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To: Erin Reinders, Michele Price, JR Pierson

From: Frank Kelty, Fisheries Consultant

Re: November Fishery Activities, and Fishery Articles,

It has been a busy week of meetings here is and overview of what has been going on.

Monday, I attend most of the day at the North Pacific Council committee meeting on Local Knowledge, Traditional Knowledge (TKLK) and Subsistence. This committee is working on how to incorporate LTTK into the NPFMC decision making process which would be helpful in protecting an understanding impacts, on subsistence activities in rural areas of Alaska. The hope is that committee recommendations move forward is that it could mitigate resource and policy conflicts over the long run. The Committee spent a long time working on the definition of subsistence it was discussed what the state definition, which basically states that the traditional or customary use of resources. Another understanding of subsistence is from the indigenous perspective that encompasses hunting and gathering activities, which have a deep connection to history, related culture, and traditions which is are sperate from commercial related activities. I have attached a great PowerPoint presentation on LKTK, a timeline outline and the Development Protocols for LKTK and Subsistence.

Tuesday, in the morning I attended a 2 hour Zoom seminar at the University of Washington School of Fisheries on a presentation preview on the 2020 Eastern Bering Sea Pollock Assessment by Dr. Jim Ianelli head scientist at the Alaska Fisheries Science Center. This was highly informative, and he gave an overview on the status on the assessment of the fishery and the recent trends that we might expect for the 2021 fishing season. The Pollock for the most important fishery for Unalaska's seafood

industry and the community's revenues. He gave an overview of the 2020 Pollock fishery the A season in 2020 performed very well the Pollock B season was terrible, the worse he has seen in many years. He is seeing a continued decline in the fishery and not having a trawl survey did not help matters. We were given an overview on the three sail drones used this summer for acoustic survey work it worked very well and the Alaska Fishery Science Center was happy with the data provided by the drones the acoustic work was very similar to the work by NOAA trawlers. The drawback from not having the trawl surveys you do not get the data on age, size, of fish and mortality. The lack of a traditional survey work also impacted information from bottom trawl work also impacts information of the Pollock resource. The drones acoustic work showed increased biomass of Pollock further to the Northwest Bering area close to the Russian boundary.

Dr. Ianelli recommendation to the NPFMC Groundfish Plan Team meeting next week via Zoom with be and Allowable Biological Catch (ABC) of 1.3 to 1.4 million metric tons (MMT) down by the 2020 ABC amount of 2.0 MMT the Total Allowable Catch (TAC) amount for this years was 1.45 MMT so if the ABC is reduces we could be looking at a TAC amount of 1.0-1.1 MMT a significant reduction if the TAC is cut 300,000MT that in pounds is 670 million pounds which would be 187million pounds reduction for Unalaska shore-plants which at an ex-vessel value of \$.012 per pound a \$22 million dollars in lost revenue to the harvesters and \$480,000 reduction in the 2% local raw fish tax for Unalaska plus a reduction in the Alaska Business, and Resource Landing Tax as well. We still have two steps to go on the decision making process; next week's Groundfish Plan Team meeting and see what they recommend to the North Pacific Council Science Statistical Committee and then the SSC recommendation to the North Pacific Council that sets the TAC meeting in December. I have attached Dr Ianelli presentation link from U-Tube with this memo.

Tuesday afternoon through today I have been attending the Alaska Seafood Marketing Institute (ASMI) All Hands-on Deck Zoom Conference from Juneau. I have been to a few of their board meetings but have not attended an annual conference. This conference brings together all the various domestic and export marketers of Alaska Seafood Worldwide they reported on the impacts they have faced from the pandemic on the sales and marketing of seafood, especially the impacts on the restaurant trade. Tuesday afternoon they had a session on Responsible Fisheries

Management (RFM) labeling most of all the product produced in Alaska is in this program this assures that they are buying is product has high quality and is sustainable which is very important in the marketing of Alaska Seafood Products around the world are highly respected and all promotions need to push product is from Alaska.

Wednesday morning, we had committee reports on Salmon and Halibut committees they reported on the challenges they face in the market place the impacts on sales in the restaurant trade. They also report on some good news that Sockeye salmon is moving well domestically in the retail sector and even Sockeye canned salmon sales have improved. The Halibut and Sablefish sales are flat especially in the restaurant sales and Black Cod has been impacted by smaller size which has impacted sales in Japan and in product to Black Cod smokers.

Wednesday afternoon noon, the White Fish Committee reported on Pollock, Cod, Rockfish and Mackerel product. Pollock block product is moving well but is in short supply. There is concern on Russian product impacting sales in Europe and China trades issues is also a problem for sales to China. Pacific Cod concerns include a 10-15% reduction probably on cod allocations next year. Which would open the door from product from Russian to fill the gap. The committee also discussed working to get marketing opportunities for Rockfish and Atka Mackerel products forms moving into domestic and export markets may be real opportunity soon.

Thursday morning the International Marketing committee met we had reports from Northern Europe, Southern Europe, and South American and marketing campaigns of salmon, white fish products, and canned salmon. Some of the promotions were a hoot a Brown Bear holding salmon was used in many grocery stores chains. They had promotions in many high-end restaurants on Cod, Pollock, and salmon. In Brazil they had the Brown Bear on a Scooter with an ASMI backpack full of product making deliveries. The takeaway from this group is that the Alaska Brand is a winner. Later today they have a domestic marketing committee meeting and a ASMI board meeting on Friday.

Attachments:

1. Power PowerPoint on LKTK and Subsistence
2. Development Protocols for LKTK and Subsistence PowerPoint presentation.

3. Development Protocols for LKTK and Subsistence
4. U-Tube Presentation 2020 EBS Pollock Stock Assessment
5. 2020 Stock Allocations spread sheet.
6. Agenda on ASMI All Hands-on Deck Annual Conference

Regards

Frank Kelty

