

SWAMC – Federal Fisheries Management



Alyeska Seafoods, Unalaska

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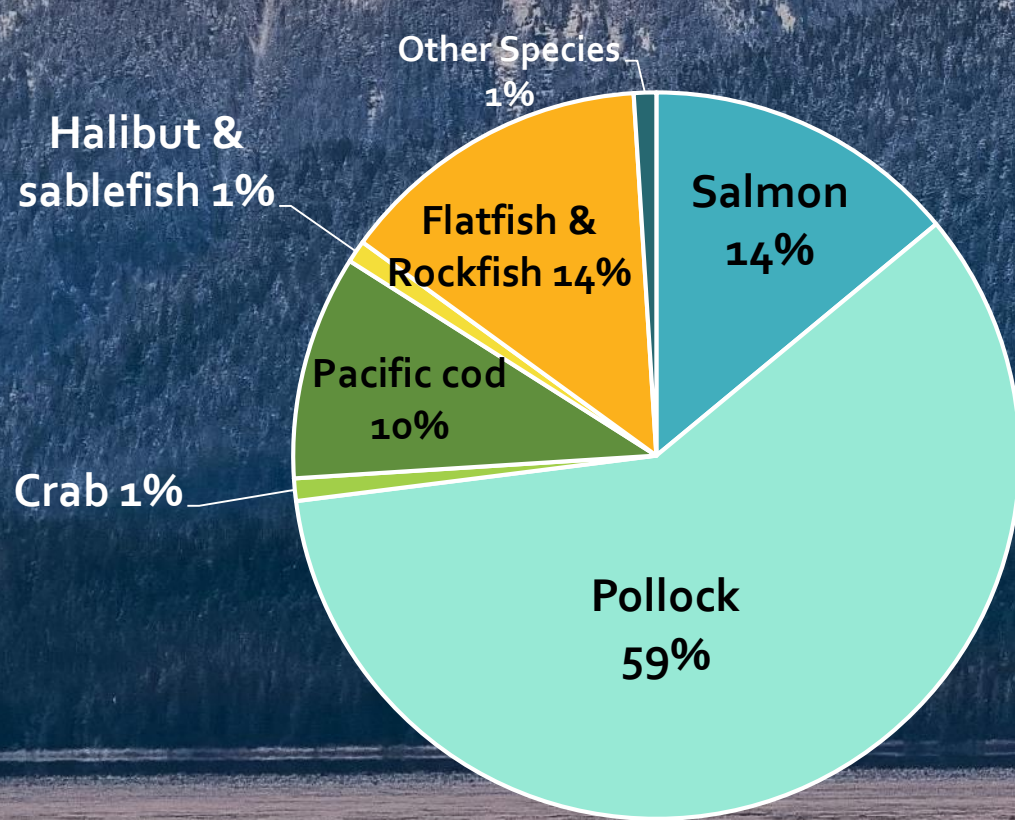


PSPA
PACIFIC SEAFOOD
PROCESSORS ASSOCIATION
EST. 1914

Alaska Seafood – What do we harvest?

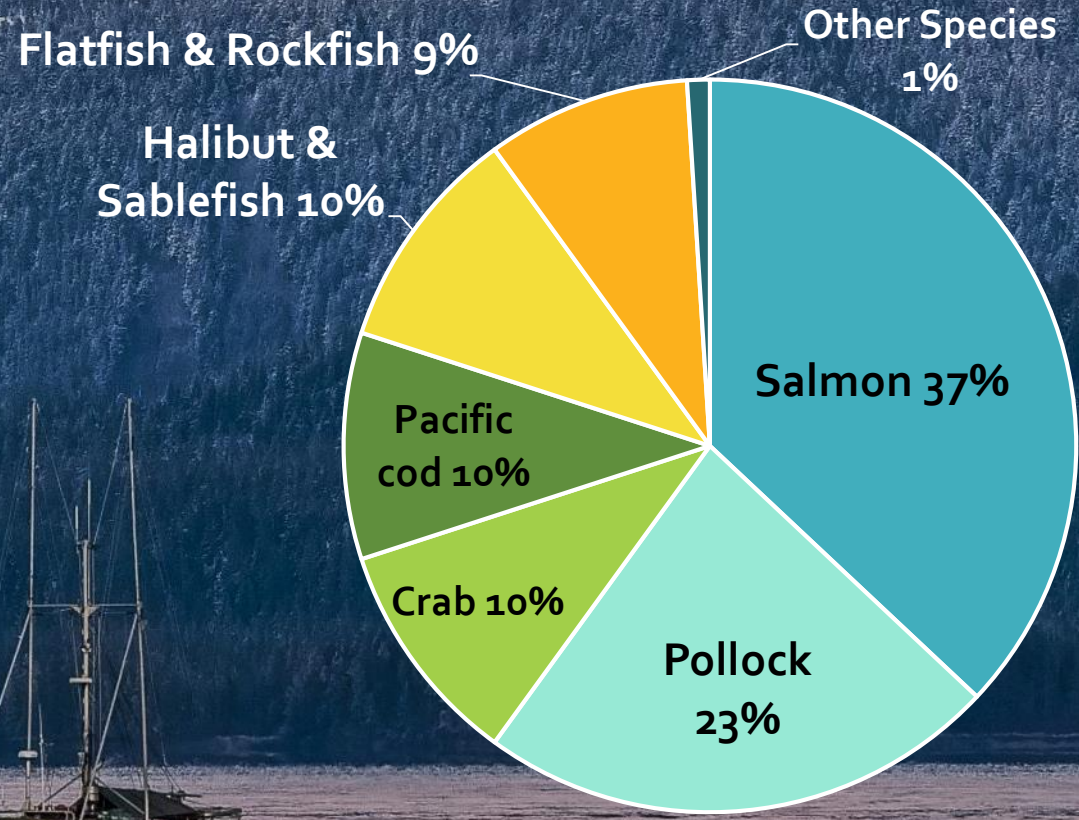
HARVEST VOLUME

5.7 Billion Pounds



EX-VESSEL VALUE

\$2.0 Billion Dollars



Pollock, salmon, crab = 70% of volume and value

Source: NMFS and ADF&G; compiled by McDowell Group 2017/18 data.

Alaska Seafood – A Sustainable Economic Driver

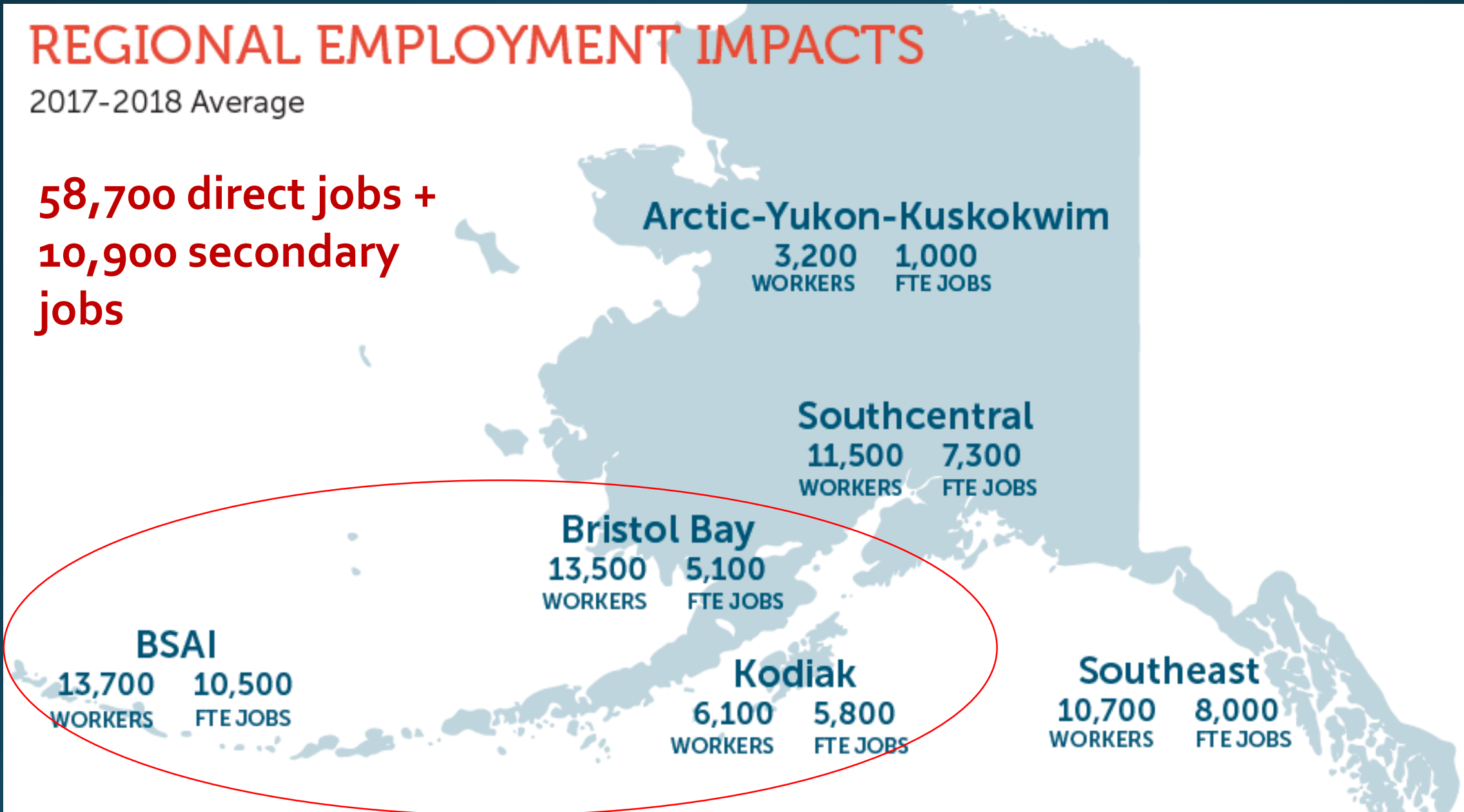
- Alaska first wholesale value: **\$4.7 billion**
- Annual economic activity created in AK: **\$5.6 billion**
- Largest private direct employer in the state: **58,700**
- Largest Alaska export (value): **69%**
- State and local taxes that sustain communities



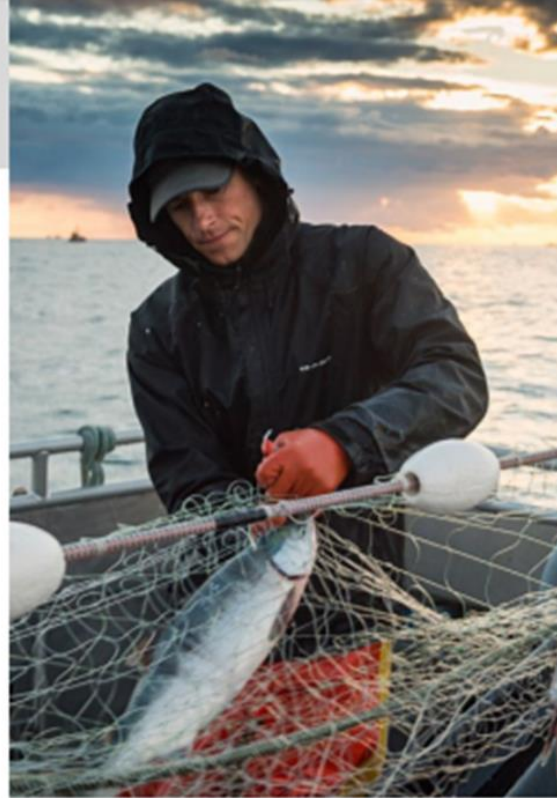
REGIONAL EMPLOYMENT IMPACTS

2017-2018 Average

**58,700 direct jobs +
10,900 secondary
jobs**



Bristol Bay



Bristol Bay sockeye salmon - harvested over a short 4-6 week season - make up 98% of regional ex-vessel value. A total of 41.3 million sockeye were harvested in 2018.

Photo courtesy Bristol Bay Regional Seafood Development Association. Photographer: Chris Miller

2018 Figures

Harvesting



453
Resident-owned
Fishing Vessels



1,473
Resident
Fishermen



\$279 Million
Harvest
Value



263 Million
Pounds of
Seafood
Harvested

14% of Alaska Total

Processing



28
Shore-based
Processing
Facilities



5,471
Total
Processing
Workers
(2017, Shoreside)



\$752 Million
Wholesale
Value



193 Million
Pounds of
Seafood
Produced

17% of Alaska Total

Regional Economic Trends in Seafood Industry

	2012	2013	2014	2015	2016	2017	2018
Resident Commercial Fishermen	1,607	1,531	1,536	1,519	1,502	1,516	1,473
Gross Earnings (\$Millions)	\$24	\$26	\$35	\$20	\$33	\$43	\$37
Average Processing Employment	1,514	1,514	1,542	1,095	1,263	1,353	1,393
Peak Processing Employment	5,037	5,312	5,374	4,309	5,116	5,175	5,460
Wages & Salaries (\$Millions)	\$37	\$39	\$41	\$38	\$42	\$46	\$49
Regional Harvest Value (\$Millions)	\$151	\$157	\$224	\$127	\$191	\$277	\$279
First Wholesale Value (\$Millions)	\$330	\$358	\$437	\$421	\$527	\$585	\$752

Bering Sea & Aleutian Islands

Regional Ex-Vessel Value
By Species, 2017/2018 Avg.

Alaska Pollock



38%

Pacific Cod



17%

Crab



16%

Flatfish



8%

Salmon



5%

Other



16%

Includes Halibut, Sablefish, Atka Mackerel, Pacific Ocean Perch, and other species

Harvesting



321

*Resident-owned
Fishing Vessels*



746

*Resident
Fishermen*



\$1.13 Billion
*Harvest
Value*



4.37 Billion
*Pounds of
Seafood
Harvested*

57% of Alaska Total

Processing



19

*Shore-based
Processing
Facilities*



6,474

*Total
Processing
Workers
(2017, Shoreside)*



\$2.56 Billion
*Wholesale
Value*



1.93 Billion
*Pounds of
Seafood
Produced*

57% of Alaska Total

Regional Economic Trends in Seafood Industry

	2012	2013	2014	2015	2016	2017	2018
Resident Commercial Fishermen	928	930	890	870	841	810	746
Gross Earnings (\$Millions)	\$45	\$47	\$41	\$50	\$47	\$62	\$53
Average Processing Employment*	3,607	3,725	3,847	3,813	3,949	3,630	3,331
Peak Processing Employment*	5,576	5,557	5,860	5,216	5,842	5,670	4,982
Wages & Salaries (\$Millions)*	\$130	\$137	\$147	\$178	\$205	\$200	\$196
Regional Harvest Value (\$Millions)*	\$1,100	\$993	\$998	\$1,105	\$1,087	\$1,089	\$1,131
First Wholesale Value (\$Millions)*	\$2,738	\$2,399	\$2,481	\$2,406	\$2,557	\$2,664	\$2,561

Kodiak

Regional Ex-Vessel Value By Species, 2017/2018 Avg.

Alaska Pollock



26%

Halibut/Sablefish



20%

Pink Salmon



19%

Sockeye Salmon



15%

Rockfish

5%

Other

10%

2018 Figures

Harvesting



602

Resident-owned
Fishing Vessels



1,157

Resident
Fishermen



\$143 Million
Harvest
Value



421 Million
Pounds of
Seafood
Harvested

7% of Alaska Total

Processing



14

Shore-based
Processing
Facilities



2,790

Total
Processing
Workers
(2017, Shoreside)



\$235 Million
Wholesale
Value



202 Million
Pounds of
Seafood
Produced

5% of Alaska Total

Regional Economic Trends in Seafood Industry

	2012	2013	2014	2015	2016	2017	2018
Resident Commercial Fishermen	1,395	1,357	1,405	1,437	1,243	1,209	1,157
Gross Earnings (\$Millions)	\$166	\$164	\$150	\$134	\$118	\$155	\$134
Average Processing Employment*	1,821	1,799	1,598	1,909	1,636	1,516	1,373
Peak Processing Employment*	2,254	2,480	2,088	2,397	1,980	1,970	1,829
Wages & Salaries (\$Millions)*	\$77	\$73	\$68	\$77	\$53	\$50	\$48
Regional Harvest Value (\$Millions)	\$233	\$218	\$196	\$161	\$126	\$193	\$143
First Wholesale Value (\$Millions)	\$381	\$397	\$330	\$393	\$247	\$416	\$235

SWAMC -Top Ports in the U.S.

COMMERCIAL FISHERY LANDINGS AND VALUE AT MAJOR U.S. PORTS, 2017 AND 2018

Port	Quantity		Port	Value	
	2017	2018		2017	2018
	Million pounds			Million dollars	
Dutch Harbor, AK	769	763	New Bedford, MA	390	431
Empire-Venice, LA	294	569	Naknek, AK	154	195
Aleutian Islands (Other), AK	552	539	Dutch Harbor, AK	173	182
Kodiak, AK	530	391	Empire-Venice, LA	100	148
Reedville, VA	320	353	Aleutian Islands (Other), AK	106	116
Intracoastal City, LA	198	328	Honolulu, HI	104	106
Pascagoula-Moss Point, MS	301	310	Bristol Bay (Other), AK	64	104
Naknek, AK	187	191	Kodiak, AK	152	104
Alaska Penninsula (Other), AK	268	155	Key West, FL	58	73
Astoria, OR	151	138	Cape May-Wildwood, NJ	81	66
Newport, OR	112	123	Point Judith, RI	57	64
Westport, WA	150	122	Bayou La Batre, AL	59	63
New Bedford, MA	111	114	Newport, OR	53	62
Cape May-Wildwood, NJ	102	101	Alaska Penninsula (Other), AK	112	61
Bristol Bay (Other), AK	43	70	Sitka, AK	75	61
Cordova, AK	99	59	Galveston, TX	55	60
Gloucester, MA	64	59	Stonington, ME	56	60
Point Judith, RI	44	48	Cordova, AK	65	55
Portland, ME	49	46	Hampton Roads Area, VA	58	55
Sitka, AK	91	46	Gloucester, MA	53	53

Federal Fisheries Update – North Pacific Council

- BSAI Halibut Bycatch Management
- Changing Central and Western Gulf of Alaska pollock and Pacific cod seasons (NOAA proposed rule)
- Potential rationalization of the BSAI Pacific cod trawl catcher vessel fishery
- Reauthorized CG rockfish program
- Allowing for incidental squid to be processed into bait products
- Pelagic trawl electronic monitoring
- Cost saving solutions for monitoring



False Pass

Federal Fisheries Update – North Pacific Council

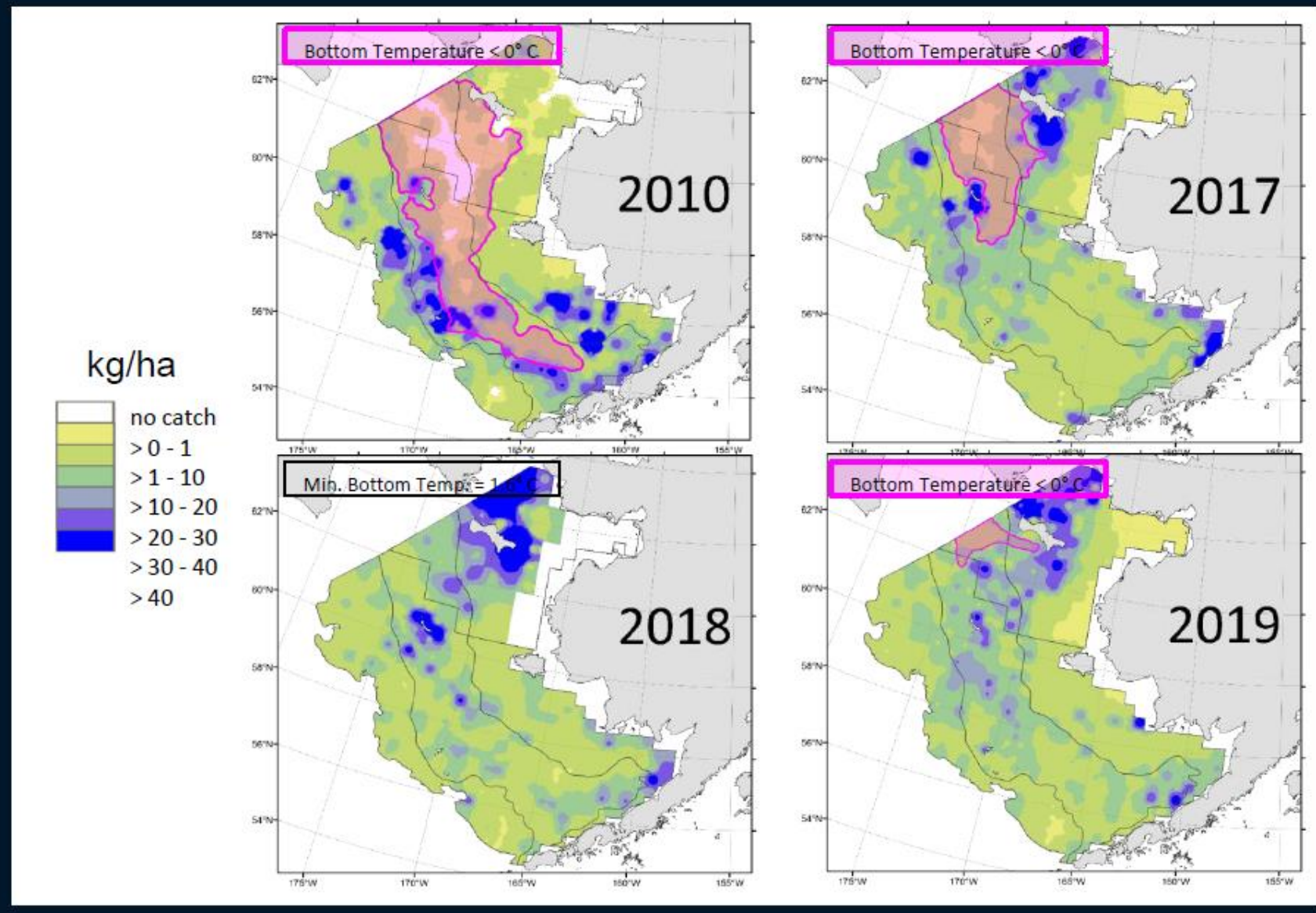
2020 Closure of the Gulf of Alaska federal Pacific cod fisheries

- affects all gear types
- affects Kodiak, King Cove, Sand Point, False Pass
- Cod biomass low due to marine heatwave (2014 – 2016, 2018)
- Federal closure to protect prey (cod) for endangered Steller sea lions
- Small state fishery open in 2020



Bering Sea Pacific cod distribution

- Continues to expand range into Northern Bering Sea (biomass +30%)
- Good condition
- Low forage fish
- Eastern Bering Sea biomass +2%
- Abundance up 112%, indicates new recruitment



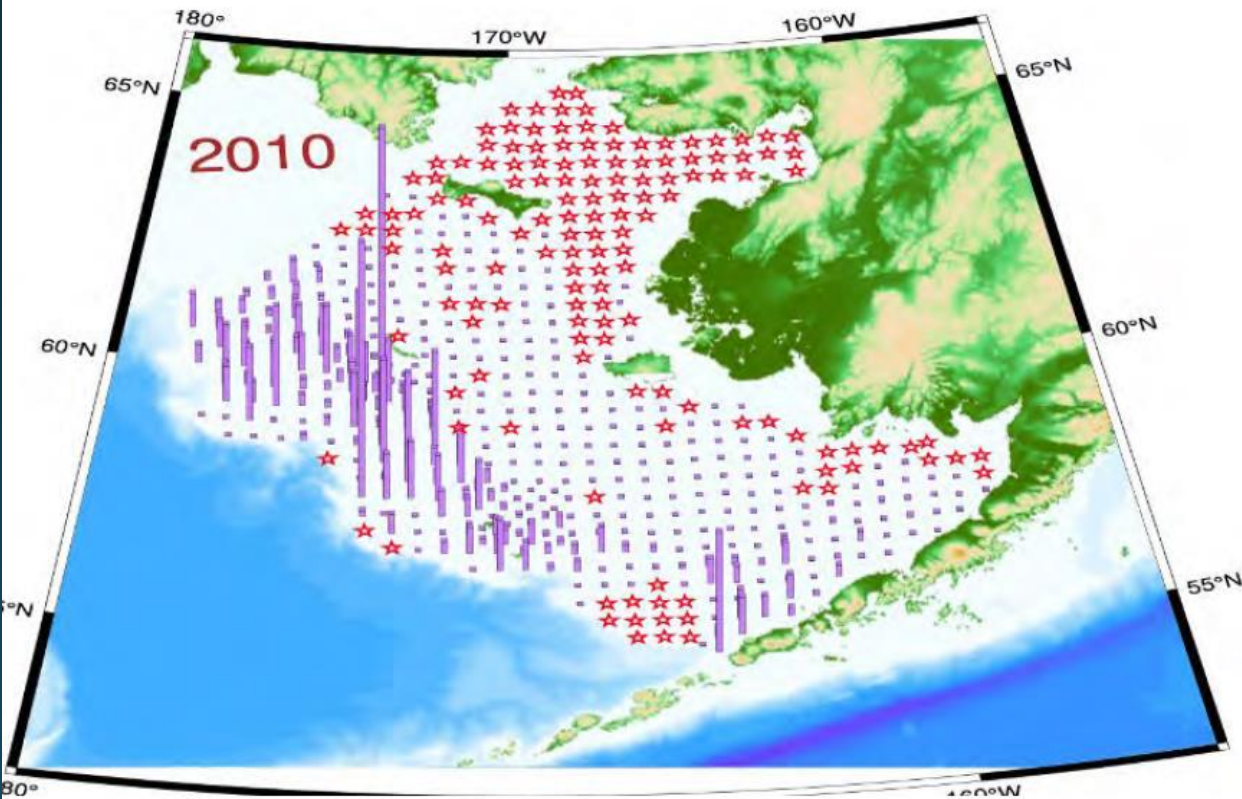
Bering Sea pollock distribution

2010 – trace amounts in Northern Bering Sea

2019 – 1.2 million metric tons in Northern Bering Sea

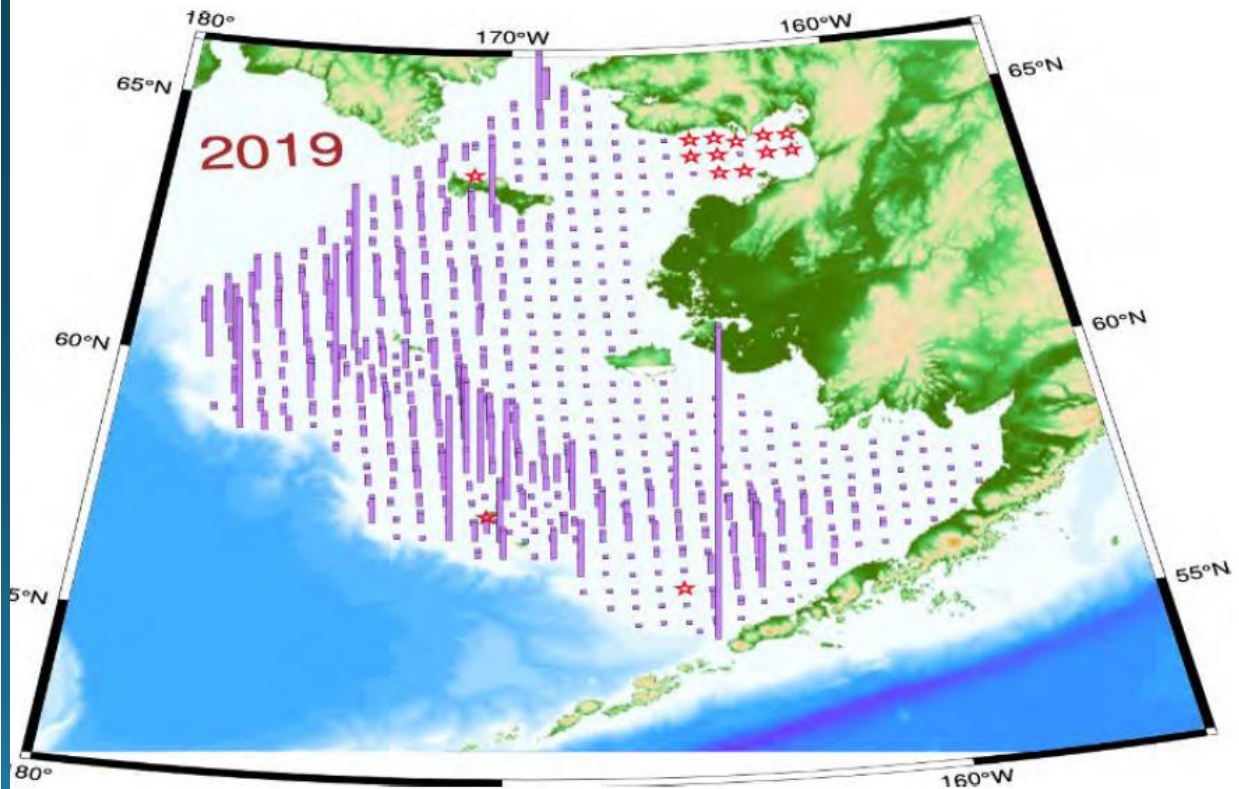
2010 standard survey
(3.74 million t pollock estimated)

C1 EBS



2019 standard survey
(5.4 million t pollock estimated)

C1 EBS



What puts seafood investments at risk

- Fluctuations in fishery abundance/ecosystems
- Trade policy & currency changes
- Global pandemics
- Aging infrastructure
- Changes in market demand & consumer preferences
- Competing species and products
- Less funding for management
- Workforce issues



Thank you



Westward Seafoods, Dutch Harbor