AGENDA D-1(b)
JUNE 2002

MEMORANDUM

TO: Council, SSC and AP Members

FROM: Chris Oliver
Executive Director

DATE: May 20, 2002

SUBJECT: Differential Gear Impact Analysis

ESTIMATED TIME
4 HOURS
(for all D-1 items)

ACTION REQUIRED

Review workplan and provide direction.

BACKGROUND

At the February meeting, the Council reviewed a proposal to prepare an informational document, which would provide data to evaluate effects of different gear types used in the groundfish fisheries. The proposal is attached as Item D-1(b)(1). The Council requested that staff review the proposal for scope and prepare a statement of work for possible contracting with outside analysts to pull together this information. A summary of the scope for this analysis will be provided at this meeting, and the Council will review the scope of work and provide direction to staff on how to proceed.

Differential Gear Analysis for the GOA

This analysis is to be completed independently of any particular management measure and should be viewed as a tool or method available to the NPFMC to accomplish the objective of future management decisions that may be considered. ~~The analysis has been sought in several actions in recent years but, due to constraints in staff time and the cloud of allocation that its use may generate, it has not been completed.~~ Evaluation of ~~potential~~ differential gear effects on a broad scale without immediate implications as to its use should provide a means to help the Council decide how GOA fisheries should be managed.

Fishing gears used in the GOA (EGOA, CGOA, and WGOA) groundfish fishery have different effects on habitat, different results for bycatch rates and bycatch mortality rates, different abilities to catch target groundfish species and different economic implications for harvesters, processors, product forms, markets and communities.

By evaluating the effects of the gears used in the fishery and the economic contribution of fish caught and processed by the different gear types to fishing communities dependent on the Gulf groundfish fisheries, the NPFMC will make more informed decisions. The differential gear analysis will help the NPFMC understand how to provide harvest opportunity and at the same time minimize to the extent practicable, the adverse effects of fishing on essential fish habitat and habitat areas of particular concern ~~habitat degradation~~ and achieve bycatch reduction in accordance with the Magnuson-Stevens Act, as well as balance the economic dependence of the fishing communities and their fishing fleets.

The following issues are pertinent to future management of the GOA fishery:

- Bycatch and bycatch mortality rates
- Habitat considerations
- Stock considerations
- Excess harvesting capacity
- Economic efficiency, product value, and quality benefits to consumers and producers
- Economic stability/dependence on groundfish in the fisheries and communities
- ~~Relative management cost and abiltiy to be managed rationally.~~ Rationalized Management
- Broad participation by community-based fishermen
- Integrity of data base (observer coverage levels)

- Potential for changes in the distribution of fishing effort if fishery moves from current open access to a rationalized fishery (will areas currently not fished become desirable fishing grounds?)
- Percentage of total fishing area already closed to gear type either seasonally or annually Analyze the effectiveness of present closed areas
- Percentage of areas already protected for benthic effects of fishing per gear type
- Rational used in past allocation issues (eg. Amendment #14)

Economics~~- relative efficiency of gear~~:

- Is there an ex-vessel price, product or quality difference?
- Is there market saturation for product derived by gear
- Seasonal value of product (milt, roe, etc.)
- Seasonal product entry into market
- Capacity to harvest the TAC
- What is the implication to processors of various levels of product quantity per delivery
- Economic efficiency and versatility of targets of harvest type
- Economic dependence of coastal communities based on fish landings by gear type
- Crew size and associated community benefits
- Net margins as a percent of gross and maximum gross
- Cost of gear conversion by vessel size, configuration and economic feasibility
- Annual expenditure per gear type in communities
- Ability to use gear in other fisheries with swing in fish abundance
- Jobs
- Support industries
- Effects on processors by changing harvest shares by gear groups

Impacts on communities adjacent to the resource:

- Number of vessels participating
- Number of crew employed (in FTEs)
- Number of processing workers employed (in FTEs)
- Rent creation and rent capture

Rationalized fisheries

- Implications of gear conversion for LLP endorsement issues
- ~~Conservation, economic and safety benefits of the removal of the race for fish through a comprehensive Gulf rationalization program~~
- Options for transitioning from one gear to another