ASMI 2024 Salmon Harvest Information, Messaging and Talking Points
Updated 9/23/2024

Situation Overview

- With this year's Alaska commercial salmon season nearly over, the total harvest of 95 million salmon is 70% of the pre-season forecast, and down 34% from 2023 (2022 for pinks).
- This drop is due largely to roughly half (54%) of the pink salmon returning than were expected. (69 million fish harvest forecast versus a 37 million fish realized harvest.)
- Alaska sockeye salmon not only met but exceeded its preseason forecast at 104%.

Historical Harvest

- Since 1975 the cumulative Alaska commercial salmon harvest has failed to reach 100 million fish six times (1975-1980, 1987).
- The commercial salmon harvest topped 200 million fish 10 times since 1995.
- From 1975-2023 the average annual commercial salmon harvest was 152 million fish.
- From 2000-2023 the average annual commercial salmon harvest was 175 million fish.

Source: ADFG Commercial Salmon Species Combined Historical Harvest Rankings

Pink salmon impacts

Canned Salmon Supply and Prices

- **Reduced Supply**: Pink salmon are primarily used in canned and value-added products. Roe is also a valuable product made from pink salmon. A low run may reduce the availability of these products.
- Because of the cyclical nature of pink harvests, many processors hold shelf-stable (canned) inventory from high harvest years to compensate for the expected following year lower harvests to maintain steady supply year-over-year.
- Pink salmon have the shortest life cycle of all five Alaska salmon species at two years.
- **Price Increases**: Lower supply could lead to higher prices for some pink salmon products, as processors have less product to sell, driving demand for available stock.

Impact on Processors and Supply Chain

- **Underutilized Capacity**: Many Alaska seafood processors rely on processing pink salmon due to its large volume. A low run can result in processors not fully utilizing their facilities, which affects overall profitability and operations.
- **Products:** Pink salmon is a primarily destined to the following markets:
  Frozen H&G - 35% by value, key markets: China (re-export to U.S. and Europe)
  Canned - 38% by value, key markets: U.S., UK, Australia
  Roe - 25% by value, key markets: Japan, Eastern Europe
  Source: 2024 Alaska Pink Salmon Outlook & Summary

Impact on Retail and Consumers

- **Product Shortages**: Retailers may face shortages of pink salmon products, leading to increased reliance on other species or products to fill shelves. Alaska's main competitor for canned pink salmon is Russia, which has also experienced a relatively poor pink salmon harvest year. Additionally, recent U.S. sanctions on Russian imported seafood have made it more difficult for canned Russian products to enter the domestic market.
- **Consumer Shift**: If prices rise or availability drops, consumers could shift to alternative options such as canned tuna or chicken, potentially eroding Alaska's consumer base domestically for canned pink salmon.

Impact on Fishermen and Community

- **Reduced Income**: Fishermen who rely on harvesting pink salmon will likely see reduced income due to smaller harvests.
- **Community Impact:** Coastal communities dependent on fishing activity may also feel economic strain from lower fish landings and processing activity.

Small sockeye salmon impacts

- **Small fish in Bristol Bay**: Bristol Bay sockeye were the smallest on record, averaging 4.53 pounds. While the harvest was down 5% from the 20-year average in number of fish, it was down 22% in volume (pounds), the metric that determines income for harvesters and processors.
- **Processing sector:** Small overall fish size for Bristol Bay sockeye will impact processor profitability because smaller fish produce smaller fillets that sell at a lower price per pound than large fillets. High overall demand for sockeye salmon this year (as indicated by preliminary wholesale prices) may diminish the extent of the lost revenue from small fish in the 2024 pack. Alternative product forms such as portions may also help. Ultimately, processor revenue will influence the ex-vessel prices offered to fishermen in 2025.
- ADFG 2024 Bristol Bay Salmon Season Summary (PDF)

Messaging

Message: Sustainability

- Every aspect of fisheries management in Alaska is based on the best available scientific data and a precautionary approach designed specifically to sustain a long-term population of the species and health of the surrounding ecosystem.
- In order to protect Alaska's sustainable fisheries, they are managed dynamically during the season using real-time data. This means, when salmon runs come back smaller than forecasted, in many cases, our fleets are restricted from harvesting

during times they typically go fishing. This is an example of responsible fisheries management.
- This summer, more of our Alaska fleet was tied up at the docks and our processors did not fill their freezers to their full capacity, which is challenging for our whole industry. Still, we are confident that our sustainable seafood management system functioned as designed, that the necessary precautions have been taken to protect our fisheries for the long haul.

Message: Adaptability

- Wild fish stocks regularly vary significantly year to year.
- While fish stocks may change year to year due to factors outside our control, the Alaska seafood industry is committed to the future health and resiliency of fish populations and the surrounding marine ecosystem for generations to come through careful, science-based and strict resource management.
- While we cannot control everything that happens in the ocean environment, we can control our response in a way that supports the long-term sustainability of the fishery and those who depend on them by continuing our commitment to responsible fisheries management.

Message: Consumer Confidence

- While Alaska harvested less salmon than our typical average, there is still plenty of wild Alaska salmon available at retail and in restaurants.
- Consumers can support our fishermen by prioritizing wild-caught Alaska seafood, whether it's putting Alaska salmon, Alaska pollock, Alaska cod or Alaska sablefish on their weekly grocery rotation or selecting Alaska crab or scallops for their special occasions.
- Alaska's thriving commercial seafood industry is based on responsive, ecosystem-based sustainability practices, which supports and sustains families, businesses and communities across the state.

Message: Certification

- Seafood lovers can confidently #AskforAlaska and know that seafood from Alaska is sustainable, and harvested in line with the world's leading sustainability standards.
- Many types of Alaska seafood, including all five species of Alaska salmon, are certified sustainable by multiple accredited seafood certifications, including RFM and MSC.