



E3 Economic and Community Indicator Reports



Scientific and Statistical Committee, NPMFC

June 2, 2026

Sarah Wise, ESSR - AFSC

Rusty Dame, ESSR - AFSC

Overview

Action Required:

Receive reports and provide feedback or recommendations for the format of a standard December agenda item, as necessary.

- **ESSR and HD Data Explorer**
- **How this work aligns with broader NPFMC process**
- **Current products**
- **Highlights and Trends**
 - ACEPO (Dec. 2025)
 - Groundfish Econ. SAFE (Nov. 2025)



Overview of ESSR Program

The AFSC Economic and Social Science Research Program produces rigorous, policy-relevant analysis to support sustainable fisheries management across Alaska and the North Pacific.

Mission

Deliver timely economic and social science products that inform management decisions and reflect the needs of fisheries, fishing communities, and stakeholders.

Collaborations

We work in partnership with NPFMC, NOAA Regional Offices, fishing industry representatives, Tribes, Alaska coastal communities, and others.



Economic and Social Science Research Program Staff



Angela Abolhassani
Social Scientist

Climate Working Group

Skills: Legal & policy analysis, qualitative methods

Research Areas: Climate adaptation, management strategy evaluation, integrated modeling, seafood infrastructure, social indicators



Michael Dalton
Industry Economist

Skills: Bioeconomic modeling, trade analysis

Research Areas: Seafood market & trade trends, ocean acidification, maximum economic yield



Russel Dame
Industry Economist

Skills: Economic data analysis, spatial fleet modeling

Research Areas: Mandated economic analysis, recreational fisheries, location choice modelling, economic indicators



Brian Garber-Yonts
Economist

Crab Plan Team

Skills: Economic analysis and modeling,

Research Areas: Mandated economic analysis, economic indicators, catch share programs and quota markets



Chang Seung
Economist

Skills: Regional economic impact modeling, integrated modeling

Research Areas: Economic modeling and research, climate change and adaptation



Sarah Wise
Social Scientist

NPFMC - SSC

Skills: Interdisciplinary methods, co-production

Research Areas: Fishing communities, Integrated assessments, knowledge systems, social indicators

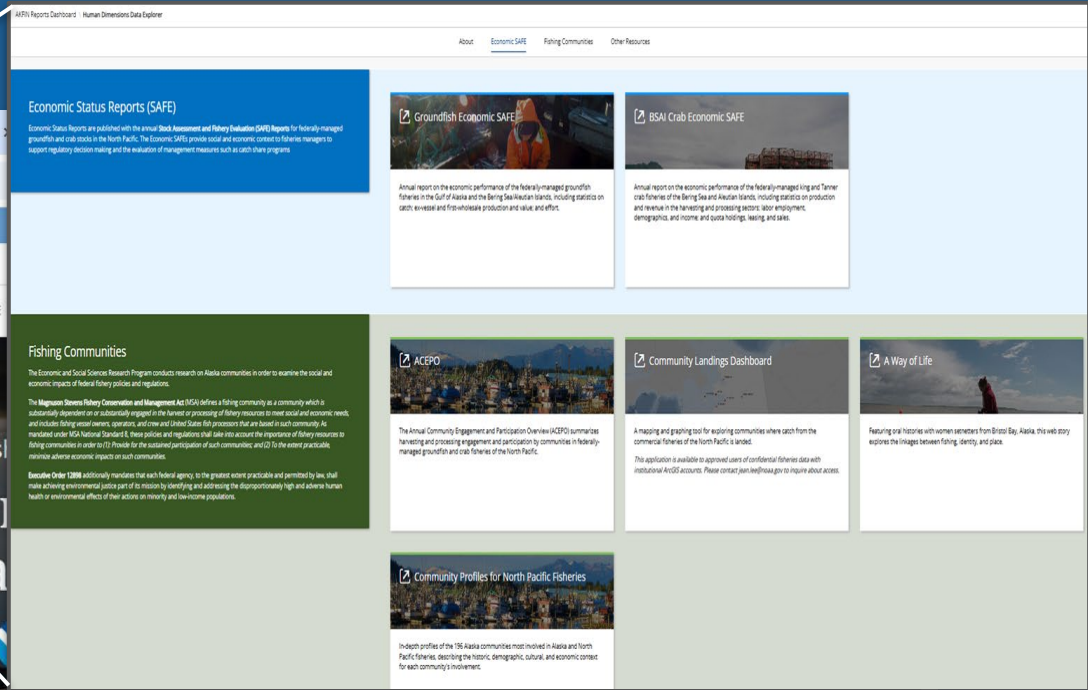
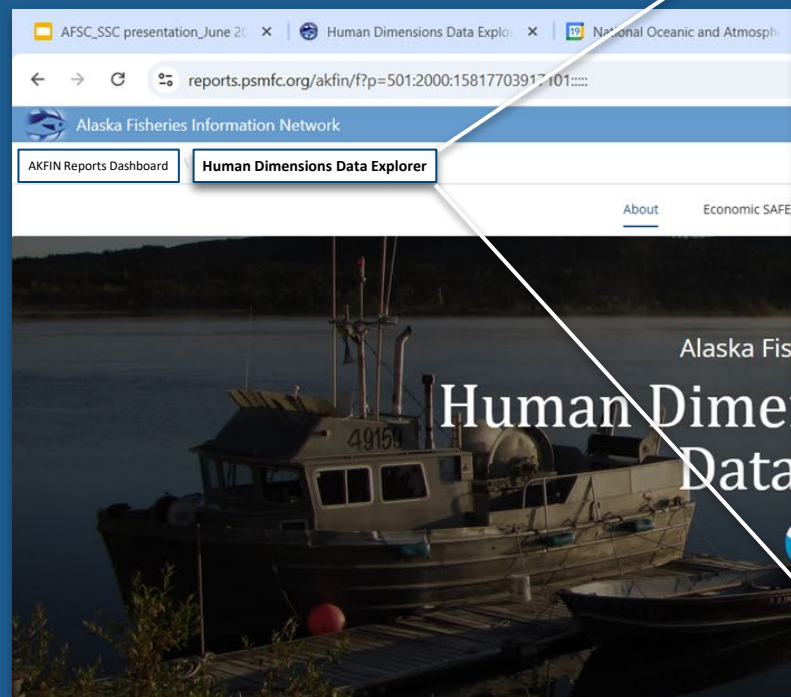


NOAA
FISHERIES

Start Here

Human Dimensions of Fisheries Data Explorer

<https://akhd.psmfc.org>



Provides access to data, data visualizations, and other tools for understanding the economic and sociocultural dimensions of Alaska fisheries.



Jean Lee, AKFIN
NOAA Affiliate



Economic Status Reports (SAFE)

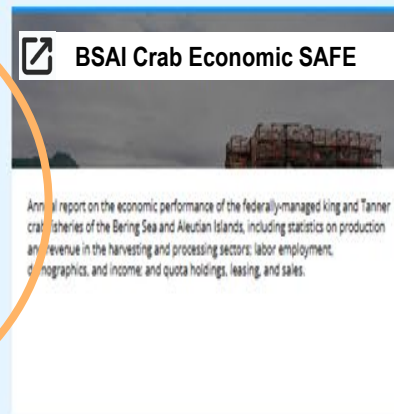
Economic Status Reports (SAFE)

Economic Status Reports are published with the annual **Stock Assessment and Fishery Evaluation (SAFE) Reports** for federally-managed groundfish and crab stocks in the North Pacific. The Economic-SAFEs provide social and economic context to fisheries managers to support regulatory decision making and the evaluation of management measures such as catch share programs.



Groundfish Economic SAFE

Annual report on the economic performance of the federally-managed groundfish fisheries in the Gulf of Alaska and the Bering Sea/Aleutian Islands, including statistics on catch, ex-vessel and first-wholesale production and value, and effort.



BSAI Crab Economic SAFE

Annual report on the economic performance of the federally-managed King and Tanner crab fisheries of the Bering Sea and Aleutian Islands, including statistics on production and revenue in the harvesting and processing sectors; labor employment, demographics, and income; and quota holdings, leasing, and sales.

Economic Status Reports (SAFE)

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.

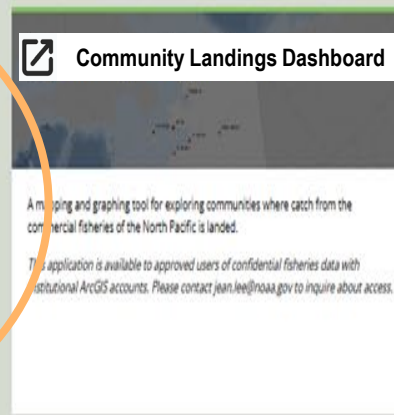
The **Magnuson Stevens Fishery Conservation and Management Act (MSA)** defines a fishing community as a community which is substantially dependent on or substantially engaged in the harvest or processing of fishery resources to meet social and economic needs and includes fishing vessel owners, operators, 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.



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 jean.lee@noaa.gov to inquire about access.



A Way of Life

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



Community Profiles

In-depth profiles of the 156 Alaska communities most involved in Alaska and North Pacific fisheries, describing the historic, demographic, cultural, and economic context for each community's involvement.



MSA - & N.S.

- NS1 - OY economic and social considerations
- NS2 - best scientific information available
- NS4 - fair and equitable distribution
- NS8 - fishing communities
- NS9 - bycatch

EBFM

NPFMC Policy Statement

Recent EBFM considerations in the Alaska Region have included a focus on the role of humans in the ecosystem and the importance of maintaining healthy fishing communities.

Seafood Strategy

Sustainable & Resilient Seafood Production

Changes in ocean conditions are affecting access to fishing opportunities, production of seafood, and fishing to support local dietary needs, cultural traditions, and tribal treaty rights.

E.O. 14276

Restoring America's seafood Competitiveness

Working toward a more adaptive, economically resilient, workforce-supported, and socially sustainable seafood system.

USDA Office of Seafood

Support domestic coastal communities and supply fishers access to grants, loans, and marketing resources.

Annual Reporting

- Groundfish Econ SAFE
- Crab Econ SAFE
- ACEPO
- Alaska Snapshot

Decision Support Tools

- MRSAM model
- Community Landings DB
- Social & economic indicators

Databases

- ACE Dashboard
- Catch shares performance
- NOAA Voices Archives

Purpose

Track AK fishery & fishing community performance

Purpose

Provide analytical support to resource managers

Purpose

Data transparency and support analysts workflow

Audience

- NPFMC
- AKRO
- Analysts
- General Public

Audience

- NPFMC
- AKRO
- Fishing Communities

Audience

- Analysts
- AKRO
- Plan Teams

Specific Uses Cases

- Harvest specs
- RIR
- Impact analyses
- Council analytical docs
- SIA

Specific Uses Cases

- Council Climate Plan
- Prioritization Analyses
- Snapshot
- Forecast landings

Specific Uses Cases

- National and regional level monitoring
- Research and analytical integration



Data availability summary for ESSR data sources

Note: These tables summarize the temporal availability of data sources used in ESSR products, including whether data are available in-season or with a reporting lag. They do not necessarily reflect the temporal scope of the ESSR products themselves, which commonly focus on prior-year reporting.

Balancing Timeliness and Uncertainty | When is the best time to present?

	April – September	October	November	December
Groundfish SAFE				
Landings volume, fleet participation, wholesale production volume	In-season data available			
Ex-vessel pricing and value	Preliminary data available for previous year and current season	Finalized data available for previous year and preliminary for in-season		
Wholesale pricing and value	No data available for prior year	Finalized data available for previous year		
Amendment 80 chapter (EDR reporting)	No data available for prior year		Finalized data available for previous year	
CrabSAFE				
Landings volume, fleet participation	In-season data available			
Wholesale production volume	No data available for prior year	Finalized data available for previous year		
Ex-vessel pricing	Preliminary data available for previous year and current season	Finalized data available for previous year and preliminary for in-season		
Wholesale pricing and value	No data available for prior year	Finalized data available for previous year		
Employment, income, costs, quota and lease activity, net earnings	No data available for prior year		Finalized data available for previous year	

Finalized / In-season available
Data are available (in-season and/or finalized for prior year)














Preliminary available
Preliminary data available for prior year and/or current season


Not yet available
No data available for prior year


These timelines reflect when data become available, not when they are reported in ESSR products.


Data availability summary for ESSR data sources


Note: These tables summarize the temporal availability of data sources used in ESSR products, including whether data are available in-season or with a reporting lag. They do not necessarily reflect the temporal scope of the ESSR products themselves, which commonly focus on prior-year reporting.

ACEPO Data Sources	April – September	October	November	December
 Community participation indices in groundfish and crab	No data available for prior year		Finalized data available for previous year	
 Regional quotient based on landed volume	Data available in-season			
 Regional quotient based on landed value	Preliminary data available for previous year and current season		Finalized data available for previous year and preliminary for in-season	
 Community harvest / landing volume for groundfish and crab	Data available in-season			
 Community harvest / landing value for groundfish and crab	Preliminary data available for previous year and current season		Finalized data available for previous year and preliminary for in-season	
 Fleet participation / active vessel ownership	Data available in-season			
 Crab resident crew	No data available for prior year		Finalized data available for previous year	
 Crab resident QS holders	Data available in-season			
 Subsistence	Data availability and timeliness is variable; data lag is 2 or more years depending on fishery			
 Population estimates (Alaska Department of Labor)	Finalized data available for previous year			
 Other demographic characteristics (ACS 5-year estimates)	No data available for prior year			Data available for prior year
 School enrollment	Data available for October 1 enrollment from prior calendar year			
 Tax revenue	Data available for the July–June fiscal year that ended in the previous calendar year			

 Finalized / In-season available
Data are available (in-season and/or finalized for prior year)

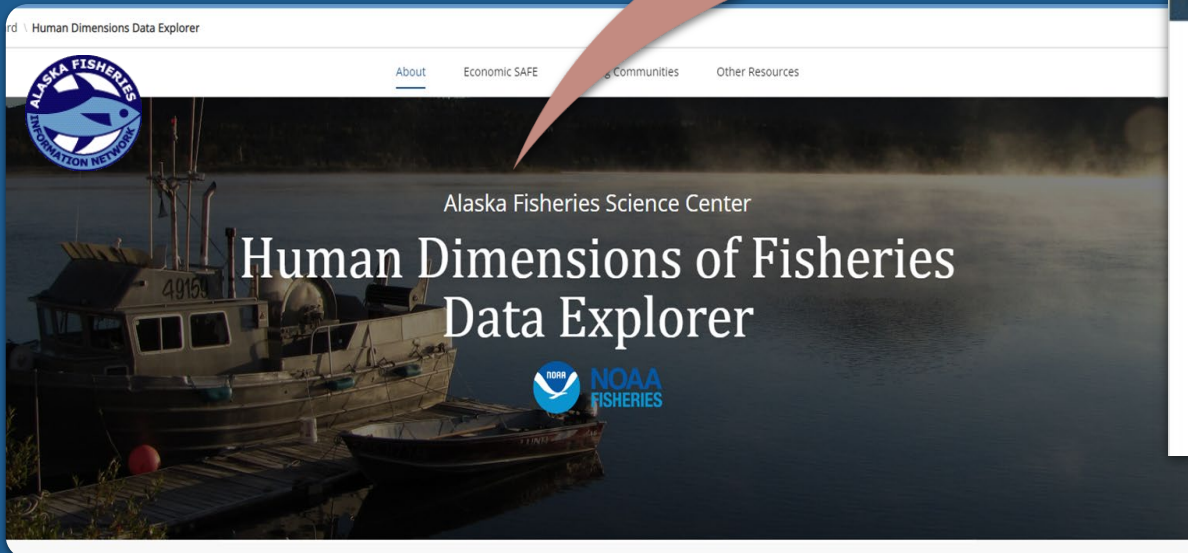
 Preliminary available
Preliminary data available for prior year and/or current season

 Not yet available
No data available for prior year

 These timelines reflect when data become available, not when they are reported in ACEPO products.

Annual Community Engagement and Participation Overview (ACEPO)

<https://akhd.psmfc.org>



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.



ACEPO

A community level analysis guided by NPFMC management objectives and the MSA National Standards.

Purpose

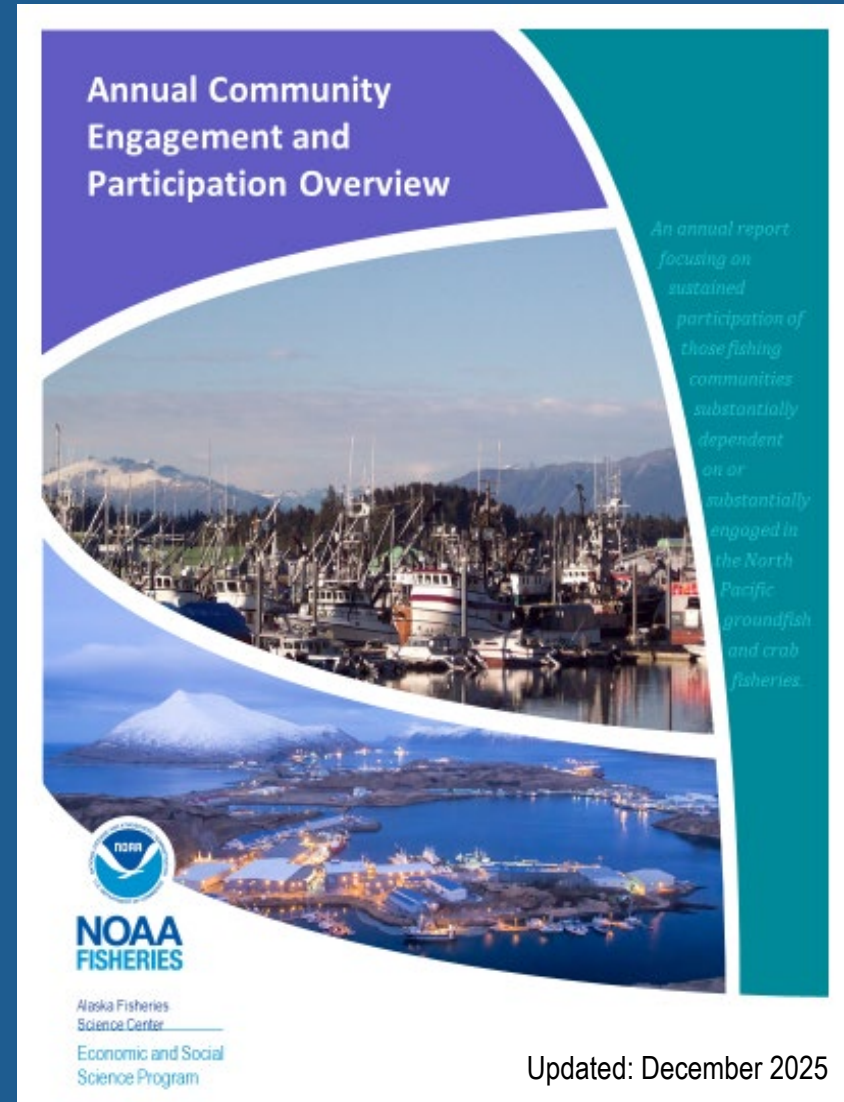
To provide community-level social and economic information on the distributional benefits of FMP groundfish and crab fisheries.

Target Audience

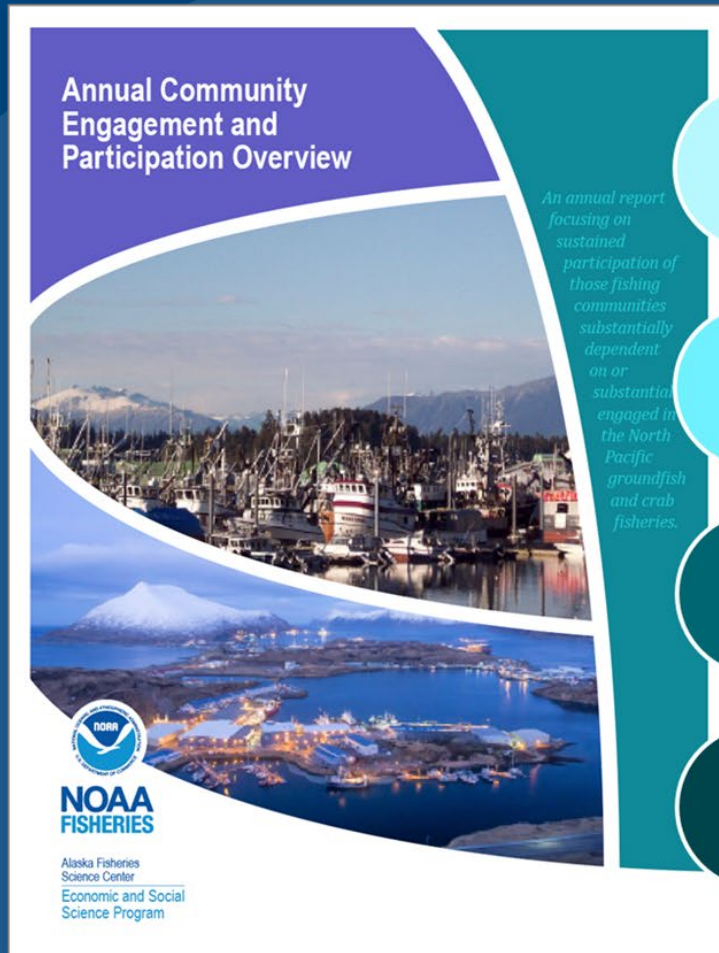
- Decision-makers and Council bodies
- Fishing communities
- General public

Timeline

- Annual update - December
- Key Trends



Structure



Introduction: Defining Fishing Communities

Methods: Engagement Indices

Overview of participation

Community Sketches

Deep dive into Highly Engaged communities and their participation in FMP groundfish fisheries.



Highlights - *Harvesting Sector*

Alaska Fisheries Science Center

Annual Community Engagement and Participation Overview (ACEPO)

for Federal Groundfish and Crab Fisheries of the North Pacific

Highly Engaged

- Homer
- Kodiak
- Petersburg
- Seattle
- Sitka



Aggregate Revenues

-12%
Down

Pounds Harvested

-2.75%
Down

of Vessels

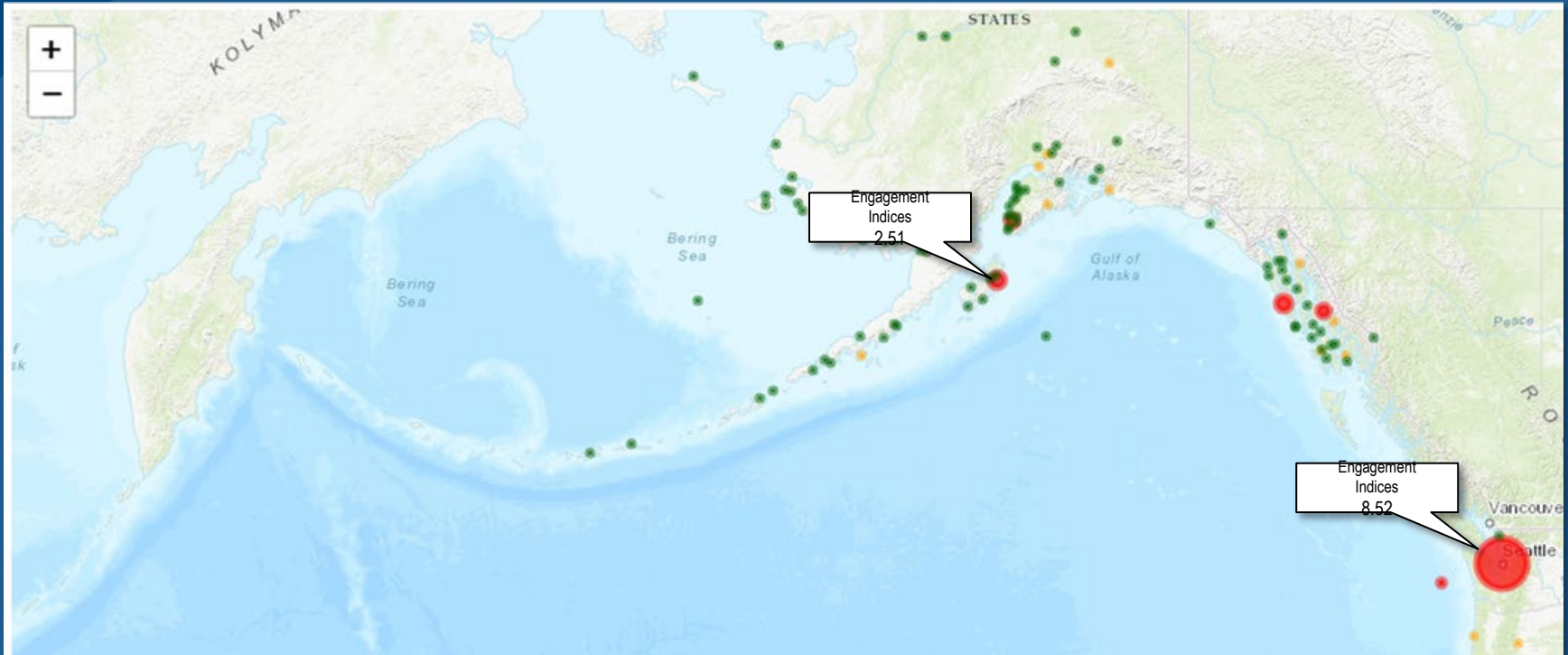
-13.9%
Down

of Vessel Owners

-13.5%
Down



Harvesting Engagement



Harvesting RQ

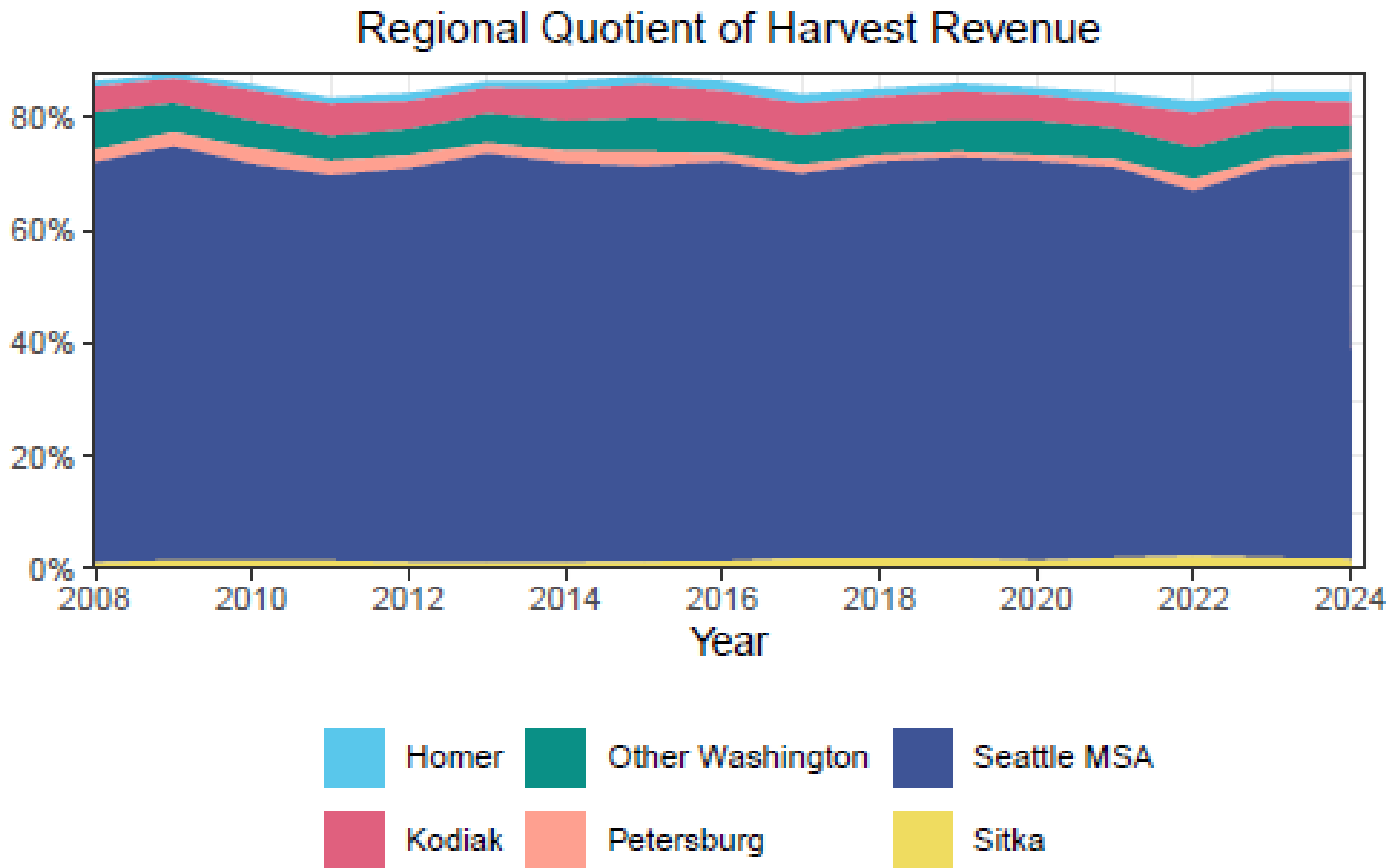


Figure 4.3.: Harvesting regional quotient of revenue for communities highly engaged in commercial groundfish harvesting for all years from 2008-2024



Highlights - Processing Sector

Alaska Fisheries Science Center

Annual Community Engagement and Participation Overview (ACEPO)

for Federal Groundfish and Crab Fisheries of the North Pacific

Highest Engagement

- Akutan
- Homer
- Kodiak
- Sitka
- At-Sea processor
- Unalaska/Dutch Harbor



Aggregate Revenues

-12%
Down

Pounds Landed

-2.75%
Down

of Processors

-1.32%
Down

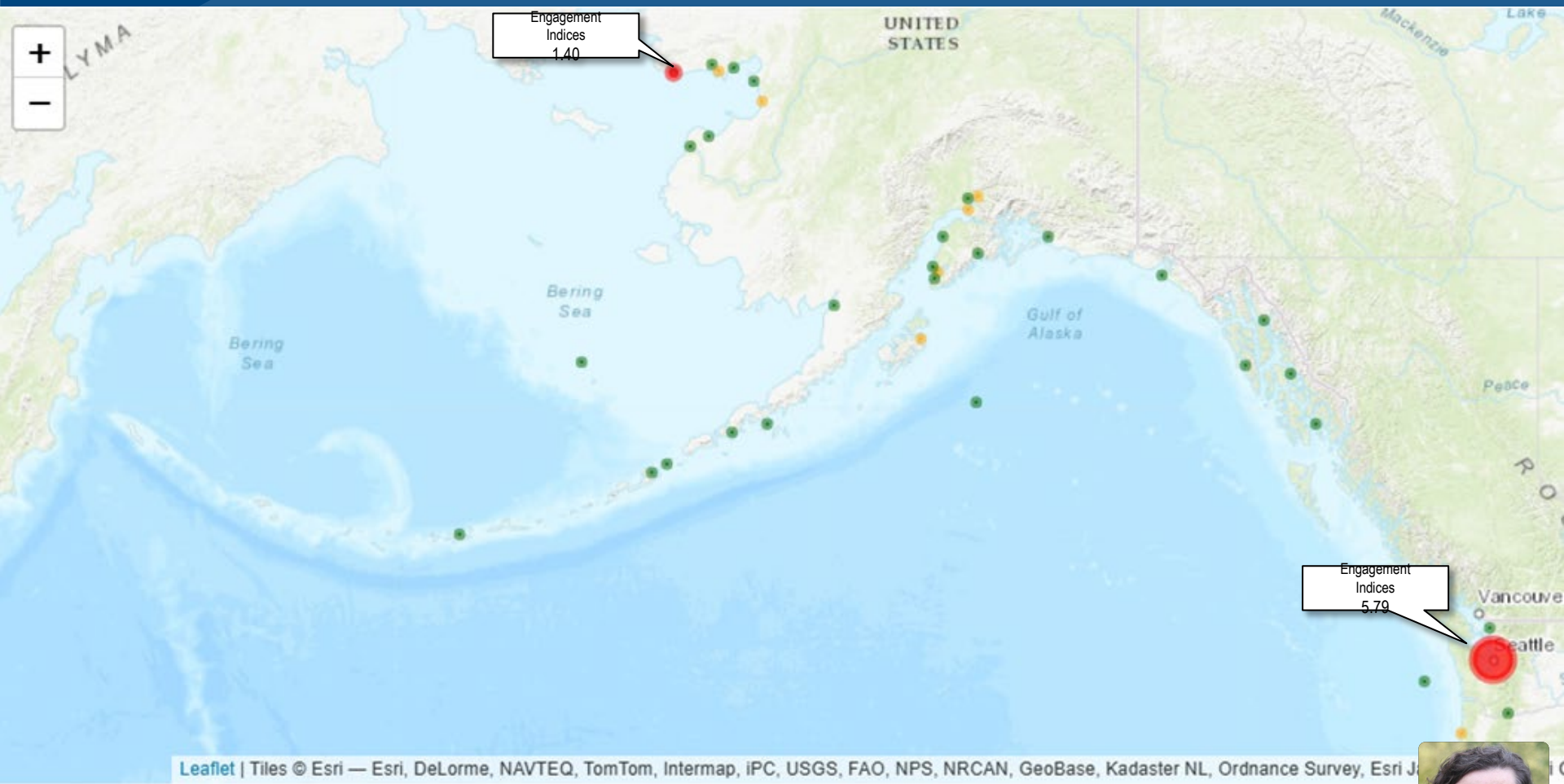
of Delivering Vessels

-17.7%
Down



FMP Crab

Harvesting Engagement



NOAA FISHERIES



Highlights - Harvesting Sector

Alaska Fisheries Science Center

Annual Community Engagement and Participation Overview (ACEPO)

for Federal Groundfish and Crab Fisheries of the North Pacific

Highly Engaged

- Anchorage
- Kodiak
- Nome
- Seattle



Aggregate Revenues

13.9%

UP

since 2023

Aggregate Pounds Landed

-70.2%

Down

Active Vessels

no change

since 2023

Crab Vessel Owners

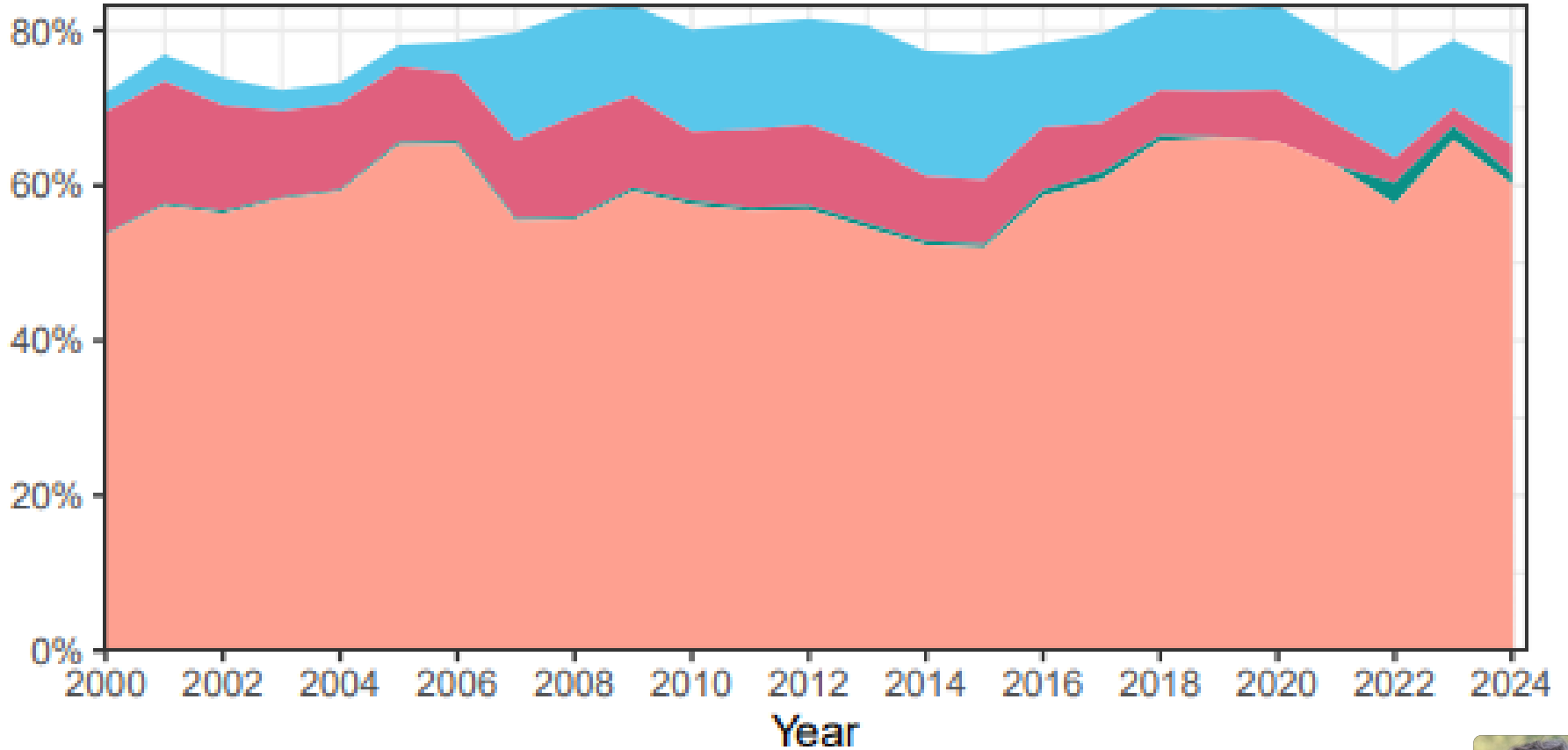
no change

since 2023



Harvesting

Regional Quotient of Harvest Revenue



 Anchorage  Kodiak  Nome  Seattle MSA



Highlights - Processing Sector

Alaska Fisheries Science Center

Annual Community Engagement and Participation Overview (ACEPO)

for Federal Groundfish and Crab Fisheries of the North Pacific

Highly Engaged

- Akutan
- At-Sea processor
- King Cove
- Saint Paul
- Nome
- Unalaska/Dutch Harbor



Aggregate Revenues

-39.6%

Down

Aggregate Pounds Landed

-70.2%

Down

Active Vessels

-55.9%

Down

Crab Vessel Owners

-24.5%

Down



Community Sketches

Community Sketch **KODIAK ISLAND BOROUGH**

Demographics (Self-identified, Census 2010)

Population	Native population (%)	Population over 65 (%)	Median household income (\$)	White (%)	Admission to Alaska Native (%)	Black or African American (%)
18,101	46.2% (over 8,300)	20.1%	\$78,179	48%	11.8%	1.4%

Other groups: Native Hawaiian or Other Pacific Islander (0.2%), Hispanic or Latino (0.2%), Asian (0.2%), Other (0.2%), Non-Hispanic White (48%), Non-Hispanic Black or African American (1.4%), Non-Hispanic Asian (0.2%), Non-Hispanic Hispanic or Latino (0.2%), Non-Hispanic Native Hawaiian or Other Pacific Islander (0.2%).

Area Description and History

The Kodiak Island Borough (CIB) consists of a series of islands (the Kodiak Archipelago) approximately 25 miles across the Shelikof Strait from the Kenai Coast and 90 miles southwest of the Kenai Peninsula. The area has been inhabited for the past 8,000 years by the Aleutian peoples who traditionally harvested fish, marine mammals, and marine mammals on the island. A history of the Aleutian Native population living in the Kodiak archipelago today are Aleutian. Their language is Aleutian, which is one of the "Beringian" languages and is closely related to Central Yupik. A Russian established a fur trading settlement on Chisliak Bay in the late 1700s. In 1882 a fish cannery opened in Kodiak, sparking further commercial developments. Today, CIB communities are highly reliant on both commercial and subsistence fishing harvesting of natural resources including fishing. The majority of commercial vessels and seafood processing plants are on the central road system on Kodiak Island, the largest island in the archipelago. Kodiak's commercial fishing port is Kodiak's largest port in volume of seafood landed, and the third largest in the United States. There are seven island communities in CIB, including Adolph, Port Lions, Larsen Bay, Old Harbor, Karluk and Ouzhidie. Native Associations active in the area include the Native of Kodiak, Inc. (NOKI), Inc., and the Kodiak Area Native Association. CIB is located in Federal Domestic and Reporting Area 800 (under 09F3), Pacific-Alaska Fishery Regulatory Area 5A (under 09F4), and Central Gulf of Alaska Subalfish Regulatory Area (under 09F5).

Infrastructure & Transportation

The Kodiak archipelago is accessible by air and sea, however accessibility varies drastically among communities. The Kodiak road system has two airports, which have several daily flights. Air taxi services provide flights to five remote villages, however weather conditions often restrict travel. City-owned seaplane bases at Trident Basin and Lily Lake accommodate Seaplane traffic. The island ferry operates three to four times a week between Kodiak and French and in the summer months, includes other ports as far west as Dutch Harbor. The Port of Kodiak has two boat harbors with 500 berths, six deep-water deep-draft piers that accommodate ferries, cruise ships, container ships, military vessels, commercial fishing vessels, and research vessels. There are approximately 140 miles of state roads on the east of Kodiak Island, however some island communities have limited access to medical services and residents travel to Kodiak City or Anchorage for treatment. Declining school enrollment is a concern for some CIB communities. Total KIB district C-12 school enrollment has decreased by 15.5% since 2008. Larsen Bay School closed in 2018, and Kodiak school closed in 2019 due to low enrollment.

Enrollment for Kodiak Island Borough School District (2008 - 2021)

While Kodiak Island is highly engaged in commercial fishing, many residents in the smaller island communities have trouble accessing necessary services, such as medical services or schools. These aspects also have consequences for community adaptive capacity, discussed in the following section.



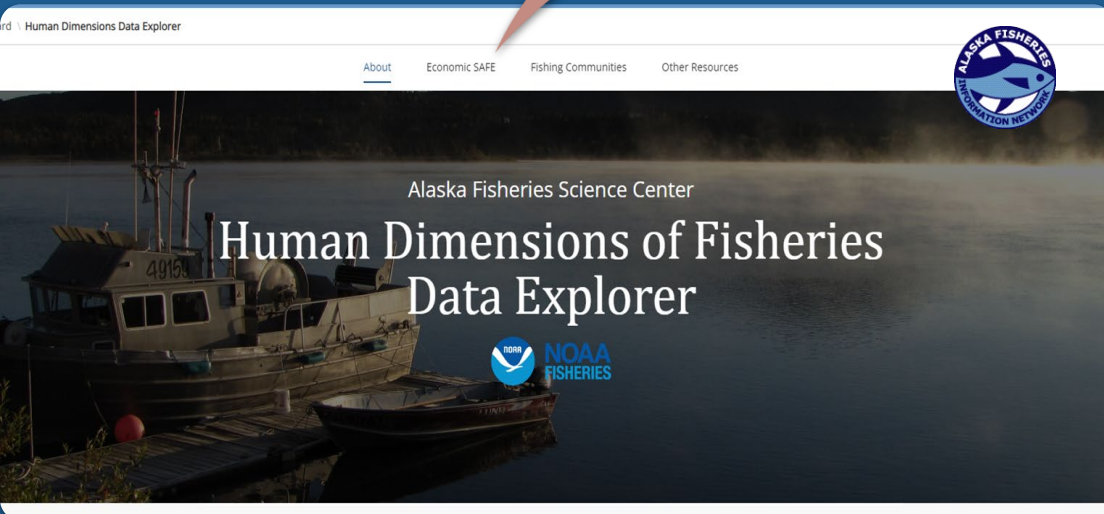
Fisheries Performance & Sustained Participation

Community well-being

Climate impacts



Groundfish Economic SAFE Brief



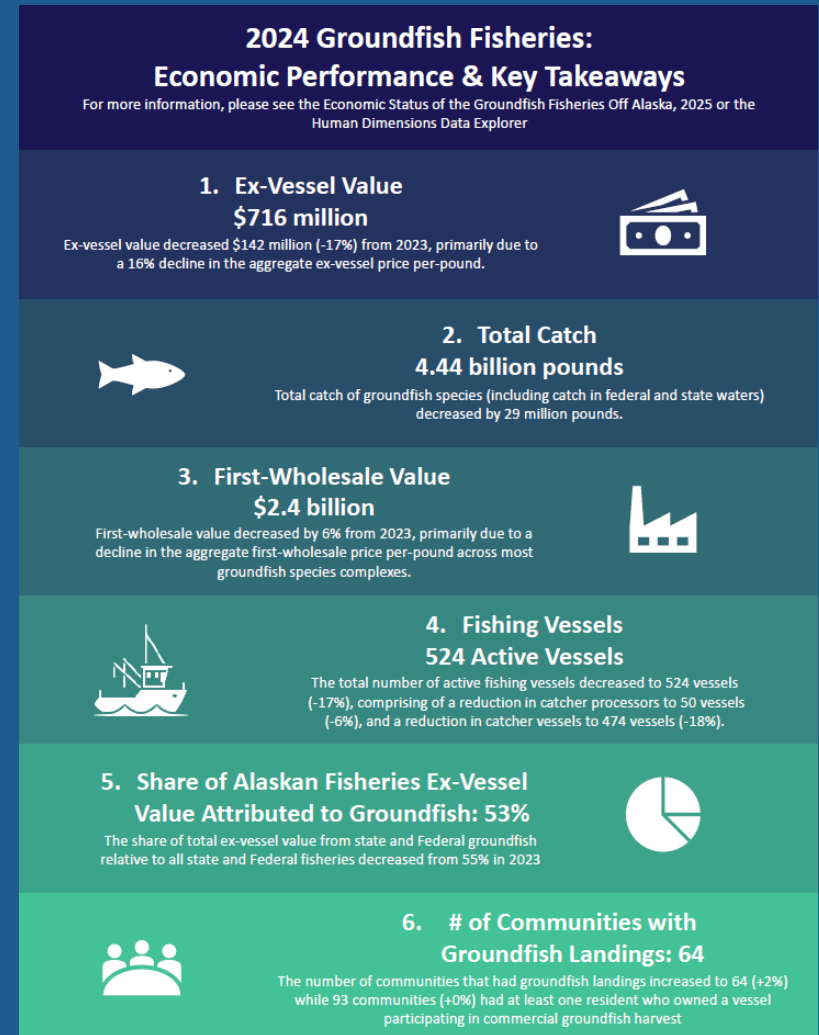
Groundfish Economic SAFE

Annual report on the economic performance of the federally-managed groundfish fisheries in the Gulf of Alaska and the Bering Sea/Aleutian Islands, including statistics on catch; ex-vessel and first-wholesale production and value; and effort.

The brief cover features a photograph of a fishing boat's deck with several crates filled with groundfish. A white box in the upper left corner contains a checkmark icon and the text 'Groundfish Economic SAFE'.

Groundfish Economic SAFE Brief

- **Key findings** from the Groundfish Economic SAFE
 - Alaska-wide and region-specific sections
 - Summary of Alaskan **catch share programs**
- One-page **infographic** on the state of the fishery
- **Timeline** outlining process of complete documents



Groundfish Economic SAFE Brief: Purpose, Audience, and Timeline

Purpose:

- Highlight key findings from the Groundfish Economic SAFE
- Encourage engagement with the HDDE and other ESSR products

Targeted Audience:

- Council-members
- General public

Timeline:

- The Brief will be available by the November Groundfish Plan Team Meeting in addition to the full Groundfish Economic SAFE
- Brief will replace the Executive Summary chapter



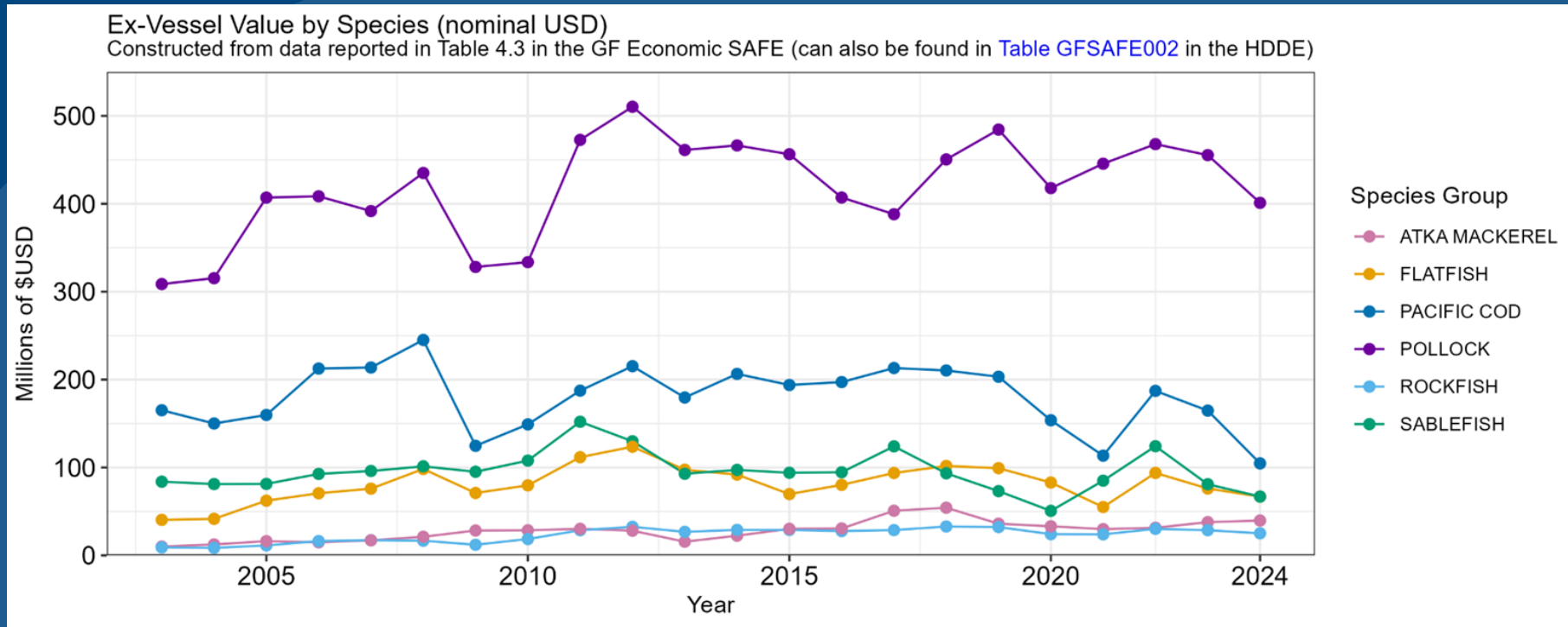
Economic Status of the Groundfish Fisheries Off Alaska, 2025

1. Economic Status of Groundfish Fisheries Off Alaska: Summary and Report Card
2. Overview of Economic Status Report
3. Figures Reporting Economic Data of the Groundfish Fisheries Off Alaska
4. Tables Reporting Economic Data of the Groundfish Fisheries Off Alaska
5. Economic Performance Indices for the North Pacific Groundfish Fisheries
6. Amendment 80 Program - BSAI Non-Pollock Trawl Catcher-Processor Groundfish Cooperatives: Economic Status Summary



Trends in Ex-Vessel Value*

* Ex-vessel value refers to the value of catch sold by vessels to processors



- Total ex-vessel value declined by 17% to \$716 million
- Significant declines in ex-vessel value for Pacific cod (-\$60 million; -36%) and pollock (-\$54 million; -12%)
- Total ex-vessel catch of groundfish remained relatively stable

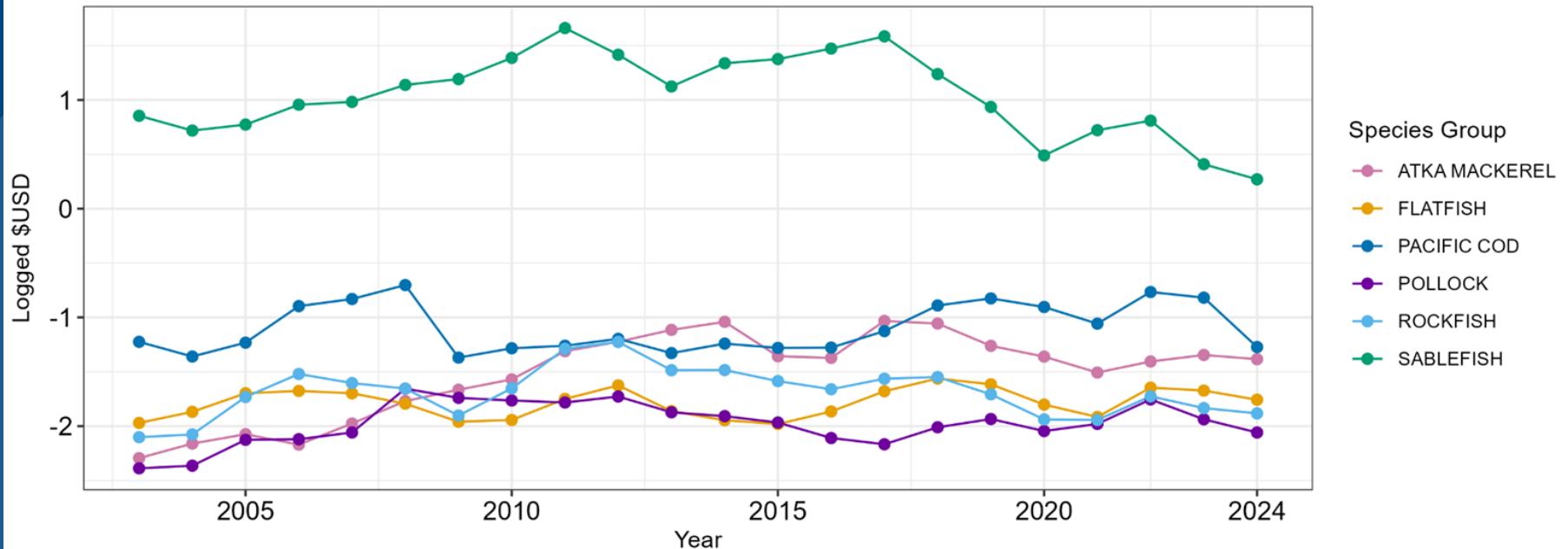
Trends in Ex-Vessel Price Per-Pound*

* Ex-vessel price per pound refers to the price paid to vessels from processors



Logged Ex-Vessel Price Per-Pound by Species (logged nominal USD)

Constructed from data reported in Tables 4.2 and 4.3 in the GF Economic SAFE (can also be found in [Table GFSAFE009](#) in the HDDE)



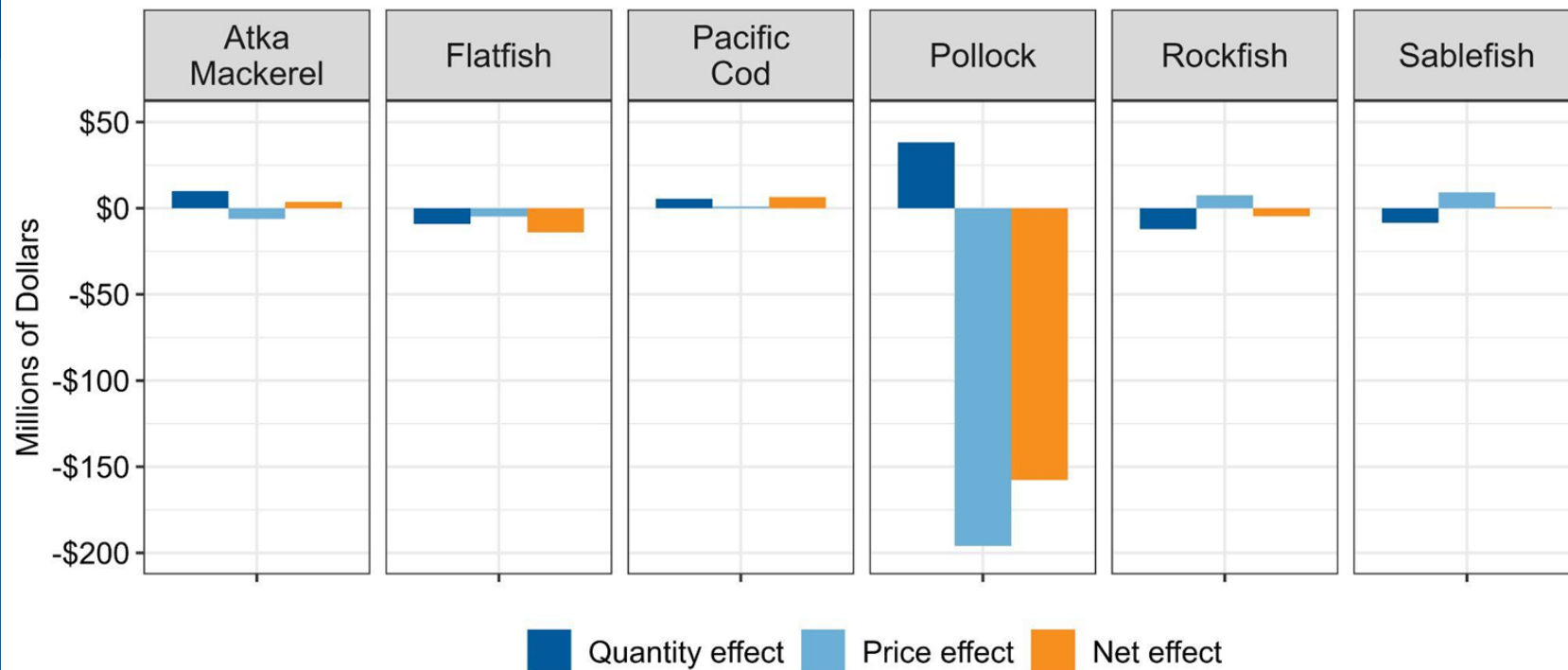
- Aggregate ex-vessel price per-pound declined by 16%
 - Second consecutive year aggregate ex-vessel price per-pound declined
- Large declines in average ex-vessel price per-pound for Pacific cod (-37%) and pollock (-11%)

First-Wholesale Market* Decomposition

* The first-wholesale market refers to the first sale after initial processing by a commercial processor



Decomposition of the change in first-wholesale revenues from 2023-2024
Region-Specific Decompositions found in Figures 3.7 and 3.8 in the Groundfish Economic SAFE

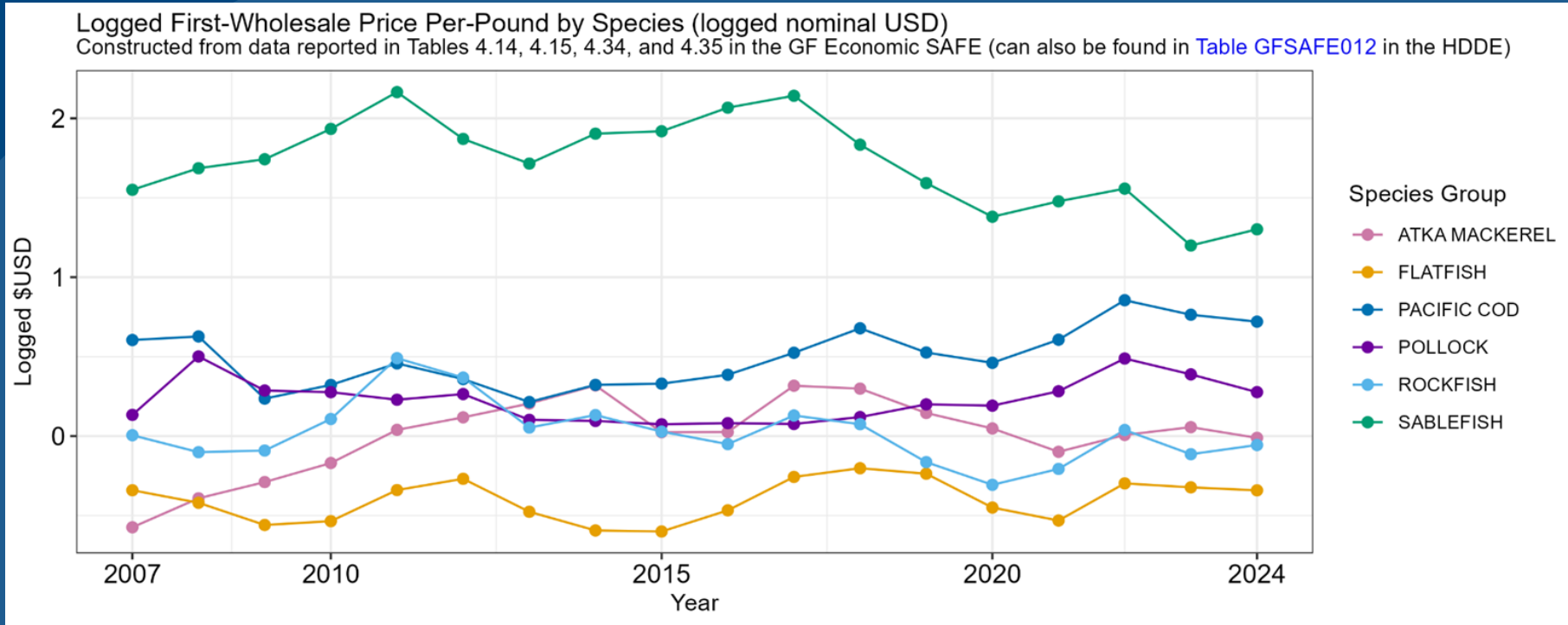


- Total first-wholesale value declined by 6% (-\$165 million)
- First-wholesale value of pollock had the largest decline (-\$159 million; -9%)

Trends in First-Wholesale Market Price Per-Pound*

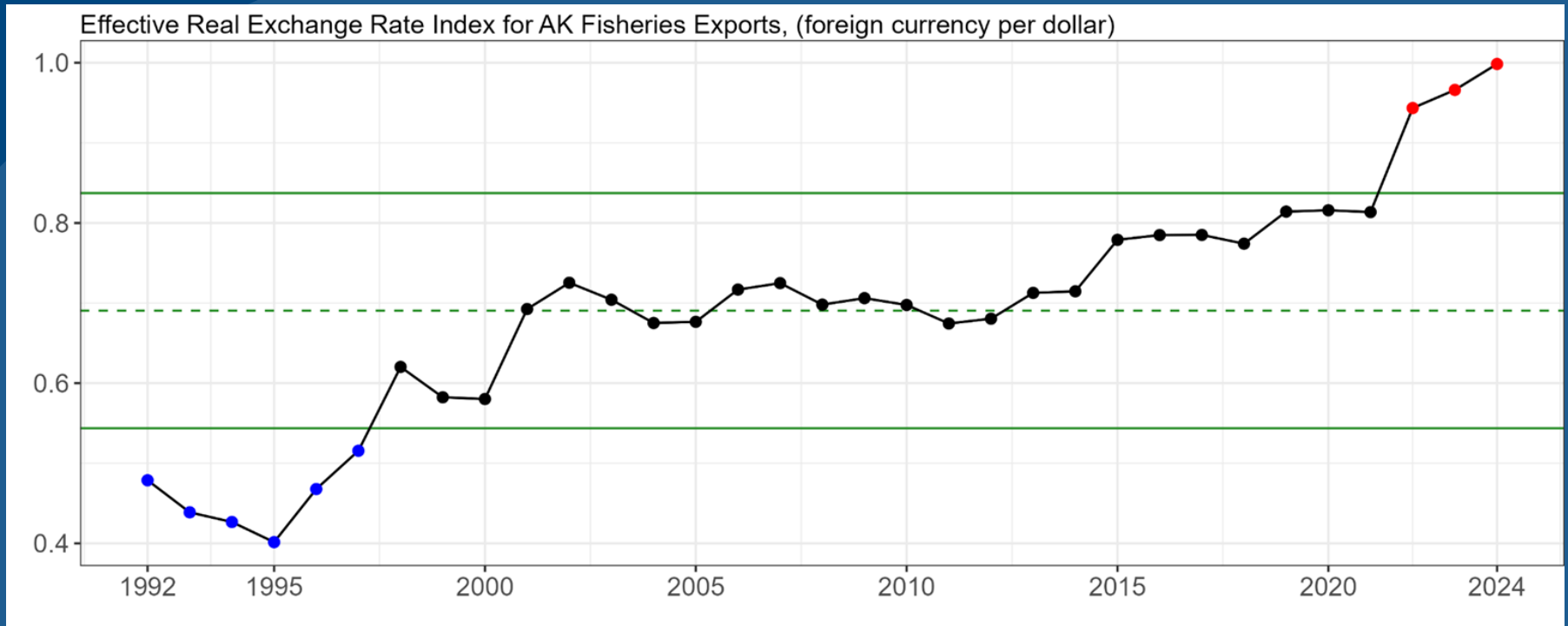


* First-wholesale market price per-pound refers to price paid to processors after initial processing



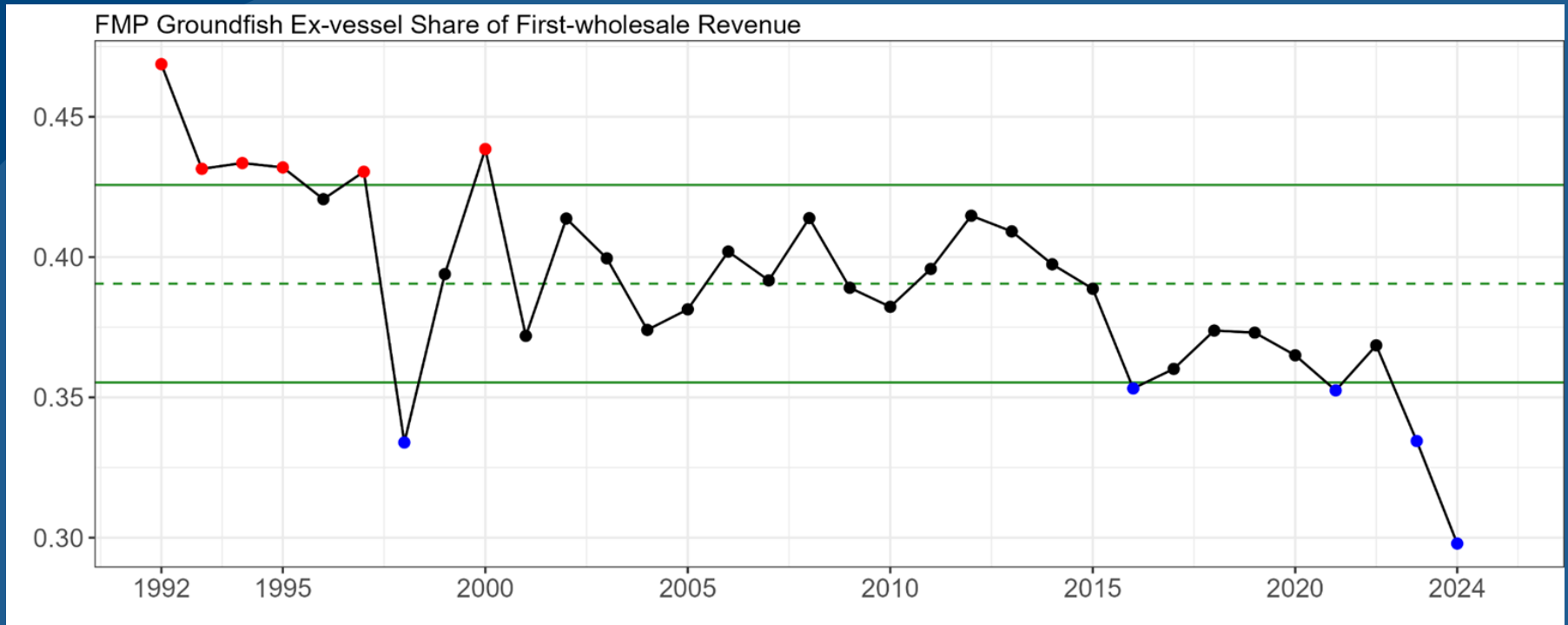
- Aggregate first-wholesale price declined by 7%
- Pollock had the largest decline in first wholesale market price (-11%)
- Changing global/domestic market conditions, climate drivers, and other compounding factors may be driving down first-wholesale market price

Effective Real Exchange Rate Index (Strength of U.S. Dollar)



- Increases to the relative exchange rate makes Alaska seafood more expensive, *ceteris paribus*
- Historical average: \$1 of product cost \$0.69 foreign currency units
- In 2024: \$1 of product cost \$0.99 foreign currency units

Ex-vessel Share of First-Wholesale Revenue



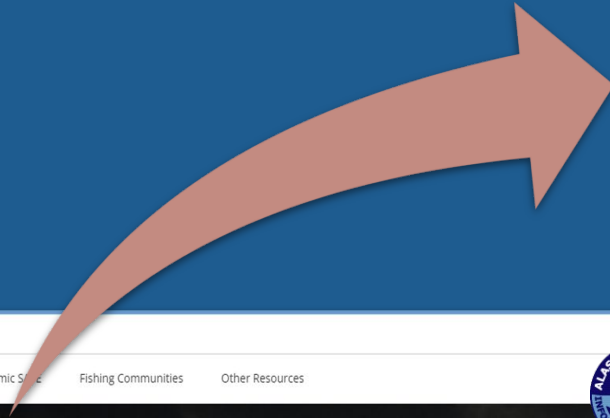
- Reductions in first-wholesale prices directly impact vessels
- Ex-vessel share of first-wholesale revenue in 2024: **29.8%**
- Approximately **30 cents of every first-wholesale dollar** goes to the vessel

Impact to the Fleets and Processors (2024 Totals)



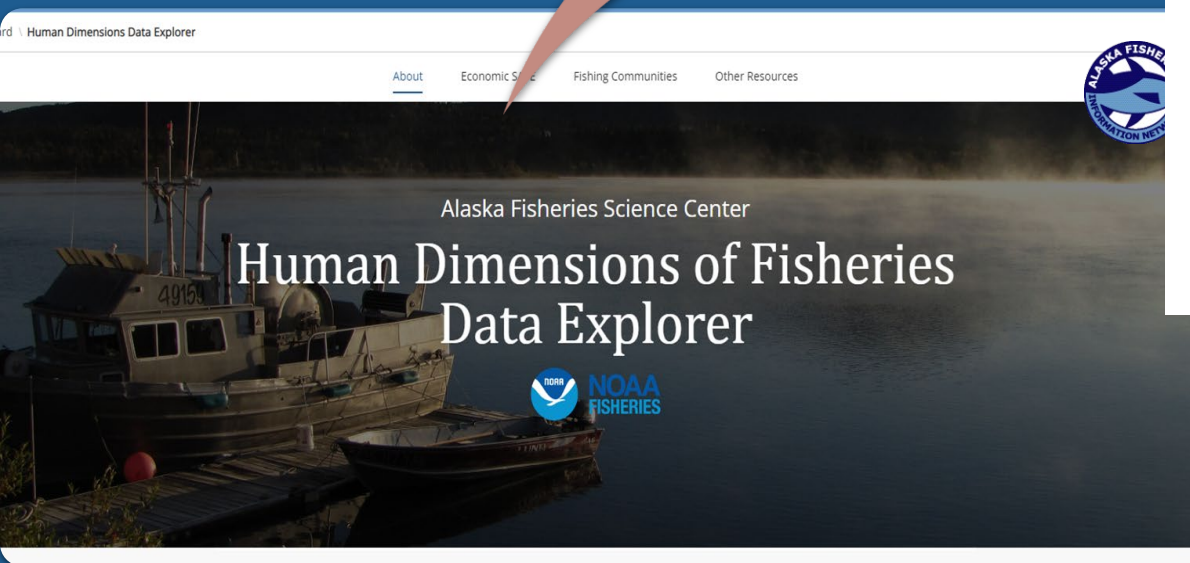
- Number of active fishing vessels: 524 vessels (-17%)
 - 50 catcher processors (-6%)
 - 474 catcher vessels (-18%)
 - Lowest number of vessels (total and by sector) in dataset
- Number of processing permits: 106 permits (-7%)
 - Similar losses between the BSAI (-5 permits) and the GOA (-4 permits)
- Number of days at-sea from groundfish catch share programs: 33 thousand days (-7%)

Performance Metrics for North Pacific Fisheries

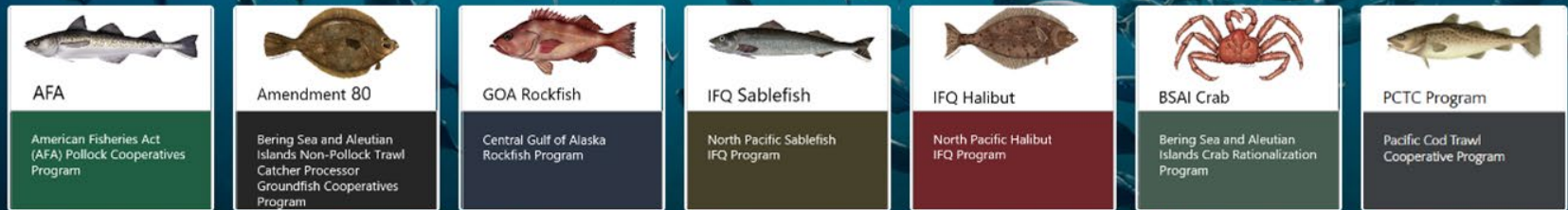


[Performance Metrics for North Pacific Fisheries](#)

Performance metrics for North Pacific fisheries catch share programs and selected non-catch share fisheries.



Performance Metrics for North Pacific Catch Share Programs



- Time series of economic performance metrics on Alaskan catch share and non-catch share programs
- Provides “baseline” (prior to implementation of catch share) metrics
- Version 1.0 – we intend to add additional program-specific metrics



Questions for SSC related

- Is the proposed format of the Groundfish Economic SAFE plus the Brief preferred to the process completed in the past?
 - Do you have any suggestions on directions moving forward?
- Is there any information absent (present) in the Groundfish Economic SAFE, Brief, or ACEPO that would be useful (unuseful) for the Council to see on an annual basis?
- For future presentations, should we focus on data trends or put more emphasis on explanations of those trends?

Questions?

