2/22/11 Industry Overview: Seafood Processing Sector

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1

Economic Engine for All Alaskans.

Alaska's Commercial Fisheries

- *If Alaska were a nation, it would be the 14th largest producer of wild seafood among seafood producing countries.*
- *Alaska produces 35 percent of the world's harvest of wild salmon.*
- *The harvest of Bering Sea pollock is among the largest single fisheries in the world.*

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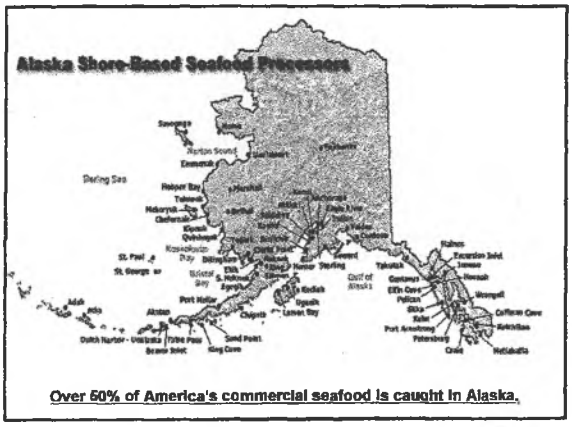

Over 60% of America's commercial seafood is caught in Alaska.

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Alaska Seafood is...

- worth approximately $5 billion annually to the Alaska economy in terms of direct, indirect, and induced economic output (Source: Northern Economics 2009)
- the state's largest private sector employer (Source AK DOL)
- Alaska's number one export (Source: AK Gov's Office of Intl. Trade)
- generates approximately $100 million in taxes and fees to state and local governments (Source: State of Alaska)

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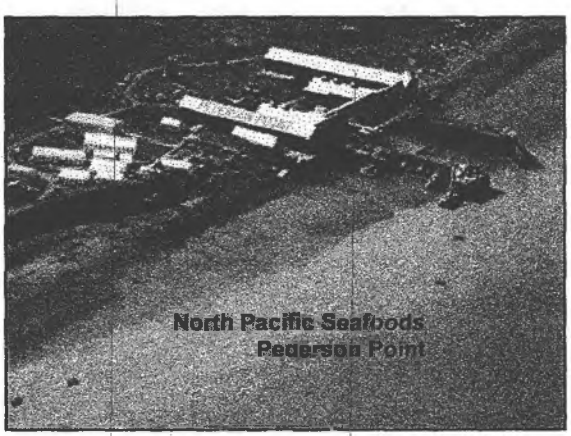

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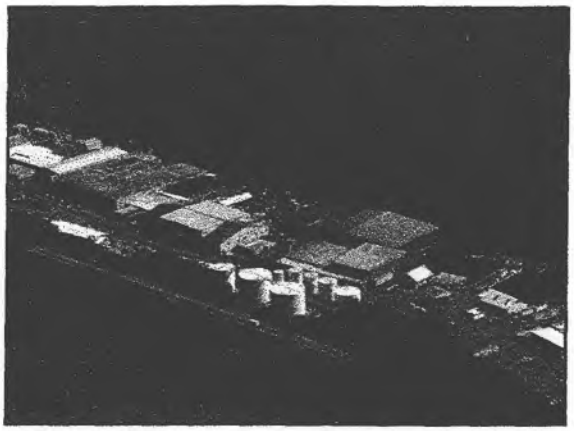

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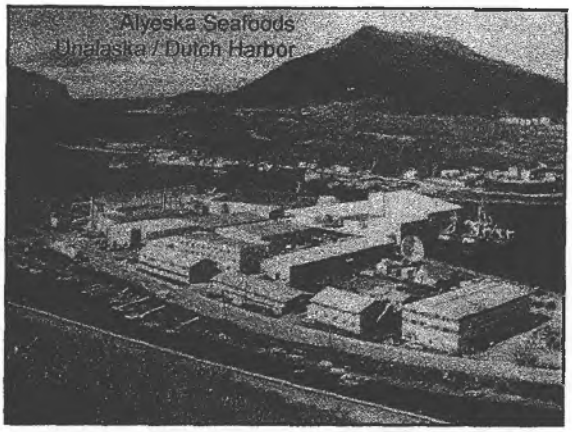
Alyeska Seafoods
Unalaska / Dutch Harbor

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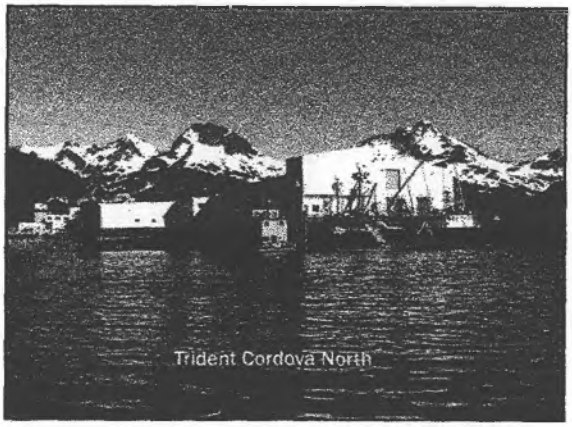
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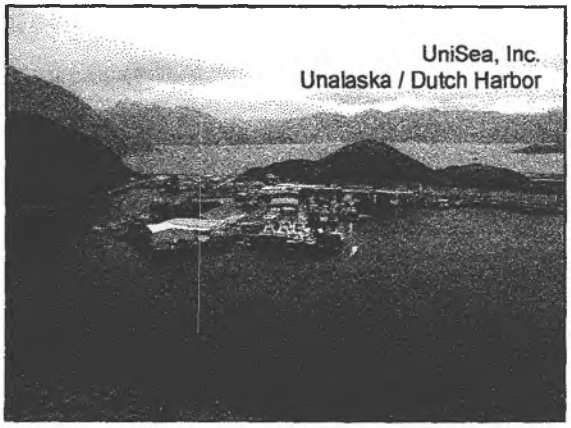
UniSea, Inc.
Unalaska / Dutch Harbor

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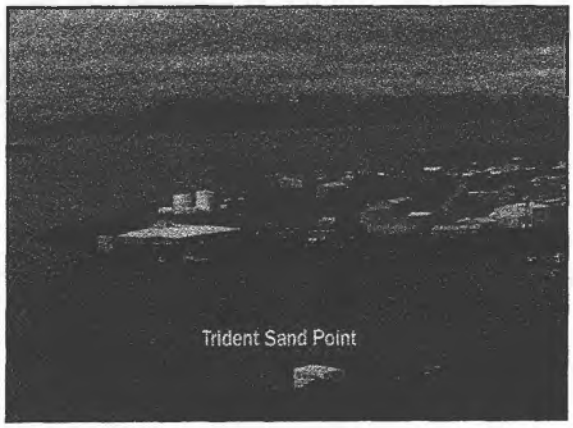

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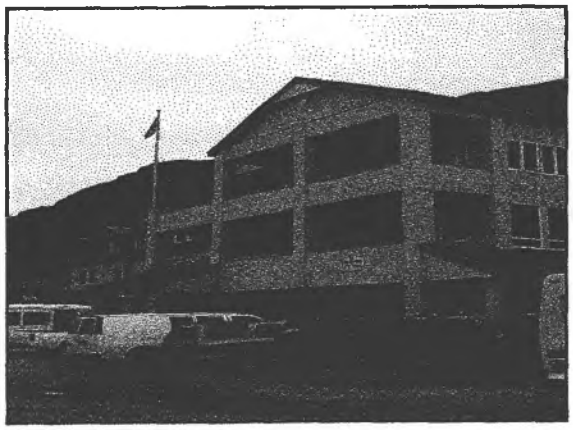

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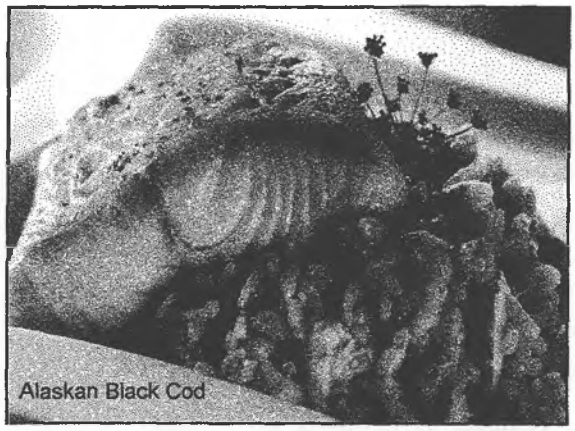

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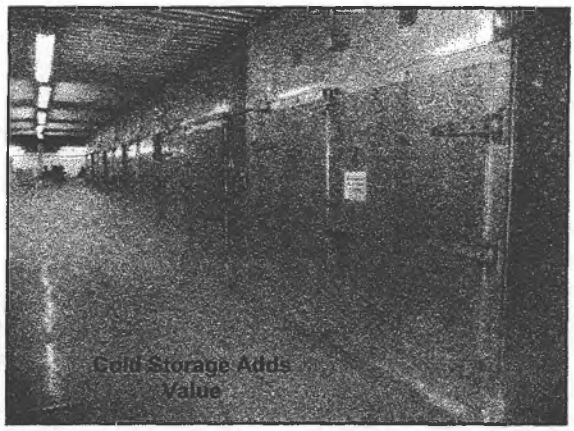

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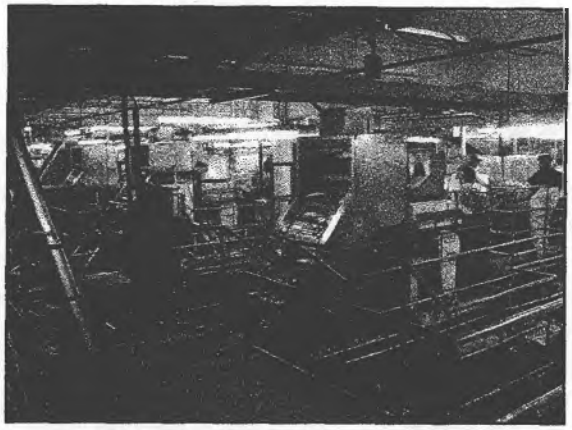

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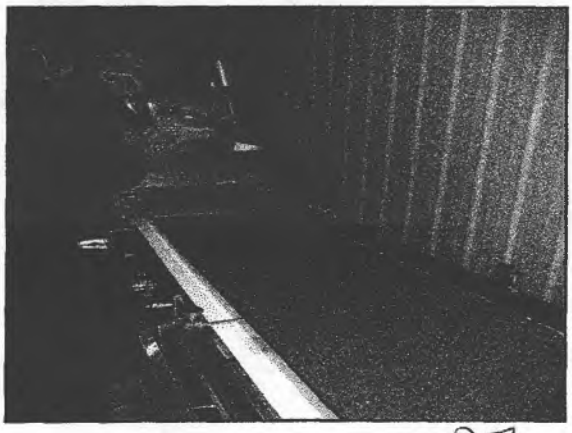

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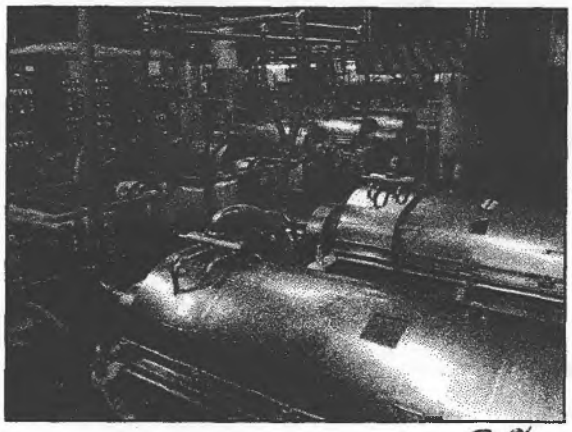

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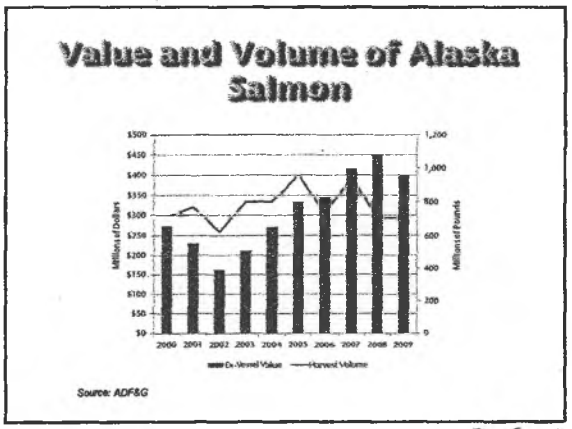

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Seafood Industry Taxes

Alaska's seafood industry generates approximately $79 million in state taxes and fees annually, in addition to taxes paid to local governments.

Source: Northern Economics 2011

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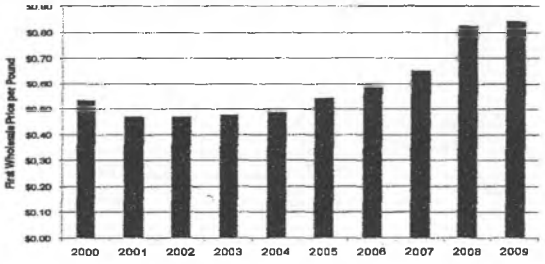
Alaska is Realizing More Value per Pound of Seafood Sold



Source: ADF&G, NOAA, and McDowell Group Estimates.

33

EMPLOYMENT

"Alaska's seafood industry is the largest private sector employer in the state, creating over 70,000 direct jobs and more than another 10,000 indirect jobs."

Source: Northern Economics: 2011

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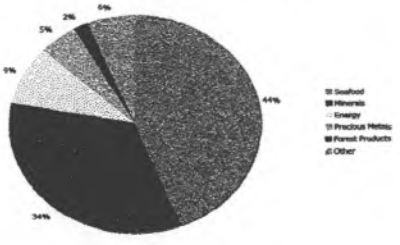
Alaska's Top Export Commodities

(Jan-Oct 2010)



Source: U.S. Census Bureau, SOA, Governors Office of International Trade

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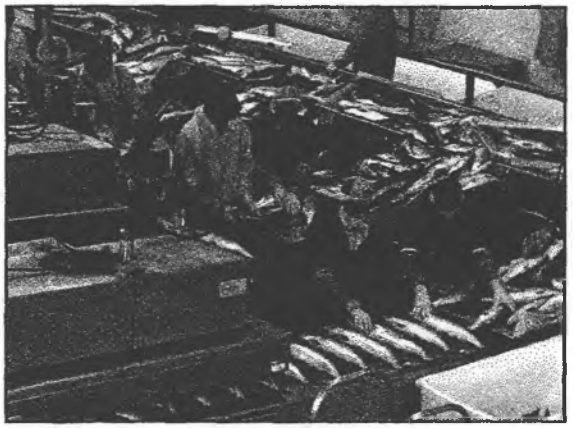

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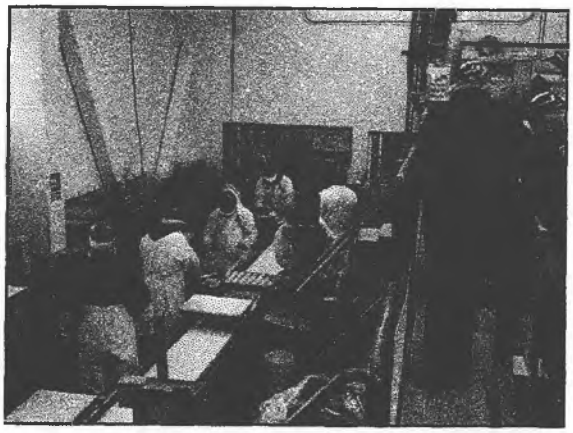

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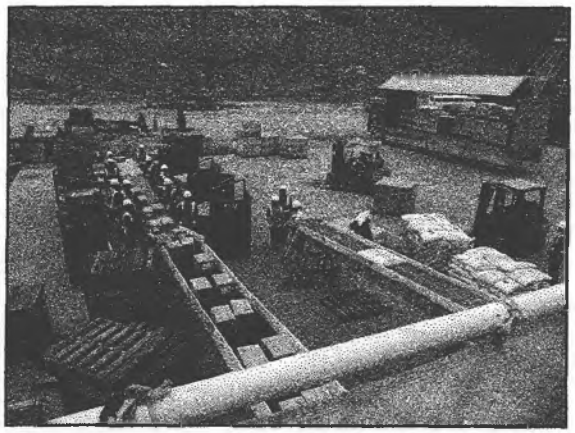

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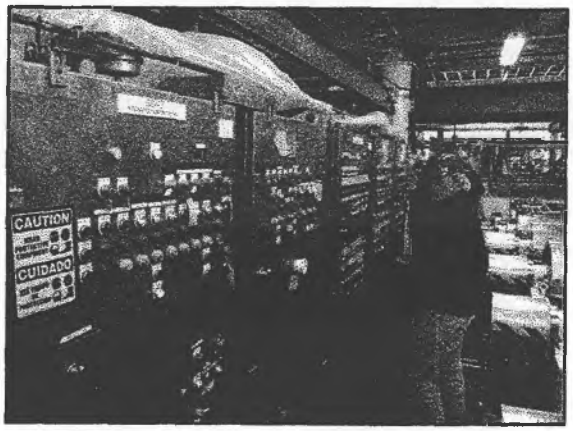

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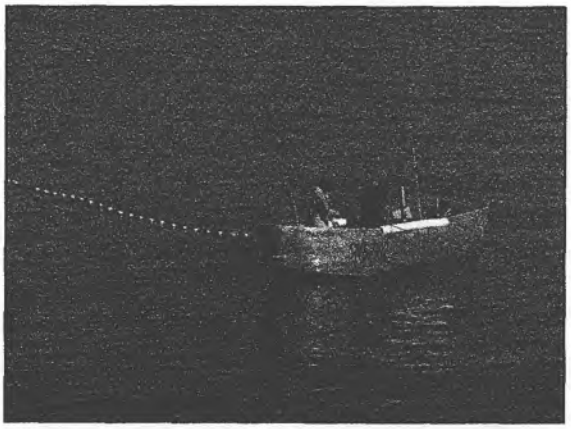

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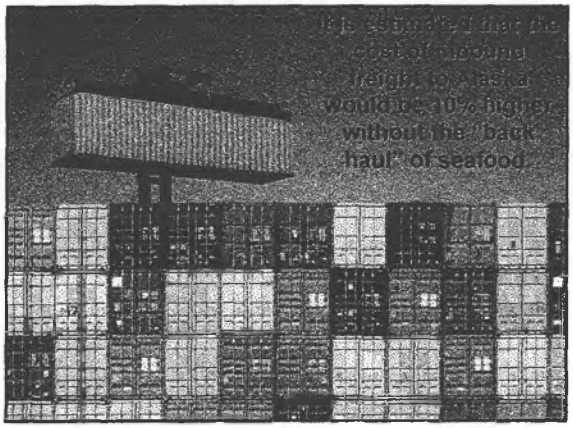

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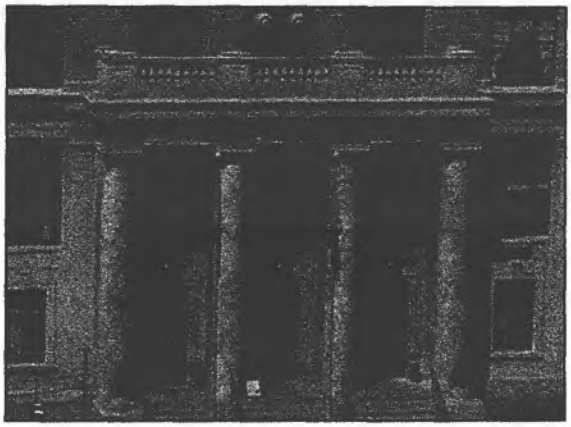

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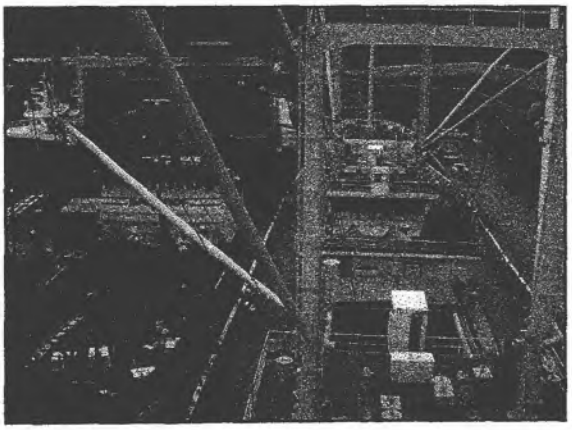

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Overview of Alaska's Seafood Processing Industry

Presentation to House Fisheries Committee
Feb. 22, 2011

By Pacific Seafood Processors Association
(Mary McDowell, Vice President, PSPA and
Glenn Reed, President, PSPA)

1 - (globe) Intro

Appreciate opportunity to speak to committee today.

PSPA is non-profit trade assoc. of seafood processing companies
Assoc. founded in 1914. (1-pager about PSPA in committee pkt)

Our membership primarily shore-based processing companies –
Companies with permanent, on-land facilities in Alaska.

2 – (map of AK with processor locations)
Today – provide brief overview of **1 sector** of seafood industry – **processing** sector
(with focus on shore-based processors)

This sector consists of facilities and operations that range from very small to very large, located throughout Alaska, primarily in coastal areas, and processes many species of fish and shellfish.

3 - (AK Seafood is..)
This sector is ONE player in a larger partnership that must be in place and functioning well in order for Alaska and Alaskans to benefit from the vast fishery resources of the state and off the state's shores

That partnership involves -- and *requires* -- efforts and success of:

- Harvesting sector – catch the fish & shellfish

  Note that committee scheduled to have overview of harvesting sector – by United Fishermen of Alaska -- on Thurs -- they'll provide further info about Alaska's commercial fisheries & harvesting sector.

- Processing sector – process the catch; develop products and markets; and sell the seafood

  Note -- besides shore-based processing that is focus of today's presentation,

  Processing sector also includes floating processors –vessels with processing facilities onboard.

  Fishing vessels deliver their catch to these vessels, and fish is then processed onboard

  AND there are Catcher-processors that both harvest and process fish at-sea.

Other parties in this "necessary partnership" include –

- Related and support businesses – shippers, distributors, and marketers;
  Fuel, refrigeration, electrical, and construction businesses;
  Boat yards; mechanics, so on

- Government – local, state and federal - for:

  Providing state's basic infrastructure – docks, harbors, roads, airports, etc
  AND
  Critical role of providing fisheries management, enforcement, and protection

- Mother Nature & providence – success depends on ocean conditions, weather, climate shifts, often-unpredictable fluctuations in fish stocks and run timing and strength -- from season to season, and week to week.

- And, finally, consumers -- the success of that end of partnership depends on many factors --- state of world economy, success of our marketing efforts, buying-power of key consumers,
  and efforts & success of competing seafood producers around the world
  AND of producers of other competing proteins – chicken, pork, other meats.

Clearly – seafood industry has lots of moving parts, players, and variables that are often beyond our control

It is a very challenging & high risk business.

Most seafood industry operations "out of sight" of major population centers of AK – so most Alaskans don't see it first hand

So, importance of industry to Alaska's overall economy often not recognized or well-understood, especially by those not directly involved, or not living in seafood-producing communities

Industry has great story to tell – anxious to tell it, show its contributions and great advances

Presentation will be quite general and basic -- plan to:

- Provide some info about the size of Alaska's seafood industry
  How Alaska ranks among seafood producing states and nations of the world

- Look at the seafood industry's long term investment in, and commitment to, Alaska
  Show some photos to give you a feel for what this industry looks like

- Talk a bit about the benefits and impacts of the industry on the state's overall economy & on AK communities ..... **not just** fishing communities, but all communities

- Wrap up with few comments on the industry's **partnership** with the state –
  What the state has done, and what still needs to be done by all of us --
  to help ensure Alaska will continue to benefit from its fishery resources and a strong seafood industry

Magnitude of Alaska seafood industry & important role it plays in state's economy

Slide on screen ---
Alaska Seafood --- including harvesting and processing – is

- worth approx. $5 billion *annually*
  (fluctuates year to year due to variables just mentioned)
- the state's largest private sector employer
- Alaska's number one export
- Generates approx. $100 million in revenues to state and local governments

4 – AK's Commercial Fisheries
Slide --

- If Alaska were a nation, it would place 14th among seafood producing countries.
- Alaska produces 35 % of the world's harvest of wild salmon
- The pollock and groundfish fishery of the Bering Sea is one of the largest fisheries in the world, by volume.

Both fishermen and processors must succeed -- in order for either sector to flourish --- and for our State and communities to realize the benefits and revenues from these resources.

"INVESTMENT"

Hear much about importance of having "investors/ investment" in Alaska

ALL resource development in Alaska – in both renewable and extractive resources – has required large amounts of outside capital.

Seafood processing is a risky business, defined by high volume and low profit margins

As Alaskans, we are fortunate we've been able to attract the investment necessary to develop and continue to expand and improve our seafood industry

5 – Westward Seafoods
Seafood industry represents huge & on-going investment & long term financial commitment in Alaska.

The seafood processing industry in AK is over 100 years old.

But has continued to modernize & grow.

In recent decades alone, industry has invested over a BILLION dollars in permanent, onshore facilities & continual upgrades & annual maintenance.

Will run through few photos for idea of what some facilities look like around the state.

Photos: 6, 7, 8, 9, 10, 11, 12, 13, 14

Sampling of some of our member companies' operations

Our members and other companies have many more operations of all sizes around AK

Shore-based processing ranges from "mom and pop" to large high-volume operations.

Broad geographic distribution – some in or near towns of various sizes; others in more remote, isolated locations.

Interiors of facilities impressive -- clean, modern, lots of activity, hundreds of employees.

Will get back to those aspects in a few minutes.

photos: 15, 16, 17, 18

Since many plants are in quite remote places --- or in communities without sufficient rental housing available to house large influx of workers needed for peak seafood seasons ....

Many plants must provide employee living and dining quarters – often for hundreds of employees.

----another significant investment and cost of being in the seafood business in Alaska

Besides physical plants -- seafood industry invests many millions (and takes financial risk) to develop and market new, value-added product forms and to constantly improve seafood quality

19 (seafood on plate)

This is critically important to keeping AK seafood competitive in world markets

Industry is proud of its investments and successes in Research and Development.

20 Today's consumers looking for more healthful and environmentally- responsible food.

AK seafood a good fit

21 But also looking for quality, price, value, and convenience

Industry working hard to meet these consumer demands.

22 **Look at Salmon --**

While continuing to produce best traditional salmon products in world --- including canned product seen here --

Photos of fillets & freezers

23 Industry also now selling large and growing portion of AK salmon as fillets , adding significant additional value to each pound.

24, 25

Has also developed hundreds of new value-added products -- salmon nuggets, patties, individual portions with sauces, etc.

26 – roe Also, produce various, high-value, forms of salmon roe (salmon eggs)

27 –*(chart: Value & Volume of AK Salmon)*

Bar chart -- no. of salmon harvested fluctuates from year to year, but because of efforts to meet consumer demands for quality & product form, and effectively market AK salmon -- -- the value of salmon has continued to rise. (ex-vessel value = dollars paid to fishermen)

28

Pollock fishery is another example of the industry efforts to add value and fully utilize harvested fish

Pollock is Alaska's largest volume fishery –industry produces fillets, block, mince, and many other value-added products

A significant amount of Alaska's pollock production goes into "SURIMI"

...which uses high-tech processing techniques that use nearly every particle of each pollock

The slide on screen shows pollock entering plant after being off-loaded from catcher vessel

Then goes thru series of steps ....

29 Here, being centrifuged to grind and pull moisture out of flesh

Thru these processes, pollock meat is turned into a protein paste,
then processed into many different, market-ready products.

30 ... one of those is "imitation crab" or "krab with a 'k'" , seen on salad bars, etc.

31 (Fish meal)

The parts of pollock that remain after utilizing meat for fillets or surimi (skins, organs, bones)
--- is turned into variety of high quality fish **meal** products

AND plants use the pollock oil as bio-fuel to help meet energy needs of their operations.

High cost of energy in AK, especially in rural AK, is major challenge for industry.

Have only touched on a some things happening in salmon and pollock processing
But Alaska's seafood industry also produces large quantities of high-quality
crab and other shellfish, halibut, cod, sablefish, many species of groundfish, and more.

Diverse industry – processing many species –
..... each requiring unique handling, processes, marketing

32 Chart – More Value per pound

All these efforts to add value and create products consumers want –
bring MORE value per pound of AK seafood harvested
(as shown in chart)

Statewide benefits of seafood processing industry

33 Export pie chart here

Seafood is **Alaska's LARGEST export product**

Important to state's overall economy – bringing in "new dollars" into economy,
not just "re-circulating dollars"

---

34 seafood tax revenues

And a revenue generator for state and local governments

Slide: "Alaska's seafood industry generates approximately $79 million in state taxes and fees annually, in addition to taxes paid to local governments."

35

And -- LARGEST PRIVATE SECTOR EMPLOYER in the state, providing over 70,000 direct jobs and generating more than 10,000 indirect jobs.

Slides: 36, 37, 38, 39, 40, 41, 42, 43, 44, 45, 46, 47, 48

Seafood industry employs large numbers of workers to staff the processing lines,

but also employs people in huge array of other skilled and entry-level positions.

Understand members of committee have expressed interest / concern about numbers of non-resident workers in some parts of seafood industry

Understandable question.

Happy to discuss that – *and industry efforts to address it* -- at END of presentation or with indiv. legislators any time.

For now, just note that —

- thousands of Alaskans **are** employed in seafood processing
- the industry is constantly seeking to hire Alaskans
- and that ALL fishermen, and ALL Alaskans, benefit from these plants being able to fill their positions and get Alaska seafood processed.

Besides importance as exporter and tax payer ---

Seafood industry also supports **transportation system** of Alaska,
--- which benefits everyone

49 Southbound shipments..

Seafood industry transports thousands of workers and millions of pounds of supplies into and around Alaska

And ships millions of pounds of seafood out.

50 - freight containers

Without seafood providing a major "back haul" with shipping companies --

Alaskans would pay higher shipping costs for northbound freight

Major shippers estimate 10% higher rates across the state

That means ALL of us– even in non-fishing communities – would pay more for our groceries, building materials, household supplies, cars, etc
-- without a healthy seafood industy

Also – in many parts of state -- without seafood industry, transportation providers would not be profitable; likely provide less or no service to some communities.

Beyond overall economic benefits to state –

Additional, direct benefits at community level

Commercial fisheries are often referred to as the "economic engine" of coastal Alaska.

Seafood processors provide a market -- the payday -- for fishing fleets in these regions

51 - large vessels at dock --
Not just for medium-sized fishing operations, & large fishing vessels

52 Set net boat (leave on screen til capitol photo)

.....but also for very small-scale commercial fisheries –

fisheries that provide much-needed cash income in small communities & largely-subsistence areas of the state,
communities where other options for cash income can be scarce.

Another benefit to communities-- Tax Revenue

Processors pay local property and fish taxes

Often by far largest, or even ***only*** significant source of local tax revenues

& Plants are part of Alaska communities – providing :

- services to local fleets
- and often, scholarships to local students, fish to local school lunch or senior lunch programs, etc.
- In many communities, seafood plant employees are living, shopping, raising families, serving on local city councils, etc

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As noted at beginning – STATE is a partner in making all this work

53 - capitol

We thank Legislature for past & current support for Alaska fisheries and seafood industry.

In addition to state's investment in overall infrastructure (transportation, etc) necessary for all businesses ---

- Alaska's fishery management is known as among best in world –

Has required legislative commitment to an adequately-funded, well-staffed Dept of F&G

- AK's fishery resources, and the habitat and waters they depend on
  among healthiest in world
  due, in large part, to the state requiring & enforcing protection of those resources

- In 1970's, legislature supported establishment of AK's Salmon enhancement Program to rebuild salmon runs depleted by years of poor federal management.

  Evolved into current private-non-profit hatchery program

  One of best-managed, most successful, fishery enhancement programs in world

  Plays important role in success of today's AK seafood industry

- In more recent years, legis passed "Salmon Product Development Tax Credit" ---
  & program extended again last session

  Small program; small cost to state,

  but provides extra boost to processors to go ahead & make sizeable investments necessary to develop new, value-added product forms, purchase new equipment, get new processes underway in their plants.

So, since statehood, AK government has adopted laws, regs, policies that have allowed the seafood industry to develop and become sustainable and strong.

NOW, and into future – What can legislature & other state and community leaders do to help ensure continued benefits of having a healthy seafood industry?

- #1 Sound management of fisheries and protection of water, fish, and fish-habitat

  Adequate funding of scientific research & ADF&G, DEC
  Incuding addressing recruitment/ retention of well-qualified staff

  Good, reliable, enforceable laws, regs, and processes
  For permitting and operations of all development projects

  Note: Alaska's pure water and environment, the purity of our seafood and the PERCEPTION of that purity – is key to marketability of Alaska seafood in today's markets.

- Continue providing for construction and maintenance of transportation infrastructure –

  Docks, harbors, airports -- for seafood industry, these are the "roads to resources"

  Need state support for programs like Municipal Harbor Facility Grant Fund

- Stable, reasonable regulatory environment –
  --fisheries management
  --standards, requirements for operations - air, water, food safety, etc

- Continued support for a strong salmon hatchery program

  With successful efforts to develop and market new, value-added salmon products .....

  Demand is high & growing

  Strong, steady supply of salmon is essential to meeting commitments and expanding markets.

- Continue to work to address high cost of energy in rural Alaska -- high energy costs are major challenge for seafood industry.

- State support for ASMI – state's contribution to partner with funding provided by industry itself helps ensure AK products promoted and successful in highly competitive world markets

- AND -- work with us to help inform all legislators and other policy makers & leaders, and the public throughout Alaska about seafood industry & importance to the whole state.

In conclusion –

- Alaska is a LARGE GLOBAL PLAYER in SEAFOOD
- This has taken LONG TERM COMMITMENT, & INVESTMENTS by the seafood industry

  & PARTNERSHIP with the State of Alaska..
- ALL Alaskans benefit from successful seafood industry and from policies that support it.
- The industry wants to continue to be GOOD CORPORATE CITIZENS OF ALASKA

  And GOOD PARTNERS with the STATE and PEOPLE of Alaska –

  to ensure the long term sustainability of Alaska's fishery resources

  & the benefits of having a strong seafood industry.

Industry always available to provide info, answer questions, & work with Legis on issues that affect our industry and the state.

We invite committee members to visit our member company plants around state to get first-hand, up-close look at seafood processing industry.

54 - Thank you -- happy to answer questions.

PSPA

PACIFIC SEAFOOD PROCESSORS ASSOCIATION
Est. 1914

What is PSPA?

Pacific Seafood Processors Association (PSPA) is a nonprofit trade association of seafood processing companies. PSPA member companies have operations in many locations throughout coastal Alaska, including Ketchikan, Wrangell, Petersburg, Sitka, Cordova, Valdez, Kodiak, Chignik, Port Moller, Sand Point, King Cove, Akutan, Unalaska/Dutch Harbor, St. Paul, Dillingham, Naknek, Pederson Point, and Togiak. Additionally, two of our member companies operate mother ships in the Bering Sea, providing opportunities for catcher vessels to deliver their catches at sea.

Our member companies purchase, process, and market hundreds of millions of pounds of salmon, pollock, crab, cod, and other species of Alaska seafood every year. They provide thousands of direct and indirect jobs in Alaska, markets to Alaska fishermen, and millions of dollars in tax revenues to Alaska communities and the State. Additionally, Alaska's seafood processing industry contributes to the economic well-being of all Alaska businesses and residents by helping contain shipping and transportation costs to, from, and within Alaska due to the large amount of goods and personnel transported to our operations in remote parts of the state and the enormous quantity of seafood product shipped south as "back haul" freight.

PSPA Member Companies:

- Alaska General Seafoods
- Alyeska Seafoods, Inc.
- Golden Alaska Seafoods, LLC
- North Pacific Seafoods, Inc.
- Peter Pan Seafoods, Inc.
- Phoenix Processor Limited Partnership
- Trident Seafoods, Inc.
- UniSea Inc.
- Westward Seafoods, Inc.

PSPA's Juneau Office:

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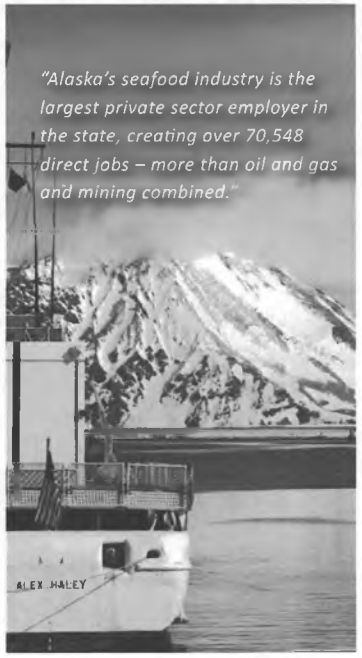
A COMMITMENT TO SUSTAINABILITY

Wild fish stocks are a dynamic resource, subject to swings in abundance due to changes in climate, feed and other factors. Despite this, Alaska's Seafood Industry continues to earn superlatives due to a commitment to stewardship and sustainability. State and federal fishery managers set catch allocations at scientifically set levels to protect the resource. As a result, no stocks of groundfish are considered overfished. Key habitat areas are closed to protect the broader ocean ecosystem totaling more than five times the entire US National Park System. Alaska fisheries operated under limited access or catch share quota systems are now recognized as a key strategy to prevent overfishing. National Geographic recently listed Alaska as one of only three well-managed fisheries in the world, the others being Iceland and New Zealand.

Courtesy of ASMI and Shpilfish Dark

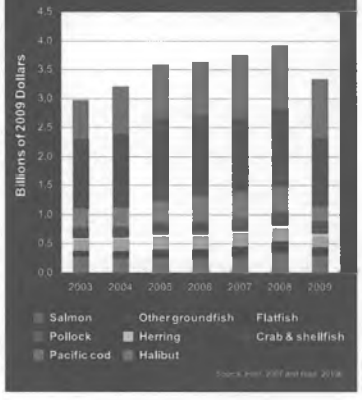
"Alaska's seafood industry is the largest private sector employer in the state, creating over 70,548 direct jobs – more than oil and gas and mining combined."



POSITIVE TREND

The inflation adjusted wholesale value of Alaska seafood has steadily increased over the past five years from $2.88 billion in 2003 to $3.3 billion in 2009, an increase of 15 percent. With continued science-based management, Alaska's seafood industry is a growing, sustainable and vital part of the Alaska economy

Real Wholesale Value by Species, 2003-2009



MARINE CONSERVATION ALLIANCE
Promoting sustainable fisheries to feed the World.

PSPA
Pacific Seafood Processors Association

APA AT-SEA PROCESSORS ASSOCIATION
Partners for Healthy Fisheries

February 2011

Alaska's Seafood Industry:

Global in stature; Leaders in the Nation; A Statewide Economic Engine That Drives Local Communities

MARINE CONSERVATION ALLIANCE
Promoting sustainable fisheries to feed the World.

F/V Mar Del Norte, Kodiak, AK
Courtesy of Alaska Groundfish Databank

Alaska's seafood – salmon, crab, pollock, halibut, cod and more – is one of the largest renewable resources in the world. Alaska's seafood production ranks 14th in the world and leads the nation's harvest from the sea. Raised wild and harvested sustainably, Alaska's quality seafood graces the finest white-tablecloth restaurants and satisfies appetites on the go at the corner fast-food outlet.

Alaska's seafood industry traces its heritage to the purchase of Russian America and it remains a vital part of the state economy today. The Alaska Seafood Industry is the state's largest private sector employer and the largest manufacturing sector; a multi-billion dollar economic engine that profoundly affects the state economy and reaches broadly from Alaska's urban centers to its smallest coastal communities.

GLOBAL STRUCTURE

At over 4 billion pounds annually, compared to other fishing nations, Alaska would be the fourteenth largest producer of wild seafood. The harvest of Bering Sea pollock and other Groundfish, capped at 2 million metric tons annually, is among the largest single fisheries in the world. Alaska also boasts 35 percent of the world's harvest of wild salmon. The 2010 salmon season was one of the best on record in terms of harvest and value, the 11th highest harvest since statehood. Alaska exports $1.6 billion of seafood annually to customers around the world including in Japan, China, Korea, Canada and Europe. Alaska fisheries are global in stature.

NATIONAL LEADERS

Alaska leads the nation in production of seafood with an annual harvest that was 52% of all seafood landed in the United States in 2009. Unalaska/Dutch Harbor has reigned as the nation's top fishing port in terms of volume for decades and it also ranks as the second top port in terms of ex-vessel value, the price paid fishermen for their catch.

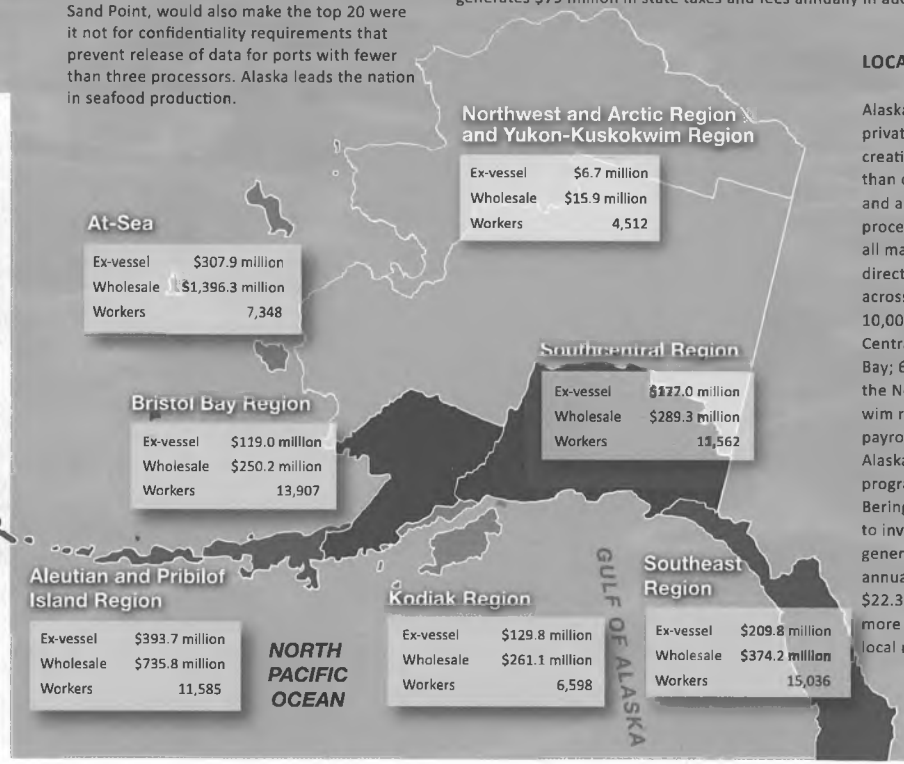
In all, eight Alaska fishing communities rank among the top 20 richest ports in the nation including Kodiak (number 3), Naknek-King Salmon (4), Sitka (5), Homer (12), Seward (17), Ketchikan (18), and Cordova (19). Three other Alaska ports, Akutan, King Cove and Sand Point, would also make the top 20 were it not for confidentiality requirements that prevent release of data for ports with fewer than three processors. Alaska leads the nation in seafood production.


Unalaska / Dutch Harbor, Alaska
Courtesy of Bob King


Photo Courtesy of the Alaska Seafood Marketing Institute

A STATEWIDE ECONOMIC ENGINE

The estimated ex-vessel value of Alaska fisheries, the price paid to fishermen, totaled $1.3 billion in 2009. The wholesale value of Alaska seafood is pegged at $3.3 billion plus $1.3 billion in indirect and induced economic output for a total of $4.6 billion to the Alaska economy. The value of seafood exports from Alaska exceeds that of mining or expenditures by the visitor industry and among other private sector industries is second only to oil and gas. Alaska's seafood industry generates $79 million in state taxes and fees annually in addition to local fish taxes.



LOCAL COMMUNITY DEVELOPMENT

Alaska's seafood industry is the largest private sector employer in the state, creating over 70,548 direct jobs – more than oil and gas and mining combined – and another 10,252 indirect jobs. Seafood processing accounts for over 71 percent of all manufacturing jobs in the state. These direct and indirect jobs are spread widely across the state including more than 10,000 jobs each in the Southeast, South Central, the Aleutian Islands, and Bristol Bay; 6,500 jobs in Kodiak and 4,500 jobs in the Northwest, Arctic, Yukon and Kuskokwim region, jobs with a combined annual payroll of over $1.45 billion. The Western Alaska Community Development Quota program, which allocates a portion of the Bering Sea catch for coastal communities to invest in economic development, generates over $180 million in revenues annually, employs 1,600 workers, pays over $22.3 million in wages, and invests millions more in training opportunities afforded local residents.

Table 1. Seafood Industry Employment by Region, 2009

Summary of Workers	Harvesting	Processing	Total
Aleutian and Pribilof Islands	5,309	6,276	11,585
Bristol Bay	9,385	4,522	13,907
Kodiak	3,664	2,934	6,598
Northern	627	68	695
Southcentral	8,071	3,491	11,562
Southeast	10,150	4,886	15,036
Yukon Delta	2,986	831	3,817
At-Sea	1,732	5,616	7,348
Total	**41,924**	**28,624**	**70,548**

Source: Northern Economics, Inc. and ADOLWD, 2010.

Table 2. Estimated Seafood Ex-vessel Volume and Value by Region, 2009

Region	Harvest Weight (1,000 MT)	Ex-Vessel Value ($ Millions)
Aleutian and Pribilof Islands	497.2	393.7
Bristol Bay	86.6	119.0
Kodiak	157.2	129.8
Northwest/Arctic/Yukon-Kuskokwim	3.9	6.7
Southcentral	77.8	177.0
Southeast	134.4	209.8
At-Sea	883.0	307.9
Total	**1,840.0**	**1,343.8**

Source: Estimated by Northern Economics using NMFS (2010a), Hiatt (2010a) and Hiatt (2010b).

Table 3. Estimated Seafood Wholesale Volume and Value by Region, 2009

Region	Product Weight (1,000 MT)	Wholesale Value ($ Millions)
Aleutian and Pribilof Islands	180.9	735.8
Bristol Bay	48.6	250.2
Kodiak	72.9	261.1
Northwest/Arctic/Yukon-Kuskokwim	2.3	15.9
Southcentral	45.4	289.3
Southeast	81.1	374.2
At-Sea	457.0	1,396.3
Total	**888.1**	**3,322.9**

Source: Hiatt, 2010b

2011 report sponsored by the Marine Conservation Alliance

This is a 2011 update of the Executive Summary from the 2009 report "The Seafood Industry in Alaska's Economy". This report, as well as the 2011 update with full references is available at www.marineconservationalliance.org.

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MARINE CONSERVATION ALLIANCE

SEA FACTS

THE SEAFOOD INDUSTRY IN ALASKA'S ECONOMY

As a major player in global markets, Alaska's seafood industry is an economic engine for both the state and the nation. This publication updates "The Seafood Industry in Alaska's Economy", first published in 2009. It shows that the seafood industry continues to be the largest private sector employer in the state.

2011 Executive Summary Update

- Alaska led all states in terms of both volume and ex-vessel value of commercial fisheries landings in 2009, with a total of 1.84 million metric tons (MT) worth 1.3 billion dollars (NMFS 2010a).

- National harvest volume in 2009 was 3,568,599 MT (NMFS 2010a).

- In the list of top 50 U.S. ports based on volume for 2009, Alaska had 11 including Dutch Harbor-Unalaska (1st); Kodiak (4th); Naknek-King Salmon (11th); Sitka (14th); Ketchikan (15th); Petersburg (18th); Cordova (21st); Seward (26th); Homer (36); Juneau (41st); Kenai (50th) (NMFS 2010a).

- In the list of top 50 U.S. ports based on ex-vessel value for 2009, Alaska had 10; 8 of them were in the top 20. These ports include Dutch Harbor-Unalaska (2nd); Kodiak (3rd); Naknek-King Salmon (4th); Sitka (5th); Homer (12th); Seward (17th); Ketchikan (18th); Cordova (19th) (NMFS 2010a). Three other Alaska ports, Akutan, King Cove and Sand Point, would also make the top 20 were it not for confidentiality requirements that prevent release of data for ports with fewer than three processors.

Photo courtesy of ASMI

- In 2009, Dutch Harbor-Unalaska was the leading U.S. port in quantity of commercial fishery landings, and the second U.S. port in value of commercial fishery landings (NMFS 2010a)

- Dutch Harbor-Unalaska ranked second (after New Bedford, MA) with a harvest value of $159.7 million dollars; Kodiak was ranked third at $103.8 million, and Naknek-King Salmon ranked fourth at $76.1 million dollars (NMFS 2010a).

- The seafood industry, through direct, indirect and induced effects, contributed a total of $4.6 billion to Alaska's economic output in 2009.

Prepared by Northern Economics

Importance of Alaska to the Global Seafood Market

- If Alaska were a nation it would have placed 14th among seafood producing countries in 2008 (NMFS 2010b and FAO 2010).

- Alaska landings of global groundfish species groups (including cod, pollock, hake and haddock) and flatfish accounted for 18 percent of the world harvest of these species groups in 2008 (Hiatt, et al. 2010 and FAO 2010).

- In 2008 about 35 percent of the world capture production of species in the "salmon, trout, smelt" group occurred in Alaskan waters (Hiatt, et al. 2010 and FAO 2010).

- Alaska accounted for 95 percent of total U.S. pacific salmon landings in 2009 (NMFS 2010a).

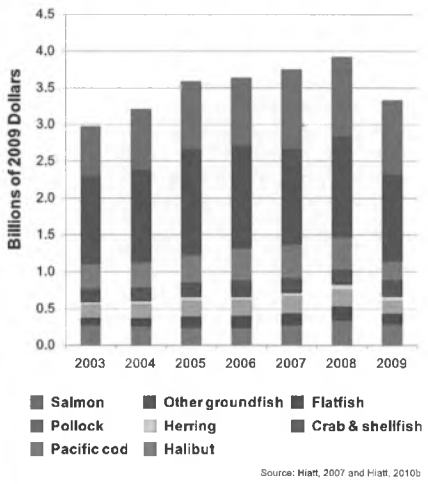
- The 2010 salmon season was one of the best on record with almost 170 million fish harvested in Alaska, the 11th highest number since statehood. Preliminary 2010 estimates show that the salmon harvest generated $533.9 million, the highest ex-vessel value in eighteen years (since 1992) (ADF&G 2010).

- In 2009, $1.6 billion dollars worth of seafood was exported directly from Alaska to destinations such as Japan, China, South Korea, Canada, and Europe (Office of the Governor of the State of Alaska 2009, NOAA 2010a).

- In 2009 Japan was the leading direct importer of Alaska fish and fisheries products (by value) followed by China, South Korea, Germany, the Netherlands and Canada (NOAA 2010a).

Photo Courtesy of PSPA

Real Wholesale Value by Species, 2003-2009



Source: Hiatt, 2007 and Hiatt, 2010b

Importance of Alaska Seafood to the U.S.

- In 2009, Alaska accounted for over 52 percent of the volume of the commercial seafood harvested in the United States (NMFS 2010a).

- Alaska as a single state led all other multi-state regions in the U.S. in terms of ex-vessel value with over 34 percent of the U.S. total (NMFS 2010a).

- The five New England States combined for a distant second with 20 percent, followed by the five states on the Gulf of Mexico with 16 percent (NMFS 2010a).

- Alaska's pollock fishery is the largest in the U.S., accounting for 24 percent of total U.S. fisheries landings (NMFS 2010a).

- In 2009, 26 percent of total U.S. crab catches were king and snow (tanner) crab, and they accounted for 35 percent of total U.S. crab value (NMFS 2010a). King and snow crab come entirely from Alaska.

- Dutch Harbor-Unalaska holds the record for catch volume with 911.3 million pounds landed in 2006 (NMFS 2010a).

- Alaska landings of Pacific Sea Herring accounted for 98 percent of the Pacific coast with 87 million pounds valued at over $29.3 million (NMFS 2010a).

Importance of Alaska Seafood to Alaska

- In 2009 total estimated ex-vessel value of Alaska's commercial harvest was $1.3 billion (NMFS 2010a).

- The additional value added by Alaska's seafood processing sector brought the first wholesale value of Alaska's commercial seafood industry to over $3.3 billion in 2009 (Hiatt et al. 2010).

- It is estimated that the seafood industry's $3.3 billion in wholesale value generated an additional $1.3 billion in indirect and induced economic output for a total contribution of $4.6 billion to Alaska's economic output (NEI using Hiatt 2010b, NOAA 2010b, Mothership Fleet Cooperative 2010 and IMPLAN 2009 data).

- The seafood industry also generated more than 80,800 direct, indirect, and induced jobs and $1.45 billion in direct, indirect and induced payments to labor and income (NEI using Hiatt 2010b, NOAA 2010b, Mothership Fleet Cooperative 2010 and IMPLAN 2009 data).

- In 2009 the wholesale value generated by the seafood industry represented over 10 percent of the $34 billion basic sector activity in Alaska's economy (Hiatt 2010b, Office of the Governor of the State of Alaska 2009, U.S. Census Bureau 2010 & 2011, ADOR 2011, McDowell 2010, and Szumigala 2010). The basic sector, because it brings money into the state from outside, is the driving force behind all economic activity in the state.

- The seafood industry ranks third in importance behind the North Slope oil and gas industry and federal government in terms of generating basic economic activity in Alaska (NEI using ADOLWD 2010 and ADOLWD 2011a).

- Alaska's seafood industry generated about $79 million in state taxes and fees, in addition to local fish taxes in fiscal year 2009 (ADOR 2009; ADCCED 2011).

- Seafood was Alaska's leading export in 2009 and accounted for 50 percent of total direct exports—nearly double the value of the second highest export sector (minerals at 26 percent), (U.S. Census Bureau 2010). Total Alaskan seafood exports were even greater; a large portion of Alaskan seafood is exported internationally from packaging and storage facilities in Washington.

- In 2009, seafood processing accounted for about 95 percent of all food manufacturing jobs in Alaska, and 71 percent of total manufacturing jobs (ADOLWD 2010 and ADOLWD 2011b).

Photo courtesy of Ron Clarke

- With an estimated harvesting and processing workforce of 70,548, the seafood industry employs more workers than any other non-government industry sector in Alaska, including oil and gas and mining combined. The trade, transportation and utilities sector follows with a workforce of 63,300 (ADOLWD 2010, ADOLWD 2011a and Warren 2010).

- With the concentration of major fishing ports in the Aleutian and Pribilof Islands region, seafood processing accounted for 58 percent of all private sector payments to labor in the Aleutian West Census Area in 2009 (ADOLWD 2011b).

- The seafood processing industry is estimated to have accounted for 35 percent of private-sector payments to labor in Kodiak in 2009 (ADOLWD 2011b).

- The Western Alaska Community Development Quota (CDQ) program, which allocates a portion of the Bering Sea catch for coastal communities to invest in economic development, generates millions of dollars each year. In 2008, the CDQ entities collectively generated more than $180 million in revenue (WACDA 2008).

- The CDQ Program augments the important role of the seafood industry in Western Alaska. Sixty-five Bering Sea communities participate in the CDQ program (WACDA 2008).

- From 1992 through 2008 the CDQ Program generated over $240 million in wages, payments to fishers, and scholarships and training benefits (WACDA 2008).

- In 2008 CDQ entities provided wage and salary jobs to more than 1,600 individuals, and the combined payroll for the year exceeded $22.3 million (WACDA 2008).

- The value of the six CDQ groups' assets increased from about $13.3 million in 1992 to over $559 million in 2009 (WACDA 2008).

adn.com
Anchorage Daily News

A standout year for local seafood

LAINE WELCH - FISHERIES REPORT *(01/01/11)*

KODIAK -- Alaska's seafood industry worked hard in 2010 to ramp up its message to policy makers, especially those from the Railbelt region who tend to overlook the industry's economic significance.

How important is the seafood industry to Alaska and the nation? At a glance:

• 62 percent of all U.S. seafood landings come from Alaska.

• 96 percent of all wild-caught salmon comes from Alaska.

• Seafood is by far Alaska's No. 1 export, valued at nearly $2 billion (next in line: zinc and lead at $785 million).

• Alaska ranks ninth in the world in terms of global seafood production.

The seafood industry is second only to Big Oil in revenues it generates to the state government's general fund each year. The industry provides more Alaska jobs than oil and gas, mining, tourism and timber combined.

Here are some fishing notables from 2010, in no particular order:

The University of Alaska created a center devoted entirely to ocean acidification studies. Meanwhile, acid levels in the Gulf of Alaska and the Chukchi and Bering seas continued to increase faster and more severely than previously thought.

Catch-share programs became the preferred tool for managing U.S. fisheries. Federal managers budgeted $54 million as "incentive" for catch shares to catch on in fishing regions.

The North Pacific Fishery Management Council approved sweeping changes to its fishery-observer program that will include all vessels longer than 40 feet.

Alaska's biggest fishery rebounded to accommodate a 2011 pollock catch of nearly 3 billion pounds, a 54 percent increase over the past two years -- but in line with the average catch for the past 30 years.

Kodiak and Sitka were the latest fishing towns to add some local catch to their school lunch menus, following Dillingham, Kenai, Fairbanks and Mat-Su.

Halibut prices seldom dipped below $5 a pound, boosting the value of the fishery to $193 million, an increase of $61 million over 2009.

Halibut catches continued a downward trend, and managers plan to trim the harvest again in 2011. Halibut catches in Southeast Alaska have dropped by more than 60 percent over the past five years.

Alaska salmon fishermen were paid an average of 66 cents a pound this year, a 16 percent increase over 2009.

The 2010 catch of 169 million salmon was the 11th largest on record. The dockside value of almost $534 million was an increase of nearly 30 percent and the best showing in 18 years.

Two areas, Bristol Bay and Prince William Sound, accounted for 55 percent of the value of the total Alaska commercial salmon catch.

Prince William Sound set a record with a total catch of 75.4 million -- nearly 45 percent of all salmon harvested in Alaska this year. The PWS harvest of 69 million humpies accounted for 66 percent of Alaska's total pink salmon catch.

Norton Sound fishermen saw some of the best chum salmon runs in 25 years. At Kotzebue, the chum catches tracked the best in 15 years. Upper Cook Inlet fishermen hauled in a huge 2.7 million sockeye harvest, almost a million more fish than expected. King salmon continued to decline on the Yukon River.

A surprise pink salmon fishery at Bristol Bay (Nushagak) attracted 60 boats and 35 setnetters who pulled in more than 1 million humpies plus 60,000 cohos. It's been so long since a pink and coho salmon fishery occurred, managers had no numbers to compare the catches to.

Peter Pan Seafoods and Bristol Bay fishermen were recognized by Alaska Head Start Association for providing local salmon to children and elders throughout Southwest Alaska.

After a decade of debate, the U.S. Food and Drug Administration proposed regulations to allow genetically modified animals for human consumption. First up: a salmon that grows up to 30 times faster than normal. Alaska senators said they will try to stop the fish from ever getting to market.

It turns out that the deadliest catch is the safest catch. A federal report showed that salmon fishing is Alaska's most dangerous fishery, with 39 fatalities over the past decade. That compares with a death toll of 12 Bering Sea crabbers during the same time.

For the 21st year in a row, Dutch Harbor ranked as the nation's No. 1 port for seafood landings. Kodiak ranked No. 4, up from the No. 5 spot. Eleven Alaska fishing towns made the list of top 50 U.S. ports.

Americans ate slightly less seafood --15.8 pounds per person, the lowest level since 2002. Beef is still what's for dinner: 108 pounds per capita, followed by 73 pounds of poultry.

Alaska king crab fetched some of the highest prices ever. Bering Sea crabbers got an advance of $6.25 a pound, compared with $4.76 last year.

Higher fish prices drove up both the demand and value for fishing permits and IFQs/catch shares in most regions of the state.

Laine Welch is a Kodiak-based fisheries journalist. Her Fish Radio programs can be heard on stations around the state. Her information column appears every other Sunday.

enlarge

Ray Hilborn

Without fishing, food will come from someplace else and at higher environmental costs, according to Ray Hilborn. This slide from his October lecture, for example, contrasts the species abundance and diversity of the forest at the edge of the field to farmland that has been cleared of plants and plowed.

Nov. 4, 2010

Eat a fish, save a rainforest: Professor says to weigh alternatives before we curtail fishing

By Sandra Hines
News and Information

enlarge

Alarming news reports and journal articles in recent years about fisheries facing ruin the world over has led to calls to curtail, or more drastically, to completely cease harvesting fish from coastal and ocean waters.

But replacing fish harvested from the sea with equivalent amounts of animal protein from pigs, cattle and chickens could take land resources equivalent to 22 times the rainforest we currently have, according to calculations by Ray Hilborn, UW professor of aquatic and fishery sciences. If we just stop trawl fishing -- often pointed to as the worst-of-the-worst ways to fish because nets drag along the bottom -- it would still take five times more rainforest than we have, he estimates.

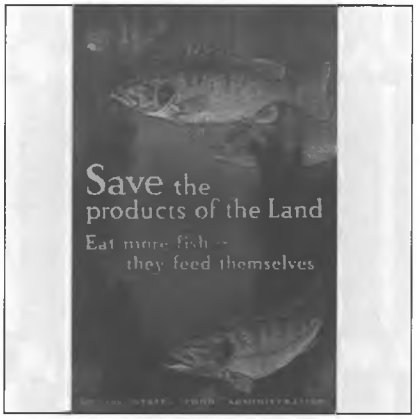
Hence the title *Eat a Fish, Save a Rainforest* for the lecture Hilborn delivered Oct. 26 as part of the series "Food: Eating Your Environment, organized by the UW Program on the Environment.

Hilborn says there are a limited number of fisheries such as Atlantic bluefin tuna where we know there are big problems and stocks are facing too much fishing pressure.

"Let's concentrate on these problems and not condemn the whole of fishing," he said. "Fish captured from marine waters make up a quarter to one-third of the animal protein consumed by humans globally -- and in places is the only animal protein available. Replacing that food will come from some place and at much higher environmental costs."

And before you vegetarians stop reading, Hilborn said to consider that areas fished for long-term sustainable yields may deplete fish abundance in an area by 70 percent and lower biodiversity by 30 percent but that should be considered in light of changes in species abundance and biodiversity when trees and other plants are removed and land plowed.

"What do you think," he said showing a slide of freshly cleared and tilled land, "If that was previously a rainforest, is biodiversity lowered by only 30 percent?"



Ray Hilborn

A poster from WWI was a concluding slide in Ray Hilborn's lecture *Eat a Fish, Save a Rainforest.*

Key to Hilborn' s argument that humans should keep fishing is that fish abundance in the world has overall been stable since the 1990s, most large fisheries are now sustainably managed and steps to curb overfishing appear to be succeeding in eight of 10 large marine ecosystems examined recently by an international group of fisheries experts. This bolsters the case that sound management can contribute to rebuilding of fisheries elsewhere, according to the group when they reported their findings in *Science* in 2009.

The group was led by Hilborn and former adversary Boris Worm of Dalhousie University, Nova Scotia. Back in 2006 Hilborn said it was mind-boggling stupid for Worm and his colleagues to say in Science that they'd detected a widespread global trend toward fisheries collapse that would lead to all fish harvested commercially being gone by 2048. The resulting news coverage frightened many people about the state of world fisheries.

The difference between the 2006 and 2009 Science papers is that the first relied on catch records, for lack of a better alternative, and the latter relied on actual estimates of abundance, as well as catch.

In his lecture, Hilborn's notion of eat a fish, save a rainforest is based on a tally he's trying to develop for fish, cattle, pigs and chickens. That tally

- Considers the resources used before one or the other ends up on the dinner table. Included could be such things as the fresh water needed and petroleum used in fertilizer to raise feed or grow pasture lands. On the fishing side would be such things as the petroleum needed to fuel vessels.
- Adds up the degradation such as manure in waterways and soil erosion from raising farm animals vs. garbage dumped at sea and oil or chemical spills from fishing.
- Totals the greenhouse gas emissions that result from both activities.

His numbers are preliminary because he said he's just begun trying to get the data but a few examples of the annual costs of livestock range from the 487 million tons of soil eroded away by worldwide pork production to 12 million tons of fertilizer required for raising cattle to 5,000 tons of antibiotics to raise chickens.

These comparisons are needed so when people talk about greatly curtailing seafood harvesting they can consider that in light of what it might mean for land resources, Hilborn said.

Hilborn's was the fourth of eight lectures in the "Food: Eating Your Environment" series where national and international experts are discussing food in its global setting including security, politics, science and society.

The lectures are free and open to the public, however, the response when seat reservations opened last summer was so strong that organizers scrambled to find larger venues and the only way to get a seat now is to show up near the start time when any open seats are up for grabs.

"Food is the ultimate environmental issue," said Julia Parrish, professor of aquatic and fishery sciences and director of the Program on the Environment. "What we eat and where it comes from shape the world's ecosystems more than any other human action. Seattle Defines the intersection of foodies and environmentalism, so it's not surprising the response to the series is so positive."

The series continues Tuesdays, from 6:30 to 8 p.m., through Nov. 30. It was organized by the Program on the Environment that has two academic offerings for UW students in conjunction with the series. Half the lectures are also part of the Jessie

and John Danz and the Walker-Ames endowed lecture series. The food series is supported by the UW Alumni Association, College of the Environment and more than a dozen other groups on and off campus.

Log in to UW News+Community to add a comment.

MARINE CONSERVATION ALLIANCE

SEA FACTS

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Photo courtesy of ASMI

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Prepared by Northern Economics

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- In 2008 about 35 percent of the world capture production of species in the "salmon, trout, smelt" group occurred in Alaskan waters (Hiatt, et al. 2010 and FAO 2010).

- Alaska accounted for 95 percent of total U.S. pacific salmon landings in 2009 (NMFS 2010a).

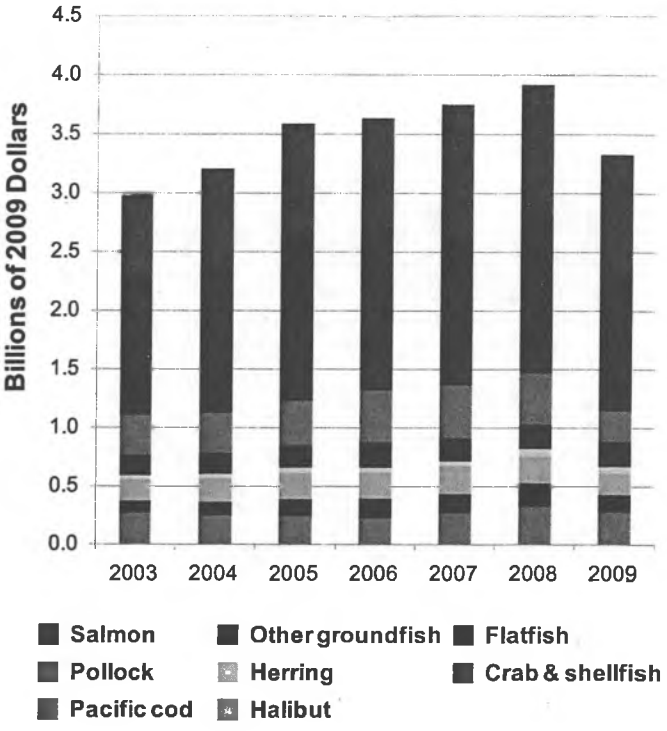
- The 2010 salmon season was one of the best on record with almost 170 million fish harvested in Alaska, the 11th highest number since statehood. Preliminary 2010 estimates show that the salmon harvest generated $533.9 million, the highest ex-vessel value in eighteen years (since 1992) (ADF&G 2010).

- In 2009, $1.6 billion dollars worth of seafood was exported directly from Alaska to destinations such as Japan, China, South Korea, Canada, and Europe (Office of the Governor of the State of Alaska 2009, NOAA 2010a).

- In 2009 Japan was the leading direct importer of Alaska fish and fisheries products (by value) followed by China, South Korea, Germany, the Netherlands and Canada (NOAA 2010a).

Photo Courtesy of PSPA

Real Wholesale Value by Species, 2003-2009



Source: Hiatt, 2007 and Hiatt, 2010b

Importance of Alaska Seafood to the U.S.

- In 2009, Alaska accounted for over 52 percent of the volume of the commercial seafood harvested in the United States (NMFS 2010a).

- Alaska as a single state led all other multi-state regions in the U.S. in terms of ex-vessel value with over 34 percent of the U.S. total (NMFS 2010a).

- The five New England States combined for a distant second with 20 percent, followed by the five states on the Gulf of Mexico with 16 percent (NMFS 2010a).

- Alaska's pollock fishery is the largest in the U.S., accounting for 24 percent of total U.S. fisheries landings (NMFS 2010a).

- In 2009, 26 percent of total U.S. crab catches were king and snow (tanner) crab, and they accounted for 35 percent of total U.S. crab value (NMFS 2010a). King and snow crab come entirely from Alaska.

- Dutch Harbor-Unalaska holds the record for catch volume with 911.3 million pounds landed in 2006 (NMFS 2010a).

- Alaska landings of Pacific Sea Herring accounted for 98 percent of the Pacific coast with 87 million pounds valued at over $29.3 million (NMFS 2010a).

Importance of Alaska Seafood to Alaska

- In 2009 total estimated ex-vessel value of Alaska's commercial harvest was $1.3 billion (NMFS 2010a).

- The additional value added by Alaska's seafood processing sector brought the first wholesale value of Alaska's commercial seafood industry to over $3.3 billion in 2009 (Hiatt et al. 2010).

- It is estimated that the seafood industry's $3.3 billion in wholesale value generated an additional $1.3 billion in indirect and induced economic output for a total contribution of $4.6 billion to Alaska's economic output (NEI using Hiatt 2010b, NOAA 2010b, Mothership Fleet Cooperative 2010 and IMPLAN 2009 data).

- The seafood industry also generated more than 80,800 direct, indirect, and induced jobs and $1.45 billion in direct, indirect and induced payments to labor and income (NEI using Hiatt 2010b, NOAA 2010b, Mothership Fleet Cooperative 2010 and IMPLAN 2009 data).

- In 2009 the wholesale value generated by the seafood industry represented over 10 percent of the $34 billion basic sector activity in Alaska's economy (Hiatt 2010b, Office of the Governor of the State of Alaska 2009, U.S. Census Bureau 2010 & 2011, ADOR 2011, McDowell 2010, and Szumigala 2010). The basic sector, because it brings money into the state from outside, is the driving force behind all economic activity in the state.

- The seafood industry ranks third in importance behind the North Slope oil and gas industry and federal government in terms of generating basic economic activity in Alaska (NEI using ADOLWD 2010 and ADOLWD 2011a).

- Alaska's seafood industry generated about $79 million in state taxes and fees, in addition to local fish taxes in fiscal year 2009 (ADOR 2009; ADCCED 2011).

- Seafood was Alaska's leading export in 2009 and accounted for 50 percent of total direct exports—nearly double the value of the second highest export sector (minerals at 26 percent), (U.S. Census Bureau 2010). Total Alaskan seafood exports were even greater; a large portion of Alaskan seafood is exported internationally from packaging and storage facilities in Washington.

- In 2009, seafood processing accounted for about 95 percent of all food manufacturing jobs in Alaska, and 71 percent of total manufacturing jobs (ADOLWD 2010 and ADOLWD 2011b).

Photo courtesy of Ron Clarke

- With an estimated harvesting and processing workforce of 70,548, the seafood industry employs more workers than any other non-government industry sector in Alaska, including oil and gas and mining combined. The trade, transportation and utilities sector follows with a workforce of 63,300 (ADOLWD 2010, ADOLWD 2011a and Warren 2010).

- With the concentration of major fishing ports in the Aleutian and Pribilof Islands region, seafood processing accounted for 58 percent of all private sector payments to labor in the Aleutian West Census Area in 2009 (ADOLWD 2011b).

- The seafood processing industry is estimated to have accounted for 35 percent of private-sector payments to labor in Kodiak in 2009 (ADOLWD 2011b).

- The Western Alaska Community Development Quota (CDQ) program, which allocates a portion of the Bering Sea catch for coastal communities to invest in economic development, generates millions of dollars each year. In 2008, the CDQ entities collectively generated more than $180 million in revenue (WACDA 2008).

- The CDQ Program augments the important role of the seafood industry in Western Alaska. Sixty-five Bering Sea communities participate in the CDQ program (WACDA 2008).

- From 1992 through 2008 the CDQ Program generated over $240 million in wages, payments to fishers, and scholarships and training benefits (WACDA 2008).

- In 2008 CDQ entities provided wage and salary jobs to more than 1,600 individuals, and the combined payroll for the year exceeded $22.3 million (WACDA 2008).

- The value of the six CDQ groups' assets increased from about $13.3 million in 1992 to over $559 million in 2009 (WACDA 2008).

Table 1. Seafood Industry Employment by Region, 2009

Summary of Workers	Harvesting	Processing	Total
Aleutian and Pribilof Islands	5,309	6,276	11,585
Bristol Bay	9,385	4,522	13,907
Kodiak	3,664	2,934	6,598
Northern	627	68	695
Southcentral	8,071	3,491	11,562
Southeast	10,150	4,886	15,036
Yukon Delta	2,986	831	3,817
At-Sea	1,732	5,616	7,348
Total	**41,924**	**28,624**	**70,548**

Source: Northern Economics, Inc. and ADOLWD, 2010.

Table 2. Estimated Seafood Ex-vessel Volume and Value by Region, 2009

Region	Harvest Weight (1,000 MT)	Ex-Vessel Value ($ Millions)
Aleutian and Pribilof Islands	497.2	393.7
Bristol Bay	86.6	119.0
Kodiak	157.2	129.8
Northwest/Arctic/Yukon-Kuskokwim	3.9	6.7
Southcentral	77.8	177.0
Southeast	134.4	209.8
At-Sea	883.0	307.9
Total	**1,840.0**	1,343.8

Source: Estimated by Northern Economics using NMFS (2010a), Hiatt (2010a) and Hiatt (2010b).

Table 3. Estimated Seafood Wholesale Volume and Value by Region, 2009

Region	Product Weight (1,000 MT)	Wholesale Value ($ Millions)
Aleutian and Pribilof Islands	180.9	735.8
Bristol Bay	48.6	250.2
Kodiak	72.9	261.1
Northwest/Arctic/Yukon-Kuskokwim	2.3	15.9
Southcentral	45.4	289.3
Southeast	81.1	374.2
At-Sea	457.0	1,396.3
Total	**888.1**	**3,322.9**

Source: Hiatt, 2010b

2011 report sponsored by the Marine Conservation Alliance

This is a 2011 update of the Executive Summary from the 2009 report "The Seafood Industry in Alaska's Economy". This report, as well as the 2011 update with full references is available at www.marineconservationalliance.org.

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