



**NOAA**  
**FISHERIES**

# AFSC Economics and Social Science Research Program *Highlights*



Dr. Sarah Wise

North Pacific Fisheries Management Council B Report | October 2025

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# Economic and Social Science Research Program Staff



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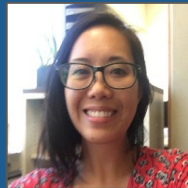
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Find us on the updated ESSR Website

<https://www.fisheries.noaa.gov/alaska/socioeconomics/alaska-economic-and-social-sciences-research>

- ◆ *Collect and analyze economic, social, and cultural data to support NOAA Fisheries stewardship responsibilities in the North Pacific and Arctic.*
- ◆ *Develop models for assessing the effects of changing markets, environmental conditions, and fisheries management on fisheries and fishing communities.*

### Areas of Focus

- Climate, ecosystems, & fisheries
- Bioeconomic models for complex systems
- EEJ approaches
- Fishing communities
- Multiple knowledge systems
- Non-market valuation
- Protected species

# ESSR Program

## Products and Tools

### Annual Fisheries Reports

- *Economic SAFEs (Groundfish & Crab)*
- *ACEPO - Annual Community Engagement and Participation Overview*

### Developed for NPFMC Staff

- *Community Landings Dashboard*

### National Initiatives & Broad Utility

- *Multi-regional Social Accounting Matrix (MRSAM)*
- *ACED - Alaska Climate Ecosystem Dashboard*
- ***Alaska Communities Snapshot***



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 practical, minimize the adverse impacts on such communities.

**Executive Order 12898** additionally mandates that the greatest extent practicable and permitted by law, the Department of Environmental Protection shall include in its environmental justice part of its mission by disproportionately high and adverse human health and environmental impacts of their actions on minority and low-income populations.



ACEPO



The Annual Community Engagement and Participation Overview (ACEPO) summarizes harvesting and processing engagement and participation by communities in federally-managed groundfish and crab fisheries of the North Pacific.



### 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 [redacted].*



### 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.

## Other Resources

Regional Economic Impact Analysis for North Pacific Fisheries

### Regional Economic Impact Analysis

Category	2010	2011	2012	2013	2014
Value Added	1.1	1.2	1.3	1.4	1.5
Employment	1.2	1.3	1.4	1.5	1.6
Household Income	1.3	1.4	1.5	1.6	1.7

A web application using a Multi-Regional Social Accounting Matrix (MRSAM) model to calculate the economic impacts from North Pacific commercial fisheries on industry output, employment, value added, household income, and state and local government revenue.

### Catch Share Performance Metrics



COMING SOON

Performance indicators for North Pacific fishery catch share programs.

### Filter by Species Group

- All Species
- Atka mackerel
- Crab
- Flatfish
- Halibut
- Herring
- Other
- Other freshwater fish
- Other shellfish
- Pacific cod
- Pollock
- Rockfish
- Sablefish
- Salmon
- Scallop

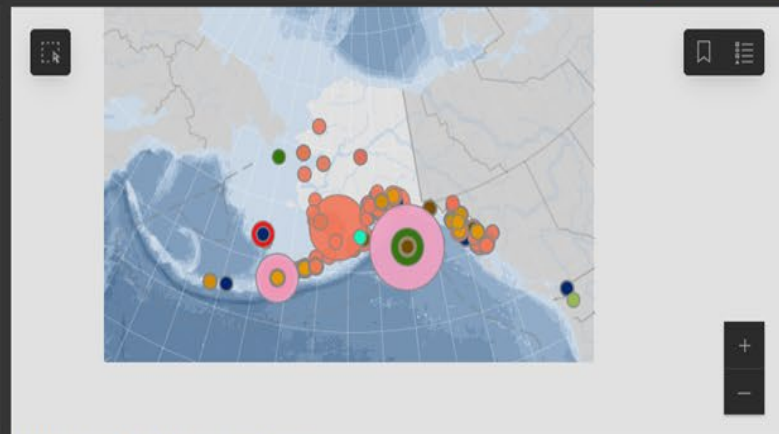
### Top 25 Community Fisheries by Value (2015 - 2019)

**At-Sea Processor**

**Pollock** (Trawl, Bering Sea and Aleutian Islands)  
 Avg. Annual Value = [redacted] (2019)  
 Fishery Share = 57.1% (#1)  
 Community Share = [redacted]

**Naknek**

**Salmon** (Other, Bering Sea and Aleutian Islands)  
 Avg. Annual Value = [redacted] (2015-



### Introduction

The Alaska Commercial Fisheries - Community Landings Dashboard allows users to explore how communities are engaged with commercial fisheries of the North Pacific. This dashboard presents information on **communities\* where raw fish are landed**, including:

- the **landing value** of fisheries by community a) *annually* from 2010 onward and b) *averaged* over the most

Introduction

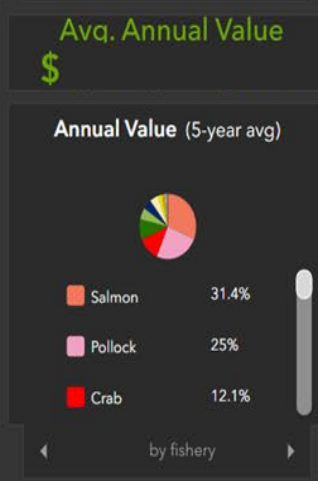
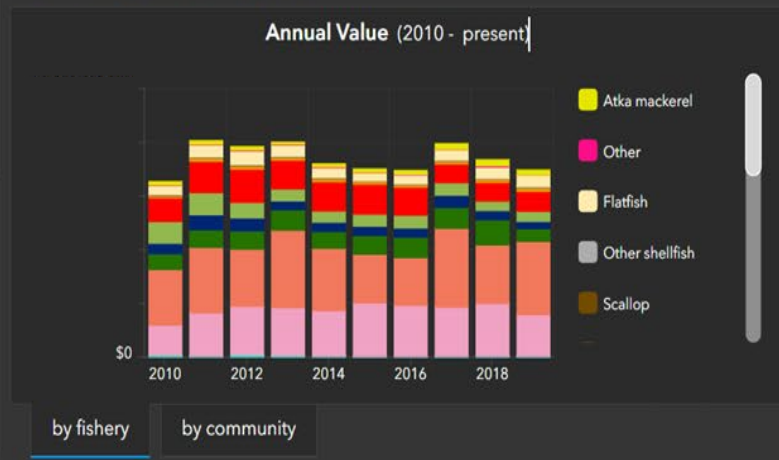
### Filter by Gear

- Jig
- Longline
- Other
- Pot
- Trawl

### Naknek

Native name: Nakniq

Alaska Division of Community and Regional Affairs  
 Community Photo Library



# Overview

## Report Purpose

- This snapshot report is intended to provide an independent assessment of the current economic and social conditions in the AK seafood industry.

## Information Used

- Includes all state and federal commercial fisheries in AK.
- We use NOAA Fisheries and 3<sup>rd</sup> party data sources to assess changes in revenues and costs, supplemented by discussions with industry members to contextualize the current market conditions facing the Alaska seafood industry.

## Key Takeaway

- There is evidence of substantial increases in costs starting in 2022 and price declines in 2023, leading to increased pressure on both harvesting and processing business operations.

# Social and Economic Importance of Seafood in Alaska

**Seafood** is a major private sector employer in AK

**Fisheries** are an economic and cultural engine across AK fishing communities, and beyond

- Strong connection between Alaska fisheries and food security in AK communities
- Fisheries underpin well-being across AK fishing communities

## Well-being

encompasses a state when needs are met and individuals and communities can pursue their goals and enjoy a satisfactory quality of life

## Connections

between fisheries and well-being for AK and other U.S. coastal communities are well established in the literature



# Challenges

Lower  
seafood prices

Higher input costs  
of harvesting  
and processing

Residual  
COVID impacts

Trade,  
exchange rates,  
and tariffs

Fisheries  
disasters

Aging physical  
capital/  
infrastructure

Lack of  
revenue insurance

Processor  
employment  
and plant closures

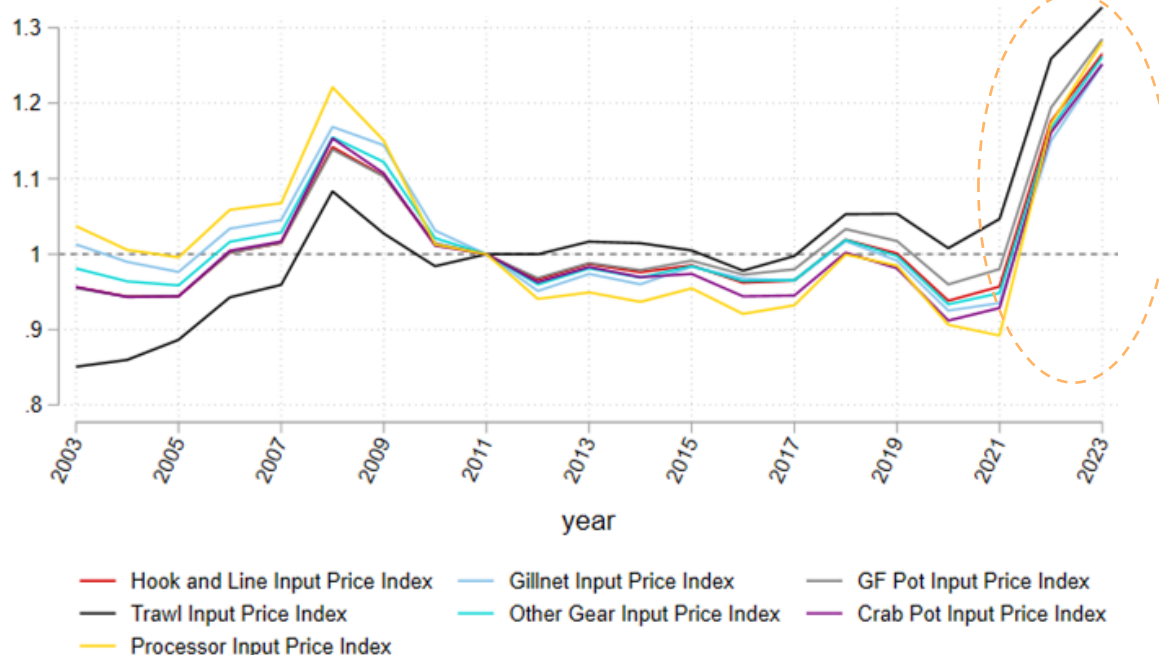
Cumulative  
effects





# Increasing Costs since 2022

Input Price Index by Gear Type (2011=1)



Significant increases in the costs of many factors of production

High interest rates

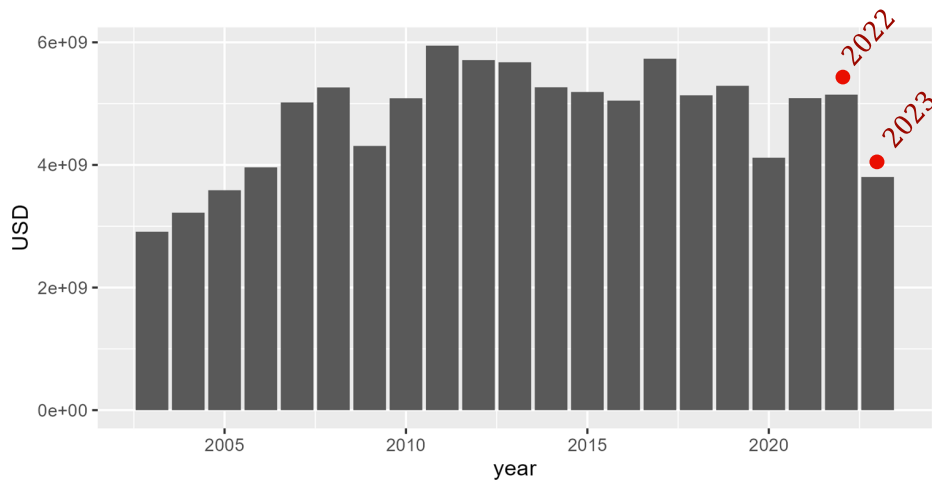
Increasing fuel prices

Wage increases  
(particularly H2B visa processing workers)

General inflation

# Declining Revenue in 2023

Statewide weighted average first-wholesale value (\$2022)



First Wholesale Value

**-26%**

**(-\$1.2 B)**

from 2022 to 2023

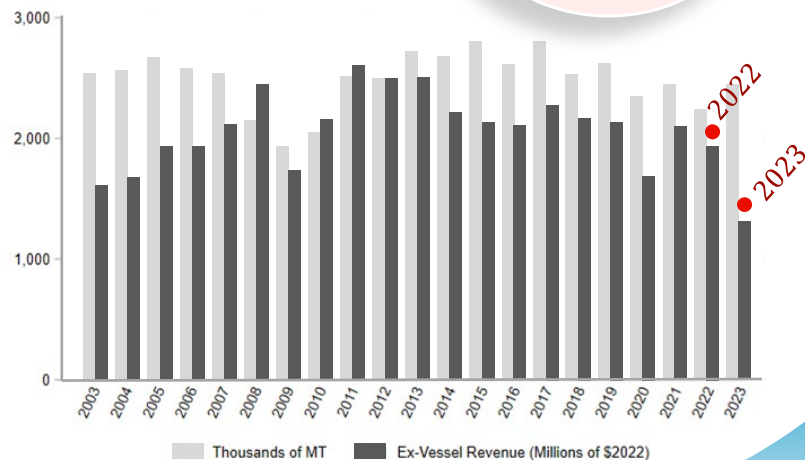
Ex-Vessel Revenue

**-38%**

**(-\$617 M)**

from 2022 to 2023

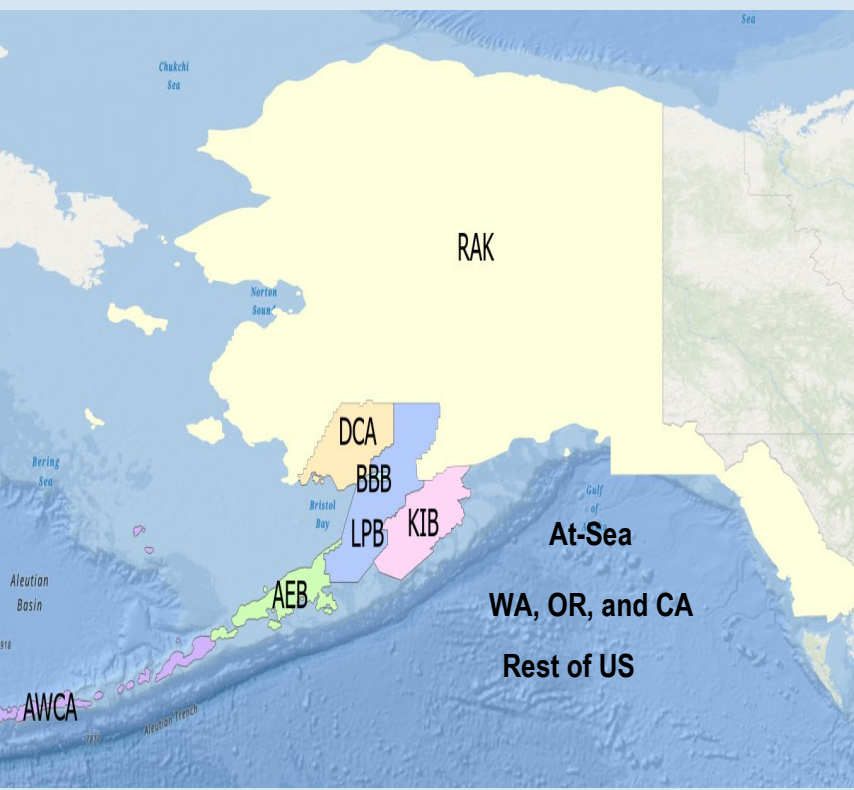
Statewide Ex-Vessel Totals



Thousands of MT Ex-Vessel Revenue (Millions of \$2022)

# Economic Impacts

from Alaska Fisheries Revenue Changes, 2022-2023



**Total**      -\$4,308 M output | -38,243 jobs | -269 M in SLG rev

**At-Sea**      -\$44 M output | -322 jobs

**Alaska Total**      -\$2,386 M output | -27,669 jobs | -\$135 M SLG rev

**Rest of US**      -\$1,199 M output | -6,482 jobs | -78 M in SLG rev

**WA, OR, CA**      -\$680 M output | -3,770 jobs | -58 M in SLG rev

SLG rev = State and local government revenue



# Implications of Downturns on Well-Being

## Declining profits from last two years of low prices compound stressors associated with ecological changes

- The “Blob” and impacts on Pacific cod and multiple salmon species and runs in the Gulf
- Disappearance of snow crab from the Bering Sea
- Closures of commercial and subsistence salmon fisheries for Western AK communities

## Some fishermen and fishing communities are struggling to survive in response

- Reporting declining physical and mental health, increasing substance abuse issues
- Struggling to make loan payments (boats, permits, insurance) with declining profits
- King Cove lost Peter Pan and 70% of its community revenues
  - Compounded by losing momentum on multiple community projects that relied on the processing facility to purchase hydroelectric power, water, and solid waste disposal

**Growing local food security implications**

**Concerns over large-scale losses**

in fisheries participation, with generational implications for fishing communities

**Recent market disruptions**

undermine fishermen’s and communities’ capacity to ultimately be resilient and survive in fisheries under climate stressors



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# Summary

## Total Losses *(Estimated)*

**\$1.8 B** loss in direct revenue in AK seafood industry, 2022-2023

**>38,000** loss in U.S. jobs (fishing and non-fishing)

**\$4.3 B** loss in U.S. output

**\$269 M** decrease in U.S. state/local tax revenues

**50%** decline in Ex-Vessel Margin Index (profitability measure), 2022 and 2023:

- *Compound effect of decreased prices (2023) and increased costs (2022+) for key production process inputs (wages, energy prices, interest rates)*

## Revenue Losses, 2023

Largely driven by low seafood prices across nearly all AK species

The result of global market forces:

- *Exchange rates and tariffs*
- *High inventories, high levels of global supply*
- *Lower global consumer demand for seafood due to inflation*
- *Lower cost of seafood production and processing in countries that compete with U.S. seafood products*

*Not disaster-eligible causes for federal fisheries disaster support*

## AK Seafood Industry

The AK seafood industry is:

- *An important way of life, sense of place, community, and identity*
- *A prominent food security provider for many Alaskans*

Recent changes:

- *Caused significant revenue losses in AK (state, towns, communities)*
- *Threaten the sustainability of AK fisheries-dependent communities and that way of life*



# Thank You!



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