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**Alaska
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Center**

Economic Status of the Groundfish Fisheries off Alaska, 2018

Presented by:

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

Sept. 18, 2019

Alaska's Groundfish Fisheries in 2018

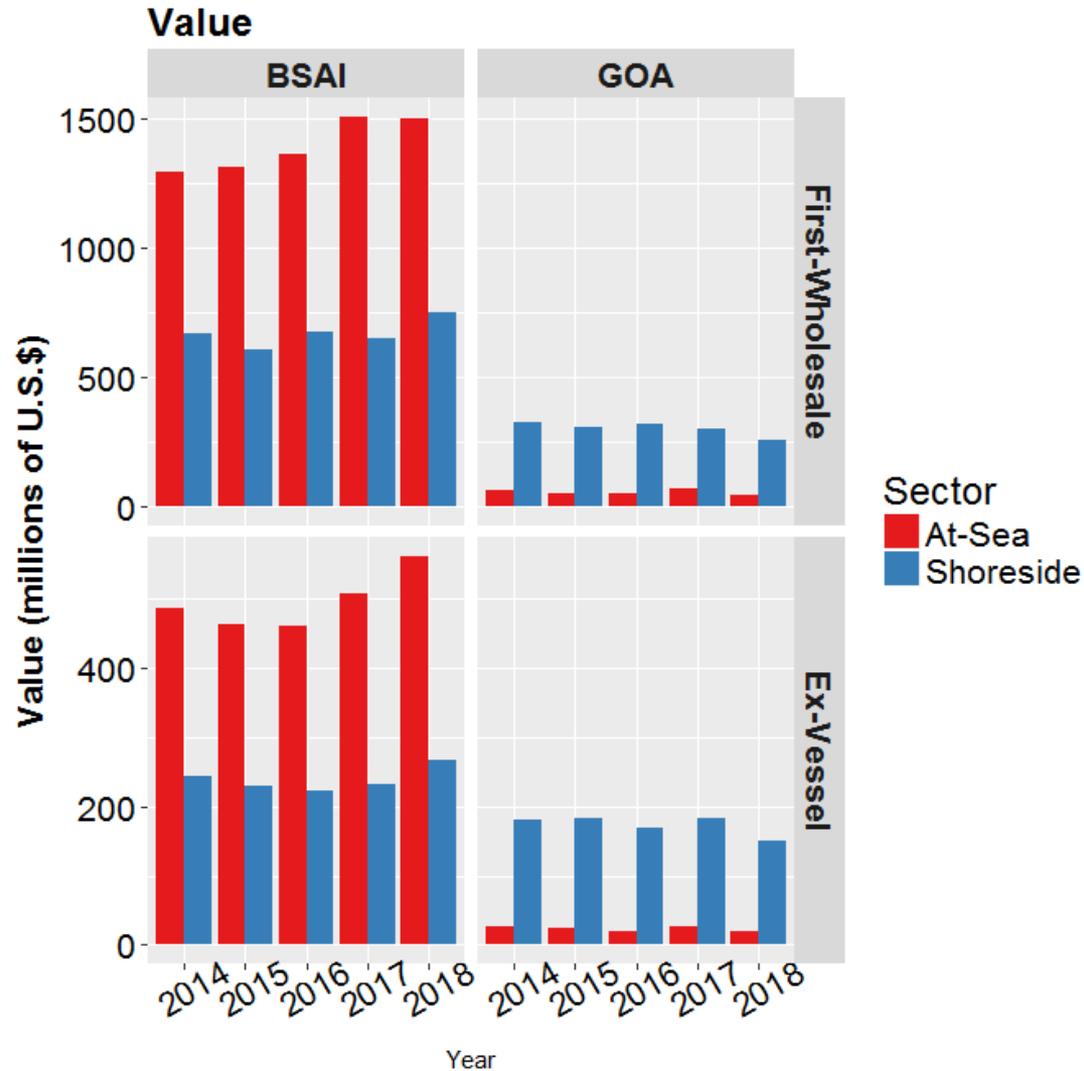
Total catch: 2.2 million t
(decreased 3%)

Aggregate value
increased in BSAI
decreased in GOA.

Wholesale value:
\$2.54 billion (down 1%)

Ex-vessel value:
\$995.8 million (up 3%)

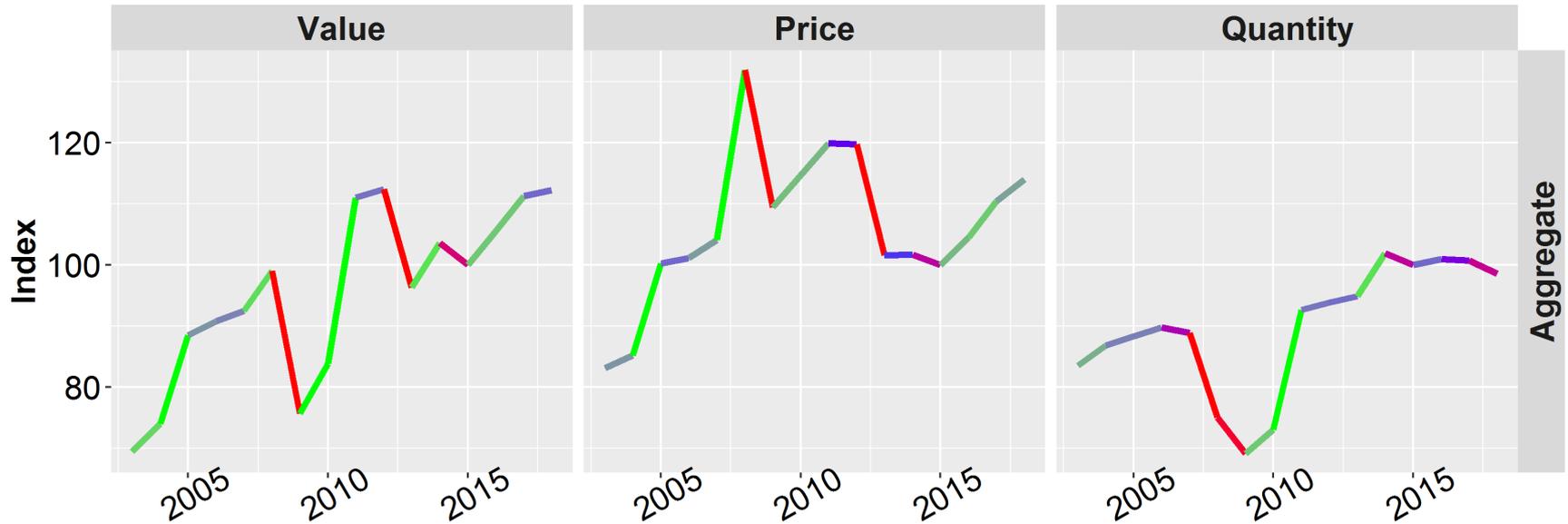
Percent change adjusted for inflation.



Values in figure nominal (not adjusted for inflation)

Alaska's Groundfish Fisheries in 2018

Alaska First-Wholesale Economic Indices



In the aggregate:

Value increased and prices increases were the dominant factor

Substantial differences in changes of species level catch

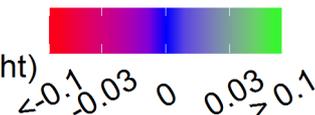
BSAI First-Wholesale Economic Indices



Species

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

(yr-on-yr % change)*(share weight)



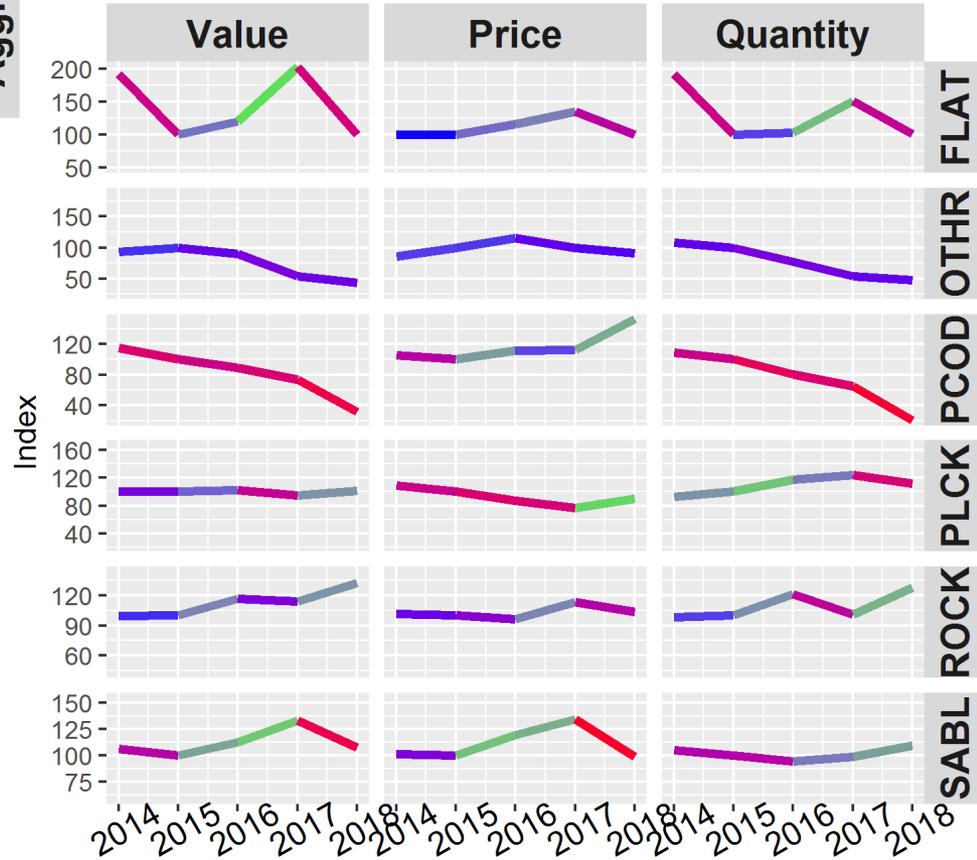
Indices are nominal (not adjusted for inflation)

GOA First-Wholesale Economic Indices

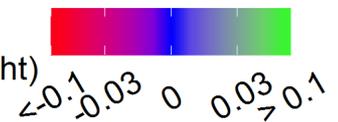


Species

- Value decreases:
 - Pollock
 - Rockfish
- Value increased:
 - Pacific cod
 - Sablefish
 - Flatfish



(yr-on-yr % change)*(share weight)



Indices are nominal (not adjusted for inflation)

Economic Status Report, 2018: Content of the Sept. Draft

- Executive Summary: 2018 highlights
- Economic Data Tables
 - Next slide
- Economic Indices – figures and tables only
 - Summary indices of value, catch/production, and price by region, at-sea/shoreside, species, gear, product type.

Economic Data Tables

<p>All Alaska Summary Tables 1 – 10</p>	<p>Catch (total and retained) Summarized discards and PSC Ex-vessel value 1st wholesale production and revenue Vessel counts</p>
<p>Bering Sea and Aleutian Islands Tables 11 – 26</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 27 - 42</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>

Where to find the data I need?

\\nmfs\akc-public\Dropbox\Fissel\EconomicSAFEData2019

TableInventory_econGroundfishSafe.csv matches table names to file names.

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
	a, discards_ak.csv
	016 psc_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 moved to and accessible through the website by November.



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Economic Status Report, 2018: Additional Final Draft Content (Nov.)

- Report Card Metrics
- Plan Team Reports
- Wholesale and **ex-vessel price** projections
- Market Profiles
- Amendment 80 Economic Data Report
- **Gulf Trawl Economic Data Report**
- Amendment 91 Economic Data Report
- **Catch share performance metrics**
- **Communities Section**
- Recent and ongoing ESSRP research and publications

New or revised content in **RED**

Potentially moved outside Econ SAFE in **GREEN**

Ex-vessel price projections

Uses unadjusted fish ticket information through part of the year to estimate an (adjusted) annual ex-vessel price.

- 2019 now-casts for pollock, cod, and sablefish from last year preformed well compared to realized price (within approx. \$0.01/lb)
- Attempt to expand to include other shoreside fisheries: halibut, pop, and arrowtooth.
- Couple with catch to now-cast revenues

Gulf Trawl Economic Data Report

Summarize results from annual surveys (2015-2018) of GOA groundfish trawl vessels and processors, including

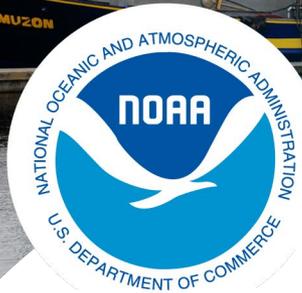
- Vessel crew: employment, earnings and demographics
- Processors: employment and earnings; monthly utility consumption and cost (Kodiak only)

GPT Species Economic Performance Report

- Economic Performance Reports:
 - BSAI: pollock, Pacific cod, flatfish complex (yellowfin sole, rock sole, flathead, arrowtooth) , rockfish (Pac. ocean perch, northern rockfish), Atka mackerel.
 - GOA: pollock (**ESP**), Pacific cod, flatfish (arrowtooth), rockfish (Pac. ocean perch, northern rockfish).
 - Combined: sablefish (**ESP**).
- EPRs will be revised to incorporate new data and discuss updated market conditions. (completed early-mid Oct.)
- GPT can give feedback/discuss:
 - EPR in the ESP.



Economic Status Report, 2018



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The Economic Status Report serves many purposes.
Among them is to provide information to the Plan Team.

Economic data for 2018 are still being finalized and validated (typically price and value).

- We invite feedback -- Ben.Fissel@noaa.gov



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Skipper surveys and other means incorporation of economic information in stock assessment

September 2019
NPFMC Groundfish Plan Team

Alan Haynie, Marysia Szymkowiak, Allan
Hicks, Ben Fissel, and Steve Kasperski

Why have Skipper / fishery participant surveys?

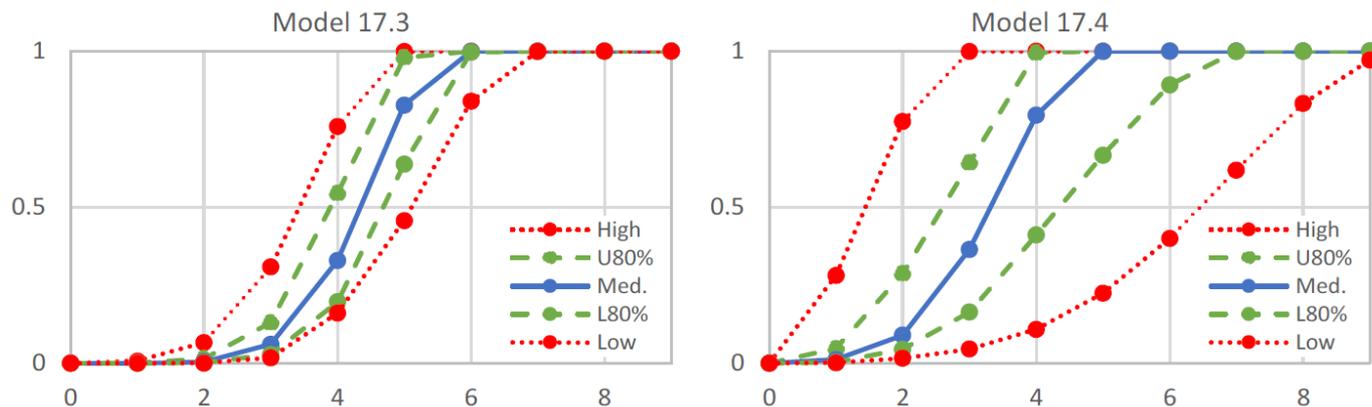
- Explain long-term trends or anomalies in data
- Potentially provide near real-time input on changing conditions
- Understand unanticipated impacts of management actions. For example:
 - Amendment 80 and the Red King Crab Savings Area both significantly changed Pacific cod targeting
 - SSL closures in the Aleutians (2011 – 2014) led to flatfish targeting shifts in the Bering Sea.
 - Amendment 91 has shifted where and when the pollock fishery fishes, which impacts the size of pollock caught.
- Facilitate cooperation between assessment scientists and fishery and community stakeholders.

Update on some recent activities (1 of 2)

- Recall that A91 skipper survey on-going as part of A91 Economic Data Report (EDR; see 2018 November SAFE for description of results).
- Council and Social Science Planning Team (SSPT) have discussed skipper surveys in context of EDR Revisions.
- In 2017, [Al(l)an H.]² proposed a Pacific cod survey and discussed it with Plan Team and industry stakeholders; delayed to see results of EDR revision.

DRAFT Pacific Cod Questionnaire

- Why?
 - Was suggested in the PT Pcod modeling subcommittee
 - Encourage stakeholder involvement
 - Learn more about changes in the fishery & in fishing conditions
 - Collect perceptions of these changes
 - Provide justification for changes in selectivity in the assessment model

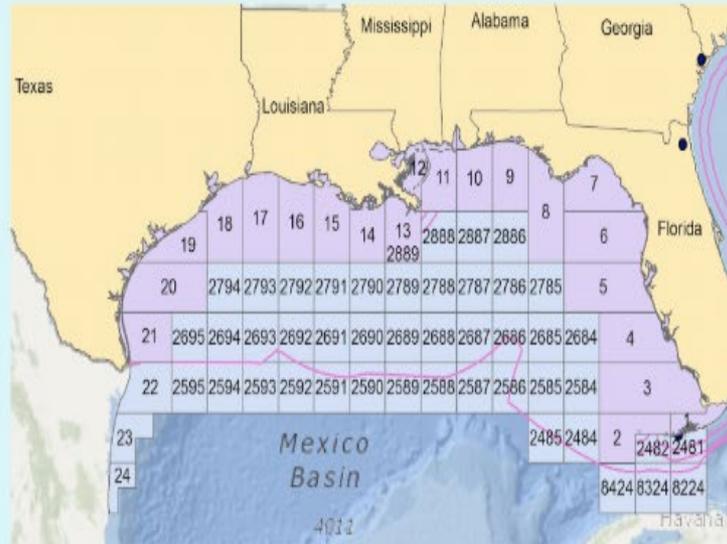


Update on some recent activities (2 of 2)

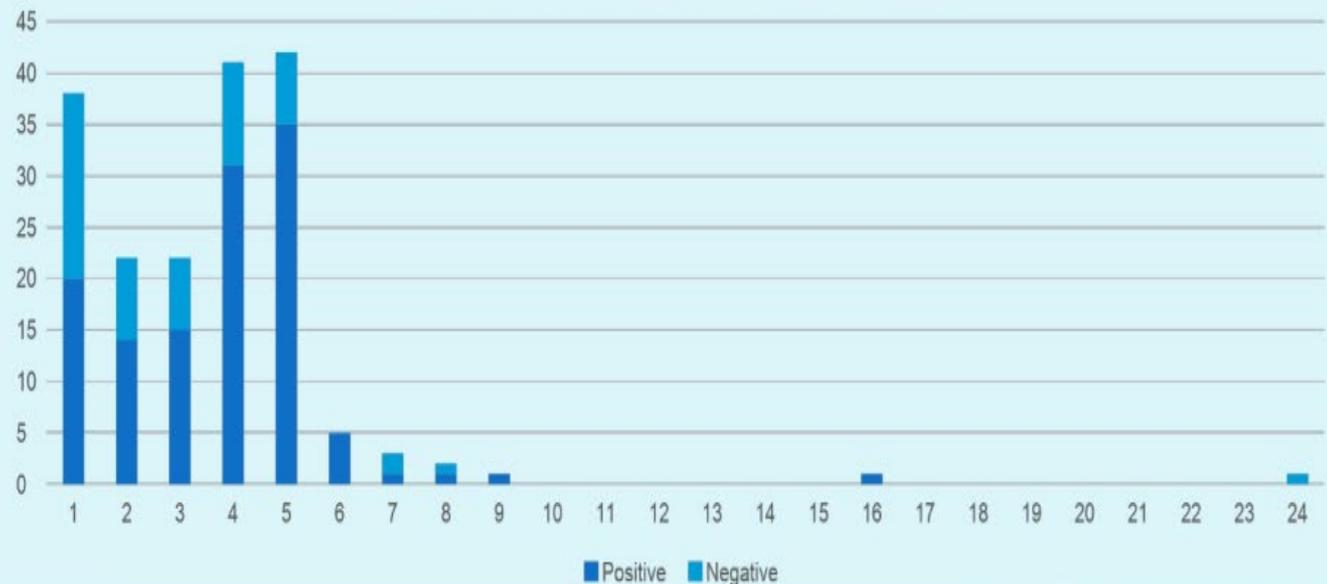
- No immediate action on skipper surveys in EDR process, so AFSC will now discuss and explore different skipper survey goals and tools.
- We will survey assessment authors about needs and discuss priorities with fishery stakeholders.

Example survey from the Gulf of Mexico, “Something’s Fishy” Tool

- Used in the Gulf to incorporate fishermen’s observations into stock assessment process
- Things we can ask:
 - Spatial and temporal dimension
 - Gear
 - Target Species
 - Observation
 - Can be targeted



Responses by Location in the Gulf of Mexico



Socioeconomic Aspects in Stock Assessments Workshop (SEASAW), February 2020

- One recommendation from the Stock Assessment Improvement Plan was to conduct this type of analysis.
- Survey of Science Center usage of economic and social information
- Evaluation of data and methods
- Plans and recommendations for future research and activities.