



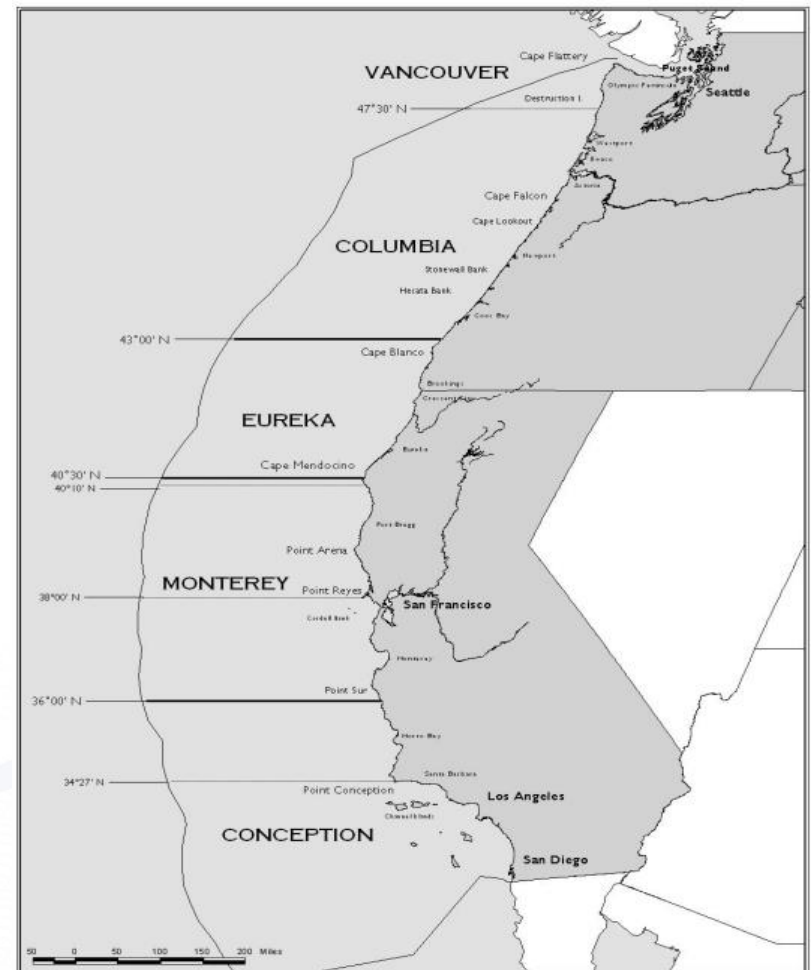
U.S. West Coast Pacific Groundfish Fishery

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Fishery Background

The fishery spans along the west coast, including California, Washington, and Oregon. There are 90 plus species being caught in the fishery, including pacific cod, pacific whiting (hake), rockfish, and sole.

The Shorebased IFQ Program allocated quota to permit owners for 30 different groundfish species and rockfish complexes, and individual quota for Pacific halibut, based on catch history



West Coast Groundfish Trawl Fishery – A Timeline



1982

Pacific Groundfish Fishery Management Plan is approved, establishing management measures for more than 87 species, including a complex system of landings limits that continued to evolve over the coming decades. **M**

Shoreside landings peak at just over 120,000 metric tons, worth \$53 million in ex-vessel revenue. **I**

1985

Fleet is overcapitalized with approximately 500 vessels, 2-3 times the number needed to harvest the annual trawl sector allocation. **I**



1991

Foreign and joint venture operations are fully replaced by domestic processing for Pacific whiting. **I**

Trip limits for non-whiting groundfish species are reduced over concerns of declining stocks. **M**



1992

First Pacific whiting processing plant opens in Newport, Oregon. **I**

1994

Limited entry program is established (Am 6) to address overcapacity with a qualifying period of 1984-1988, resulting in 384 permits endorsed for trawl gear. **M**

Trip limits are standardized to monthly or bi-monthly landings limits in an effort to reduce discarding. **M**

1997

Sector-specific Pacific whiting quota allocation ends the race-to-fish between (but not within) sectors. **M**

Formation of the Pacific Whiting Conservation Cooperative eliminates the race-to-fish within the catcher-processor sector. **M**

1999

Non-whiting groundfish landings and revenues decline by more than 50% from the early 1980s. Capital utilization rates range from 27-41% for shoreside trawl vessels. **I**

Lingcod, Pacific ocean perch, and bocaccio rockfish are declared overfished. **F**

2000

Secretary of Commerce declares the West Coast groundfish fishery a failure, estimated to have cost fishermen \$11 million in lost revenue in a single year. **I**

Pacific whiting relative spawning stock biomass drops to 29% of unfished biomass. **F**

Cowcod and canary rockfish are declared overfished. **F**

2001

Darkblotched and widow rockfish are declared overfished. **F**

2002

Council establishes Rockfish Conservation Areas to minimize catch of overfished rockfish. **M**

Moratorium on new catch share programs established by the 1996 Sustainable Fisheries Act is lifted. **M**

Pacific whiting and yelloweye rockfish are declared overfished. **F**

2003

Council initiates the trawl vessel buyback program resulting in the permanent removal of 91 vessels and associated permits from the groundfish, Dungeness crab, and pink shrimp fisheries. **M**

Research estimates that the buyback program would increase revenue by 50% for remaining permits. **I**

2004

Council implements rebuilding plans for seven overfished groundfish stocks (Am 16). **M**

Pacific whiting is declared rebuilt. **F**

2005

Lingcod is declared rebuilt. **F**

Lower pollock quota in Alaska and rising ex-vessel whiting prices incentivize greater West Coast participation. **E**

2006

Council implements measures to protect Essential Fish Habitat for Pacific Coast Groundfish (Am 19). **M**

2008

Council implements license limitation program for the Pacific whiting fishery (Am 15), limiting participation until the implementation of the IFQ program. **M**

2009

Pacific whiting fishery is certified by the Marine Stewardship Council. **E**

Sector-specific bycatch species quota allocation ends race-to-fish for constraining species between at-sea sectors. **M**

2010

Petrale sole is declared overfished. **F**



2011

Council implements catch share program (Am 20 & 21), including individual fishing quotas, co-ops, and Pacific whiting quota for processors, mandatory economic data collection, and 100% observer coverage. **M**

Tohoku Earthquake and Tsunami hits Japan, potentially impacting seafood product demand and ex-vessel prices. **E**

Fishery participants can lease quota pounds but cannot yet purchase quota shares. **I**

2012

Widow rockfish is declared rebuilt. **F**

2013

Council implements Program Improvements and Enhancement Rule, including the removal of year-end ban on quota pound transfers. **M**

2014

Fishery participants can buy and sell quota shares. **I**

Council implements the collection of cost recovery fees as required under the Magnuson-Stevens Act. **M**

Non-whiting groundfish fishery is certified by the Marine Stewardship Council. **E**

Russia implements trade sanctions against Europe and the United States, potentially impacting fish exports. **E**

2015

Canary rockfish and petrale sole are declared rebuilt. **F**



Council establishes catch limits for unfished and unmanaged forage fish (Am 25) and implements the Observer/Catch Monitoring Rule, including certification requirements for observer providers. **M**

The Blob and El Niño converge leading to record low biomass of key prey for many catch share species, having uncertain impacts on the availability and distribution of target species biomass. **F**

Catch attainment is low for Pacific whiting. **I**

2017

Bocaccio and darkblotched rockfish are declared rebuilt. **F**

2017-2018

NMFS finalizes the 5-year review of the catch share program. **M**

M Management Measures

I Industry Characteristics

E External Factors

F Fishery Resource



Management of the Fishery

The fishery is managed by the National Oceanic and Atmospheric Administration (NOAA).

The Pacific Fishery Management Council (Council) oversees the management of the fishery.

The Groundfish Management Team (GMT) provides objective scientific information to the Council,

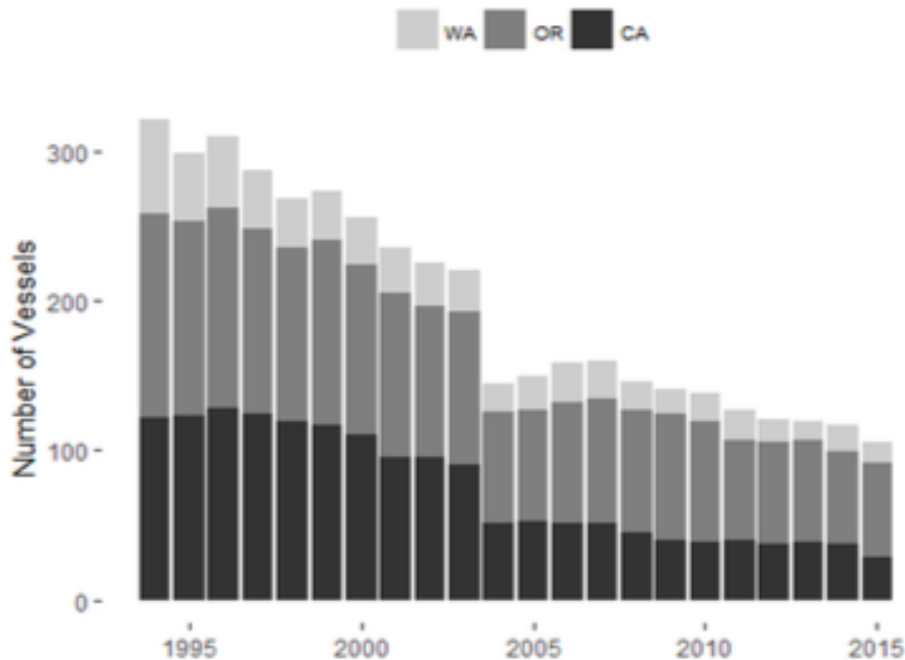
There is also a Groundfish Advisory Subpanel (GAP). The general purpose of the GAP is to advise the Council on management decisions. Input from all the groups are considered, but the Council makes the final management decisions.

Adaptive Management Program (AMP)

- IFQ program for the shore based trawl fleet
- Cooperative programs for the at-sea mothership and catcher/processor trawl fleets
- 10% of the quota was reserved at the start of the AMP

- The Makah, Quileute, Hoh, and Quinault Tribes off the Washington coast participate in tribal commercial, ceremonial and subsistence fisheries for groundfish according to their treaty rights
- Management of tribal fisheries is conducted by the individual tribes.

Economic Contribution and Social Implications



To restrict consolidation in the shoreside catch share program and mothership co-ops, the Council limited the percentage of quota share (the long-term harvest privilege) that entities in those sectors may control.

Economic Contribution and Social Implications



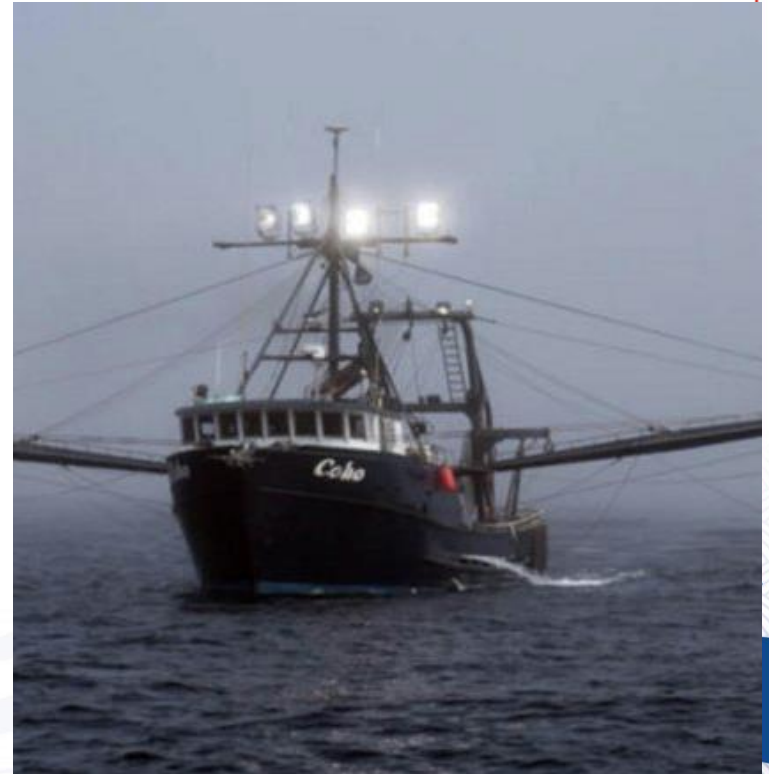
Social Equality

- The catch share program created a new type of fishery participant: a quota share owner. Quota share owners have the option to lease their annual quota pound allocations to other participants



Achieving Sustainability

- Primary intention listed in AMP was to reduce bycatch and discard mortality for all species
- Discards of six of the seven overfished rockfish species dropped at least 90% after implementation
- Seafood certification and labeling programs



Main Challenges and Way Forward

- Spatial conflict between catch share harvesters (catch share gear switching vessels targeting sablefish using fixed gear fishing south of the 36° N. latitude line) and vessels fishing in the open access and daily trip limit sablefish fisheries

- What to do with the ten percent reserved quota:
 - Barriers to new entrants
 - Community Stability
 - Processor Stability
 - Conservation
 - Any other unintended consequences