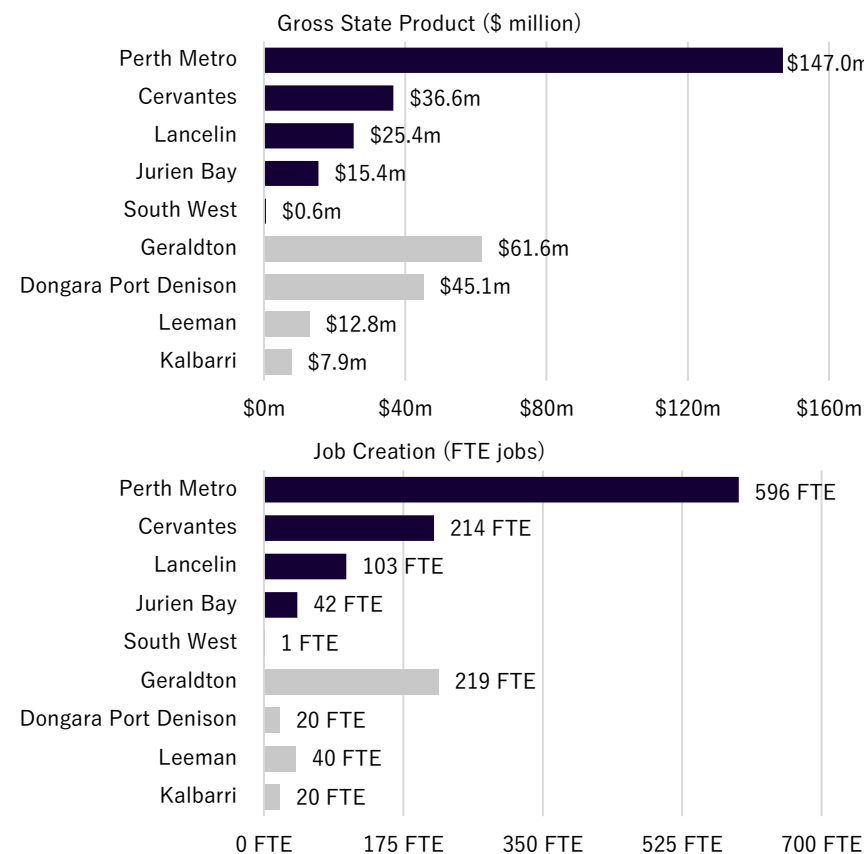
The importance of the western rock lobster industry to regional Western Australia is reflected in the large number of direct and indirect jobs employed or supported by the industry and the value that it adds to regional economies. Many of the towns in which the industry is located are small coastal towns that have limited employment opportunities and economies. The western rock lobster industry helps to maintain the social and economic fabric of these towns. This section sets out the economic contribution that the industry makes to a selection of towns and areas in the Northern Zone and the Southern Zone.

In 2023-24, the western rock lobster industry contributed \$399 million to the regions outside of the Perth Metropolitan Region. The largest contribution was realised in Geraldton, which accounted for 15% of the total regional product from the western rock lobster industry. The industry is also prominent in the towns of Dongara and Port Denison (11% of GRP) and Cervantes (9.2% of GRP). Whilst the contribution in other regional towns is smaller, it remains important to the economic livelihood of these regional centres.

In 2023-24, the industry directly employed around 750 full time, part time and casual jobs in regional Western Australia in fishing, holding facilities, transport, administration, and tourism. The activities of the industry in Geraldton and Cervantes account for the largest regional job creation with each town supporting 16% of the 1,347 FTE direct and indirect jobs supported by the industry in the broader economy. Lancelin also supports large job creation contributing 7.7% of all regional FTE jobs created by the industry.

ACIL Allen estimates that for every FTE person directly employed by the industry in regional Western Australia, a further 1.3 FTE job was created in the regions.

Figure 3.4 Economic contribution of the western rock lobster industry to the economy by town, 2023-24



Source: ACIL Allen

Economic contribution of the Northern Zone

The Northern Zone of the western rock lobster industry includes fishery Zone A and Zone B which is the area north of and including the town of Green Head. It includes the key ports of Geraldton, and Dongara and Port Denison as well as at multiple smaller ports such as Kalbarri, Port Gregory, Horrocks, and Leeman. In addition, a Carrier Boat operates in the Zone which in 2023-24, delivered 360.3 tonnes of product or 9.7% of the total catch in the Northern Zone.

There are holding facilities throughout the Northern Zone including at Geraldton, Dongara and Port Denison, and Leeman, as well as boat building and servicing businesses in Geraldton and Dongara.

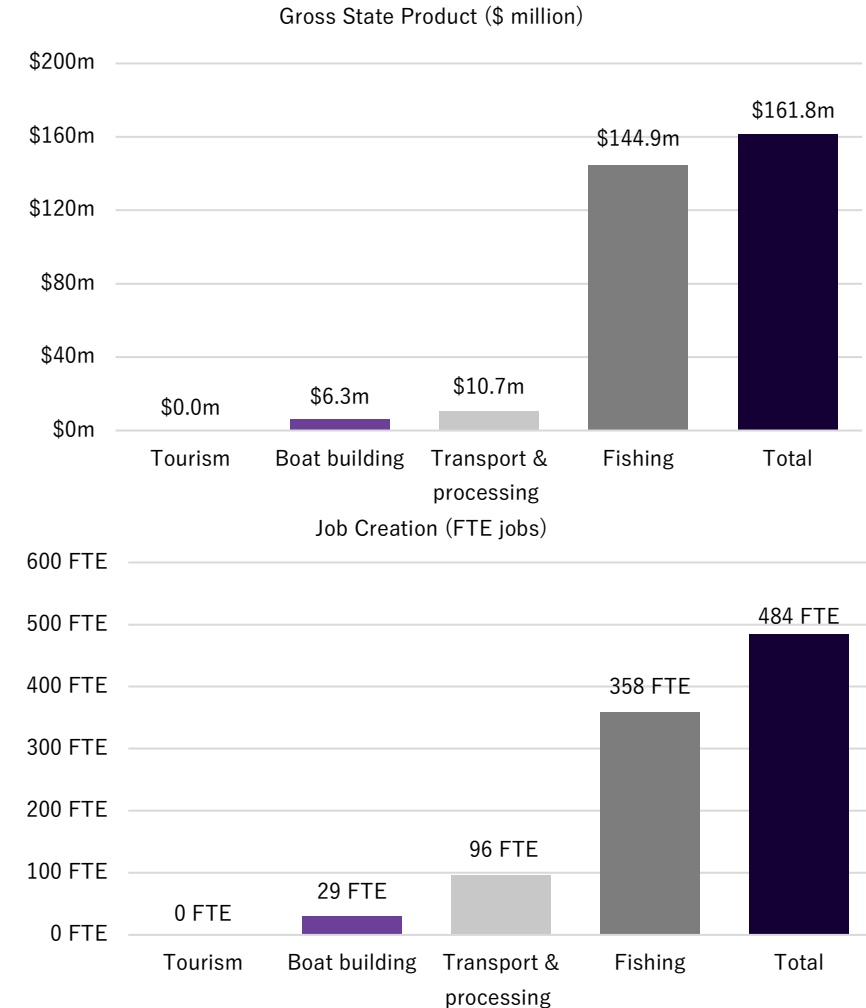
In 2023-24, there were 120 lobster vessels in the Northern Zone that delivered 3,703 tonnes of western rock lobster or just over half of the State's total catch. An estimated 71% of the catch in the Northern Zone is delivered to ports in Geraldton, Dongara and Port Denison making them the key port towns for the industry in regional Western Australia.

In 2023-24, **the western rock lobster industry in the Northern Zone contributed \$161.8 million to the GSP of Western Australia.** This is equivalent to 30% of the total contribution by the industry to the State economy.

There was job creation of 484 FTE jobs as a result of the western rock lobster industry, which is 25% of the total jobs created by the industry in the State. This means that for every FTE job directly employed by the western rock lobster industry, a further 0.4 FTE jobs are created in the economy of the Northern Zone.

	Gross Regional Product	Job Creation
Kalbarri	\$7.9m	20 FTE
Geraldton	\$61.6m	219 FTE
Dongara and Port Denison	\$45.1m	114 FTE
Leeman	\$12.8m	40 FTE

Figure 3.5 Economic contribution of the western rock lobster industry to the Northern Zone, 2023-24



Source: ACIL Allen

Kalbarri



The town of Kalbarri is located in the Shire of Northampton. In 2023-24, there were 15 vessels that delivered an estimated catch of 230.9 tonnes of western rock lobster to the Kalbarri Maritime Facility. This is around 6.2% of the total catch in the Northern Zone.

In 2023-24, the activities of the western rock lobster industry in Kalbarri contributed \$7.9 million to the GSP of Western Australia with all of this value contributed by fishing. The Gross Town Product of Kalbarri is \$130.1 million, with the western rock lobster

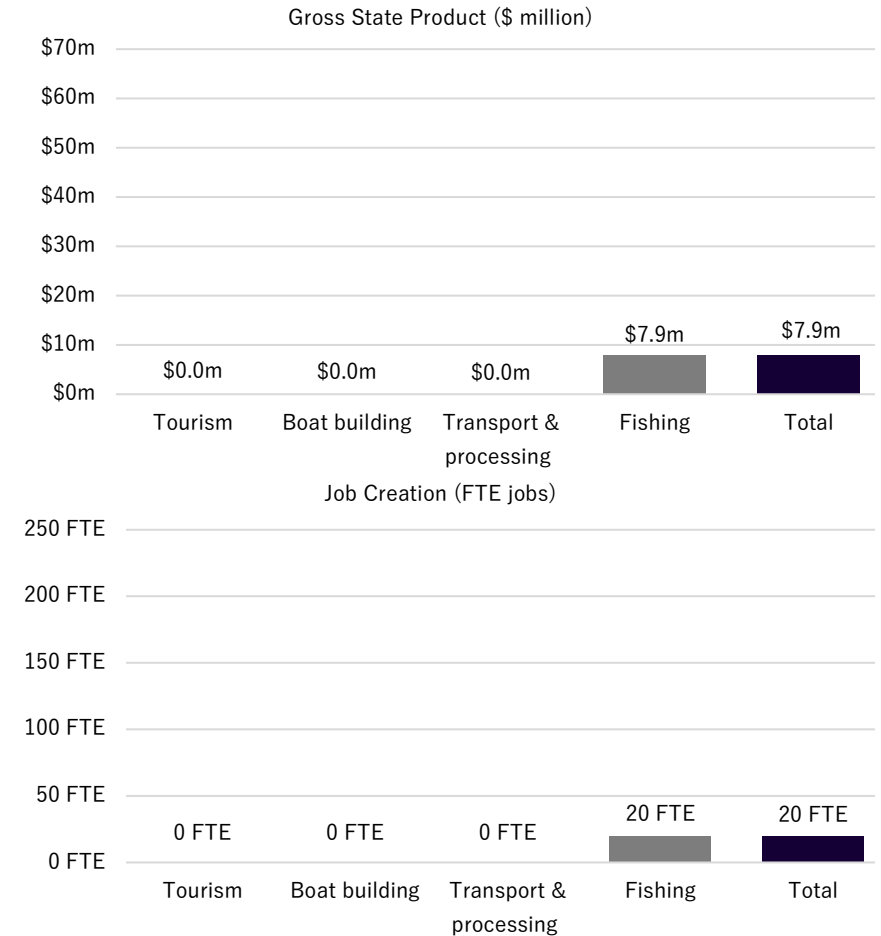
industry accounting for approximately 6.0% of this value.

The total direct and indirect job creation as a result of the western rock lobster industry was 20 FTE which is 4.2% of all job creation in the Northern Zone. There are an estimated 425 FTE employed people in Kalbarri with the western rock lobster industry supporting 4.7% of jobs in the town.²

The contribution of the western rock lobster industry in the town of Kalbarri is equivalent to 4.9% of total contribution by the Northern Zone to the economy and 4.2% of job creation.

² FTE workers have been calculated by adding the part time and full time workers reported in the 2021 Australian Bureau of Statistics Census to provide an estimate of the FTE workforce.

Figure 3.6 Economic contribution of the western rock lobster industry to the town of Kalbarri, 2023-24



Source: ACIL Allen

Geraldton



Geraldton is the major population centre north of Perth and the regional service centre for the Mid West region providing businesses and services to the surrounding economy and population. Rock lobster fishing commenced from the town in the early 1900s and has grown to become one of the most important towns for the western rock lobster industry.

In 2023-24, there were 82 vessels that delivered a catch of 1,375.4 tonnes to ports in Geraldton. The town receives 37% of the

total catch of western rock lobster in the Northern Zone which is the largest share received by any of the ports in the Zone.

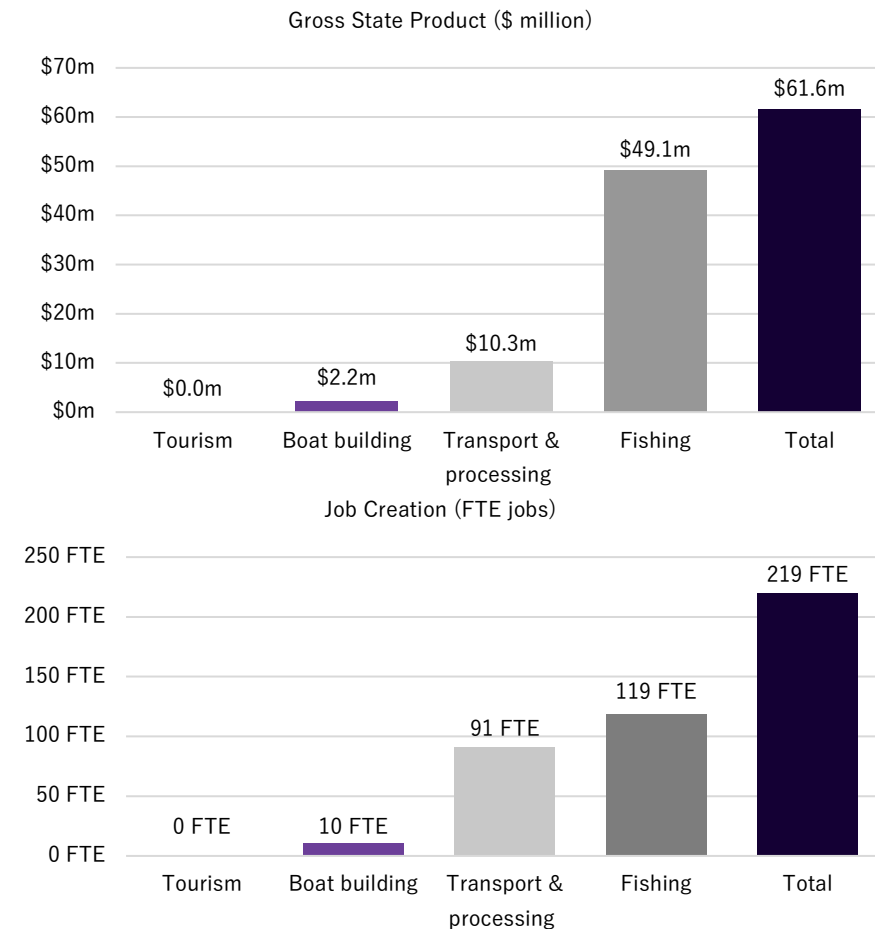
In 2023-24, the western rock lobster industry in the town contributed \$61.6 million to the GSP of Western Australia, which is the largest contribution of any regional town. Its contribution is equivalent to 38% of the total contribution of the Northern Zone to the economy. The Gross Town Product of Geraldton is estimated to be \$4,245.5 million with the western rock lobster industry contributing 1.5% of this value.

The largest contribution is from fishing which contributed \$49.1 million or 80% of the total value. The activities in transport and the holding facilities contributed \$10.3 million and boat building contributed \$2.2 million.

The western rock lobster industry in Geraldton directly and indirectly created 219 FTE jobs in the broader economy, including 119 FTE jobs created from fishing activities and 91 FTE jobs created from the activities of the transport and holding facilities. To place this in perspective, this job creation in the broader economy is equivalent to just under two per cent of all jobs in Geraldton.

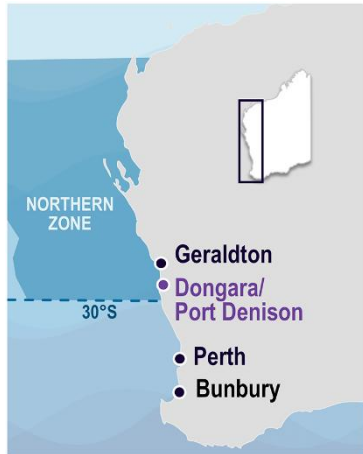
This is the largest job creation of any regional town and is equivalent to 45% of all job creation in the Northern Zone.

Figure 3.7 Economic contribution of the western rock lobster industry to the town of Geraldton, 2023-24



Source: ACIL Allen

Dongara and Port Denison



Dongara and Port Denison are neighbouring towns located in the Shire of Irwin. Rock lobster fishing began in the towns in the 1950's and continues to play an important role in their economies. In 2023-24, there were 51 vessels that delivered a catch of 1,224.2 tonnes of western rock lobster to the Port Denison Marina. This is one third of the total catch in the Northern Zone and represents the second largest catch in regional Western Australia after Geraldton.

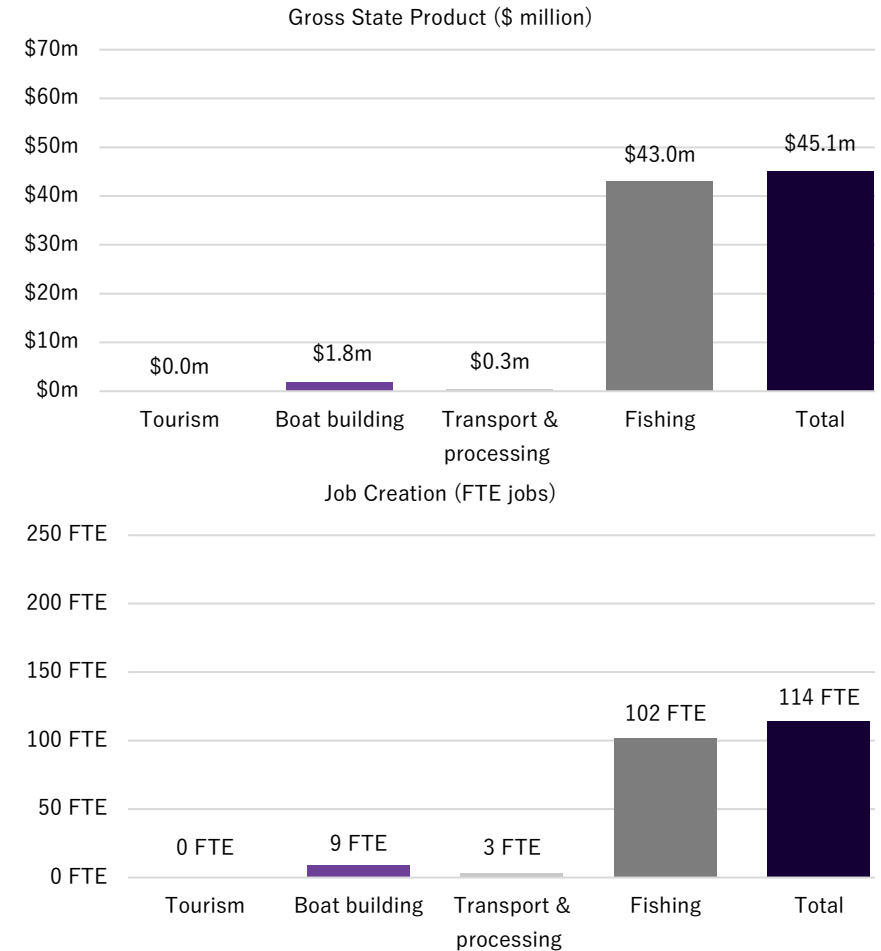
In addition to fishing, there are lobster handling facilities located in the towns as well as boat building and servicing businesses.

In 2023-24, the activities of the western rock lobster industry in Dongara and Port Denison contributed \$45.1 million to the GSP of Western Australia. The largest contribution was from fishing with smaller contributions from boat building and servicing and from the holding facilities located in the towns.

The towns of Dongara and Port Denison account for 28% of the total contribution of the western rock lobster industry to the economy of the Northern Zone. The western rock lobster industry plays a major role in the economy of the towns with the western rock lobster industry accounting for the equivalent of 21% of their \$213.0 million Gross Town Product.

The industry is a major employer providing jobs in fishing, boat building and servicing, and at holding facilities. In 2023-24, there was total direct and indirect job creation of 114 FTE jobs as a result of the western rock lobster industry in the towns which is 24% of all job creation in the Northern Zone. To place this in perspective, this job creation in the broader economy is equivalent to 13% of jobs in the towns.

Figure 3.8 Economic contribution of the western rock lobster industry to the towns of Dongara and Port Denison, 2023-24



Source: ACIL Allen

Leeman



Leeman is located in the Shire of Coorow. The rock lobster industry began in the area in the late 1950's and continues to play a key role in the town's economy. In 2023-24, there were 19 vessels that delivered 382.3 tonnes of catch to Leeman and surrounding areas.³

Leeman has the smallest economy of the towns in this report with a Gross Town Product of \$17.1 million. In 2023-24, the western rock lobster industry contributed \$12.8 million to the Gross Town Product of Leeman which is three quarters of the town's

economy. This is the largest share of any of the towns in this report and is an example of the importance of the western rock lobster industry to regional Western Australia.

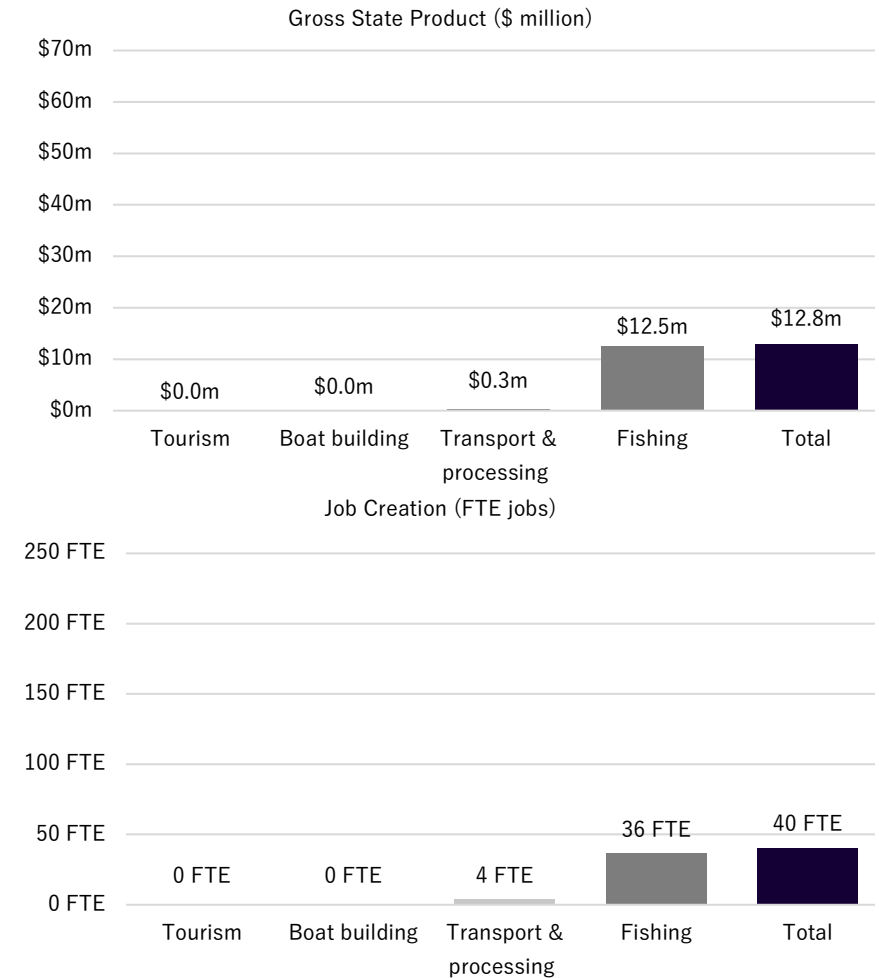
Nearly all of the contribution to the economy is from fishing which contributed \$12.5 million. A smaller contribution is realised from the existence of holding facilities in the town which generated \$0.3 million in economic value.

In 2023-24, the industry created or supported 40 FTE jobs as a result of the activities of the industry in the town including the direct jobs employed by the industry and the indirect jobs in the broader economy. The job creation associated with the town is equivalent to 39% of the size of the town's FTE workforce.

Nearly all of these direct and indirect jobs can be attributed to fishing (36 FTE jobs), with a further four FTE jobs created by the activities of the handling facilities. Although an important part of the town's economy, the activities in Leeman only accounted for 8% of the share of contribution to GSP and to job creation in the Northern Zone.

³ Includes the catch landed at Freshwater, Knobby Head North, Leeman and Greenhead

Figure 3.9 Economic contribution of the western rock lobster industry to the town of Leeman, 2023-24



Source: ACIL Allen

Economic contribution of the Southern Zone

The economic contribution of the Southern Zone is significant and driven by the catch of lobster, processing facilities located at Fremantle and Cervantes, boat building and servicing, transport, and tourism with the Lobster Shack at Cervantes attracting thousands of visitors and charters offered in other towns including Jurien Bay.

In 2023-24, there were 95 lobster vessels that delivered their catch to ports in the Southern Zone carrying 3,701 tonnes of lobster with the majority delivered to ports in the Perth Metropolitan Area. The catch in the Southern Zone represents just under half of the state's total western rock lobster catch for the season.

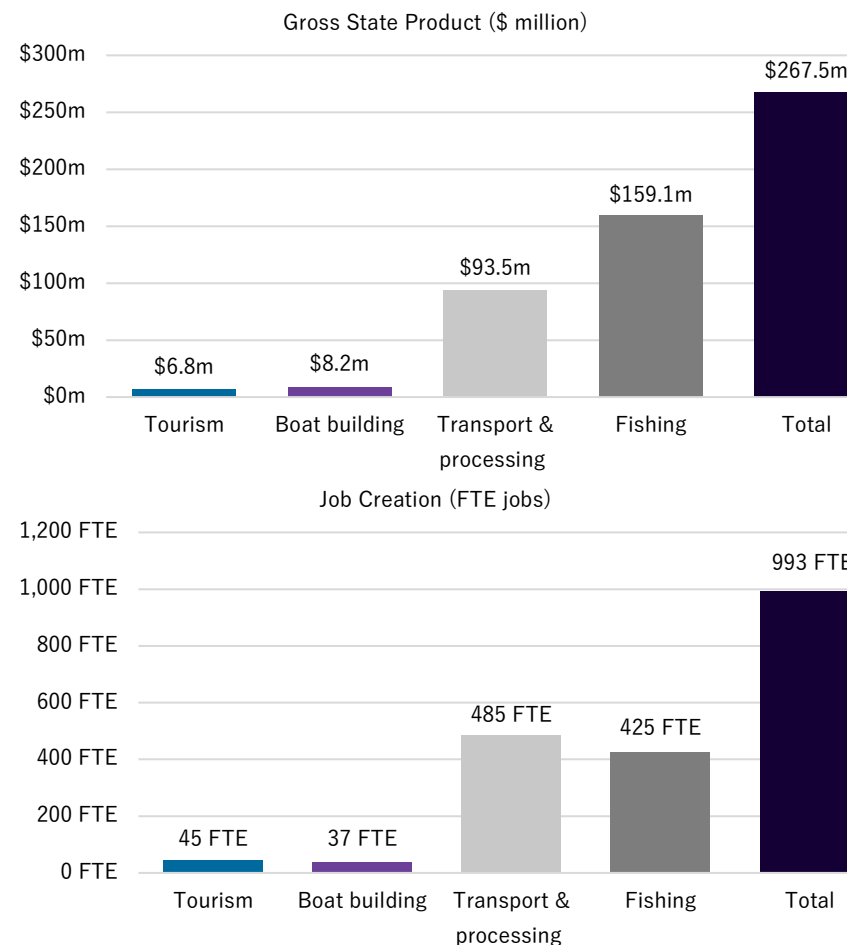
	Gross Regional Product	Job Creation
Jurien Bay	\$15.4m	42 FTE
Cervantes	\$36.6m	214 FTE
Lancelin	\$25.4m	103 FTE
Perth	\$147.0m	596 FTE
South West	\$0.6m	1 FTE

In 2023-24, the Southern Zone contributed \$267.5 million to the GSP of Western Australia which is 49% of the total contribution of the western rock lobster industry to the State economy. Across the western rock lobster value chain, the fishery is the major contributor, generating \$159.1 million or 59% of this value.

There are an estimated 830 people directly employed in the western rock lobster industry in the Southern Zone, which is equivalent to 576 FTE employees. In 2023-24, there was total job creation in the Southern Zone of 993 FTE including direct and indirect employment. The largest direct employment and job creation are in transport, holding facilities, and processing which directly employ around 275 FTE and support total job creation of 485 FTE direct and indirect jobs.

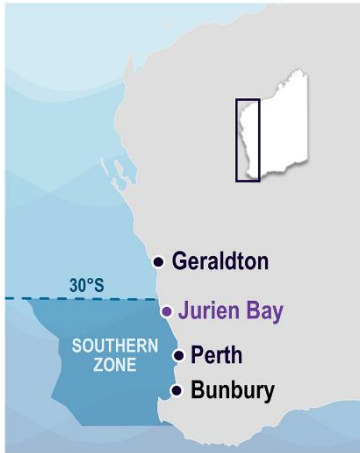
Fishing is also a major employer in the Southern Zone accounting for 425 FTE jobs of which 265 FTE jobs are directly employed on fishing vessels.

Figure 3.10 Economic contribution of the western rock lobster industry to the Southern Zone, 2023-24



Source: ACIL Allen

Jurien Bay



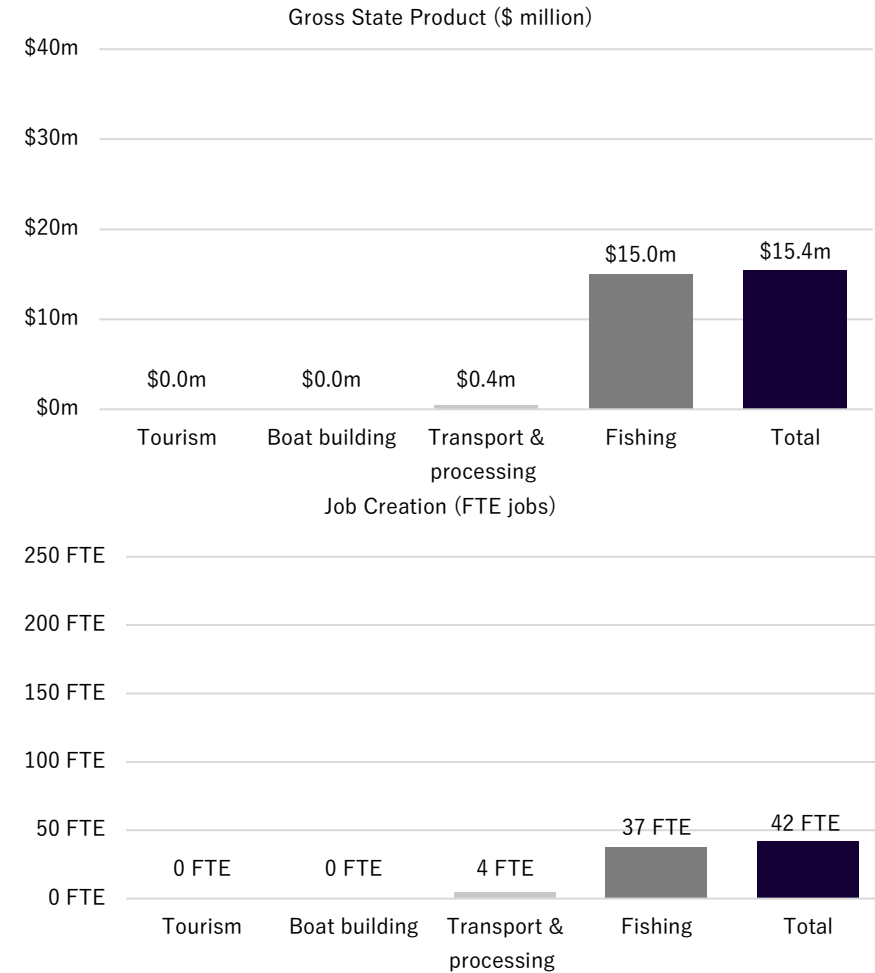
Jurien Bay is located in the Shire of Dandaragan. Rock lobster as a commercial industry began in Jurien Bay in the 1950's and remains an important part of the local economy. In 2023-24 there were eight vessels that delivered 434.7 tonnes of western rock lobster to the Jurien Bay Boat Harbour. This is equivalent to 12% of the catch of the Southern Zone. There are also holding facilities in the town which prepare lobster for processing.

In 2023-24, the western rock lobster industry in Jurien Bay contributed \$15.4 million to the GSP of Western Australia. This is equivalent to 5.8% of the contribution of the Southern Zone. The town as a Gross Town Product of \$241.6 million with the western rock lobster industry contributing 6.4% of this value.

Nearly all of this contribution is from fishing which accounted for \$15.0 million of GSP, while the activities of the holding facilities contributed \$0.4 million.

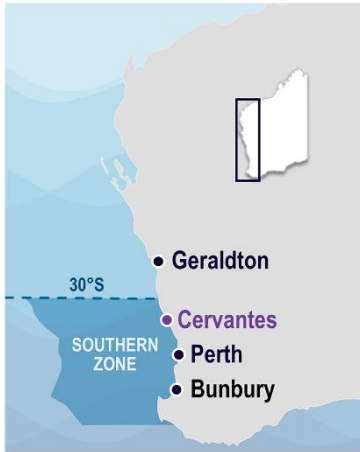
In 2023-24, the western rock lobster industry created 42 FTE jobs in Jurien Bay including the direct and indirect jobs supported by the industry. Nearly all of these were created by fishing which supported 37 FTE jobs and handling facilities which created 4 FTE jobs. The job creation of the western rock lobster industry in the broader economy associated with its activities in Jurien Bay is equivalent to around 7.4% of the size of the employed workforce in the town.

Figure 3.11 Economic contribution of the western rock lobster industry to the town of Jurien Bay, 2023-24



Source: ACIL Allen

Cervantes



Cervantes is also located in the Shire of Coorow. Rock Lobster fishing has played an integral part of the town's economic development since the 1960's and remains its most valuable economic contributor. In 2023-24 there were 14 vessels that delivered their catch of western rock lobster to Cervantes with a combined catch of 729.9 tonnes. The only regionally based rock lobster processor in the State is located in Cervantes as well as holding facilities that support the processing facility in the town and those in the Perth Metropolitan Area.

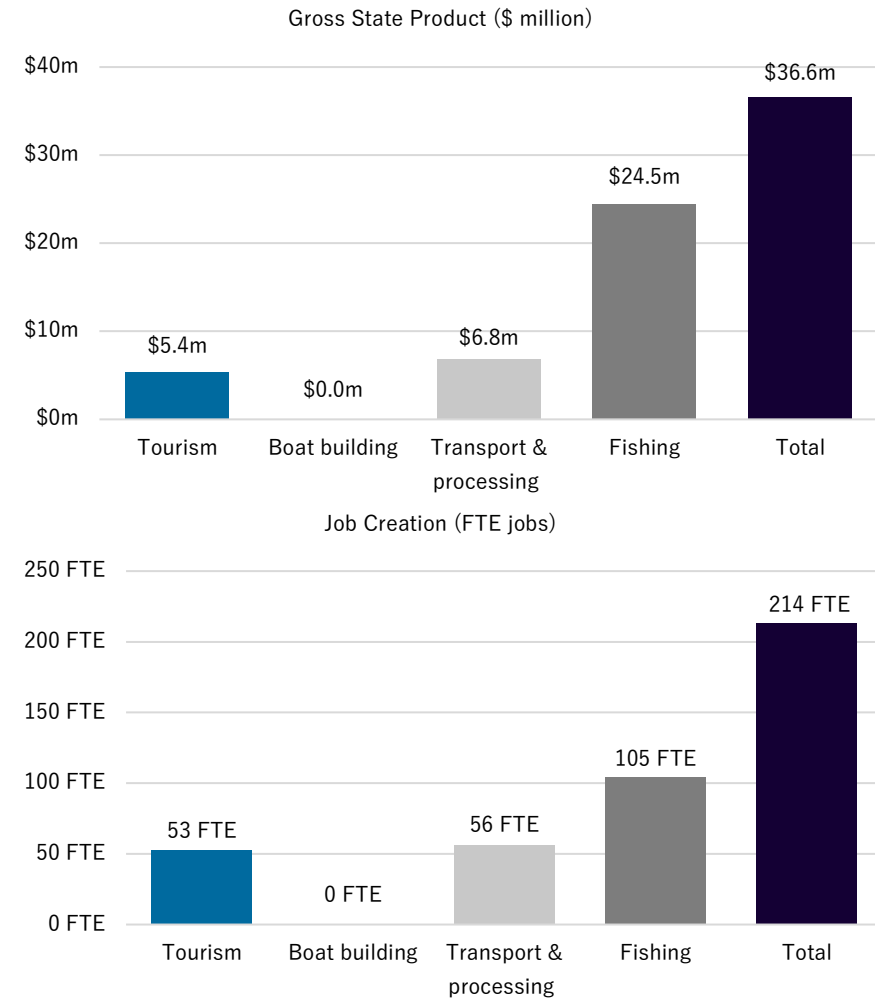
The Lobster Shack is a popular visitor destination that forms part of the processing facility, offering tours and meals. The facility attracts large numbers of day trippers and overnight visitors to the town providing jobs and economic value.

In 2023-24, the western rock lobster industry in Cervantes contributed \$36.6 million to GSP which is 14% of the economic contribution generated by the Southern Zone. This is the largest regional contribution in the Southern Zone and the third largest contribution in regional Western Australia with the value driven by fishing, and large contributions from processing and transport, and tourism. In 2023-24, fishing provided \$24.5 million or two thirds of the total contribution. The processing and holding facilities contributed a further \$6.8 million and tourism contributed \$5.4 million.

The town supports a very small economy with an estimated Gross Town Product of \$55.1 million with the western rock lobster industry contributing 67% of this value. This is the second largest share of any economy by the industry.

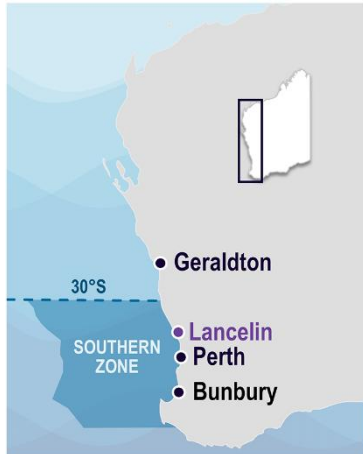
The industry also creates a large amount of direct and indirect job creation of 214 FTE associated with the town of which 105 FTE is from fishing, 56 FTE from processing and holding facilities, and 53 FTE from tourism.

Figure 3.12 Economic contribution of the western rock lobster industry to the town of Cervantes, 2023-24



Source: ACIL Allen

Lancelin



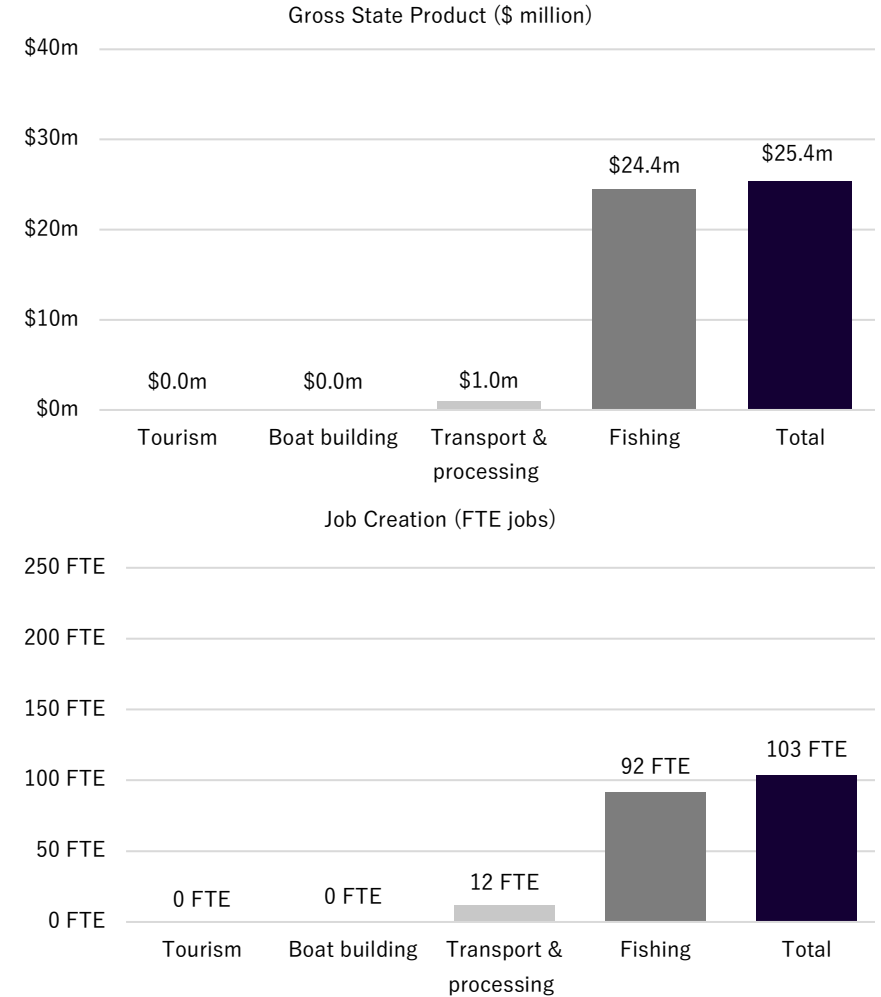
Lancelin is a town in the Shire of Gingin. The rock lobster industry began in the town in the late 1940's and the industry continues to add to the economic diversification and workforce. In 2023-24, there were 27 lobster vessels that delivered 730.9 tonnes of catch to the Lancelin Maritime Facility.

There are holding facilities in the town where lobsters are prepared for transport to processing facilities.

In 2023-24, the western rock lobster industry in the town contributed \$25.4 million to the GSP which is 9.5% of the total contribution of the industry in the Southern Zone. The town has a very limited economy with an estimated Gross Town Product of \$57.4 million with the western rock lobster industry contributing 6.4% of this value.

The western rock lobster industry provides direct employment in holding facilities and associated transport industry. In 2023-24, there was job creation of 103 FTE jobs associated with the town of which 92 FTE were associated with fishing and 12 FTE from transport and handling. This job creation is significant with the industry supporting job creation in the broader economy equivalent to the entire workforce of the town.

Figure 3.13 Economic contribution of the western rock lobster industry to the town of Lancelin, 2023-24



Source: ACIL Allen

Perth Metropolitan Area

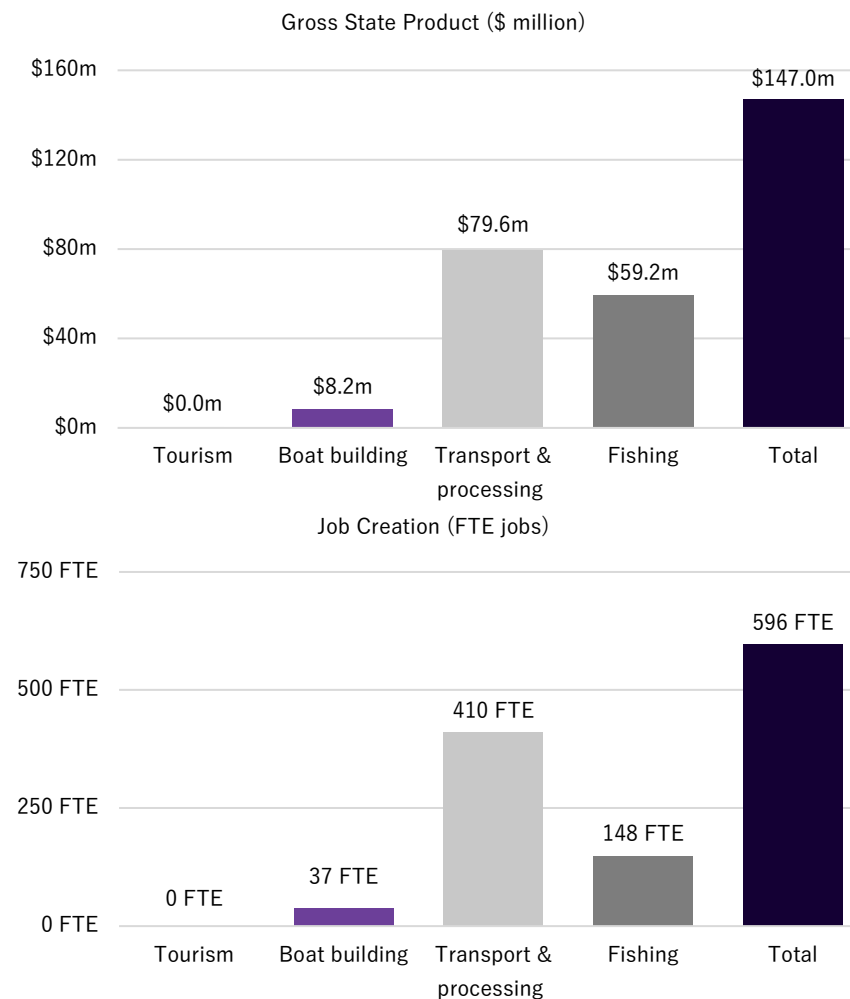
The Perth Metropolitan Area stretching from Two Rocks in the north to Mandurah in the south. In 2023-24, there were 77 vessels that delivered their catch to Two Rocks Marina, Fremantle Fishing Boat Harbour, Mandurah Ocean Marina, Mindarie Marina, Hillarys Boat Harbour, Mangles Bay (Rockingham), and Port Coogee Marina. Together they received a total catch of 1,584.3 tonnes.

There are significant world class processing facilities located in Perth which are strategically located close to Perth Airport as the international gateway to the export market. There are holding facilities located in Mandurah and Two Rocks, and boat building and maintenance businesses are also located in the area.

In 2023-24, the activities of the western rock lobster industry in the Perth Metropolitan Area, contributed \$147.0 million to the GSP of Western Australia or 27% of the total contribution to the State economy and 55% of the contribution of the industry in the Southern Zone. This is the largest contribution of any town associated with the industry and is due to the large presence of the industry and the supply chains that support it. Perth is the only location where the handling, transport and processing parts of the supply chain contribute a larger share of GSP than fishing contributing \$79.6 million compared to \$59.2 million from fishing and \$8.2 million from boat building and servicing.

There are an estimated 341 FTE jobs directly employed by the western rock lobster industry in the Perth Metropolitan Area in boat building and servicing, fishing transport, holding facilities, and processing facilities. Job creation was also the largest in the Perth Metropolitan Area with the activities of the industry contributing 596 FTE jobs or 31% of all job creation in the State and 60% of job creation in the Southern Zone. An estimated 410 FTE of jobs were created by the handling, transport and processing parts of the supply chain while 148 FTE were created from fishing, and 37 FTE from boat building and servicing.

Figure 3.14 Economic contribution of the western rock lobster industry to the Perth Metropolitan Area, 2023-24



Source: ACIL Allen

South West

The South West region is the area to the south of the Perth Metropolitan Area and includes the regional cities of Busselton and Bunbury. In 2023-24, there were three vessels that delivered catch to ports in the region carrying 16.2 tonnes of western rock lobster.

The industry makes a small contribution to the economy of the region making up \$0.6 million of Gross Regional Product in 2023-24 with all of that value contributed by fishing. The activities of the western rock lobster industry in the region contributed one FTE job in the broader economy including the direct and indirect jobs created by the industry.



Figure 3.15 Economic contribution of the western rock lobster industry to the South West, 2023-24



Source: ACIL Allen

Appendices



A Input Output Modelling Framework

Input Output models capture the direct and indirect effects of expenditure by capturing, for each industry, the industries it purchases inputs from and also the industries it sells its outputs to. For example, the Input Output model for Western Australia captures purchases from and sales to industries located in Western Australia, as well as imports from outside of Western Australia.

Figure A.1 depicts how expenditure from an industry is traced through a (very simple) economy.

The initial impact occurs in when the businesses in an industry make purchases from other industries. In the cast of the western rock lobster industry this includes purchases of inputs such as bait, gear, fuel, and packaging.

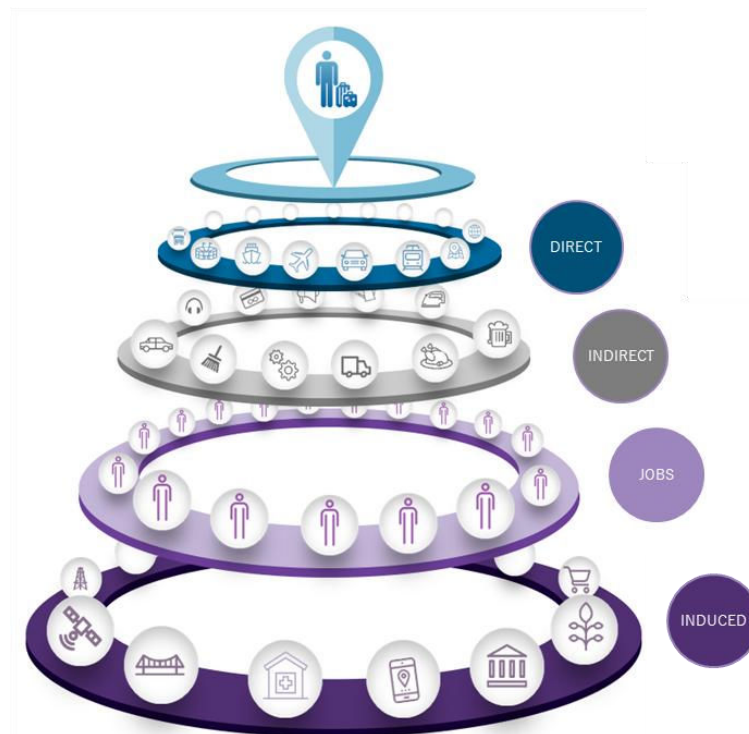
These purchases by the western rock lobster industry means that the other industries increase their output as well. They in turn require inputs from other industries to satisfy this additional demand which also stimulates those industries.

The impacts grow smaller with each iteration and ultimately converge to zero. This is because they always only share the impact that occurred in the preceding iteration.

This direct and indirect demand for goods and services requires labour stimulating increases in jobs and parts of jobs along the supply chains that directly and indirectly support the western rock lobster industry.

The flow of expenditure from business to business results in wages and salaries being paid to employees, profits to be earned, and taxes to be paid to government. In turn, the stimulus to wages, profits, and taxes also results in flow-on or induced economic activity.

Figure A.1 “Trace Through” of Expenditure in an Input Output Model



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