



BRISTOL BAY

Regional Seafood Development Association

**Bristol Bay Ex-Vessel Price &
Fleet Services Report**

HARVEST YEAR 2022

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Introduction

In Q4 2022, Bristol Bay Regional Seafood Development Association (BBRSDA) contracted with Ocean Strategies to conduct a post-season survey of the Bristol Bay fleet with a focus on price, incentives and services offered to fishermen. This report reflects the responses and information provided by the respondents and has not been verified with the processors in Bristol Bay.

The survey was open from October 13 - November 1, 2022 and collected 101 responses from S03T permit holders. The survey was designed to solicit information regarding price, incentives and services offered to permit holders from various processors in the region. To be clear, processors do not post or publish this information, nor did they corroborate this information. This data has been collected from the fleet via an online survey leaving room for gaps in data.

In order for information about a processor to be included in the survey results, Ocean Strategies required at least five respondents to indicate a business relationship with a processor. Therefore, some processors and corresponding data are not reflected in this report.

In addition, at the time of the survey (October-November 2022) the overwhelming majority of fishermen had not received a price adjustment. Ocean Strategies did not re-engage fishermen in order to determine if a late season price was offered in late 2022 or early 2023. It is recommended that this data be collected in future surveys.

With regards to methodology, in most cases, there was consensus about each processor's base price per pound. However, there were some deviations from the standard which are noted in the range provided for each.

Data collected about incentives offered for chilling, mats, bleeding and slide varied within each processor largely due to uncertainty about the best way to report the data in the context of the survey. The results attempt to summarize the information while also providing other data points that were provided.

Finally, for services offered, if a processor offered a specific service to even one fisherman it is noted as "offered" to indicate that the processor is capable of offering this service. Each service contains comments to provide more information about the processor's service offerings.

It is worth noting that the survey did inquire about production bonus structures and profit sharing. Only one respondent noted this in their survey so it is not included in the information. It is recommended that this topic be addressed through future surveys.

Bristol Bay Sockeye Salmon Ex-Vessel Price and Bonus Summary

Table of base and final price paid for an average harvester (pounds/boat)

Company	Base Price	Final Price	Quality Bonus*
Alaska General Seafood	\$1.15/lb	N/A	\$0.30/lb
Leader Creek Seafood	\$1.15/lb	N/A	\$0.32/lb
North Pacific	\$1.15/lb	N/A	\$0.30/lb
OBI	\$1.15/lb	N/A	\$0.30/lb
Peter Pan	\$1.15/lb	N/A	\$0.30/lb
Silver Bay	\$1.15/lb	N/A	\$0.30/lb
Trident	\$1.15/lb	N/A	\$0.25/lb

*Quality bonus information is the total quality bonus paid as part of the processor's pricing structure. The amount indicated here reflects the information provided in the survey by the majority of respondents and is an attempt to summarize the quality bonus available at each processor. This amount may be inaccurate due to the nature of individual reporting. All responses indicate the low-end of the range reported in the survey.

Bristol Bay Sockeye Salmon Processor Services Offered Summary

Below is a summary table of the services offered by each processor. A check mark indicates that the processor offered that service to at least one (1) fisherman in 2022 based on the survey responses and is therefore able to offer that service. However, this does not reflect the terms under which a service is offered or how many individuals noted a service is available. Please see company specific information for more details.

Company	Freight	Storage	Fuel	Bunkhouse	Food Purchasing	Frozen Food Storage	Mechanical Support
Alaska General Seafood	✓	✓	✓	✓	✓	✓	✓
Leader Creek Seafood	✓		✓		✓	✓	✓
North Pacific	✓	✓	✓	✓	✓	✓	✓
OBI	✓	✓	✓		✓	✓	✓
Peter Pan	✓	✓	✓	✓	✓	✓	✓
Silver Bay	✓	✓	✓		✓	✓	✓
Trident	✓	✓	✓		✓	✓	✓



Alaska General Seafoods

Price (\$/lb.)

- Base 2022 Sockeye Price/lb
 - The majority of responses noted a base price of \$1.15 with base price ranging from \$1.15-\$1.45.
- Late Season 2022 Sockeye Price/lb
 - The majority of responses noted no late season price with one noting an increase of \$0.10/lb..

Quality Bonus Structure (\$/lb.)

Alaska General Seafood uses a quality-based pricing structure for their fishermen providing incentives for chilling, bleeding and floating.

- Chilling – The majority of responses noted a \$0.20 incentive for chilling.
- Bleeding – All responses noted a \$0.05 incentive for bleeding.
- Slide – *n/a*
- Floating – All responses noted a \$0.05 incentive for floating.

Other Notes: Survey data indicated that Alaska General Seafood required 800 lb (or less) brailer bags.

Fleet Services & Fishermen Contract

- Freight: Offered
 - Comments: Multiple responses indicate 2 units free
- Storage: Offered
 - Comments:
 - Boat storage and net storage available
 - Multiple responses indicated \$1500 per boat
- Fuel: Offered
 - Comments: Multiple responses noted \$5.35/gallon
- Bunkhouse: Offered
- Food Purchasing: Offered
- Frozen Food Storage: Offered
- Mechanical Support: Offered
- Contract: Processor DOES NOT offer contracted terms to Bristol Bay fishermen

Leader Creek Fisheries



Price (\$/lb.)

- Base 2022 Sockeye Price/lb.
 - All responses indicated a base price of \$1.15/lb
- Late Season Sockeye Price/lb.
 - The majority of responses indicated no late season price with two responses noting an increase to \$1.30/lb.

Quality Bonus Structure (\$/lb.)

Leader Creek Fisheries uses a quality-based pricing structure for their fishermen providing incentives for chilling, bleeding, slide and floating. Many responses noted that Leader Creek Fisheries has a best fish program that outlines the terms of the incentives.

- Chilling: The majority of responses noted a \$0.20 incentive for chilling which also required floating.
- Bleeding: All responses indicated a \$0.10 incentive for bleeding.
- Slide: All responses indicated a \$0.02 incentive for slide.
- Floating: Multiple responses noted that included this incentive is connected to chilling.

Fleet Services & Fishermen Contract

The majority of responses noted that fleet services were made available to them with two respondents noting that fleet services were not made available.

- Freight: Offered
 - Most noted freight support for north bound cargo with differences in specific north bound support
- Storage: Not Offered
- Fuel: Offered
 - Multiple respondents noted that the fuel price was \$5.35/gallon
- Bunkhouse: Not Offered
- Food Purchasing: Offered
- Frozen Food Storage: Offered
- Mechanical Support: Offered
 - Some responses indicated that RSW support was available
 - Some responses indicated that no mechanical support was available
- Contract: Processor DOES NOT offer contracted terms to Bristol Bay fishermen

North Pacific Seafoods



Price

- Base 2022 Sockeye Price/lb.
 - All responses indicated a base price of \$1.15/lb
- Late Season Sockeye Price/lb.
 - Most responses indicated no late season price with one response noting a late season price of \$1.40.

Quality Bonus Structure (\$/lb.)

North Pacific Seafood uses a quality-based pricing structure for their fishermen providing incentives for chilling, bleeding and floating.

- Chilling: The majority of responses noted a \$0.20 incentive for chilling which also required floating.
- Bleeding: The majority of responses noted a \$0.05 incentive for bleeding.
- Floating: The majority of responses noted a \$0.05 incentive for floating.

Fleet Services & Fishermen Contract

The majority of responses noted that fleet services were made available to them with one respondent noting that fleet services were not made available.

- Freight: Offered
 - Comments: Multiple responses noted 1000 lb free
- Storage: Offered
 - Comments: Both boat and net storage available
- Fuel: Offered
 - Comments: Responses noted that fuel price ranged from \$2.60-\$5.70/gal
- Mechanical Support: Offered
 - Comments: Many noted that welder and RSW support made available
- Bunkhouse: Offered
 - Comments: Almost all noted that bunkhouses were available
- Food Purchasing: Offered
- Frozen Food Storage: Offered
- Contract: Processor DOES NOT offer contracted terms to Bristol Bay fishermen
 - Comments: One response indicated they were offered contracted terms

OBI Seafoods



Price

- Base 2022 Sockeye Price/lb.
 - The majority of responses noted a base price of \$1.15 with base price ranging from \$1.10-\$1.35.
- Late Season Sockeye Price/lb.
 - The majority of responses did not indicate a late season price but two responses noted a late season price that was \$0.10/lb and \$0.20/lb higher than their base price.

Quality Bonus Structure (\$\$/lb.)

OBI Seafoods uses a quality-based pricing structure for their fishermen providing incentives for chilling, bleeding and floating.

- Chilling: The majority of responses noted a \$0.15 incentive for chilling. This incentive ranged from \$0.10-\$0.25/lb.
- Bleeding: The majority of responses noted a \$0.10 incentive for bleeding. This incentive ranged from \$0-\$0.10.
- Floating: The majority of responses noted a \$0.05 incentive for floating with one response indicating a \$0.10 incentive.

Fleet Services & Fishermen Contract

- Freight: Offered
- Storage: Offered
 - Comments:
 - Net Storage: Offered
 - Boat Storage: Some responses indicated boat storage was offered in Egegik
- Fuel: Offered
 - Comments: Multiple responses indicated \$5.47/gal
- Mechanical Support: Offered
 - Comments: Responses indicated that mechanical support was offered for RSW
- Bunkhouse: Not Offered
- Food Purchase: Offered
 - Comments: All but one response indicated that food purchasing was offered
- Frozen Food Storage: Offered
 - Comments: Responses indicated that frozen food storage is offered and not offered
- Contract: Processor DOES NOT offer contracted terms to Bristol Bay fishermen
 - Comments: One response indicated a contract

Peter Pan Seafoods



Price (\$/lb.)

- Base 2022 Sockeye Price/lb.
 - The majority of responses noted a base price of \$1.15 with base price ranging from \$1.05-\$1.15.
- Late Season Sockeye Price/lb.
 - N/A

Quality Bonus Structure (\$/lb.)

Peter Pan uses a quality-based pricing structure for their fishermen providing incentives for chilling, bleeding and floating.

- Chilling: The majority of responses noted that chilling and floating were incentivized together at \$0.25 for both. One response indicated \$0.15 for chilling and \$0.05 for floating.
- Bleeding: The majority of responses indicated \$0.05 for bleeding.
- Slide: Multiple responses indicated that mats were required.
- Floating: SEE CHILLING

Fleet Services & Fishermen Contract

The majority of responses indicated that fleet services were available to them with three responses indicating no fleet services.

- Freight: Offered
 - Comments: Specifics regarding freight services offered differed amongst the responses
- Storage: Offered
 - Comments: Some responses indicated boat storage is paid for if you are above the fleet average
- Fuel: Offered
 - Comments: Fuel available at tenders - \$5.50-\$5.55/gal
- Bunkhouse: Offered
 - Comments: 2 out of 7 responses indicated a bunkhouse was available
- Food Purchasing: Offered
- Frozen Food Storage: Offered
 - Comments: 2 out of 7 responses indicated frozen food storage available
- Mechanical Support: Offered
- Contract: Processor DOES NOT offer contracted terms to Bristol Bay fishermen
 - Comments: One response indicated a contract

Silver Bay Seafoods



Price

- Base 2022 Sockeye Price/lb.
 - All responses indicated \$1.15 base price
- Late Season Sockeye Price/lb.
 - N/A

Quality Bonus Structure (\$/lb.)

Silver Bay Seafood uses a quality-based pricing structure for their fishermen providing incentives for chilling, bleeding and floating.

- Chilling: Responses noted that chilling incentive ranged from \$0.15-\$0.20.
- Bleeding Responses indicated a range for bleeding incentive from \$0.05-\$0.12.
- Slide: Responses indicated a range for slide incentive from no incentive to \$0.05.
- Floating: Some responses indicated floating is the same as chilling while others indicated an incentive that ranges from \$0.05-\$0.10.

Other Notes:

- Multiple responses noted that mats and floating were required to receive the chilling and bleeding incentive.
- Multiple responses noted brailer bags should be less than 1000 lb.

Fleet Services & Fishermen Contract

- Freight: Offered
 - Comments: Multiple responses indicated free nets northbound and some totes
- Storage:
 - Comments:
 - Boat Storage: Not offered
 - Net storage: Offered
- Fuel: Offered
 - Comments: multiple responses noted \$5.52/gal from tenders
- Mechanical Support: Offered
 - Comments: All indicated mechanical support is offered including RSW and welding
- Bunkhouse: Not offered
- Food purchasing: Offered
 - Comments: Majority of responses indicate that food purchasing was available through tenders
- Frozen food storage: Offered
- Contract: Processor DOES NOT offer contracted terms to Bristol Bay fishermen

Trident Seafoods



Price

- Base 2022 Sockeye Price/lb.
 - All responses indicated a base price of \$1.15/lb
- Late Season Sockeye Price/lb.
 - N/A

Quality Bonus Structure (\$/lb.)

Trident Seafoods uses a quality-based pricing structure for their fishermen providing incentives for chilling, bleeding and floating.

- Chilling: Responses noted that chilling incentive ranged from \$0.10-\$0.25/lb.
- Bleeding: Responses noted that bleeding incentive ranged from \$0.05-\$0.10/lb.
- Slide: Two responses indicated a \$0.05/lb incentive for mats.
- Floating: Majority of responses indicated a \$0.05 incentive with one respondent indicating a \$0.10 incentive.

Fleet Services & Fishermen Contract

- Freight: Offered
 - Comments: All responses indicated freight services were offered.
- Storage:
 - Comments:
 - Boat storage not offered
 - Net storage offered - Different responses regarding the net program
- Fuel: Offered
 - Comments: Multiple responses indicated \$5.45/gal
- Mechanical Support: Offered
 - Comments: Multiple responses noted RSW support and welder available
- Bunkhouse: Not Offered
- Food Purchasing: Offered
 - Comments: Multiple responses noted basic food available at tenders
- Frozen Food Storage: Offered
 - Comments: Half of responses noted that frozen food storage was offered
- Contract: Processor DOES NOT offer contracted terms to Bristol Bay fishermen
 - NOTE: One response indicated a contract

Bristol Bay Fishermen 2022 Survey

The BBRSDA is launching a "Fleet Price & Services Report" to increase transparency, provide competitive market information and support business planning and strategies for our members. Completing this short survey will help BBRSDA provide an accurate assessment of market conditions and opportunities in the Bay.

Please note: questions with an asterisk (*) are required.

* 1. Which processor did you deliver the majority of your fish to in 2022?

2. How many years have you delivered to this processor?

* 3. What was your base 2022 Bristol Bay sockeye price per pound (\$/lb)?

4. What was your late season Bristol Bay sockeye price per pound (\$/lb)?

5. When did the late season pricing take effect?

Date

Date



* 6. Please indicate which of the following quality based pricing structures applies to your market.

- Quality bonus
- Quality incentives (for example, 25c for RSW or 5c for bleeding)
- None of the above

Bristol Bay Fishermen 2022 Survey

7. Please provide the terms and relevant details of your quality bonus (include \$/lb and other terms).

Bristol Bay Fishermen 2022 Survey

* 8. Please provide the price per pound (\$/lb) you received for each of the quality incentives listed below. If nothing, enter 0 (zero).

Chilling

Bleeding

Slide or Mats

Floating

9. Please provide additional details and terms about the quality requirements or quality bonus structure that was available to you.

Bristol Bay Fishermen 2022 Survey

* 10. Have you received a production bonus for your 2022 harvest?

Yes

No

Bristol Bay Fishermen 2022 Survey

* 11. What was your production bonus?

* 12. How much (total pounds) did you deliver to the processor?

Bristol Bay Fishermen 2022 Survey

* 13. Have you received any price adjustment payments or profit sharing payments from your processor (not including dividend payments or production-based bonuses)?

Note: We will be reaching out to fishermen throughout the year to gather more information about price adjustments/profit sharing as payments are dispersed.

Yes

No

Bristol Bay Fishermen 2022 Survey

14. Please provide details about any price adjustment or profit sharing payments you have received include price per pound (\$/lb) and other terms.

Bristol Bay Fishermen 2022 Survey

* 15. Were you offered the option or asked to sign a contract for the 2022 season?

Yes

No

* 16. Did your processor make fleet services available to you?

Yes

No

Bristol Bay Fishermen 2022 Survey

* 17. Was freight support offered to you as a fleet service this year?

Yes

No

18. Please describe the freight service provided by the processor. (Allowance provided? Free? Other structure?)

* 19. Was boat/net storage offered to you as a fleet service this year?

Yes

No

20. Please describe the boat/net storage provided by the processor. (Allowance and how much? Storage provided?)

* 21. Were you offered fuel access and support as a fleet service this year?

Yes

No

22. Please describe the processor's terms of fuel access and support, including the 2022 fuel price per gallon (\$/gal).

* 23. Was in-house mechanical support offered to you as a fleet service this year?

Yes

No

24. Please describe the in-house mechanical support provided by the processor (welding? RSW? mechanics? electricians? Please note any costs to you)

* 25. Were bunkhouses offered to you as a fleet service this year?

Yes

No

26. Please describe the bunkhouse offerings and any associated costs (Available? At cost? Free? Price and conditions?)

* 27. Was food purchasing offered to you as a fleet service this year?

Yes

No

28. Please describe the food purchasing program made available to you.

* 29. Was frozen food storage offered to you as a fleet service this year?

Yes

No

Bristol Bay Fishermen 2022 Survey

* 30. Did you fish under processor limits in 2022?

Yes

No

31. Please explain the limits issued in 2022.

32. What other factors influence which processor you choose to deliver to?

33. Thank you for taking the time to fill out this survey. If you are interested in being entered into the raffle or receiving the results of this survey, please share your contact information below.

****This information will NOT be shared with BBRSDA.****

First Name

Last Name

Email address