

Fisheries Management—More Than Meets The Eye

Nils E. Stolpe

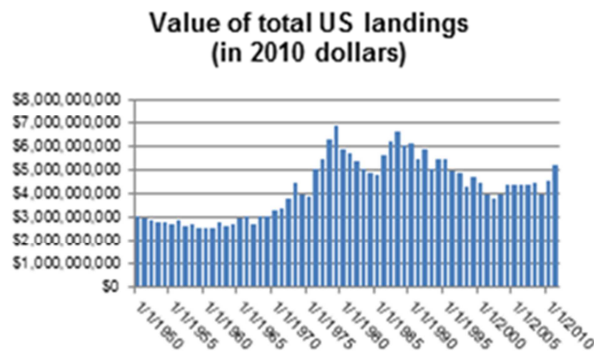
FishNet USA/July 8, 2013

Last year I wrote *After 35 years of NOAA/NMFS fisheries management, how are they doing? How are we doing because of their efforts?* (<http://www.fishnet-usa.com/After 35 years of NOAA.pdf>). I concluded with:

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.

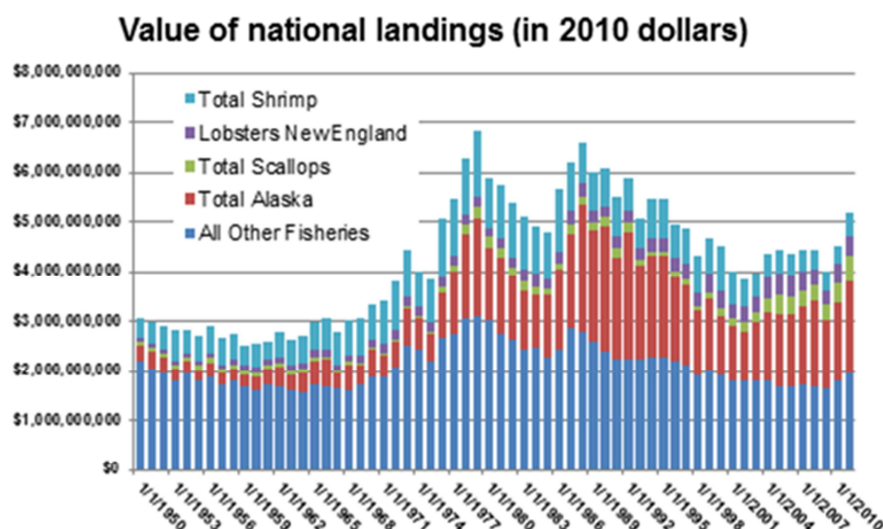
That having been a year ago, and statistics measuring the performance of our commercial fisheries for 2011 being available (http://www.st.nmfs.noaa.gov/st1/commercial/landings/annual_landings.html), I thought I'd check back to see what, if anything, had changed.

Nationally, the total adjusted (to 2010 dollars) value of landings continued a gradual upswing that's gone on intermittently since 2002/03. The post Magnuson (1976) low point in 2002 was under \$4 billion, and by 2011 it had risen to over \$5 billion, an increase of 35%. The adjusted value of the 2011 catch, \$5.176 billion, was 76% of the highest total catch (in 1979) of \$6.83 billion and 22% above the average landings (from 1950 to 2011) of \$4.25 billion.



All in all, the big picture is mostly positive. Unfortunately, the big picture is made up of a lot of smaller pictures, and some of them aren't so good.

In the following chart I separated the value of the total landings in Alaska and the separate values of landings in American lobster, sea scallops and Southern shrimp (all species combined) from all other species.



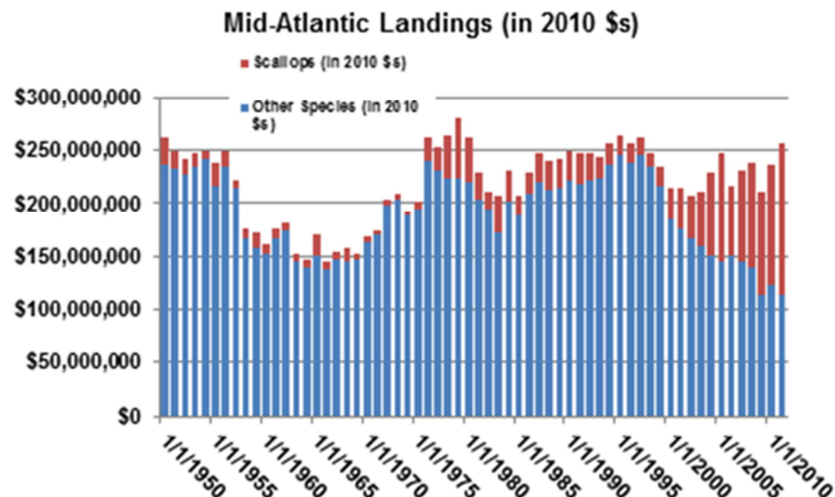
For total value of landings in 2011 Alaska is at about 70% of where it was at its post Magnuson high (\$1.84 billion vs \$2.58 billion). Atlantic sea scallops were at their all-time record value (\$485 million) and American lobster were at 89% of their all-time high (\$405 million vs \$456 million in 2005). Unfortunately the 2011 (Southern) shrimp landings were valued at only 34% of what they were at their highest (\$472 million vs \$1.333 billion in 1979).

In 1950 the Bureau of Commercial Fisheries reported landings of 223 distinct species or species groups (i.e. Shrimp, Dendrobranchiata). In 2011 the National Marine Fisheries Service reported landings of 460 species or species groups.

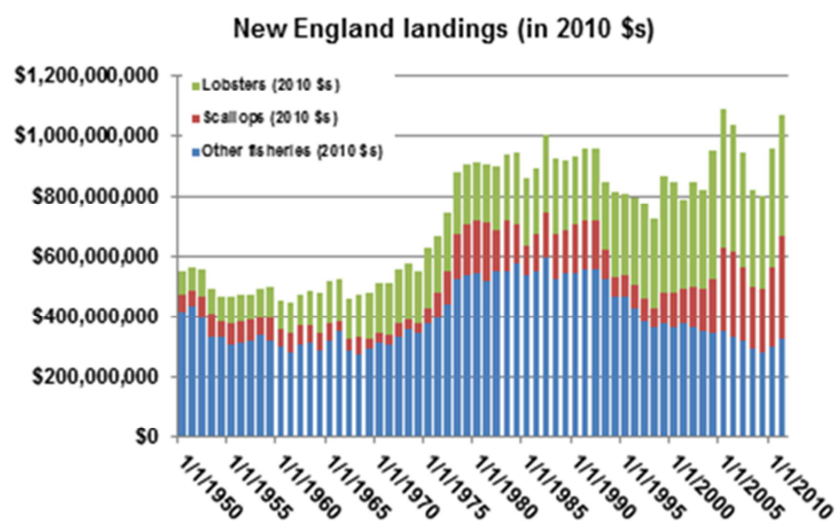
The 20 most valuable fisheries in 1950 and in 2011 and the percentage of their value to the total value of landings for that year are listed below:

1950		2011	
Shrimp	17%	Sea Scallop	14%
Yellowfin Tuna	11%	Shrimp (white & brown)	11%
Eastern Oyster	11%	American Lobster	10%
Skipjack Tuna	7%	Walleye Pollock (AK)	9%
Pacific Sardine	5%	Sockeye Salmon (AK)	7%
Haddock	5%	Pacific Halibut (AK)	5%
Menhaden	5%	Pacific Cod (AK)	5%
Sockeye Salmon (AK)	4%	Dungeness Crab (AK)	5%
Sea Scallop	4%	Sablefish (AK)	5%
Acadian Redfish	4%	Blue Crab	4%
American Lobster	4%	Pink Salmon (AK)	4%
Pacific Halibut (AK)	3%	Menhaden	4%
Chinook Salmon (AK)	3%	Snow Crab (AK)	3%
Quahog Clam	3%	King Crab (AK)	3%
Coho Salmon (AK)	3%	Eastern Oyster	2%
Pink Salmon (AK)	3%	Chum Salmon (AK)	2%
Chum Salmon (AK)	3%	Pacific Geoduck Clam	2%
Blue Crab	2%	California Market Squid	2%
Striped Mullet	2%	Bigeye Tuna	1%
Atlantic Cod	1%	Pacific Hake (AK)	1%

In the Mid-Atlantic in 2011 the total value of landings, \$220 million, were 79% of the highest landings value reported (\$279 million in 1979). However, sea scallops made up more than half of the total landings value (56%, \$143 million v. \$114 million). While the overall picture looks positive, the value of the landings in the Mid-Atlantic minus the sea scallop production have been in a steady decline since the late 90s and are at the lowest point ever.



In New England the situation is comparable, but both American lobster and sea scallop production are responsible for the overall “healthy” appearance. There was a slight upswing in the value of the other fisheries in recent years but it appears that with the planned – and in part implemented reductions in the groundfish TAC, it seems as if this slight upswing won’t carry over.

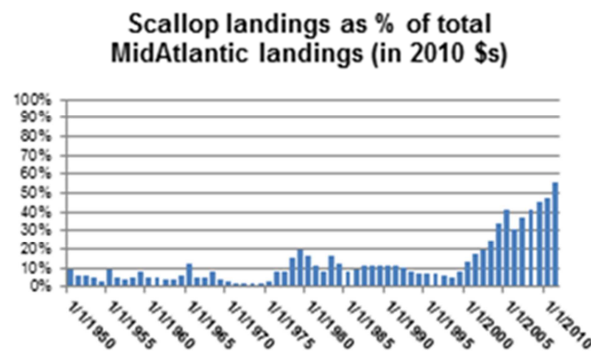


Conservation and management measures shall, consistent with the conservation requirements of this Act (including the prevention of overfishing and rebuilding of overfished stocks), take into account the importance of fishery resources to fishing communities in order to (A) provide for the sustained participation of such communities, and (B) to the extent practicable, minimize adverse economic impacts on such communities. National Standard #8, Magnuson-Steven Fisheries Conservation and Management Act (As amended through October 11, 1996).

A looming problem in both the Mid-Atlantic and New England is a pending cutback in the sea scallop quota for the next fishing year that at this point is expected to approach 40%. While the effects of a cut of this magnitude will obviously be significant to the scallop fleet, there will be not so obvious but potentially devastating effects on the other fisheries and on fishing communities as well.

A complex of ancillary businesses is required to operate a commercial fishing dock. These include vessel/equipment maintenance and repair facilities, ice plants, chandleries and shippers/truckers. Obviously it requires a certain level of business – a minimum amount of revenue coming “across the dock” – for them to stay open. In the Mid-Atlantic a 40%

cut in scallop revenues will be more than a 20% cut in commercial fishing revenues in a single year. In New England it will be somewhat less than that, but it will be combined with whatever additional cuts result from the proposed groundfish cuts.



I'm not that familiar with all of the fishing ports in the Mid-Atlantic and New England but have a fairly good understanding of those in New Jersey, and in New Jersey there isn't one commercial port that lands fish from the ocean-going fleet that is mostly – or even largely – focused on scallops. They all handle a mix of fish and shellfish. A large part of their longevity is due to the fact that they have maintained a reasonable amount of flexibility thanks to their diverse fleets. But a drastic cutback in scallop revenues, particularly if it is coupled with the continuing decline in the revenues from other fisheries, will threaten that longevity.

The proposed scallop cutback has been presented as a temporary measure, and the Fisheries Survival Fund - representing the majority of limited access scallop fishermen in New England and the Mid-Atlantic and other industry groups are working to ameliorate the proposed cuts, but when it comes to businesses that are waterfront dependent a two year temporary reduction could easily become permanent before the cutbacks are restored. Except for the lull over the past several years there have been intense development pressures at the Jersey Shore and on most of the developable waterfront areas from Cape Hatteras North. It's just about assured that they will be back to their customary levels very shortly.

Originally the Magnuson Act placed much more emphasis on business- and community-supportive aspects of federal fisheries management. Those aspects have been eroded by the lobbying activities of the handful of ENGOs that have come to dominate the world of fisheries/oceans activism. They, and for the most part NOAA/NMFS as well, address fish issues on a case by case, species by species basis. More importantly, the people at NOAA/NMFS tend to shy away from cumulative economic impacts when they have analyses done, and cumulative impacts are what most of the commercial fishermen, the people who depend on them and the businesses they support have to deal with – and in New England and the Mid-Atlantic (at least, and this isn't to slight the industry elsewhere, because I doubt that it's different in many other ports) in spite of increasing total landings value, it could be getting a lot worse really soon.