



**NOAA  
FISHERIES**

# Economic Status of the Groundfish Fisheries off Alaska, 2023

Presented by: Brian Garber-Yonts  
AFSC, Economics and Social Science Research

Presentation to the Joint Groundfish Plan Teams  
November 13, 2023



**NOAA FISHERIES**

# Overview of presentation

- Contributors & introductions
- Social and Economic Data Resources/AKFIN Human Dimensions Data Explorer
- Outline of Groundfish Economic SAFE and status of preliminary/GPT draft
- Summary of key findings:
  - 2022 (final)
  - 2023 (in-season/YTD)



# Contributors

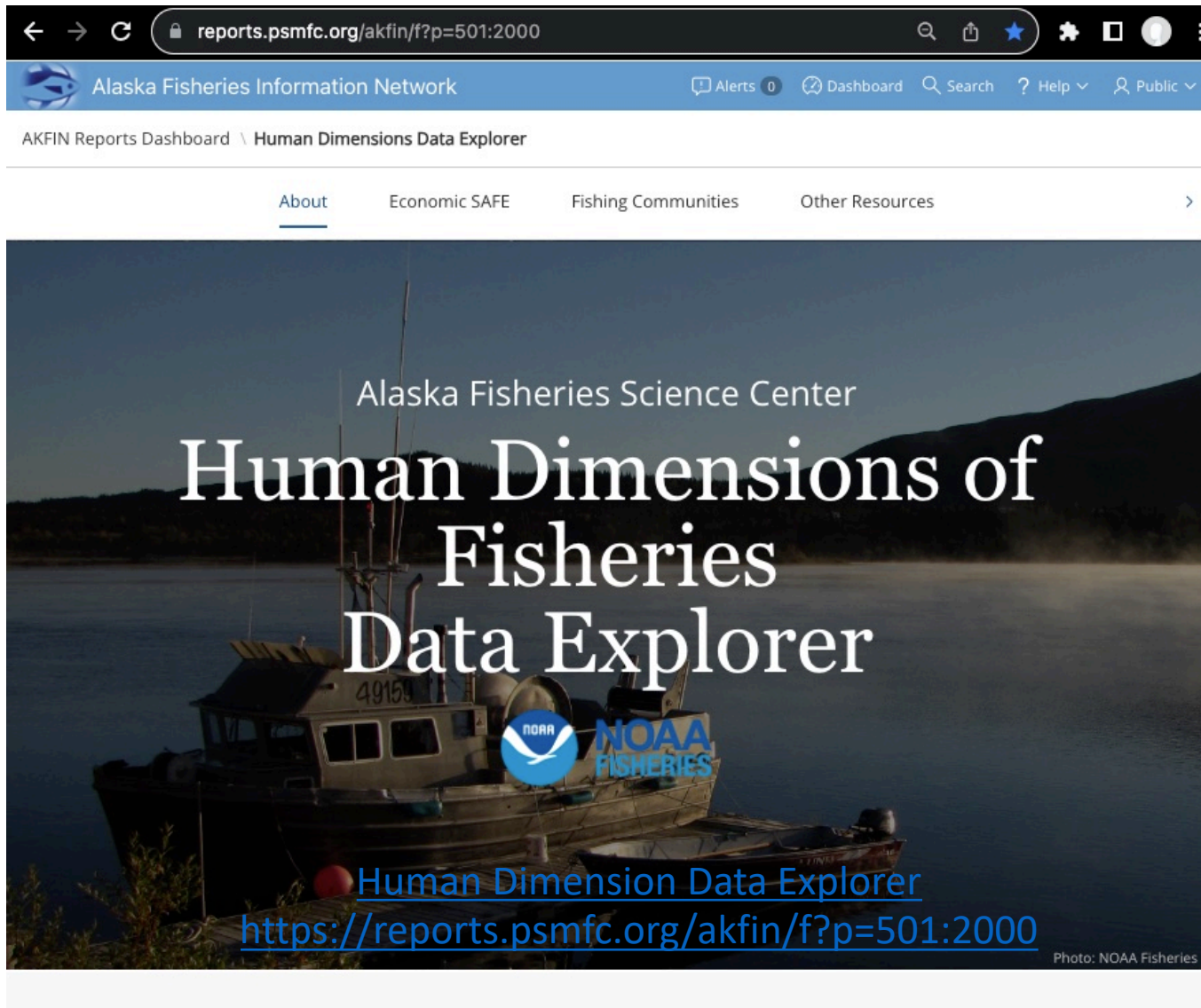
Anna Abelman and Jean Lee (AKFIN/PSMFC)



Mike Dalton, **Russel (Rusty) Dame**, Brian Garber-Yonts, Steve Kasperski,  
Dan Lew, Chang Seung, Marysia Szymkowiak, Sarah Wise (ESSR Program)

Ben Fissel (NMFS/OST)

# Where to find the data I need?



The screenshot shows a web browser window with the URL [reports.psmfc.org/akfin/f?p=501:2000](https://reports.psmfc.org/akfin/f?p=501:2000). The page header includes the Alaska Fisheries Information Network logo and navigation links for Alerts, Dashboard, Search, Help, and Public. The main content area features a navigation menu with 'About', 'Economic SAFE', 'Fishing Communities', and 'Other Resources'. The central banner displays the text 'Alaska Fisheries Science Center' and 'Human Dimensions of Fisheries Data Explorer' over a background image of a fishing boat. A NOAA Fisheries logo is overlaid on the banner. At the bottom of the banner, there is a link to the 'Human Dimension Data Explorer' and the URL <https://reports.psmfc.org/akfin/f?p=501:2000>. A photo credit 'Photo: NOAA Fisheries' is visible in the bottom right corner of the banner.

# Where to find the data I need?

Alaska Fisheries Information Network

AKFIN Reports Dashboard \ Human Dimensions Data Explorer \ Groundfish Economic SAFE

About SAFE Highlights Available Data

Alaska Fisheries Science Center  
Groundfish Economic SAFE

About SAFE Highlights Available Data

Retained catch in metric tons (millions)

All Sectors

Catcher Processors

Year

Alaska Mackerel Pollock  
Flatfish Rockfish  
Other Groundfish Sablefish

+ Catch and discards

+ Ex-vessel value

+ Wholesale production and value

+ Effort

+ Fleets

[Human Dimension Data Explorer](https://reports.psmfc.org/akfin/f?p=501:2000)  
<https://reports.psmfc.org/akfin/f?p=501:2000>

# Where to find the data I need?

AKFIN Reports Dashboard \ Human Dimensions Data Explorer

About Economic SAFE Fishing Communities Other Resources

## Fishing Communities

The Economic and Social Sciences Research Program conducts research on Alaska communities in order to examine the social and economic impacts of federal fishery policies and regulations.

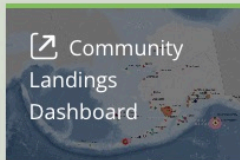
The **Magnuson Stevens Fishery Conservation and Management Act (MSA)** defines a fishing community as *a community which is substantially dependent on or substantially engaged in the harvest or processing of fishery resources to meet social and economic needs, and includes fishing vessel owners, operators, and crew and United States fish processors that are based in such community.* As mandated under MSA National Standard 8, these policies and regulations shall take into account the importance of fishery resources to fishing communities in order to (1): *Provide for the sustained participation of such communities; and (2) To the extent practicable, minimize adverse economic impacts on such communities.*

**Executive Order 12898** additionally mandates that each federal agency, to the greatest extent practicable and permitted by law, shall make achieving environmental justice part of its mission by identifying and addressing the disproportionately high and adverse human health or environmental effects of their actions on minority and low-income populations.



### Community Profiles for North Pacific Fisheries

In-depth profiles of the 196 Alaska communities most involved in Alaska and North Pacific fisheries, describing the historic, demographic, cultural, and economic context for each community's involvement.



### Community Landings Dashboard

A mapping and graphing tool for exploring communities where catch from the commercial fisheries of the North Pacific is landed.

*This application is available to approved users of confidential fisheries data with institutional ArcGIS accounts. Please contact [jean.lee@noaa.gov](mailto:jean.lee@noaa.gov) to inquire about access.*



### Social Indicators Toolbox

The NOAA Fisheries Community Social Vulnerability Indicators Toolbox provides a suite of social, economic, and climate change indicators for evaluating coastal communities' vulnerability and resilience to disturbances.



### A Way of Life

Featuring oral histories with women setnetters from Bristol Bay, Alaska, this web story explores the linkages between fishing, identity, and place.



### ACEPO

**NEW**  
The Annual Community Engagement and Participation Overview (ACEPO) summarizes harvesting and processing engagement and participation by communities in federally-managed groundfish and crab

[Human Dimension Data Explorer](https://reports.psmfc.org/akfin/f?p=501:2000)  
<https://reports.psmfc.org/akfin/f?p=501:2000>



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AKFIN Reports Dashboard \ Human Dimensions Data Explorer

About
Economic SAFE
Fishing Communities
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ACEPO
About
Explore Groundfish
Explore Crab
Access the Data

## Processing Participation

Select a community \*

Akutan
At-Sea Processor
Unalaska-Dutch Harbor
Kodiak

\* Includes communities that were highly engaged in groundfish processing (index score >=1) in any year from 2008 to 2021.

Community	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021
<b>Akutan</b>	1.09	1.22	1.17	1.24	1.19	1.16	1.30	1.29	1.24	1.44	1.46	1.51	1.42	1.67
<b>At-Sea Processor</b>	9.32	9.25	9.35	9.20	9.22	9.30	9.07	9.17	9.18	9.22	9.14	9.17	9.18	9.02
<b>Unalaska-Dutch Harbor</b>	2.38	2.42	2.04	2.44	2.40	2.29	2.69	2.42	2.39	2.13	2.48	2.42	2.49	2.58
<b>Kodiak</b>	1.71	1.79	1.94	2.03	2.05	1.86	2.17	2.14	2.10	1.89	1.67	1.67	1.64	1.82

### Processing Engagement Index

### Regional Quotient of Landing Revenue

[Human Dimension Data Explorer](https://reports.psmfc.org/akfin/f?p=501:2000)  
<https://reports.psmfc.org/akfin/f?p=501:2000>

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# Economic Status Report, 2023: Content of the November Draft

[https://apps-afsc.fisheries.noaa.gov/Plan\\_Team/2023/economic.pdf](https://apps-afsc.fisheries.noaa.gov/Plan_Team/2023/economic.pdf)

- Executive Summary
  - High level summary of economic performance in 2022
  - Report card metrics – through 2022
- Economic Data Tables
  - Breakdowns of AK, BSAI, and GOA ex-vessel and wholesale volume, value, and price by species, gear, and product through 2022
- Economic Indices - figures and tables only
  - Summary indices of value, catch/production, and price by region, at-sea/shoreside, species, gear, product type, through 2022
- Wholesale market profiles (updated 2022, through 2021)
- Year-to-date 2023 in-season catch and value estimates





# Economic Status Report, 2022: Additional Final Draft Content

- Wholesale and ex-vessel price projections
- Amendment 80 economic data report

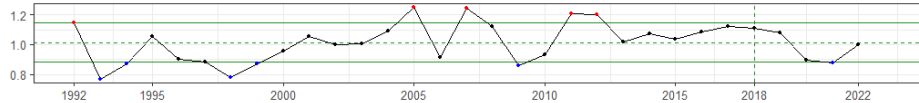
Plan team reports (forthcoming, M. Dalton)

## Economic Performance Reports and ESPs

- Tables only

# Report Card Metrics for the Alaska Commercial Groundfish Fisheries off Alaska

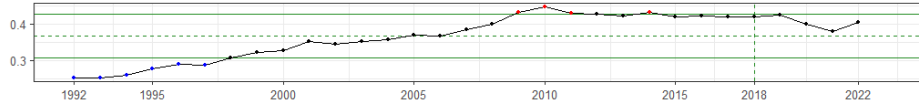
1) FMP Groundfish Real First-wholesale Revenue (2022\$) Index



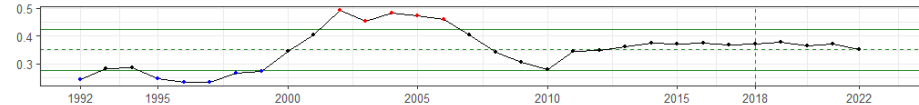
2) FMP Groundfish Real First-wholesale Price (2022\$) Index



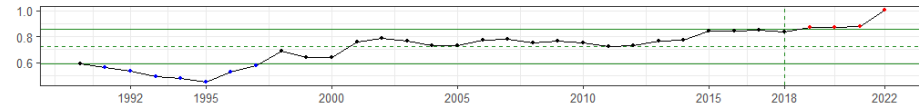
3) First-wholesale Production Volume/Total Groundfish Catch Within FMP Groundfish Fisheries



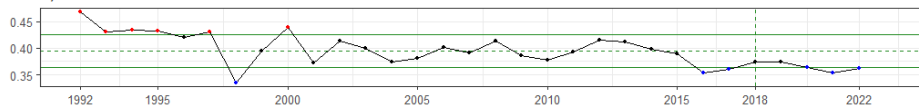
4) Alaska's Effective Share of Pollock and Cod Global Catch



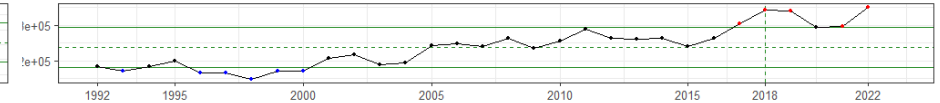
5) Effective Real Exchange Rate Index for AK Fisheries Exports, (foreign currency per dollar)



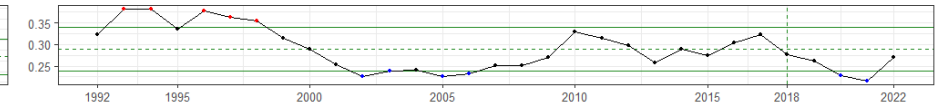
6) FMP Groundfish Ex-vessel Share of First-wholesale Revenue



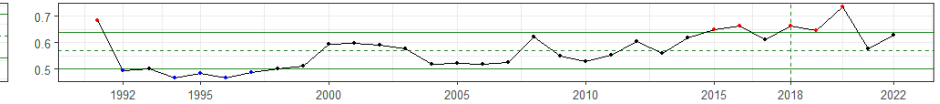
7) FMP Groundfish Real First-wholesale Value (2022\$)/Fishing Weeks



8) Alaska Resident Share of FMP Groundfish Ex-vessel Value

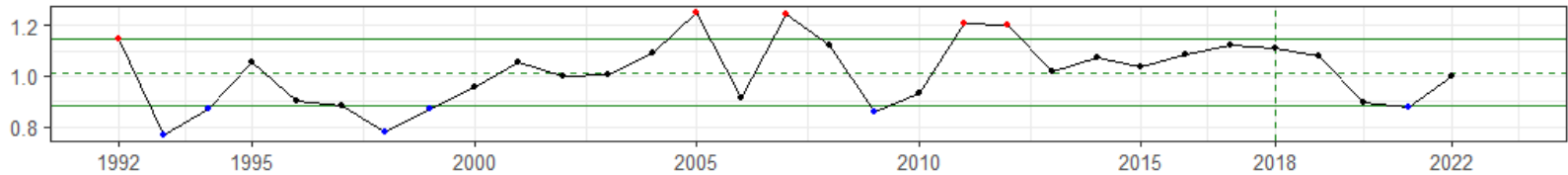


9) Share of All Alaska Fisheries (Including Non-FMP Groundfish) Shoreside Ex-vessel Value Attributable to the Top 5

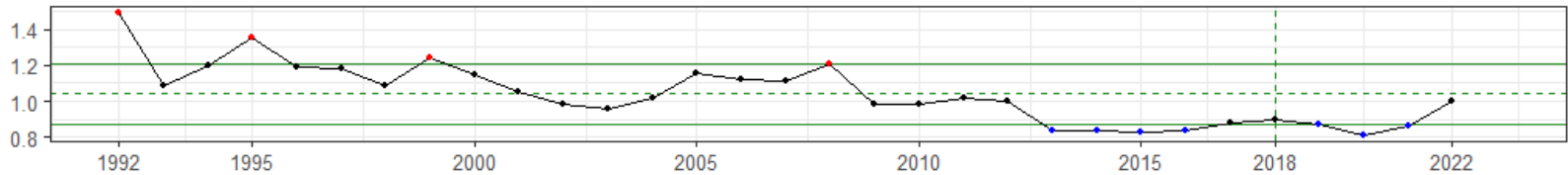


# Report Card Metrics for the Alaska Commercial Groundfish Fisheries off Alaska

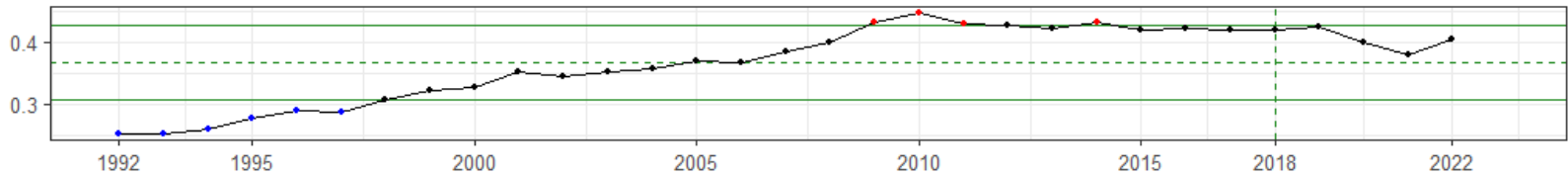
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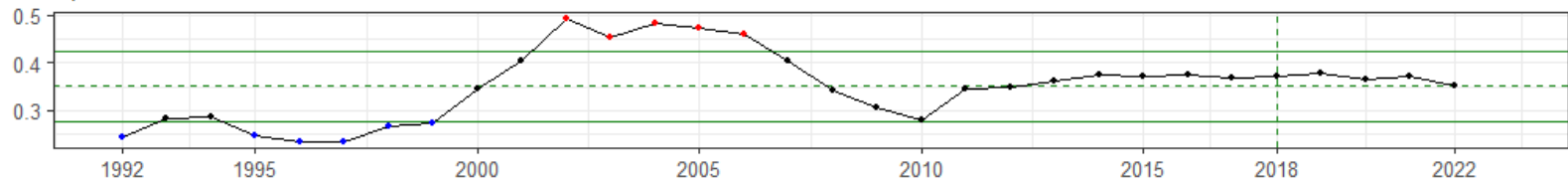


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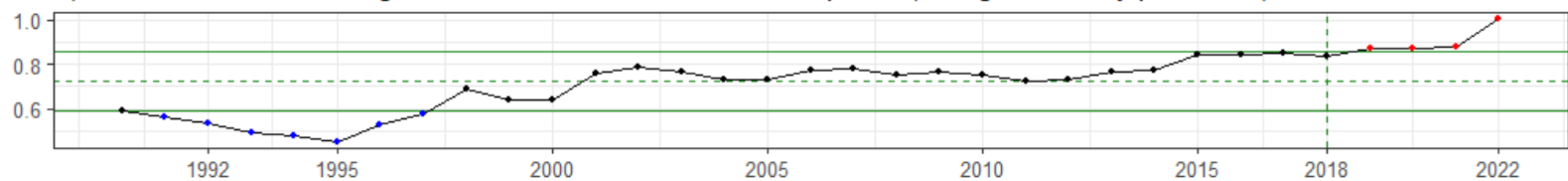


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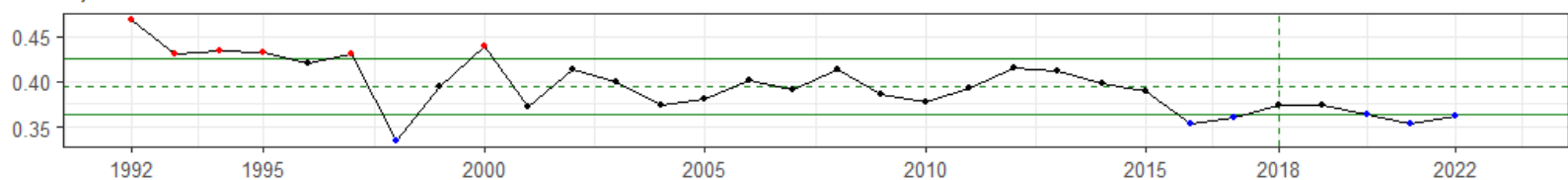
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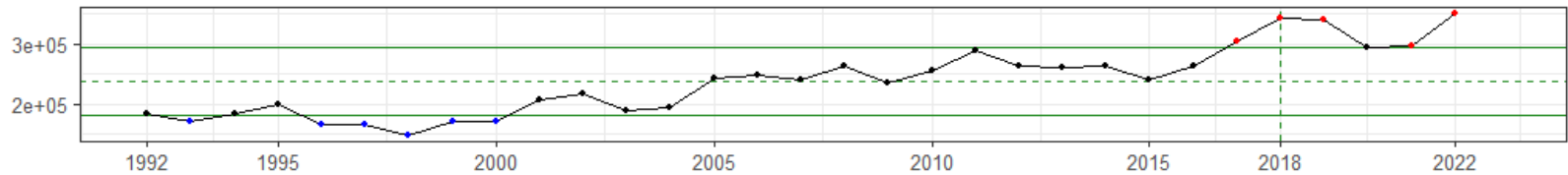


6) FMP Groundfish Ex-vessel Share of First-wholesale Revenue

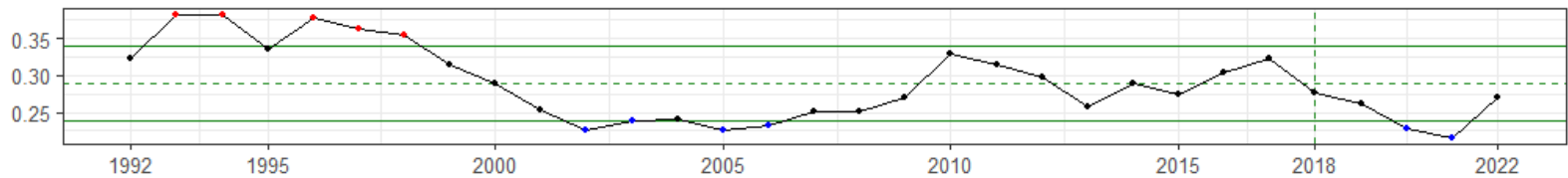


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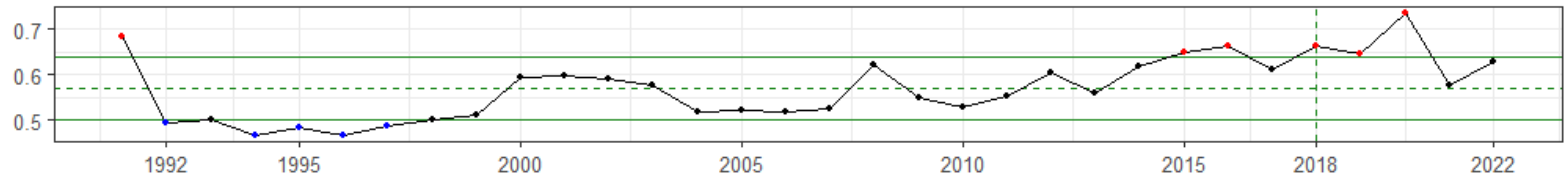
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9) Share of All Alaska Fisheries (Including Non-FMP Groundfish) Shoreside Ex-vessel Value Attributable to the Top 5

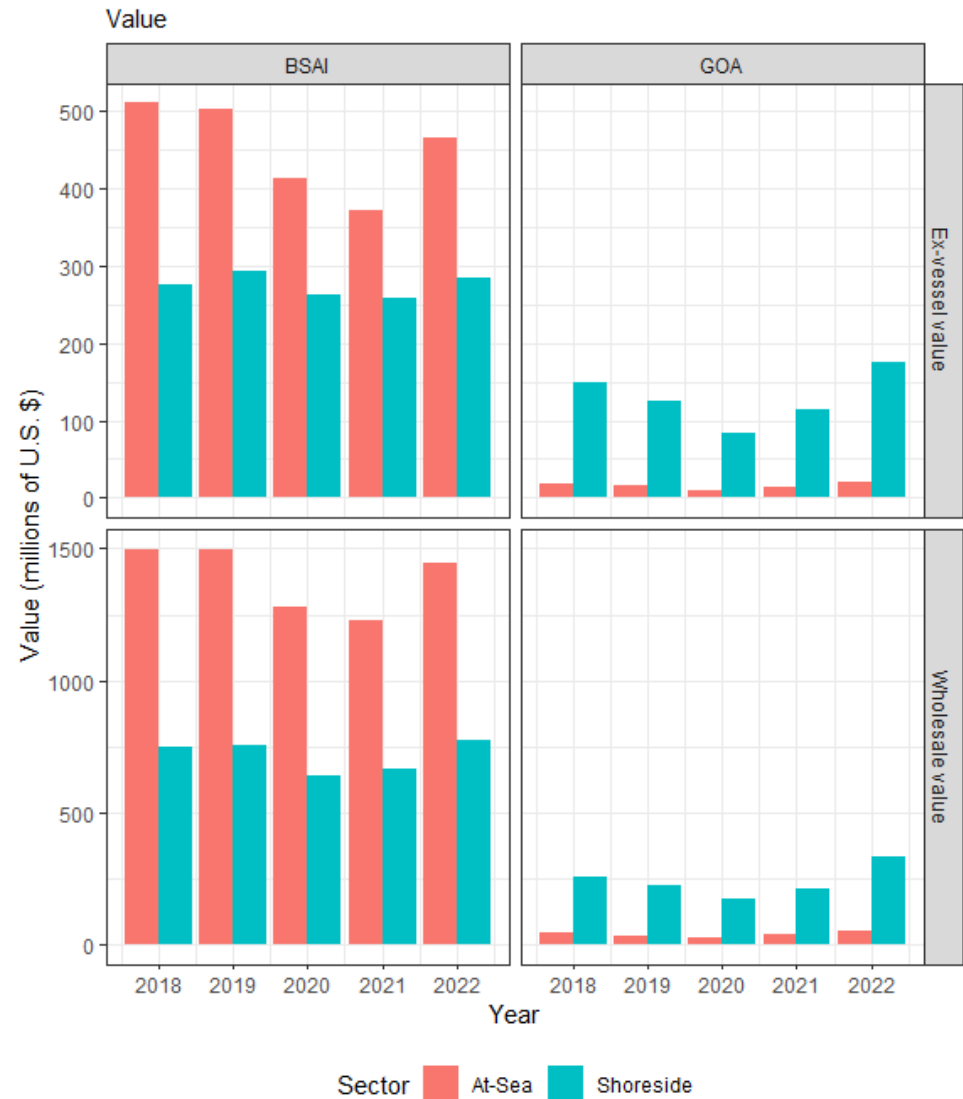


# Alaska's Groundfish Fisheries in 2022

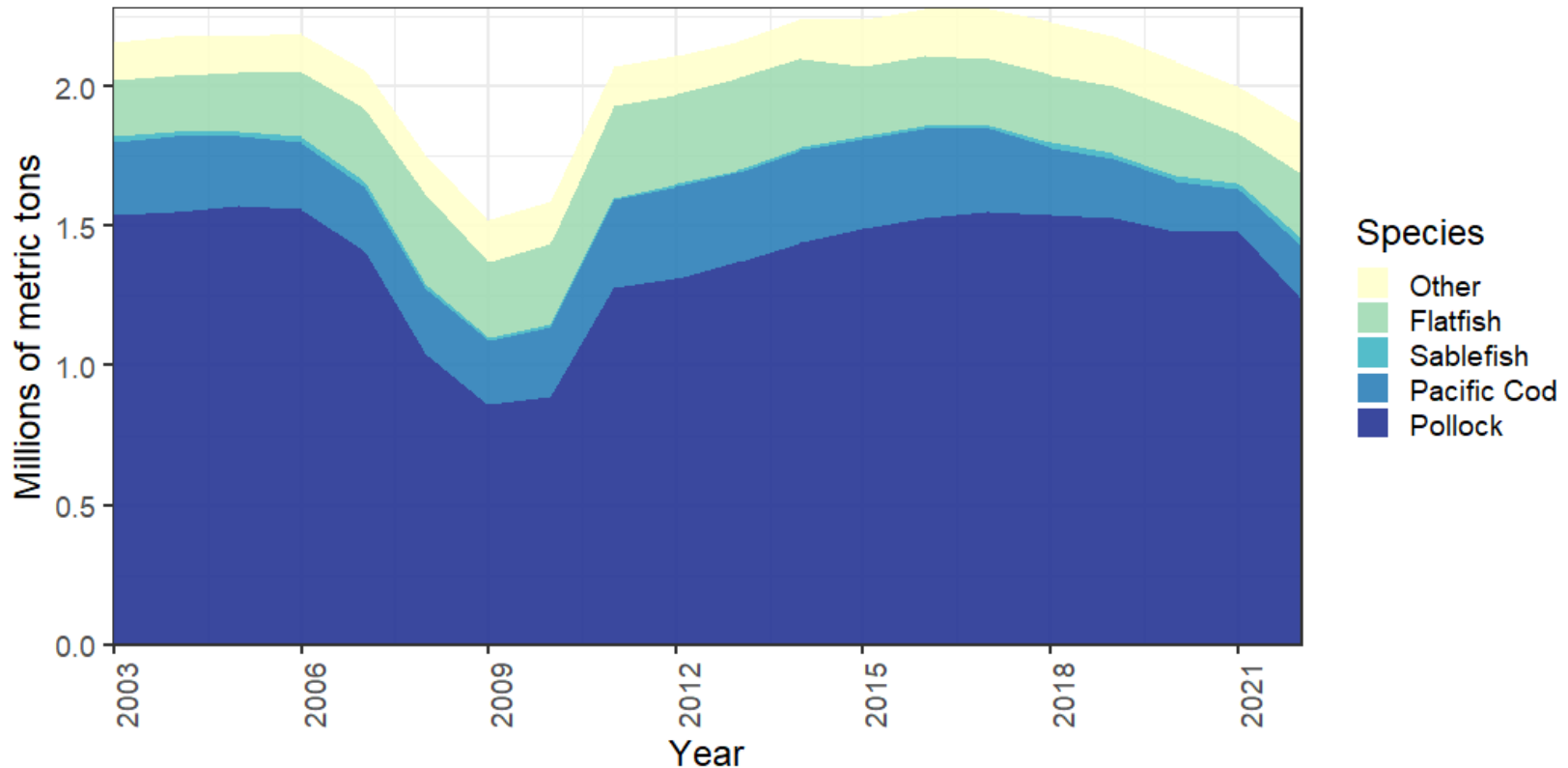
Total catch: 1.87 million t (- 7%)

Aggregate ex-vessel value: \$945 million (+27% BSAI and GOA)

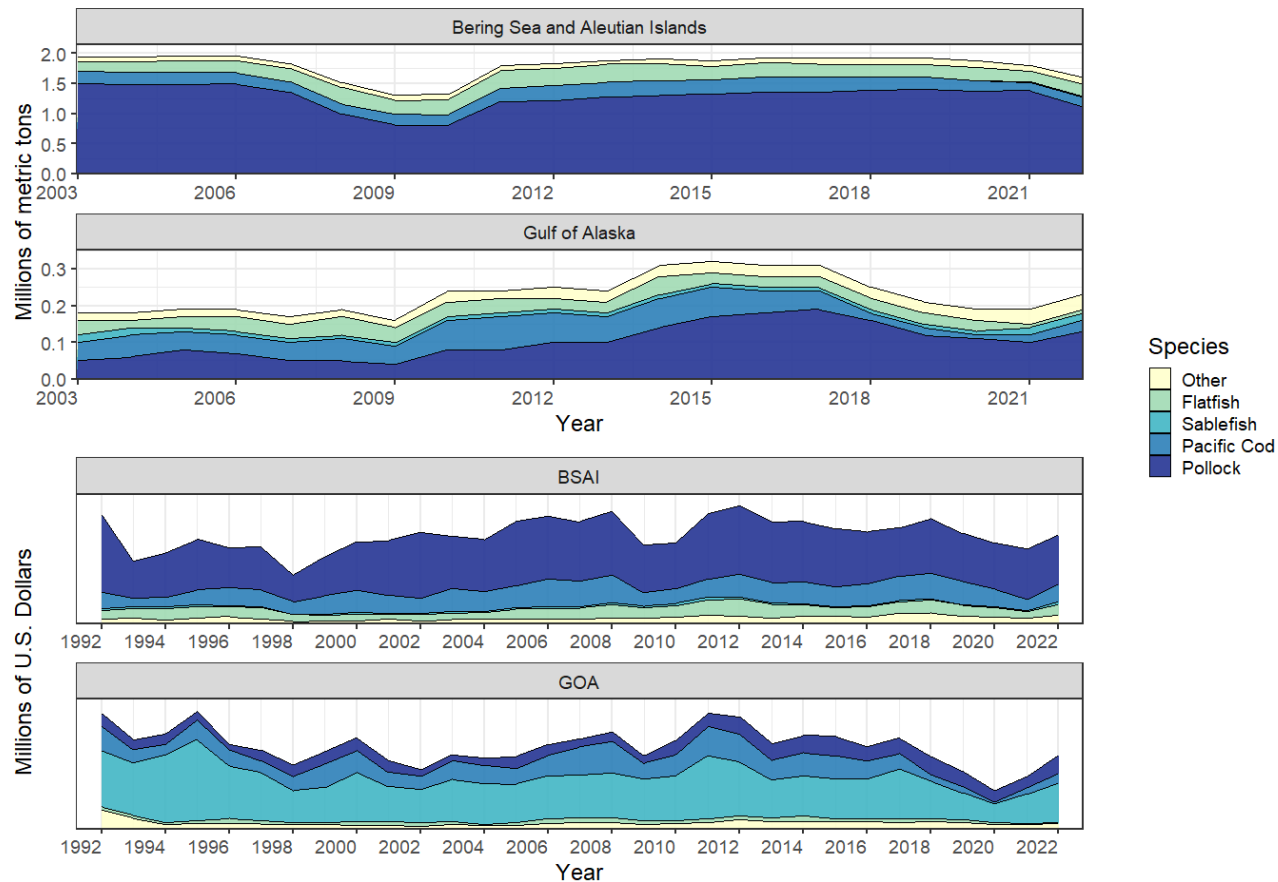
Wholesale value: \$2.6 billion (+13.1%)



# Groundfish catch in the commercial fisheries off Alaska by species, 2022

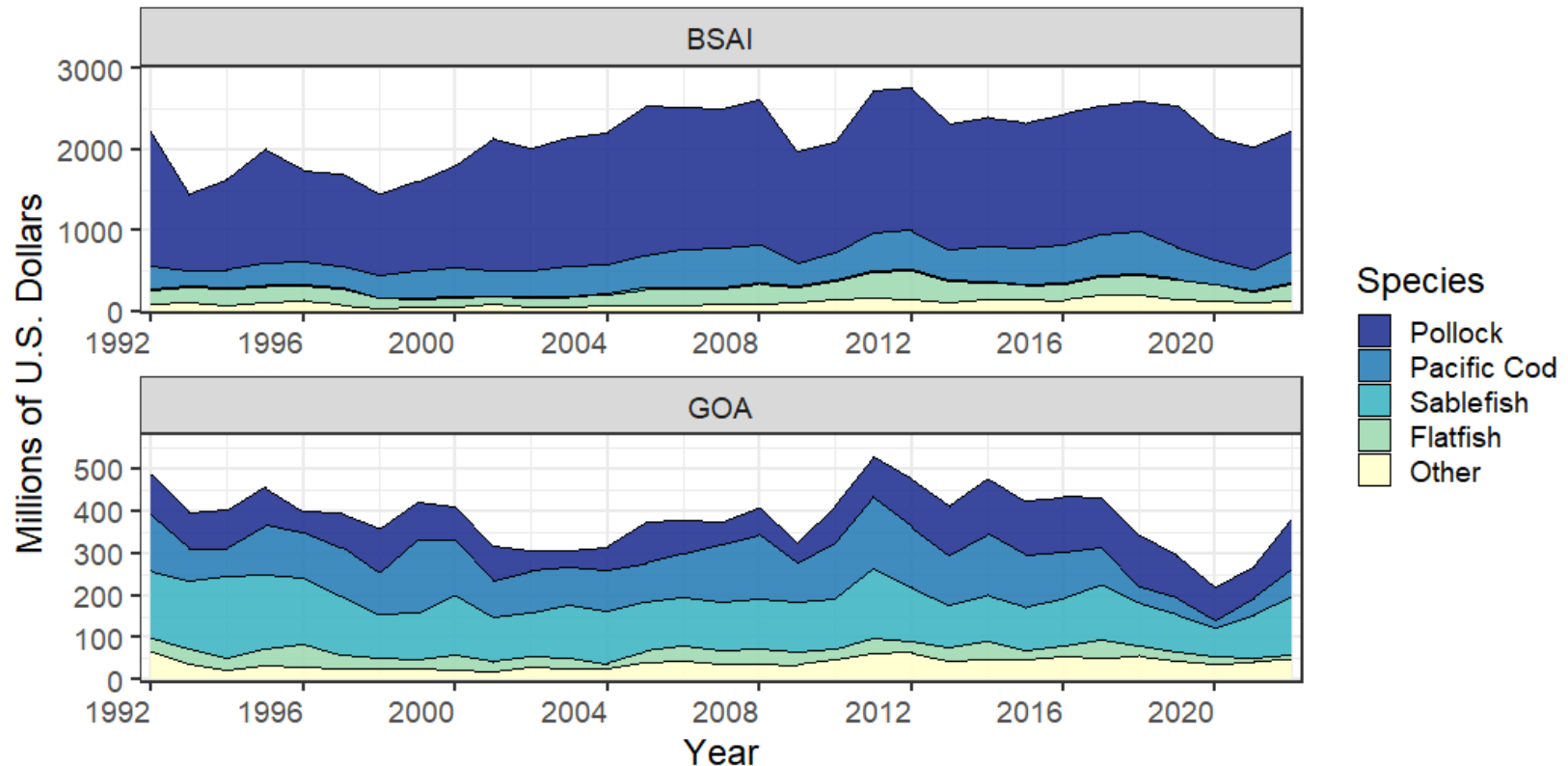


# Groundfish catch and ex-vessel value in the commercial fisheries off Alaska by species, FMP area, 2022

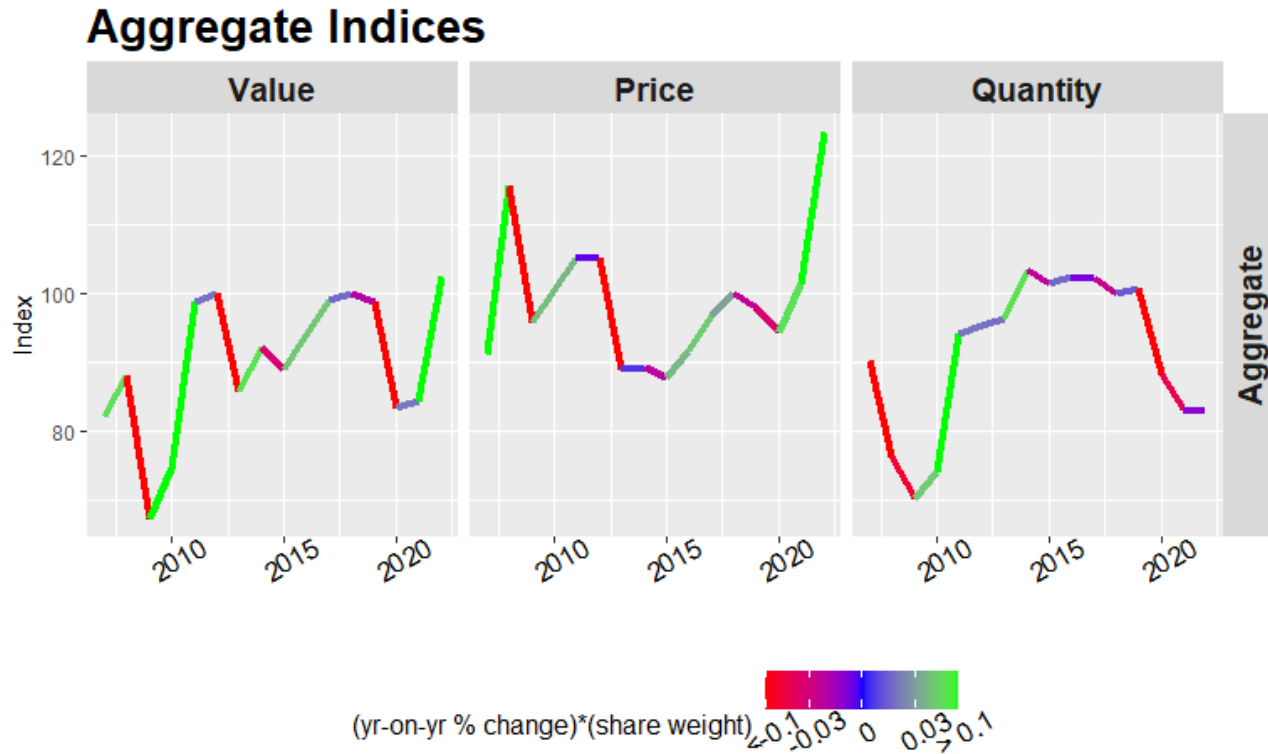




# Real gross product value of the groundfish catch off Alaska by species, FMP area, 2022



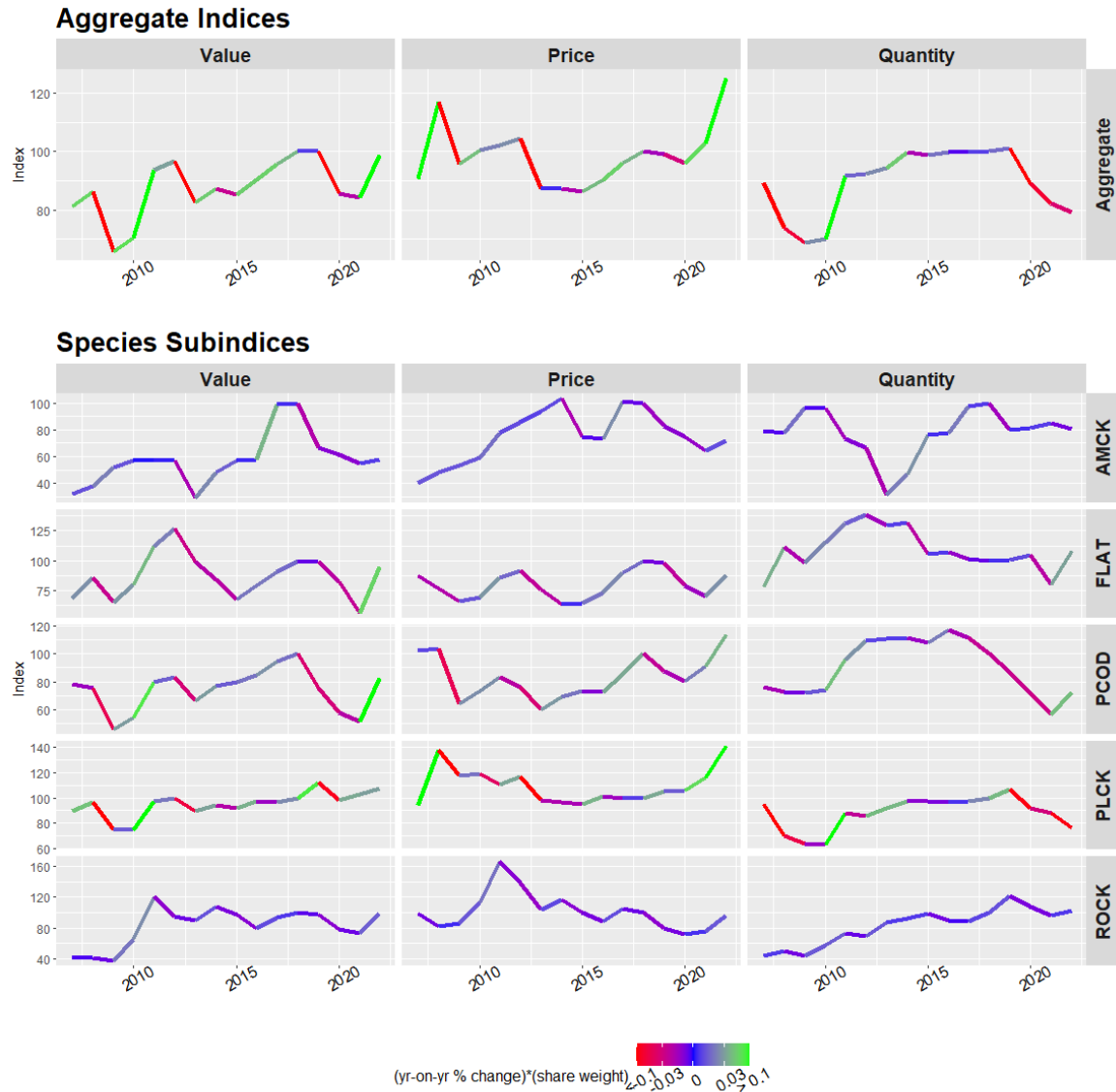
# Alaska First Wholesale Economic Indices, 2022



In the aggregate: The change in value was the result of increasing prices which offset decrease in aggregate volume

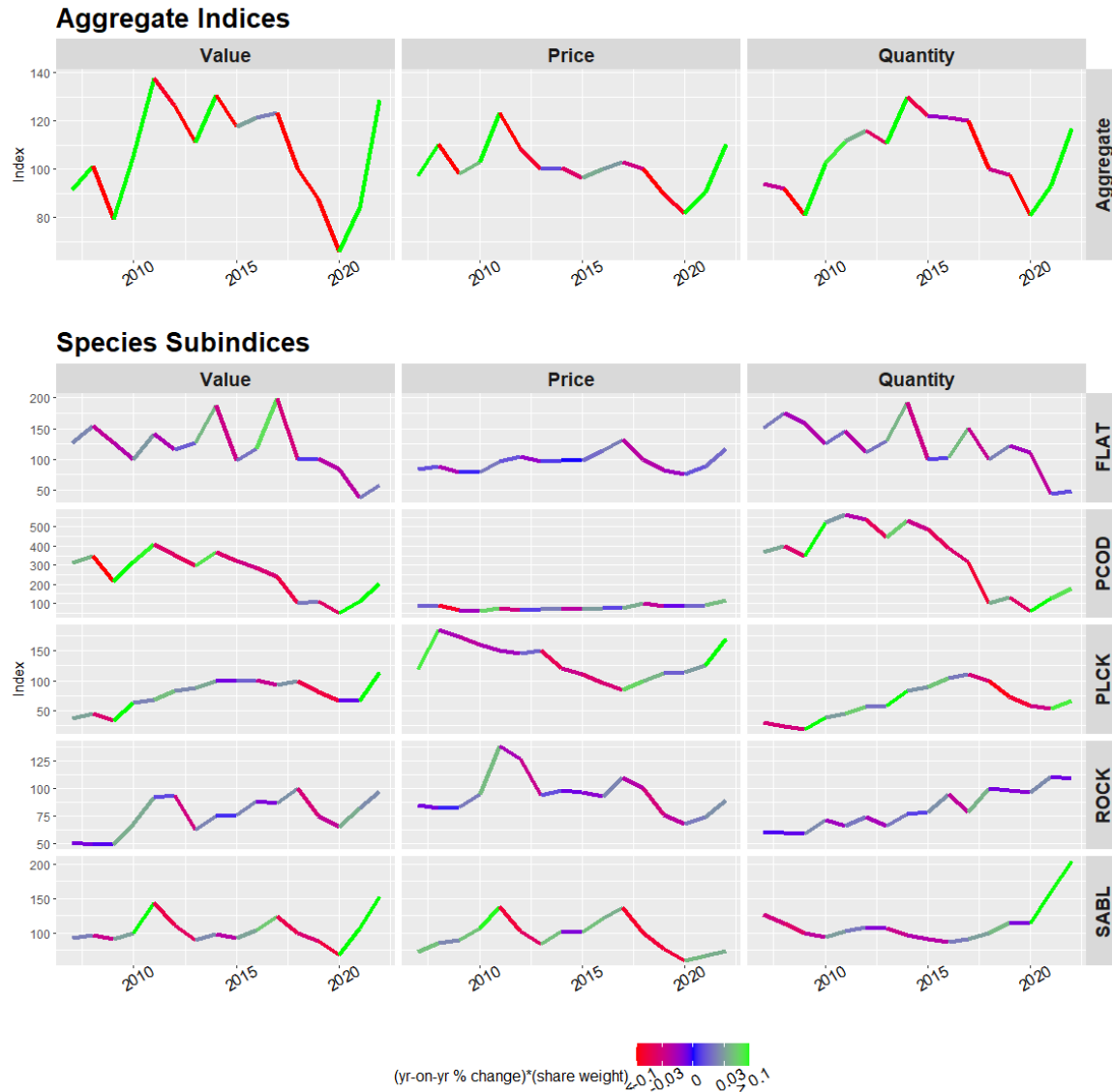
# BSAI First Wholesale Economic Indices, 2022

- Wholesale value index stable or increasing across all major BSAI groundfish
- Increased prices offset aggregate decline in production
- Prices in P. cod and pollock historically high in 2022, others saw modest improvement from low 2021 prices



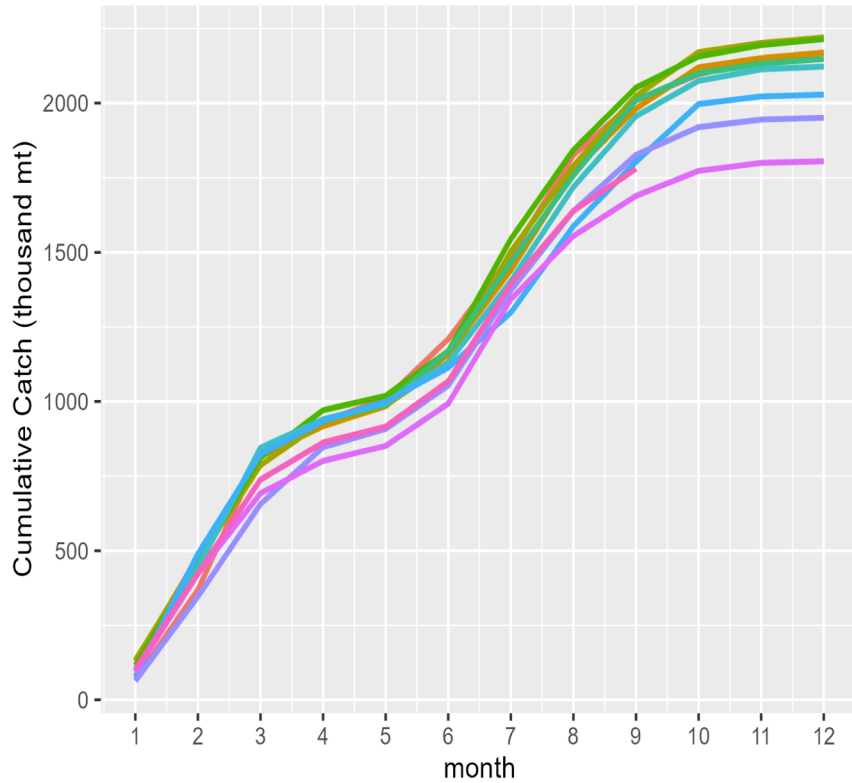
# GOA First Wholesale Economic Indices, 2022

- Wholesale value showed strong y/y gain in 2022, with index stable or increasing across all major GOA groundfish, esp. P.cod and sablefish
- Price gains more modest in GOA, esp. sablefish

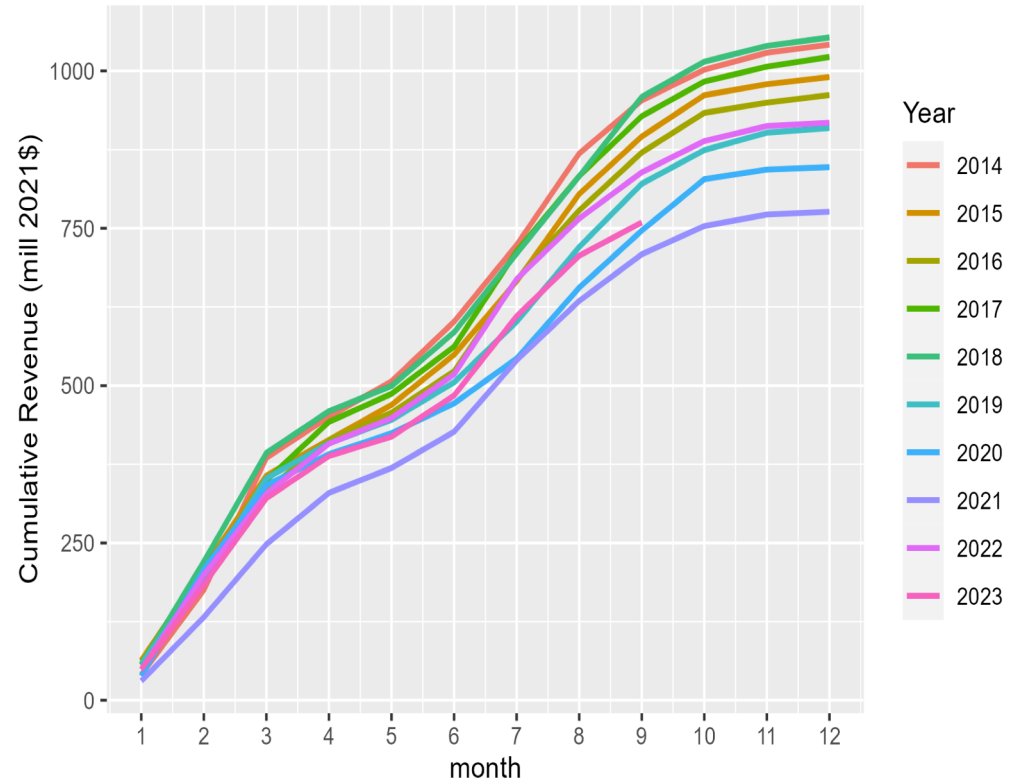


# In-season Ex-Vessel Harvest and Revenue Estimates for 2023

Alaska Groundfish Cumulative Catch (thousand mt) 2014-2023

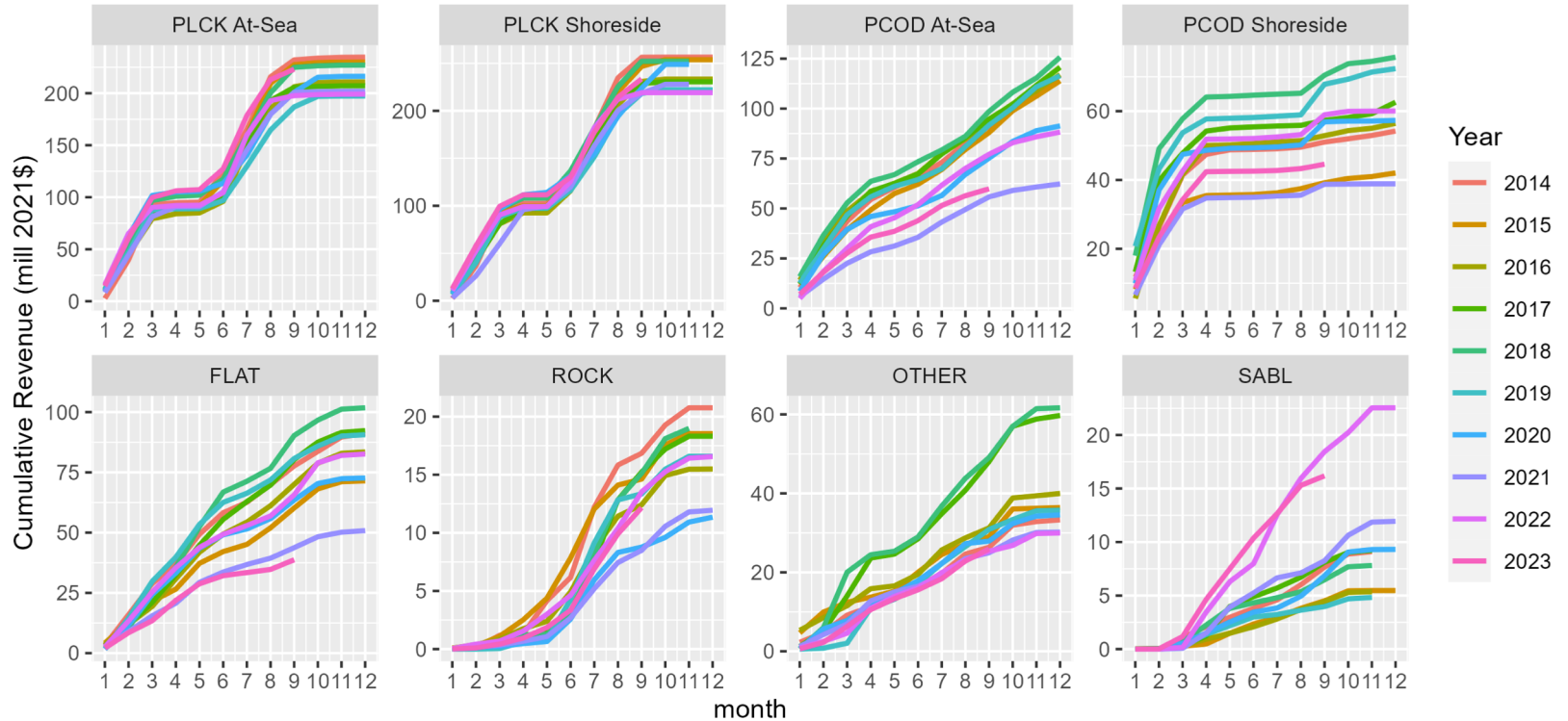


Alaska Groundfish Cumulative Estimated Revenue (million 2022\$) 2014-2023

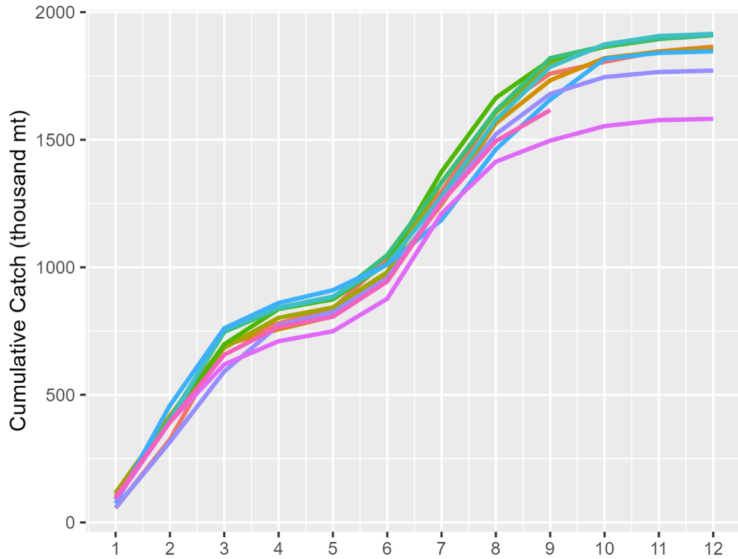


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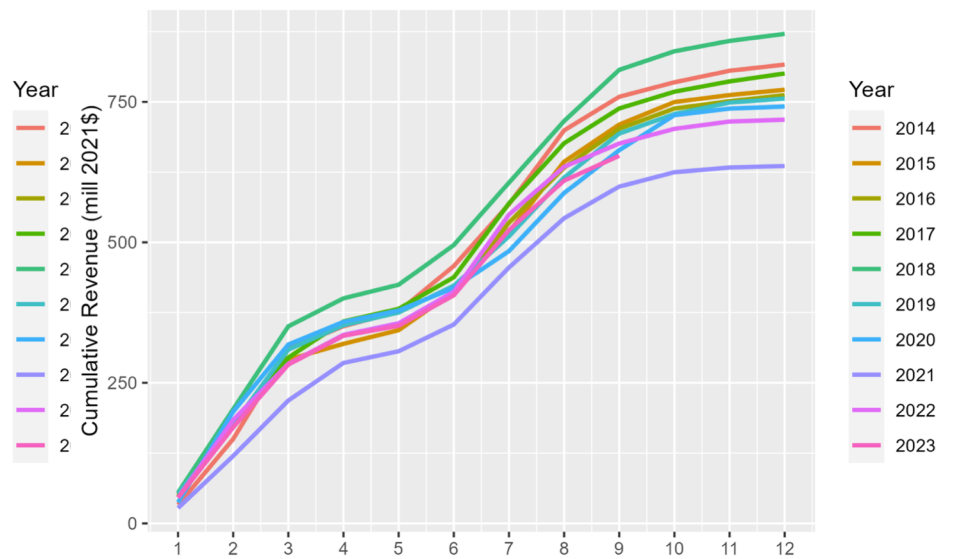
BSAI Groundfish Cumulative Estimated Revenue (million 2022\$) 2014-2023



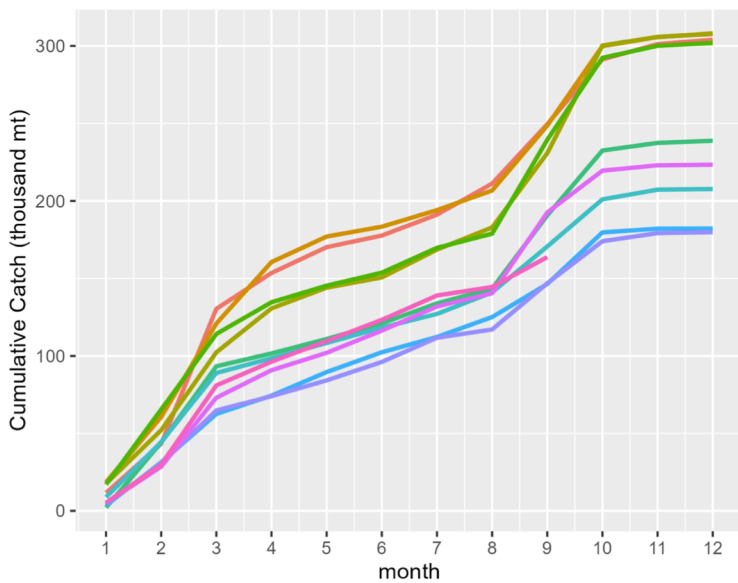
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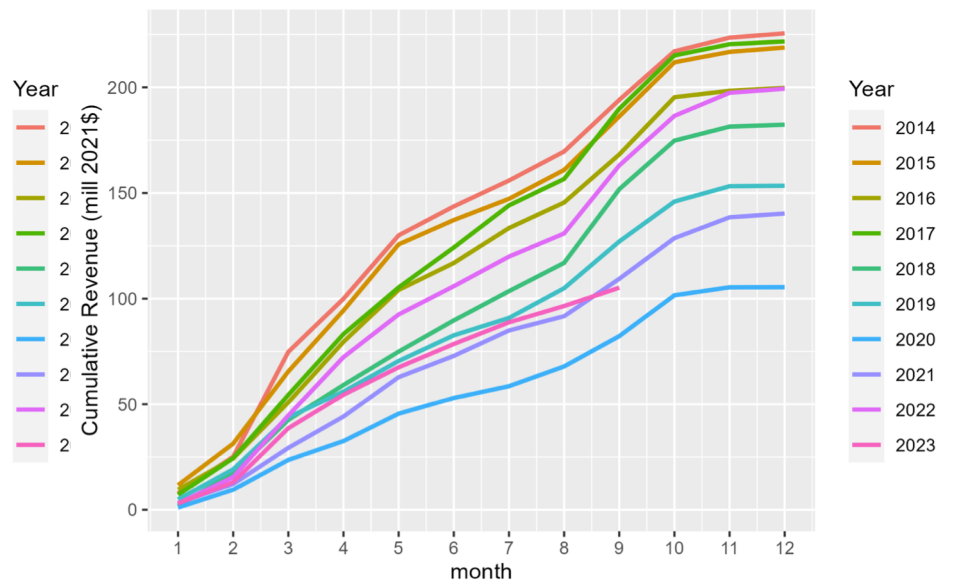
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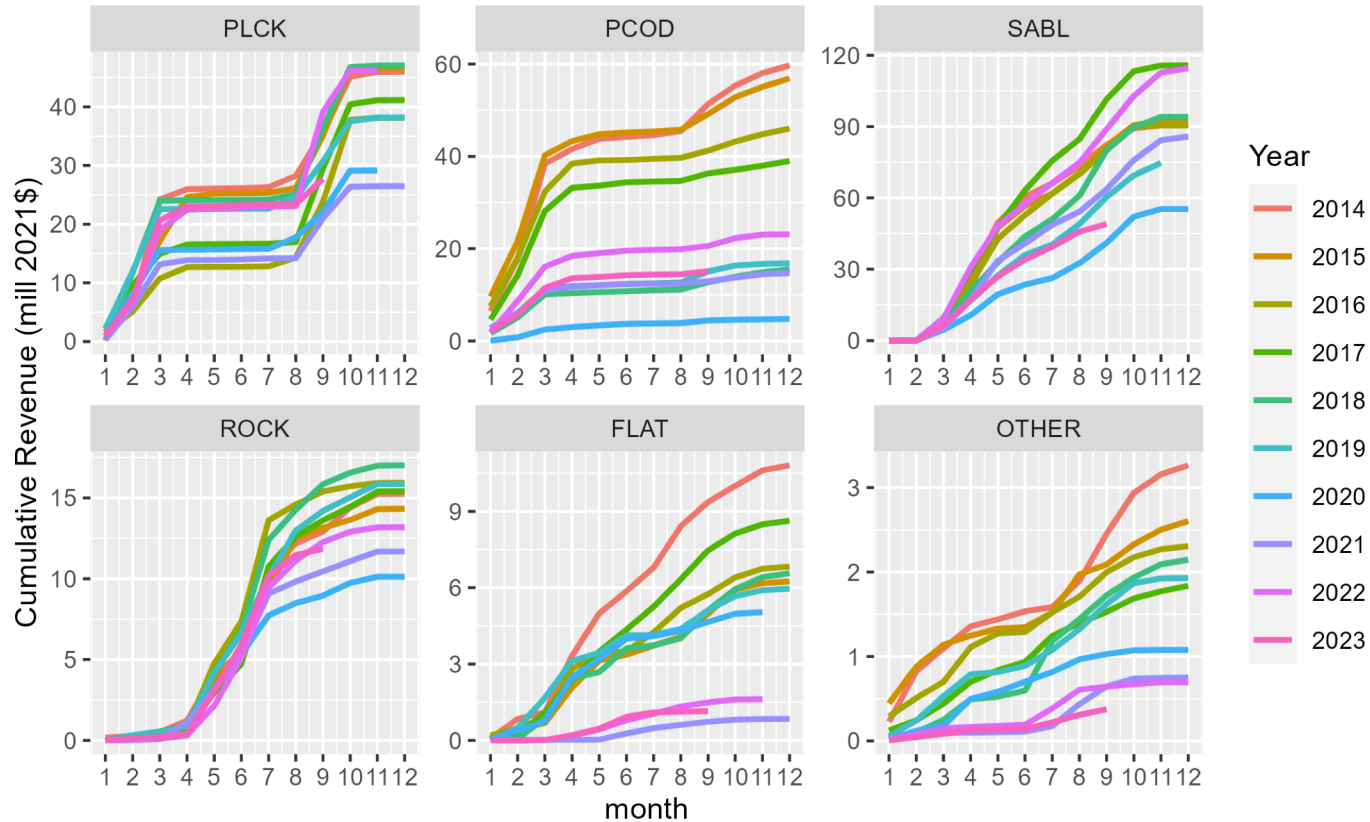


GOA Groundfish Cumulative Estimated Revenue (million 2022\$) 2014-2023



# In-season Ex-Vessel Harvest and Revenue Estimates for 2023

GOA Groundfish Cumulative Estimated Revenue (million 2022\$) 2014-2023





# Summary

- 2022 prices buffered volume declines
- 2023 prices generally eroding
  - Production among competitors (Russia mainly), tariffs, oversupply and 2022 inventory, manipulation in foreign currency
- Recent years produced consistently lower revenues than the first couple of years in the time series
  - For both BSAI and GOA
  - Time series begins during the start of the Blob which precipitated large changes in groundfish
- Focus on year-over-year changes obscures cumulative impacts to industry and fishing communities from multiple years of sustained economic losses



# Questions?

