

**After 35 years of NOAA/NMFS fisheries management, how are they doing? How are we doing because of their efforts?**  
FishNet USA/June 25, 2012  
Nils E. Stolpe

Since passage of the Magnuson-Stevens Fisheries Conservation and Management Act in 1976, the federal government, through NOAA/NMFS, has been in charge of managing most of the fisheries in the U.S. Exclusive Economic Zone (that area from 3 to 200 miles offshore of our coastline). Particularly in light of the recent spate of self-congratulations from NOAA/NMFS leadership over the “great strides” they’ve made in transforming our fisheries from inadequately managed or unmanaged free-for-alls to a level of “sustainability” that the whole world should applaud and emulate, I thought it might be interesting to examine how well the feds have done from the domestic seafood harvesting perspective.

While anyone reading this is likely to have been exposed to the self-congratulatory press releases and the media attention they have generated, I doubt that most people have been able to put it into any kind of significant, real world perspective. What, after all, does the term “not overfished” actually mean to anyone standing on the shore?

Domestic fisheries landings dating back to 1950 are available through the NMFS Annual Commercial Landing Statistics website at [http://www.st.nmfs.noaa.gov/st1/commercial/landings/annual\\_landings.html](http://www.st.nmfs.noaa.gov/st1/commercial/landings/annual_landings.html). The database contains across-the-dock landings data at the species level accessible by state, region and nationally, in weight (pounds and metric tons) and in landed value.

Dealing with the landings of hundreds of species of fish and shellfish, products with prices that range from a few cents to \$10+ dollars a pound, I thought that the best way to demonstrate what’s actually going on regarding the well-being of our fisheries – and their annual contributions to the regional and national economies – is by tracking the value of annual landings. Dealing with inflation that has devalued the dollar by almost an order of magnitude from 1950 to 2010 (\$1 in 1950 was the equivalent of \$9.50 in 2010), I converted the reported value of landings to 2010 dollars using the inflation rates from the U.S. Inflation Calculator (<http://www.usinflationcalculator.com/>).

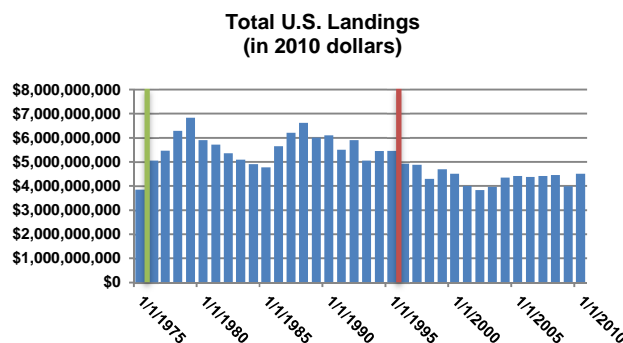
It’s glaringly obvious that many of the people who are involved in fisheries management today from both inside and outside the government have either lost sight of the fact that commercial fishing is a business or have never cared a bit whether such businesses were successful or not. But fisheries management, at least as I understand it, being there to maximize the sustainable production of seafood, the level of performance of our federal fisheries managers and our federal fisheries management system should therefore be evaluated at that level first.

**Value of Total U.S. landings**

The following chart doesn’t offer any surprises to anyone who is familiar with the recent history of commercial fishing in the United States. Of particular significance is the rapid increase in the value of landings demonstrated from 1975 to 1980. This is supposedly a reflection of the impact of the passage of the Magnuson Act, the phasing out of foreign fishing vessels in the U.S. EEZ and their replacement with domestic vessels.

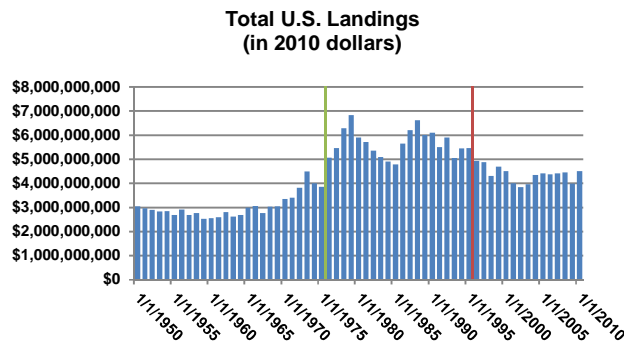
The gradual decline starting immediately thereafter and continuing into the 21<sup>st</sup> century, it has been argued, is a reflection of harvesting returning to more sustainable levels. Now, thanks to the efforts of the fisheries management regime, domestic seafood production is hovering around \$4 billion per year and, at least from a superficial level, thanks to NOAA/NMFS and what the Magnuson Act has been turned into, stability seems to have come to the commercial fishing industry.

*Note: the beginning of Magnuson management in this and the following charts is indicated by the green vertical “1976” line. The red vertical “1996” line indicates the time when the Pew Trusts appear to have gotten serious about saving fish at the expense of fishermen.*

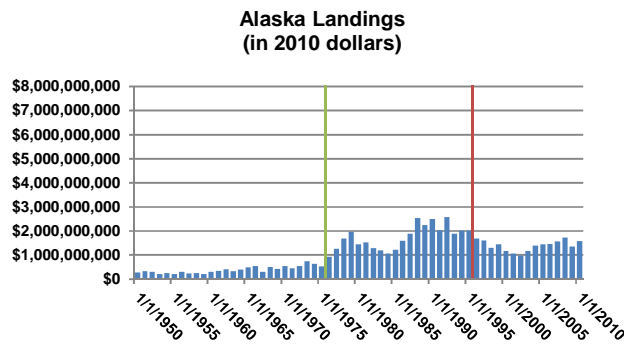


However, as is so often the case when dealing with marine fisheries, things aren’t quite what they seem on the surface. If we extend total U.S. landings back to 1950 we get a totally different picture. The increase in the value of U.S. landings didn’t

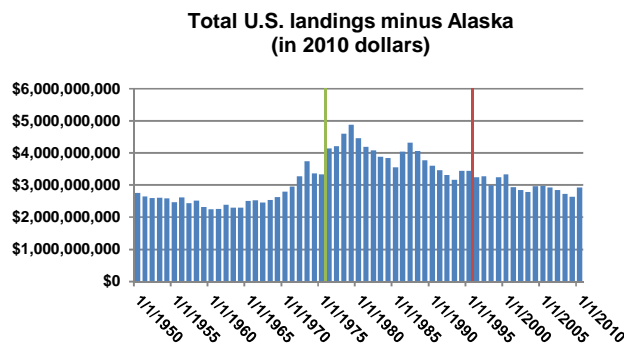
start after and obviously wasn't a result of the Magnuson Act. In fact, it started in the late 1950s/early 60s and really got going in the 70s. The post-Magnuson "boom" was just a continuation of a multi-decade trend.



However, as the following chart shows, Alaskan landings were increasing at a much lower rate than were those in the lower 48 states until the early 70s, at which time they started to increase more rapidly. They reached the \$1 billion (in 2010 dollars) level with the passage of Magnuson.



Subtracting Alaskan landings from total U.S. landings paints a significantly different picture than the one we've grown accustomed to, showing a slow and steady decline in revenues to domestic fishermen since 1978, coincidentally – or perhaps not – around the time when Magnuson management was really taking hold. Not counting Alaska, today the value of our domestic commercial fisheries is only 60% of what it was in 1979/1980.



(I'll note here that this flies in the face of the commonly held belief that overcapitalization and overinvestment, the supposed causes of the "overfishing" that supposedly plagued our domestic fisheries until they were "saved" by foundation-funded ENGOs, was brought about by the passage of Magnuson in 1976. It's obvious that our fisheries – even minus the impact of the rapidly developing Alaskan fisheries - had been expanding since the early 1960s.)

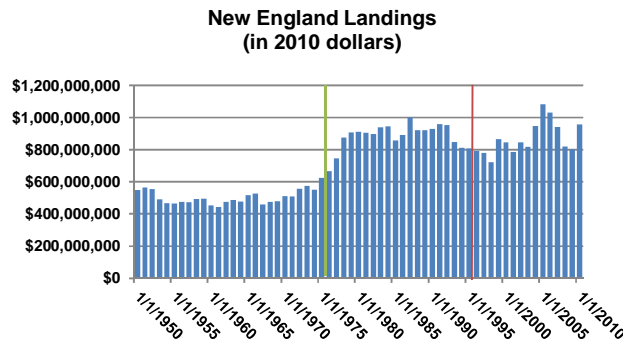
Total U.S. landings in 2010 were 66% of what they were at their highest point (1979). Minus Alaska, total U.S. landings were 60% of what they were in 1979.

**The story region by region – New England first**

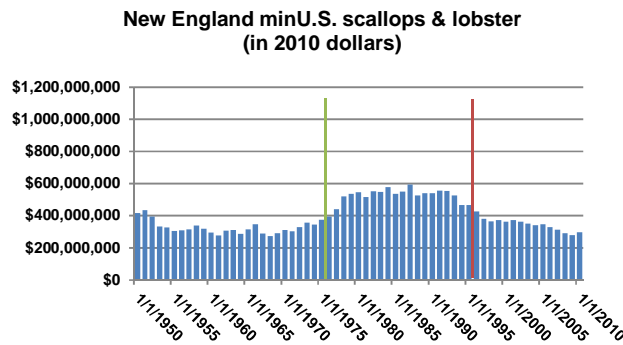
Starting out in New England, home of our oldest and not so long ago some of our most valuable fisheries, things appear to be not so bad. Reaching a post-Magnuson plateau in the late 70s/early 80s, total New England landings have bounced around that level ever since.

Unfortunately, the reality, at least in the majority of New England fisheries, is far from “not so bad.” Since 1950, almost half of the value of New England landings (converted to 2010 dollars) has been in the lobster and sea scallop fisheries. In 2010 these two fisheries accounted for over 69% of New England’s total landings.

In 2010 dollars, the New England lobster fishery has increased in value from \$73 million in 1950 to \$395 million in 2010. That’s an increase of 540%. The sea scallop fishery has increased from \$57 million to \$265 million, an increase of 460%.



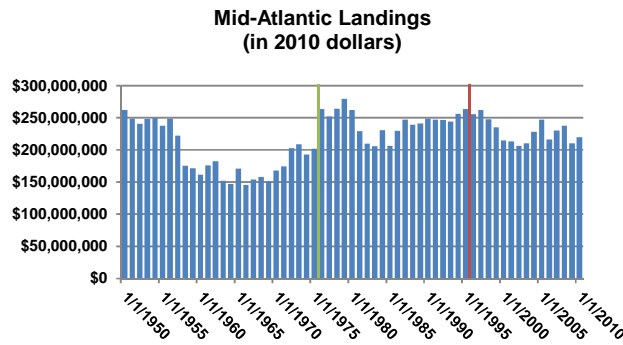
When sea scallop and lobster landings are subtracted from the total, there is a decline in value extending from the early 90s that is still going on. This decline would not be particularly significant if it weren’t for the fact that there is so little overlap between the participants in both the lobster and sea scallop fisheries and the other New England fisheries.



Considering all of the fisheries exclusive of lobsters and sea scallops, New England landings today are just under 50% of what they were at their highest point (1987).

**The Mid-Atlantic**

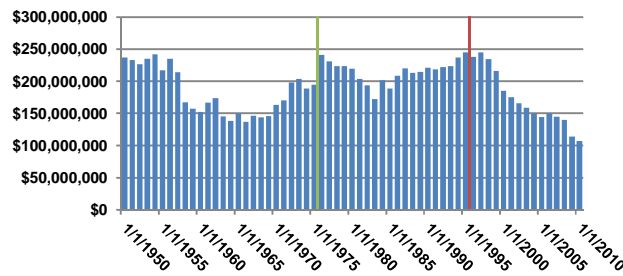
Like New England, conditions in the Mid-Atlantic seem to have been fairly stable since the 70s. The value of recent landings is below what it was in the early 50s but hasn’t really plummeted.



However, the Mid-Atlantic shares the sea scallop resource with New England. Mid-Atlantic scallop landings increased from \$25 million (corrected for inflation) in 1950 to \$112 million in 2010, an increase of 448%.

When the value of sea scallop landings is removed from the total Mid-Atlantic landings, a decline similar to that seen in New England (though starting later and being much more precipitous) becomes obvious.

**Mid-Atlantic Landings minus scallops  
(in 2010 dollars)**

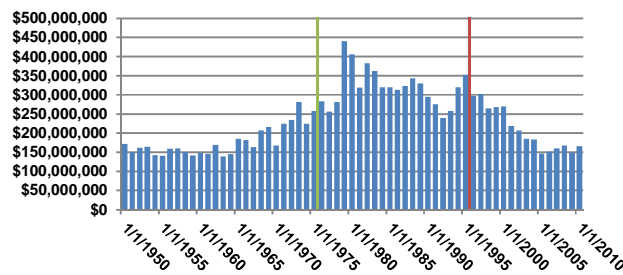


Commercial landings in the Mid-Atlantic in 2010 were 44% of what they were at their highest point (1995).

### The South Atlantic

The value of South Atlantic landings was fairly constant through the 1970s, appears to have increased rapidly to a peak just around when Magnuson became law and has declined just about steadily since then.

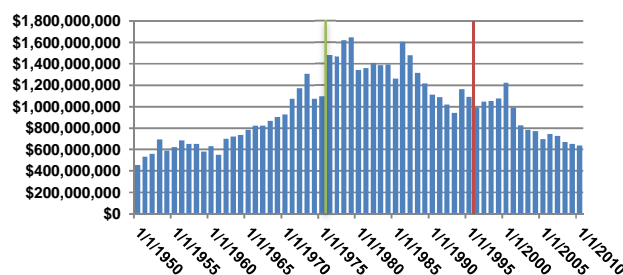
**South Atlantic Landings  
(in 2010 dollars)**



Commercial landings in the South Atlantic in 2010 were 38% of what they were at their highest point (1979).

### The Gulf of Mexico

**Gulf of Mexico Landings  
(In 2010 dollars)**



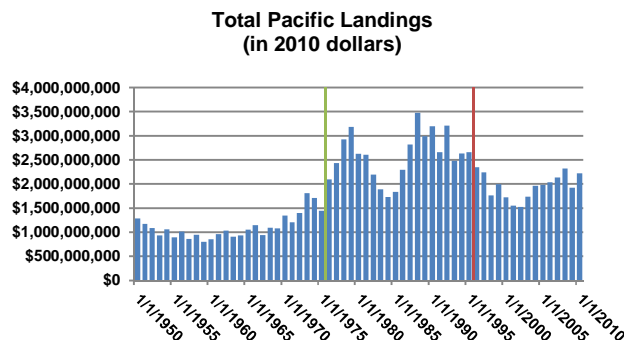
Commercial landings in the Gulf of Mexico in 2010 were 39% of what they were at their highest point (1979)

After 1960 the annual values of commercial landings from New England (minus sea scallops and lobster), the Mid-Atlantic (minus U.S. sea scallops), the South Atlantic and the Gulf of Mexico and for the entire U.S. (minus Alaska) are for the most part similar. They increase slowly until the passage of Magnuson, they vary around a peak until at least the late 70s and then they decline to levels at or around where they were in the 1950s. (The Mid-Atlantic is an exception to this last, the value of landings there declining to significantly below where they were in the 50s).

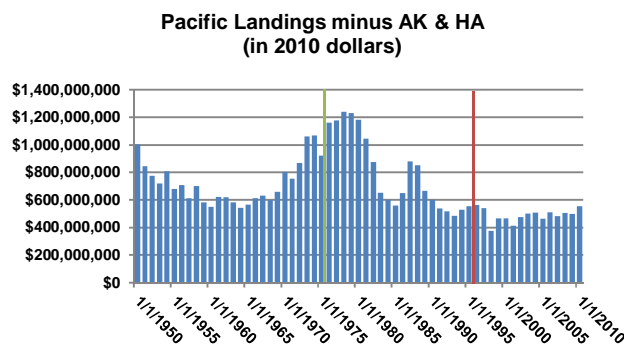
In all of the Atlantic regions and the Gulf of Mexico the commercial fishermen are earning about as much today as they were pre-Magnuson.

## The Pacific

The value of total Pacific landings appears to be higher than it was pre-Magnuson.



U.S. Pacific landings in 2010 were 64% of what they were at their highest point (1988). However, most of the recent increase in value can be attributed to the growth in the Alaskan fisheries and the fact that Hawaiian landings were only taken into account in the NOAA/NMFS commercial landings database since 1981. Considering only the value of landings from California, Oregon and Washington, the picture on the West coast seems much as it does on the East coast and in the Gulf of Mexico. The only difference is that the value of recent landings seems level, rather than exhibiting the declines that characterize all of the other regions.



Exclusive of Hawaii and Alaska, U.S. Pacific landings in 2010 were 45% of what they were at their highest point (1978).

On all coasts the commercial fishing industry, after thirty plus years of very expensive management, is at best back where it was in the days of rudimentary electronics, extremely cumbersome and inefficient gear, and supposedly unenlightened and definitely much less expensive management. And, based on their actions rather than on their words, that's obviously not back far enough for the people in charge at NOAA, or for the ENGOs that seem to be in charge of them.

### A disclaimer of sorts

Not all of the fisheries that are included in the NOAA/NMFS commercial landings database are managed by the federally controlled regional fisheries management councils. Some are managed entirely by the states, some are managed by one of the coastal marine fisheries commissions, and some are managed by a combination of councils and commissions. To a large extent these various management regimes have overlapping personnel, overlapping leadership and overlapping funding. A handful of marine fisheries are managed by international bodies, and the total landings data also includes freshwater species whose values are negligible relative to marine and estuarine species.

### But things aren't as bad as they seem. They're worse

In fact, they are much more dismal. Fuel is one of the largest operating expenses in virtually all of our commercial fisheries. In 2004 Peter Teyedmers reported in *Fisheries and Energy Use* (Encyclopedia of Energy - Vol. 2, Elsevier) that fuel consumption in various fisheries ranged from 100 liters per metric ton in North Atlantic purse seine fisheries for herring and mackerel thru 2300 liters per metric ton for flatfish trawling in the NE Atlantic to 3000+ liters per metric ton for pelagic longlining and shrimp trawling in the Pacific.

Depending on the fishery, fishermen and fleet operators that I queried reported that today they are spending from 10% to 40% of their operating expenses to buy fuel. In 1999 the national average retail cost of diesel fuel was less than \$1.00 per gallon. Though the price has eased somewhat in recent weeks (\$3.78 per gallon for the week of June 11, 2012), it was at its highest, \$4.72 per gallon, in July of 2008. Fortunately at the present time we're all getting a slight reprieve from fuel costs, but no one is predicting that those prices are here to stay.

### **The important questions**

On all our coasts the commercial fishing industry, after thirty plus years of increasingly intensive management, is at best back where it was in the days of rudimentary electronics, extremely cumbersome and inefficient gear, and supposedly unenlightened and definitely much less expensive management. And, based on their actions rather than on their words, that's obviously not back far enough for the people in charge at NOAA, or for the ENGOs that seem to be in charge of them.

Looking beyond the phenomenal growth in Alaska, where fisheries revenues increased by a factor of ten between the early 50s and the late 80s, the value of our commercial fisheries is well on the way to its lowest level in 50 years. This plunge is even more dramatic when the unprecedented increase in the value of only two fisheries –northeastern sea scallops and lobsters – are taken into consideration. After 35 years, after the investment of tens of billions of fishing industry dollars into research and development, after the “investment” of billions of taxpayer dollars into what started out as a system to allow U.S. fishermen to take advantage of our abundant marine resources, it appears that in the Atlantic and Gulf coastal states we are back where we started and in the Pacific and nationally we're just about there.

Our collective fisheries were never as badly off as grandstanding ENGOs convinced the public and our lawmakers that they were. Regardless of that, they are unquestionably in great shape now. Are the fishermen - the only people who have paid a price for that recovery - going to profit from it? At this point there aren't a lot of indications that they are going to. Ill-conceived amendments to the Magnuson Act, the ongoing foundation-funded campaign to marginalize fishermen and to hold them victims of inadequate science, and a management regime that is focused solely on the health of the fish stocks and is indifferent to the plight of the fishermen effectively prevent that.

If the people who have been in charge of managing our fisheries deserve anything, should it be congratulations for doing an effective job for the fishermen?

*Next week we'll take a look at landings in some major East coast fisheries since 1950.*