

AFSC's Economic and Social Sciences Research Program (ESSRP): Updates for the Groundfish Plan Teams Steve Kasperski, Nov. 13, 2017



The ESSRP team



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Economic and Human Dimensions Science Review

NOAA Fisheries 2017 Science Program Reviews: Economic and Human Dimension Science



2017 Program Review

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HIGH QUALITY SCIENCE is fundamental to NOAA as a science-based agency. NOAA Fisheries conducts objective peer reviews of scientific activities in major programs at its Science Centers on a regular basis using agreed-upon criteria. The purpose of the reviews is to maximize the transparency and effectiveness of major science programs located at the six Science Centers as well as those located in or coordinated through NMFS Headquarters.

- **July 17th-20th, 2017**
- **https://www.afsc.noaa.gov/program_reviews/2017/default.htm**



Social Science Planning Team

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The Council's Social Science Planning Team is established to facilitate and enhance the use of social science data in the management process, and operates under the following mission statement:

The Social Science Planning Team (SSPT) is established to improve the quality and application of social science data that informs management decision-making and program evaluation. The SSPT is constituted of representatives who will strategize medium- and long-term improvements in data collection and analytical methodology, allowing the NPFMC to better meet its own program objectives as well as LAPP review requirements defined in the Magnuson-Stevens Act and recommended in NMFS guidelines. The SSPT will identify data needs, make recommendations regarding research priorities, and advise analysts in efforts to improve analytical frameworks when possible. The SSPT will support the collection and aggregation of social science data in a manner that cuts across Fishery Management Plans and specific management programs within the North Pacific region.

The SSPT will hold a public organizational teleconference at 10am AKT on November 14, 2017, and report back to the Council and its advisory bodies at the February 2018 Council meeting in Seattle, WA. The first annual in-person SSPT meeting is tentatively scheduled for May 2018, with dates and location to be determined.

NPFMC's Social Science Planning Team (SSPT)

<https://www.npfmc.org/committees/social-science-planning-team/>

- First meeting tomorrow (via teleconference)
 - 10 am to 1pm AKT
 - Call in information: 888-456-5038
 - Participant passcode: 8480290
- Focus on medium- and long-term improvements in data collection, research priorities, and analytical methodologies
- Cuts across Fishery Management Plans and specific management programs

Questions?





**NOAA
FISHERIES**

**Alaska
Fisheries
Science
Center**

Economic Status of the Groundfish Fisheries off Alaska, 2016

Presented by:

**Ben Fissel
AFSC Economics and Social Sciences
Research Program (ESSRP)**

Nov. 13, 2017

Economic Status Report, 2016: Final Draft Content (Nov.)



NOAA
FISHERIES

Report Expected to be finalized the week of Nov. 21

- Report Card Metrics
- Plan Team Reports
- Economic Indices
- Wholesale Price Projections
- Market Profiles
- Catch Share Performance Metrics
- Amendment 80 Economic Data Report
- Amendment 91 Economic Data Report
- Communities Section
- Recent and Ongoing ESSRP Research and Publications

Revised Economic Data Tables

<p>All Alaska Summary Tables 1 – 8</p>	<p>Catch (total and retained) Ex-vessel catch and real revenue of all AK fisheries 1st wholesale production and real revenue of all AK fisheries Summarized discards and PSC Vessel counts</p>
<p>Bering Sea and Aleutian Islands Tables 9 – 24</p>	<p><u>Ex-vessel:</u> Retained catch, prices and value (with specific flatfish and rockfish species). Retained catch by target. Value metrics by fleet</p> <p><u>1st wholesale:</u> Production, prices, and value (with specific flatfish and rockfish species). Production value metrics by processor group</p>
<p>Gulf of Alaska Tables 25 – 40</p>	<p><u>Effort:</u> Vessel counts, average length, tonnage, CV and CP fishing weeks, CV and CP crew weeks.</p>
<p>Pacific halibut Tables H1 – H10</p>	<p>Catch PSC Ex-vessel value, price 1st wholesale production, value and price Effort: vessel counts, vessel days, crew days</p>

GPT Species Economic Performance Report

Economic Performance Reports:

- BSAI: **pollock, Pacific cod, flatfish, rockfish, Atka mackerel.**
- GOA: **pollock, Pacific cod, flatfish, rockfish complex.**
- Combined: **sablefish.**

Most included as an appendix to the stock assessments. Some were incorporated into the text. Sablefish included with ESP as appendix.

- Welcome feedback on content: Too much/not enough information? Report too long? Different information?

Where do I find the economic data I need?

\\nmfs\akc-public\Dropbox\Fissel\EconomicSAFEData2017

Open `Tablenames_econGroundfishSafe_NovDraft.csv`
To get an excel sheet matching table names to file names.

	A	B
1	List of Tables	File name
1	Groundfish catch in the commercial fisheries of Alaska by area and species, 2007-2016 (1,000 metric tons, round weight)	gftotcatch_ak.csv
2	Catch of species other than groundfish in the domestic commercial fisheries, 2002-2016 (1,000 metric tons)	nongftotcatch_ak.csv
3	Groundfish retained catch off Alaska by area, vessel type, gear and	gftretcatch_ak.csv
6	Real ex-vessel value of the catch in the domestic commercial fisheries off Alaska by species group, 2002-2016; calculations based on COAR (\$ millions, base year = 2016)	rexvval_ak.csv
7	Production and real gross value of groundfish and non-groundfish	rwsval_ak.csv

Currently only accessible to AFSC.
The data will be accessible through the website soon.

Web application: Expected completion Jan. 2018

Ex-vessel value of the groundfish catch off Alaska, 2003-2015

Species

Area

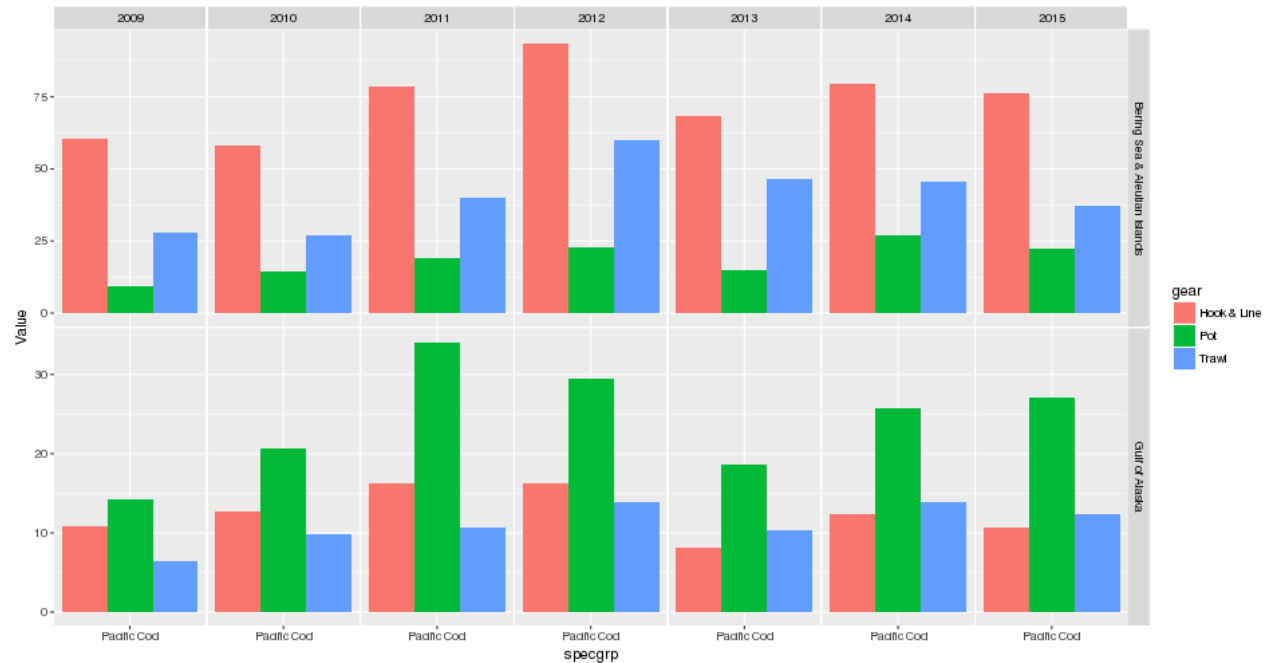
Stratify by:
 Gear
 Sector

Gear

Sector

Year

For details see Table 19 of the Economic Status of the Groundfish Fisheries off Alaska, 2015.



specgrp	zone	gear	sector	2009	2010	2011	2012	2013	2014	2015
Pacific Cod	Bering Sea & Aleutian Islands	Hook & Line	All Sectors	60.60	58.20	78.70	93.70	68.20	79.40	76.30
Pacific Cod	Bering Sea & Aleutian Islands	Pot	All Sectors	9.40	14.60	19.00	22.60	15.00	27.00	22.40
Pacific Cod	Bering Sea & Aleutian Islands	Trawl	All Sectors	27.90	27.00	40.00	59.80	46.60	45.40	37.30
Pacific Cod	Gulf of Alaska	Hook & Line	All Sectors	10.90	12.70	16.20	16.30	8.10	12.30	10.60
Pacific Cod	Gulf of Alaska	Pot	All Sectors	14.30	20.60	34.10	29.50	18.70	25.80	27.10
Pacific Cod	Gulf of Alaska	Trawl	All Sectors	6.40	9.90	10.70	13.90	10.40	13.90	12.30

<http://pssev.psmfc.org:4949/ECON-GF-SAFE/table19/>

Note: this application is still under construction.

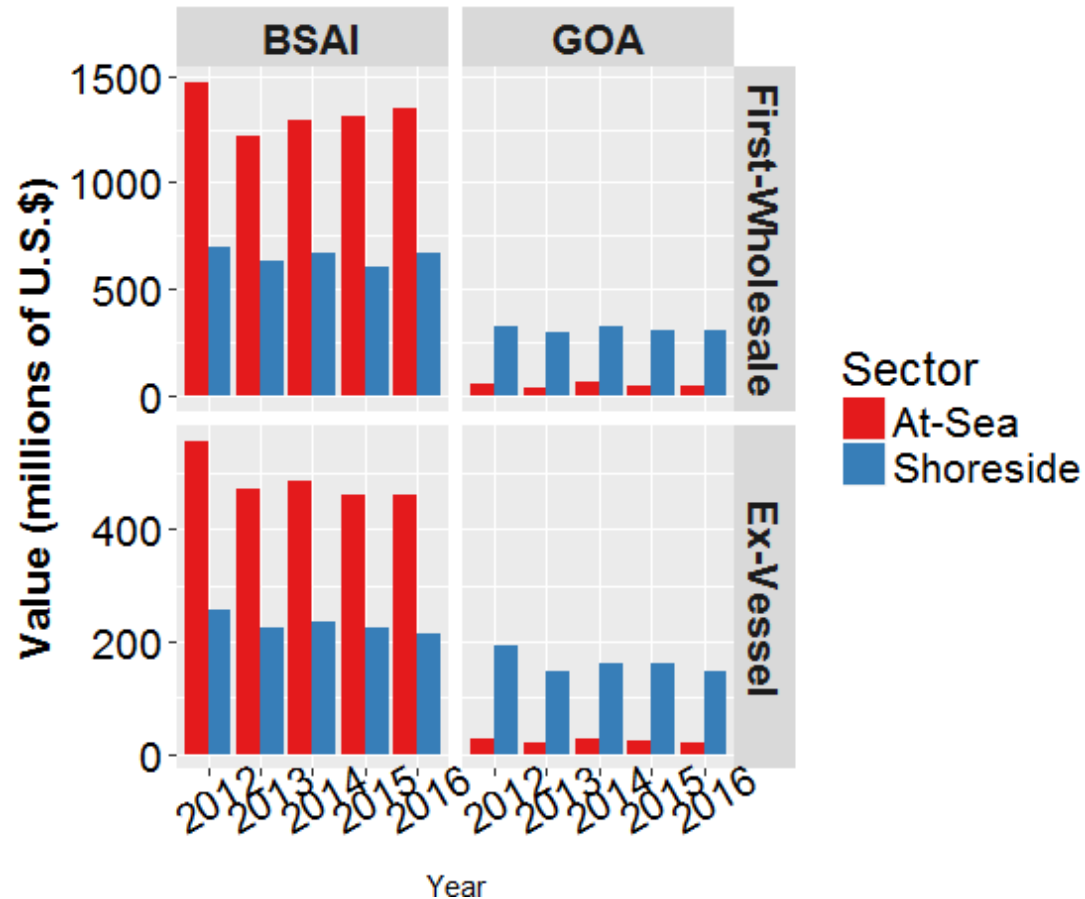
Alaska's Groundfish Fisheries in 2016

Total catch: **2.3 million t**
(up 2.5%)

Value stable across
regions and sectors

Wholesale value:
\$2.38 billion (up 4%)

Ex-vessel value:
\$871 million (down 3.8%)

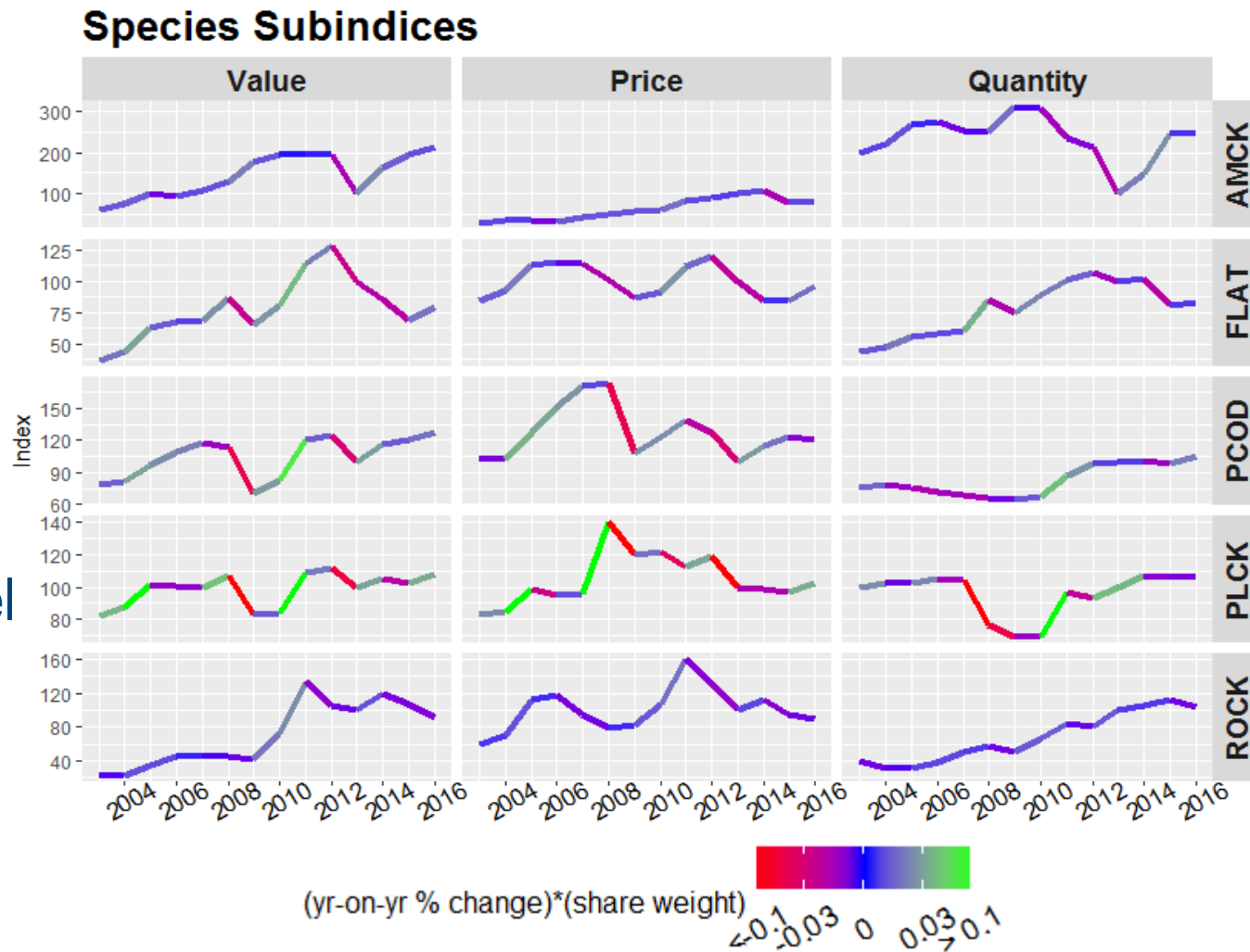


Percent change adjusted for inflation.

Values in figure nominal (not adjusted for inflation)

BSAI 1st Wholesale Economic Indices

- Value decreased:
 - Rockfish
- Value increased:
 - Pollock
 - Pacific cod
 - Flatfish
 - Atka mackerel

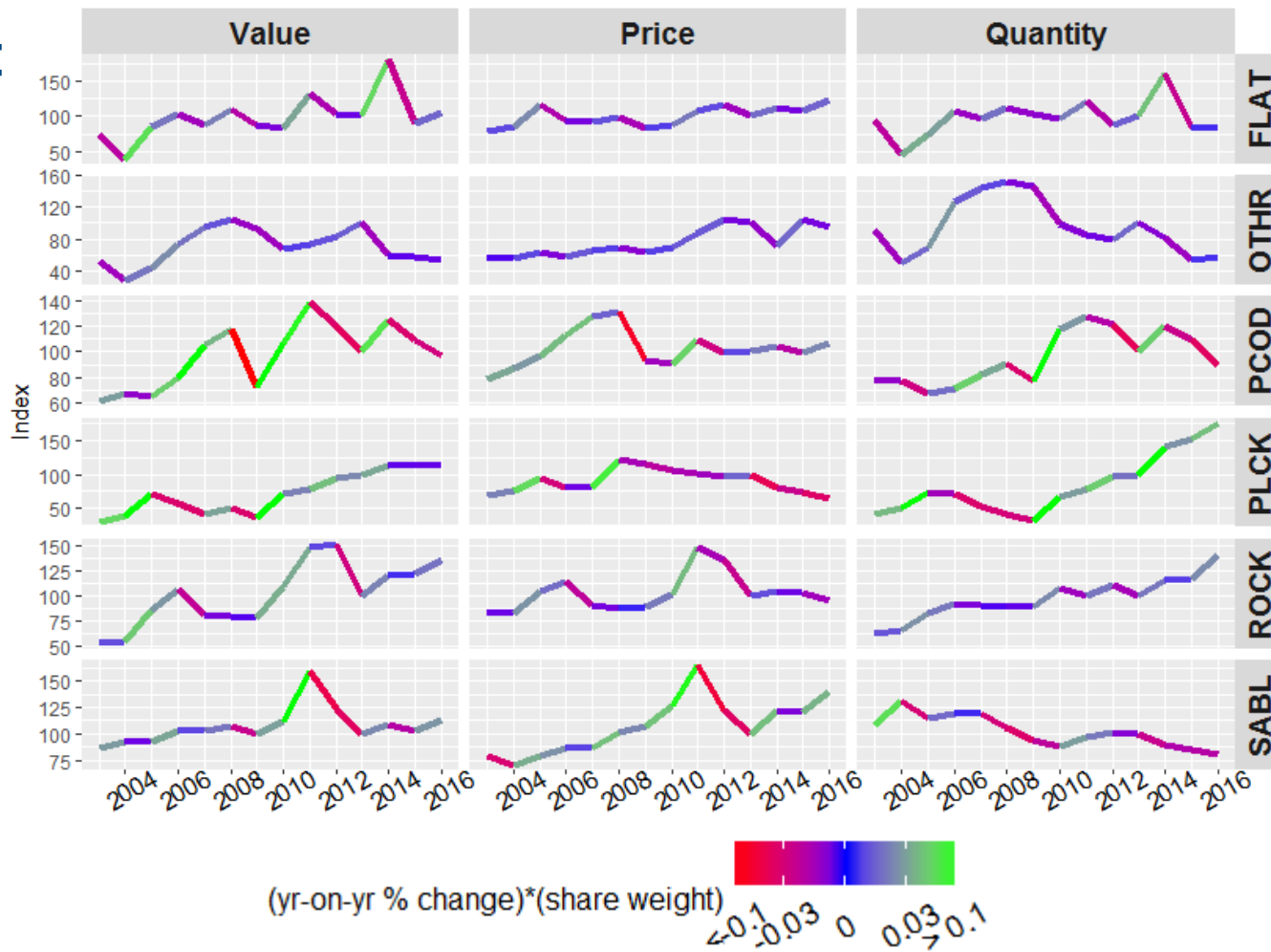


Values are nominal (not adjusted for inflation)

GOA 1st Wholesale Economic Indices

- Value decreased:
 - Pacific cod
- Value increased:
 - Rockfish
 - Sablefish
 - Flatfish
- No significant change
 - Pollock

Species Subindices



Values are nominal (not adjusted for inflation)

Gulf of Alaska Pacific cod Economic Performance Report for 2016

Pacific cod is a critical species in the catch portfolio of the Gulf of Alaska (GOA) fisheries. Pacific cod typically accounts for just under 30% of the GOA's FMP groundfish harvest and over 20% of the total Pacific cod catch in Alaska. Total catch of Pacific cod in the GOA was 64 thousand t and retained catch 63 thousand t, down 18% in 2016 from 2015. Retained catch is below the recent high of 79 thousand t in 2014, and is just under the 2007-2011 average of 63 thousand t (Table 2.30). Catches in 2017 are expected to be below 2016 with a 10% reduction in the 2017 TAC. Preliminary stock assessment estimates as of Oct. 2017 suggest a substantial reduction in the 2018 catch specifications. Ex-vessel revenues in 2016 were down 18% to \$41 million with the reduction in catch (Table 2.30). The products made from GOA Pacific cod had a first-wholesale value was \$90 million in 2016, which was down 12% from 2015 and below the 2007-2011 average of \$102 million (Table 2.30, Table 2.31, and Table 2.32).

The fishery for cod is an iconic fishery with a long history, particularly in the North Atlantic. Global catch was consistently over 2 million t through the 1980s, but began to taper off in the 1990s as cod stocks began to collapse in the northwest Atlantic Ocean. Over roughly the same period, the U.S. catch of Pacific cod (caught in Alaska) grew to approximately 250 thousand tons where it remained throughout the early to mid-2000s. European catch of Atlantic cod in the Barents Sea (conducted mostly by Russia, Norway, and Iceland) slowed and global catch hit a low in 2007 at 1.13 million t. U.S. Pacific cod's share of global catch was at a high at just over 20% in the early 2000s. Since 2007 global catch has grown to 1.85 million t in 2014 as catch in the Barents Sea has rebounded and U.S. catch has remained strong at over 300 thousand t since 2011. European Atlantic cod and U.S. Pacific cod remain the two major sources supplying the cod market over the past decade accounting for roughly 75% and 20%, respectively. Atlantic cod and Pacific cod are substitutes in the global market. Because of cod's long history, global demand is present in a number of geographical regions, but Europe and the U.S. are the primary consumer markets for many of the Pacific cod products. The market for cod is also indirectly affected by activity in the pollock fisheries which experienced a similar period of decline in 2008-2010 before rebounding. Cod and pollock are commonly used to produce breaded fish portions. Alaska caught Pacific cod in the GOA became certified by the Marine Stewardship Council (MSC) in 2010, a NGO based third-party sustainability certification, which some buyers seek. Changes in global catch and production account for much of the broader time trends in the cod markets. In particular, the average first-wholesale prices peak approximately \$1.90 per pound in 2008 and

Gulf of Alaska Pacific cod

GOA ~ 20% of AK Pac. cod catch

Ex – vessel data

	Avg 07-11	2012	2013	2014	2015	2016
Retained catch K mt	62.7	76.9	63.9	79.5	77.2	63.1
Ex-vessel value M \$	\$51.3	\$59.6	\$37.2	\$52.1	\$50.0	\$41.0
Ex-vessel price lb \$	\$0.371	\$0.352	\$0.264	\$0.297	\$0.293	\$0.294
Hook & line share of catch	27%	27%	21%	23%	20%	17%
Pot gear share of catch	48%	48%	49%	48%	52%	60%

Pacific cod's share of GOA landings: 20% of groundfish and 9% of all fisheries.

Distribution of cod catch:

Central Gulf: 55-60%

Western Gulf: ~ 40%

Other Gulf: 1-2%

Cod Share of Regional GF Revenue:

Central Gulf: ~ 25%

Western Gulf: ~ 50%

Other Gulf: ~ 2%

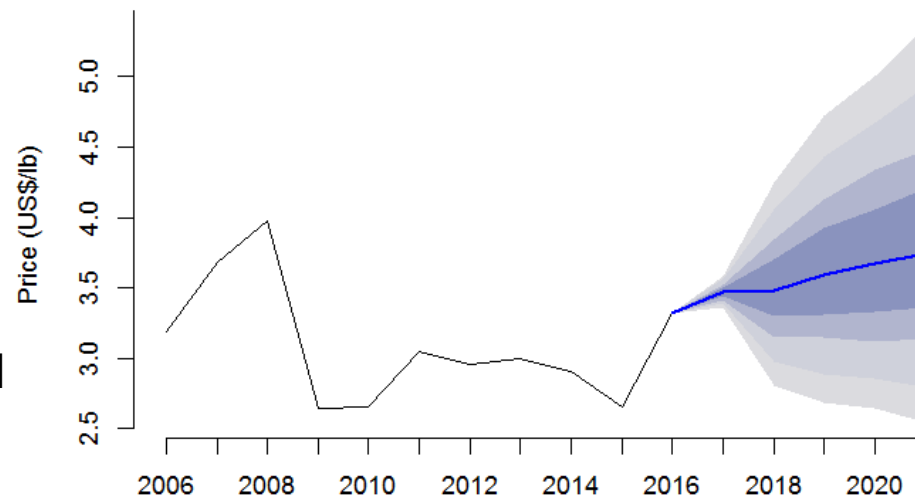
GOA First-wholesale data

		Avg 07-11	2012	2013	2014	2015	2016
All Products	volume K mt	27.58	34.09	23.80	31.07	32.00	21.65
All Products	value M \$	\$102.1	\$113.6	\$94.2	\$118.1	\$102.9	\$90.2
All Products	price lb \$	\$1.68	\$1.51	\$1.80	\$1.72	\$1.46	\$1.89
Fillets	value share	48.2%	50.1%	71.3%	57.1%	36.2%	64.6%
Fillets	price lb \$	\$3.09	\$2.84	\$3.14	\$3.10	\$2.64	\$3.36
Head & Gut	value share	37.5%	35.4%	15.6%	32.6%	51.1%	22.4%
Head & Gut	price lb \$	\$1.39	\$1.19	\$1.01	\$1.25	\$1.25	\$1.09

Pacific cod fillet price projection

Fillets are an important product type for GOA
 Fillet prices expected to remain strong with decreased supply through 2017 and 2018.

Prices won't rise indefinitely, at some point, sufficiently high prices will induce processors and consumers substitute into other fish proteins.



Values are nominal (not adjusted for inflation)

Cod Markets

Global supply of cod expected to decline slightly in 2017 (down 1.4%) and more so in 2018 (5.4%) (Groundfish Forum estimates).

GOA P. cod 20% of AK and US 20% of global, so GOA only 4% of global, but the drop in GOA P. cod comes amid declines in BSAI P. cod and Atlantic cod.

	Avg 07-11	2012	2013	2014	2015	2016	2017 (thru July)
Global cod catch K mt	1,272	1,600	1,831	1,853	1,764	-	-
U.S. P. cod share of global catch	19.7%	20.7%	17.0%	17.7%	18.1%	-	-
U.S. cod consumption K mt (est.)	80	97	104	114	107	113	-
Share of U.S. cod not exported (est)	25%	30%	31%	31%	26%	29%	-
Export volume K mt	90.3	111.1	101.8	107.3	113.2	105.2	67.7
Export value M US\$	\$286.3	\$363.6	\$308.0	\$314.2	\$335.0	\$311.7	\$208.0
Export price lb US\$	\$1.439	\$1.485	\$1.373	\$1.328	\$1.342	\$1.344	\$1.393
Frozen (H&G) value share	68%	80%	89%	91%	90%	92%	92%
Fillets value share	16%	11%	5%	4%	4%	4%	6%
China value share	25%	43%	48%	51%	51%	52%	57%

Values are nominal (not adjusted for inflation)

Thanks!

Questions and comments to: Ben.Fissel@noaa.gov