

To: Ashley Heimbigner, ASMI

From: McKinley Research Group

Date: January 2022

Re: Alaska Seafood Harvest and Production Volumes and Values in 2020

This memo provides a summary of Alaska statewide and regional commercial fishing and seafood processing volumes and values for 2020 – a year significantly affected by COVID and a range of natural fluctuations. Comparable data for 2017 to 2019 is included to provide perspective on the 2020 numbers. The data presented in the following tables are drawn from ADF&G Commercial Operators Annual Reports (COAR) and the Alaska Fisheries Information Network (AKFIN), and North Pacific Fisheries Management Council Stock Assessment and Fishery Evaluation (SAFE) reports.

Statewide

- Alaska’s total seafood ex-vessel volume was down 11% in 2020 from 2019, driven largely by poor salmon runs, lower Pacific cod quotas, and roughly 5% of the pollock quota being left in the water due to a combination of dispersed biomass and COVID-related fishing disruptions.
- The ex-vessel value (the amount paid to fisherman), and wholesale value were down 27% and 21% respectively because of both the lower harvest volume mentioned above and because COVID-caused closures of restaurants and cafeterias lowered demand for many Alaska seafood products, leading to lower prices.

Table 1. Alaska Seafood Harvest and Production Volume and Value, 2017-2020 (millions)

	Pounds Purchased	Ex-Vessel Value	Production Volume (pounds)	Wholesale Value
2017	6,032	\$2,035	2,963	\$4,851
2018	5,438	\$1,964	2,610	\$4,475
2019	5,658	\$1,988	2,776	\$4,669
2020	5,057	\$1,457	1,993	\$3,666
% chg '20 vs '19	-11%	-27%	-28%	-21%
% chg '20 vs '18	-7%	-26%	-24%	-18%



Bristol Bay

- Sockeye salmon is overwhelmingly the most valuable species harvested in Bristol Bay. The volume of the Bristol Bay sockeye salmon harvest in 2020 did not decline as much from the previous year as salmon runs in other parts of the state. But the sockeye harvest was down 9% from 2019 in total pounds.
- COVID-caused price disruptions magnified the effects of the slight harvest volume downturn. The amount paid to fishermen for Bristol Bay sockeye salmon in 2020 was down 40% from 2019. The total ex-vessel value of all species in the Bristol Bay region decreased by 34%.

Table 2. Bristol Bay Seafood Harvest and Production Volume and Value, 2017-2020 (millions)

	Pounds Purchased	Ex-Vessel Value	Production Volume (pounds)	Wholesale Value
2017	376.6	\$321.9	193.1	\$604.9
2018	340.7	\$385.6	194.2	\$732.2
2019	373	\$384.9	221.0	\$739.2
2020	307	\$253.7	133.2	\$522.3
% chg '20 vs '19	-18%	-34%	-40%	-29%
% chg '20 vs '18	-10%	-34%	-31%	-29%

Bering Sea and Aleutian Islands

- Harvest volumes were down 5% in 2020 due to both lower quotas for species including Pacific cod, and because COVID-19 disruptions to fishing caused more quota to go unfished. Only 95% of the Total Allowable Catch for BSAI pollock was caught in 2020. Usually, 100% of the quota is harvested in this fishery, however, COVID disruptions and a dispersed pollock biomass made fishing more difficult.
- COVID closures of foodservice businesses led to lower demand for key Bering Sea and Aleutian Islands species, leading to lower ex-vessel and first wholesale values. The average (statewide) ex-vessel price of pollock fell 10% to \$0.13 per pound in 2020. Ex-vessel rockfish prices fell 21% to \$0.14 per pound and crab prices fell 17% to \$4.00 per pound.

Table 3. Bering Sea/Aleutian Islands (BSAI) Seafood Harvest and Production Volume and Value, 2017-2020 (millions)

	Pounds Purchased	Ex-Vessel Value	Production Volume (pounds)	Wholesale Value
2017	4,549	\$1,063	1,979	\$2,603
2018	4,395	\$1,086	1,914	\$2,580
2019	4,442	\$1,102	1,979	\$2,682
2020	4,193	\$909	1,487	\$2,263
% chg '20 vs '19	-6%	-18%	-25%	-16%
% chg '20 vs '18	-5%	-16%	-22%	-12%

Kodiak

- Particularly low sockeye and keta salmon harvest volumes hurt the total value of the seafood industry in Kodiak in 2020. Both were down about 35% from 2019 in terms of total pounds. In addition, Chinook salmon harvests were down 25%. However, the pink salmon harvest was strong for an even-numbered year, up more than 200% from 2018. The coho harvest was up 11% from 2019. Low ex-vessel prices because of COVID-disrupted markets further depressed the value of the Kodiak salmon harvest.
- Halibut harvests increased in 2020 in Area 3B to the west of Kodiak Island, one of only a few areas that had increased halibut harvest in 2020. The sablefish harvest was up 13% in the Western Gulf of Alaska, however ex-vessel prices were down for both sablefish and halibut statewide (36% and 20% respectively) as foodservice closures cut into demand for these high-value seafood products.

Table 4. Kodiak Region Seafood Harvest and Production Volume and Value, 2017-2020 (millions)

	Pounds Purchased	Ex-Vessel Value	Production Volume (pounds)	Wholesale Value
2017	547.3	\$218.8	334.7	\$462.6
2018	379.9	\$148.7	219.4	\$255.2
2019	415.7	\$172.6	238.7	\$323.5
2020	329.7	\$109.7	195.4	\$263.5
% chg '20 vs '19	-21%	-36%	-18%	-19%
% chg '20 vs '18	-13%	-26%	-11%	3%

Southcentral

- Low sockeye salmon harvest volumes were a major factor in lower seafood harvest value across Southcentral Alaska in 2020, with volumes down 60% from 2019 in Cook Inlet and 69% in Prince William Sound. The keta harvest was also down 53% in Prince William Sound and the (usually fairly small) keta harvest in Cook Inlet was down 71%. The pink salmon harvest was down 9% in Prince William Sound (from 2018). Cook Inlet's small pink salmon harvest was up 71% from 2018.
- Halibut harvests were down 14% in Area 3A, which includes Cook Inlet and Prince William Sound. Sablefish harvests were up 5% in the West Yakutat area. As in other parts of the state, increases in sablefish catch did not rise to meet the levels of increased quota that became available in 2020. This can be attributed to both the low prices for sablefish in 2020 and COVID disruptions to the fishing season, which began just as the pandemic began.

Table 5. Southcentral Region* Seafood Harvest and Production Volume and Value, 2017-2020 (millions)

	Pounds Purchased	Ex-Vessel Value	Production Volume (pounds)	Wholesale Value
2017	270.7	\$178.1	214.2	\$563.2
2018	142.5	\$119.1	139.4	\$431.9
2019	233.8	\$154.5	175.3	\$479.9
2020	123.6	\$76.7	95.1	\$329.2
% chg '20 vs '19	-47%	-50%	-46%	-31%
% chg '20 vs '18	-13%	-36%	-32%	-24%

*Includes Prince William Sound, Kenai Peninsula Borough, and Anchorage.

Southeast

- Low salmon harvest volumes drove the total seafood harvest values down in Southeast Alaska in 2020. The 2020 Southeast sockeye harvest was down 58% from 2019, the keta harvest was down 54%, and the coho harvest was down 36%. The 2020 pink harvest was 8% below 2018. The Chinook harvest increased by 13%.
- The Southeast halibut harvest in 2020 was 6% below the 2019 harvest, in line with a 6% decrease in halibut quota in the region. The 2020 sablefish harvest was up 4% in Southeast, while the TAC was up 23%.

Table 6. Southeast Region Seafood Harvest and Production Volume and Value, 2017-2020 (millions)

	Pounds Purchased	Ex-Vessel Value	Production Volume (pounds)	Wholesale Value
2017	273.8	\$240.6	235.2	\$595.3
2018	163	\$210.8	135.2	\$450.7
2019	183.1	\$167.5	158.1	\$433.2
2020	100.5	\$105.8	80.2	\$282.5
% chg '20 vs '19	-45%	-37%	-49%	-35%
% chg '20 vs '18	-38%	-50%	-41%	-37%

Arctic-Yukon-Kuskokwim (AYK)

- The AYK region experienced the largest year-over-year decline in harvest volume between 2019 and 2020 among Alaska regions, driven largely by poor runs of keta salmon. In 2020, the AYK keta harvest dropped from 8.3 million pounds to 1.6 million, a more than 80% decline.
- Commercial fishing occurs on a smaller scale in the Arctic-Yukon-Kuskokwim region than other parts of Alaska. However, the industry provides an important source of income for coastal communities.

Table 7. Arctic-Yukon-Kuskokwim Seafood Harvest and Production Volume and Value, 2017-2020 (millions)

	Pounds Purchased	Ex-Vessel Value	Production Volume (pounds)	Wholesale Value
2017	14.6	\$12.8	7.1	\$22.2
2018	16.9	\$13.3	8.1	\$24.3
2019	10.3	\$6.3	4.0	\$11.8
2020	3.2	\$2.1	1.5	\$5.4
% chg '20 vs '19	-69%	-67%	-64%	-54%
% chg '20 vs '18	-81%	-84%	-82%	-78%